Invoice extraction with UiPath and Rossum

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Many organizations try to automate Accounts Payable processes with UiPath robots. To achieve automation benefits, it is necessary to reduce or eliminate the human effort associated with data capture from invoices.
Agenda

Reference Accounts Payable process

What you will need

Plug&Play solution

Basic description
Provided source-codes
Credentials
Sending documents
Human verification
Receiving data
Optional step: Automated human verification

Wrap up

Q & A
Reference AP process

1. Get invoices
2. Extract data
3. Invoice posting to ERP
4. Approve non-PO invoices
Reference AP process

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RPA

:-(
Reference AP process

1. Get invoices
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RPA

ROSSUM
ELIS: Cognitive data capture

No templates, works out of the box

Easy to use UI

Easy to integrate, deploy & customize.

Self-learning = no maintenance
# What you will need

<table>
<thead>
<tr>
<th>Elis basic account</th>
<th>UiPath Studio</th>
<th>Integration source codes</th>
</tr>
</thead>
</table>
In this demo, you can find 2 sample workflows that connect UiPath robot to Elis Cognitive platform. The basic version of the data processing workflow is depicted below and contains 4 steps:

1. **Send documents** from local folder to Elis.
2. **Elis processes documents** (it can take several minutes).
3. **Elis online user interface** is used for human verification (this step can be skipped by using Optional_AutomatedVerification.xaml workflow).
4. **Receive data** from Elis and store the results in .xlsx file.
Plug&Play solution

Step 1: Decompress the source code file
Step 2: Insert your Elis credentials

<table>
<thead>
<tr>
<th>Name</th>
<th>Date modified</th>
<th>Type</th>
<th>Size</th>
</tr>
</thead>
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<td>a_Input files</td>
<td>20/03/2019 14:18</td>
<td>File folder</td>
<td></td>
</tr>
<tr>
<td>b_Processing files</td>
<td>20/03/2019 14:10</td>
<td>File folder</td>
<td></td>
</tr>
<tr>
<td>c_Processed files</td>
<td>20/03/2019 14:18</td>
<td>File folder</td>
<td></td>
</tr>
<tr>
<td>d_Output data</td>
<td>20/03/2019 14:11</td>
<td>File folder</td>
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</tr>
<tr>
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<td>Windows.XmlDocument</td>
<td>24 KB</td>
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<tr>
<td>02_Export.xaml</td>
<td>16/03/2019 20:12</td>
<td>Windows.XmlDocument</td>
<td>42 KB</td>
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<td>credentials.json</td>
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<td>JSON File</td>
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<td>LICENCE.txt</td>
<td>07/02/2019 20:26</td>
<td>Text Document</td>
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<tr>
<td>readme.txt</td>
<td>07/02/2019 21:06</td>
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</tr>
</tbody>
</table>
Plug&Play solution

Step 3: Send documents

01_Import.xaml

Invoices successfully uploaded to Rossum Elis.

To see your processed invoices login at: https://elis.rossum.ai
## Plug&Play solution

### Step 4: Human verification

**ELIS**

<table>
<thead>
<tr>
<th>Status</th>
<th>Document Name</th>
<th>Modified at</th>
<th>Received at</th>
<th>Modified by</th>
<th>Document's message</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>invoice.pdf</td>
<td></td>
<td>09:20 PM 23/3/19</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>alert.pdf</td>
<td></td>
<td>09:20 PM 23/3/19</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Plug&Play solution

Step 4: Human verification

ELIS

[Image of a screen showing a Step 4: Human verification process with an ELIS software interface and a sample invoice.]
Plug&Play solution

Step 4: Human verification

Invoice

Date & Tax Point: 1st May 2014
To: FIFE COLLEGE
Pittsburgh Road
Dunfermline
KY11 8DY
F.A.O. Mr Davie Neilson

Invoice No: MSG/5646
Job Ref: 80/31035/05
VAT Reg. No: 832 7762 12
Plug & Play solution

Step 4: Human verification

ELIS
Plug&Play solution

Step 5: Export data

02_Export.xaml

Data successfully downloaded.

Check "id_Output data" folder to see the results.
Plug&Play solution

Step 5: Export data

ELIS
Plug&Play solution

Optional step: Automated human verification

In the previous steps, we’ve implemented a very basic flow with human verification. However, it is possible to implement custom logic that allows you to skip the manual check.

We provide you UiPath workflow Optional_AutomatedVerification.xaml that can verify extracted data instead of a human (ex. PO matching, Vendor matching, etc.).
Wrap-up

- We showed you a simple integration between Rossum and UiPath
- We welcome feedback (webinars@rossum.ai)
- These slides, video and detailed instructions will be available in your inbox

Additional materials

- Elis homepage
- Elis documentation
- Technical Webinar recordings
Q&A
Thank you

Feedback and additional questions:
webinars@rossum.ai