



Agentic Document Intelligence Bot for Classification & Content Reasoning.

Readme

**Version 1.0
10/16/2025**



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1. Introduction

This document contains all essential information for the user to make full use of this A360 [\(Bot/Command Package\)](#). It includes a description of the functions and capabilities and step-by-step procedures for setup & configuration of the [\(Bot/Command Package\)](#).

1.1 Overview

In many organizations, incoming documents like **invoices, purchase orders, forms, and scanned PDFs** are manually sorted. This process is slow, error-prone, and often lacks transparency. It's also difficult to explain why a document was classified a certain way — especially when formats look similar.

To solve this, we use an **Agentic Document Intelligence Bot** powered by AI.

🔍 What the Bot Does

- It reads the entire document **line by line**, just like a human would.
- It automatically identifies the **type of document** — for example:
 - Invoice
 - Purchase Order
 - Standard Form
 - Recipe
 - Unstructured or unknown format
- It gives a **confidence score** (e.g., 92%) to show how sure it is about the classification.
- It also provides a **natural-language explanation** — telling you *why* it classified the document that way.

💡 Why This Matters

- Saves time by automating document sorting.
- Reduces manual errors and improves accuracy.
- Helps build trust in automation by showing clear reasoning.
- Makes it easier to audit and trace decisions.
- Supports many document types — even scanned or free-form content.



1.2 Use cases or Challenges

The key Challenges include:

- Manual document sorting is time-consuming and error-prone.
- Difficult to differentiate between similar formats (e.g., PO vs Invoice)
- No consistent reasoning available behind document classification.
- Hard to build trust in automation without explanation or accuracy indicators.
- Unstructured documents and scanned content create ambiguity.

1.3 How Agentic Process Automation Solves the Problem

- Agentic AI reads the entire document line-by-line from start to end.
- Classifies document into types: Invoice, Purchase Order, Standard Form, Recipe, or Unstructured.
- Returns confidence level (%) indicating how sure the system is about the classification.
- Provides natural language reasoning to explain why a document is classified a certain way.
- Enhances document traceability, auditability, and intelligent routing in automation flows.

1.4 Business Impact of AI-Powered Document Classification

- Automated document sorting with over 90% accuracy in structured content.
- Saves significant manual effort in triaging incoming PDFs and forms.
- Provides transparent reasoning for auditing and exception handling.
- Improves confidence and trust in automation decisions with confidence score.
- Reduces turnaround time for document processing.
- Scalable to support diverse document formats including recipes and free-form content.



2. Requirements & Prerequisites

2.1 System Requirements

| Component | Minimum Requirement |
|-----------|---|
| Processor | Intel Core i5 (11th Gen or higher) |
| RAM | 16 GB |
| Storage | 500 GB free disk space |
| Network | 1 GbE, IPv4/IPv6 compatible |
| OS | Windows 10 or 11 |
| Bot Agent | Automation Anywhere Bot Agent v22.180.39 |
| Platform | Automation 360 Control Room (v37 or higher) |

2.2 Prerequisites

- Automation 360 environment set up and running.
- Bot Agent installed and connected.
- AI Skill deployed and linked via Model Connection in AI Agent Studio.



3. Getting Started

3.1 Quick Start

3.1.1 Setup

- Download the bot package from Bot Store.
- Import it into your Automation 360 Control Room

3.1.2 Folder Structure

Ensure the following bots are imported:

- Document Classifier → `GetFileDetails` – Main task bot
- Document Classifier → `DocumentClassification` – AI Skill bot
- Document Classifier → `UploadFiles` – Form interface

3.1.3 Configure AI Skill

- Navigate to AI Agent Studio.
- Create or select a Model Connection.
- Assign the connection to the `DocumentClassification` AI Skill.
(How to create model connection link attached below)
 - Connecting to AI: Model connections establish a link between Automation 360 and the chosen AI model. This allows your automations to access the model's capabilities.
 - Powering AI Skills: AI Skills, the reusable AI components in AI Agent Studio, rely on Model connections to function. The connection determines which AI model will be used to execute the skill.
 - Select the Model connection in AI Skill (Steps to create and manage is provided below in link)
[Create and manage Model connections](#)

