

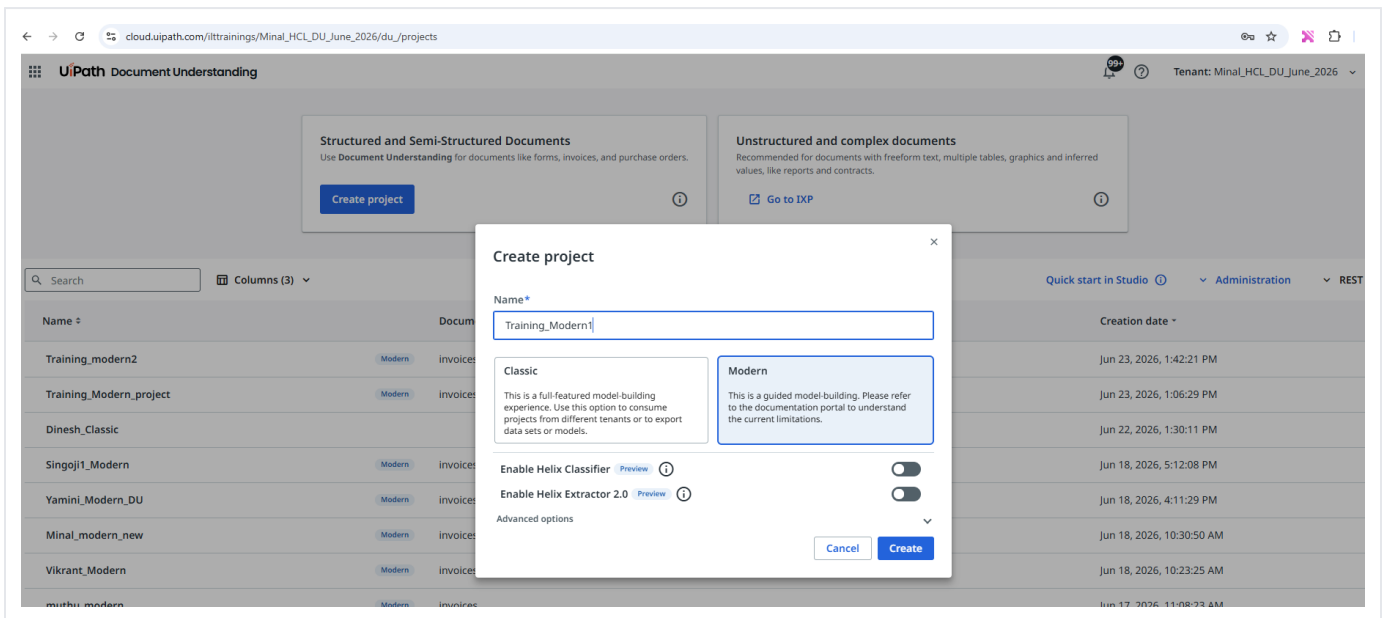
Module 04 — Semi-Structured Docs: Practical Exercise Steps

UiPath Document Understanding (Modern Projects) — step-by-step walkthrough for extracting data from invoices.

1. Create a New Document Understanding Project

SETUP

1. Open **UiPath Document Understanding** service in Automation Cloud.
2. Select **Create Project**.



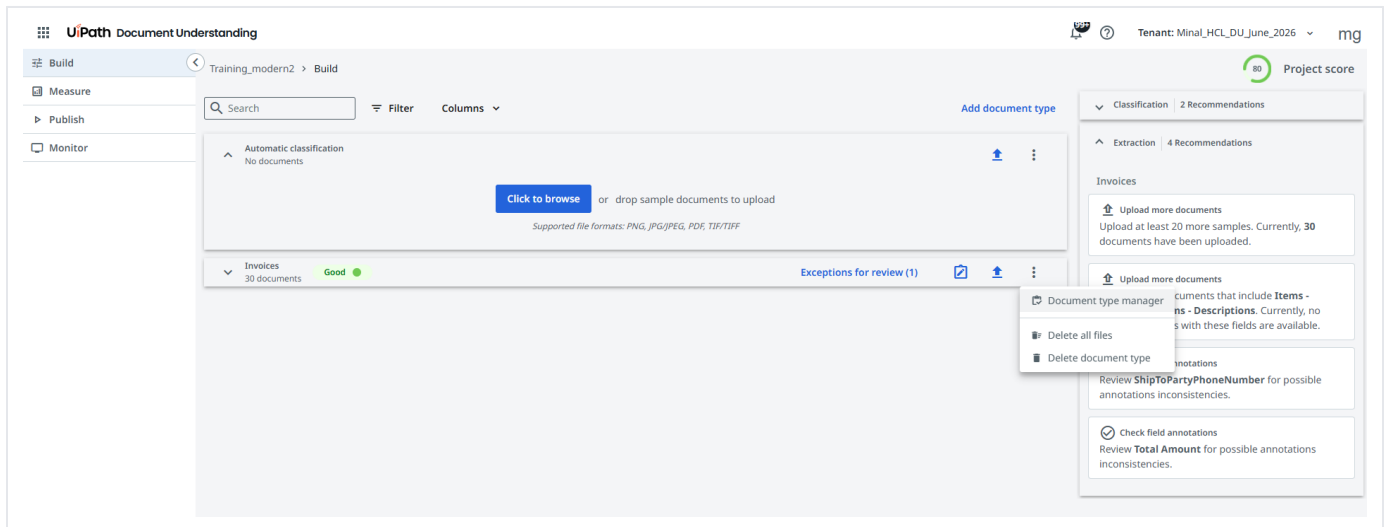
Create Project screen

1. Give the project the name **Training_Modern** and click **Save**.
2. Add the document type — choose **Invoices** and click **Add**.