3.1.4 Run the Bot

- Open **GetFileDetails** Bot.
- Click **Run**.
- A Form will appear prompting document upload



3.1.5 Upload Document

- Supported formats: PDF
- Examples: Invoice, Purchase Order, Standard Form, Recipe, Unstructured

Document Classification

Select a file

Drop file here or [browse](#)

Filename

Submit

Original Filename

Document Type

CONFIDENCE SCORE

Additional comments

Close

3.1.6 View Results

After submission, the bot returns:

- **Document Type** (e.g., Invoice)
- **Confidence Score** (e.g., 95%)
- **Explanation** (e.g., “Contains fields like Invoice No., Date, Terms...”)

Automation Anywhere, Inc.
633 River Oaks Parkway, San Jose, CA 95134, USA
Tel: (950) 322-1234

Sold to:
Ultrion Inc.
1801 Taboro Beach Rd #1180
La Salle, MI 48145

Ship to:
Ultrion Inc. - Receiving Dock
6305 N. Rouse Rd
Oak Harbor, OH 43449

Invoice no.:
10280

Invoice Date:
22 Aug 2018

Invoice Order:
26537

| Quantity | Item no. | Description | Unit Price | Tax | Amount |
|---------------------|----------|-------------------------|------------|-----|--------|
| 1 | 1001 | Widget Type A | 22.00 | G | 22.00 |
| 1 | 1007 | Bracket - Widget Type C | 36.75 | G | 36.75 |
| Subtotal | | | | | 58.75 |
| Tax 1 (GST) @ 7% | | | | | 4.11 |
| Invoice Amount | | | | | 62.86 |
| Terms: 2% 10 Net 30 | | | | | |

Select a file

Drop file here or [browse](#)

[Invoice10013.pdf](#)

Filename

Submit

Original Filename

Invoice10013.pdf

Document Type

Invoice

CONFIDENCE SCORE

95%

Additional comments

The document contains elements typical of an invoice, such as "Invoice no.", "Invoice Date", "Sold to", "Ship to", and "Terms", indicating it is an invoice.



3.1.7 Outputs

- Document classification result
- Confidence score (percentage)
- Natural-language explanation for audit and validation

3.1.8 Tips for Developers

- Use this bot as a reusable component in larger workflows.
- Ideal for document-heavy processes with high variability.
- Can be scaled for batch processing in future versions.



4. Support & FAQs

4.1 Support

Free bots are not officially supported. You can get access to Community Support through the following channels:

- You can get access to Community Support, connecting with other Automation Anywhere customers and developers on [APeople](#) – the [Bot Building Forum](#), the [Bot Store Support Forum](#), or the [Developers Everywhere Group](#).
- Automation Anywhere also provides a [Product Documentation portal](#) which can be accessed for more information about our products and guidance on [Enterprise A2019](#).

4.2 FAQs

Q: What types of documents can this bot classify?

A: The bot can automatically identify and classify documents such as invoices, purchase orders, standard forms, recipes, and even unstructured or scanned content. It reads the entire document and decides the type based on layout and content.

Q: How does the bot explain its classification?

A: Along with the document type, the bot provides a confidence score (e.g., 92%) and a natural-language explanation. This helps users understand *why* a document was classified a certain way, improving trust and auditability.

For questions relating to Enterprise A2019: See the [Enterprise A2019 FAQs](#).



Appendix A: Record of Changes

| No. | Version Number | Date of Change | Author | Notes |
|----------|----------------|-------------------|------------------------|-------------------------------|
| <i>1</i> | <i>1.0.0.0</i> | <i>10/16/2025</i> | <i>Ashish R Mishra</i> | <i>Initial version of Bot</i> |



Appendix B: References

| No. | Topic | Reference Link |
|-----|--|----------------------------|
| 1 | Overview of Enterprise A2019 | Click here |
| 2 | Guidance: Building basic A2019 bots | Click here |
| 3 | Guidance: Building A2019 action packages | Click here |
| 4 | APeople Community Forum | Click here |
| 5 | Automation Anywhere University | Click here |