2. Configure Extraction Fields

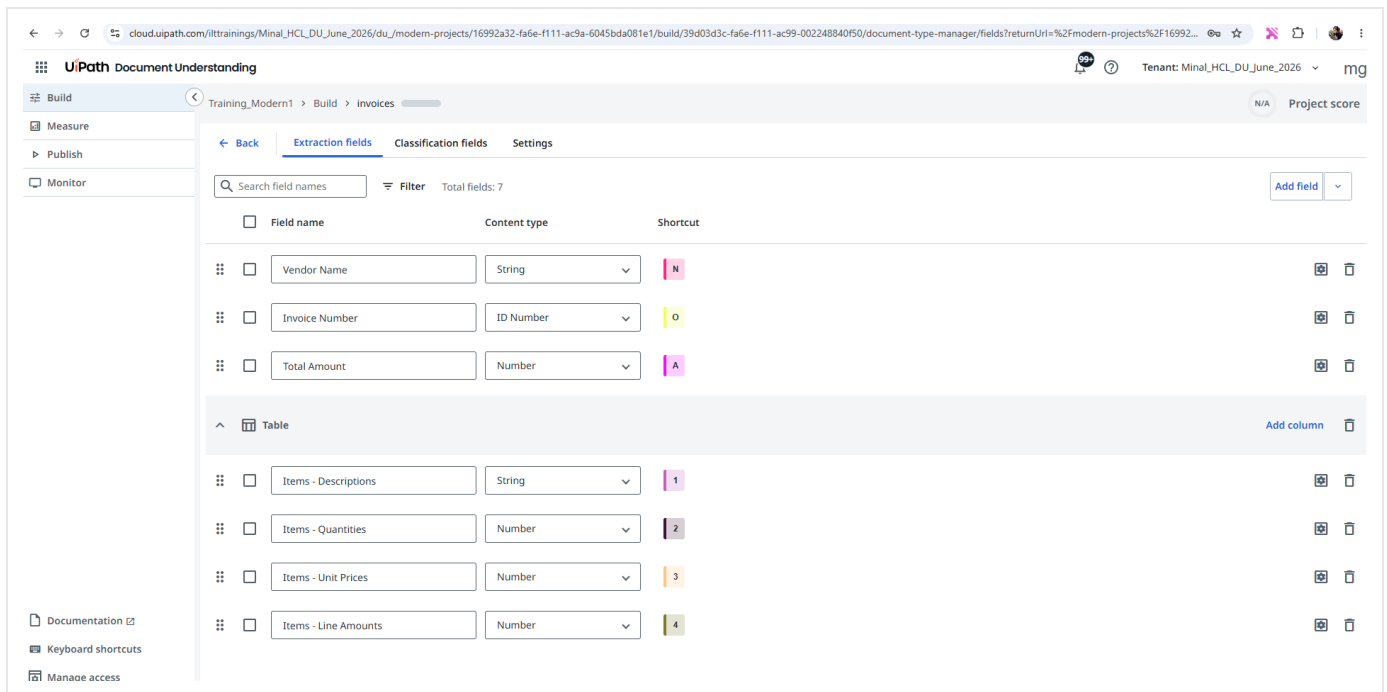
CONFIGURATION

1. Click the **⋮ (3 dots)** menu and select **Document Type Manager**.



Document Type Manager menu

1. Click on the **Extraction Fields** tab. Keep these fields and remove all others.



Extraction Fields tab

1. Add a new extraction field named ShipToPartyPhoneNumber of type **String**.

3. Upload Sample Documents

DATA

1. Navigate to the **Build** section.
2. Upload your sample invoice documents.
3. Wait for the documents to be processed.
4. Verify all uploaded files appear and are ready for annotation.

4. Annotate Documents

ANNOTATION

1. Open a sample invoice.
2. Select a field from the **Extraction Fields** panel on the right.
3. Highlight the corresponding value on the document.
4. Annotate these fields across all documents:
 - ShipToPartyPhoneNumber
 - Vendor Name
 - Invoice Number
 - Total Amount
5. Annotate table columns for line-item extraction if applicable.

5. Validate Annotations

REVIEW

1. Review all highlighted fields across documents.
2. Ensure each field is mapped to the correct region.
3. Check confidence scores and extraction quality.
4. Save the annotations.

6. Check the Measure Section

EVALUATION

1. Navigate to the **Measure** tab and open **Metrics**.
2. Ensure you have a satisfactory accuracy percentage for each field.

♦ TIP

For high-stakes workflows aim for **90%+ F1**. With human-in-the-loop validation in place, **75–80%** is acceptable.

7. Publish the Extraction Model

PUBLISHING

1. Navigate to the **Publish** tab.
2. Click **Create Project Version**, choose document type **Invoices**, give it a name, and click **Create**.
3. Toggle the **Deployed** button to make the model live.

8. Create a Studio Automation

AUTOMATION

1. Click on "**Open Studio Web**".

UiPath Document Understanding

Tenant: Minal_HCL_DU_June_2026 mg

Project score: 80

Build Measure Publish Monitor

Training_modern2 > Publish

Project versions Export model training datasets

Search Deployment Tag: All

Create project version

Name	Deployment Tag	Date	Version	Status	Deployed
Training_Invoices2	Production	Jun 23, 2026, 3:19:23 PM	1	Deployed	☒

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Automate your process

Use this Document Understanding project in an automation of choice in Studio, Studio Web or APIs.

Training_Invoices2 Jun 23, 2026, 3:19:23 PM

Integrate via API Open Studio Web

Open Studio Web button on the Publish page

1. This will open the automation in Studio Web in another tab.
2. Run the Studio Web workflow and test it.
3. Observe the execution logs.
4. Verify extraction results.
5. Confirm that invoice data is extracted successfully.