

STP Report for Standard Forms

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Contents

1	Introduction	2
1.1	Purpose of this document	2
1.2	Overview	2
1.3	Benefits	2
2	Key Features.....	2
2.1	Command Parameters	2
2.2	STP Report Output	3
3	Pre-requisites	5

1 Introduction

1.1 Purpose of this document

This document aims at explaining :

- Features of STP Report for Standard Forms
- Pre-requisites
- How to execute the Bot

1.2 Overview

Standard Forms STP Report gives a summary of fields extracted in Standard Forms and helps identify fields with low confidence. The fields with STP lower than 90% are highlighted on the original document for easy visual identification. It also provides the document wise summary of fields extracted with STP percentage

1.3 Benefits

1. The package helps us identify the documents with lower STP so we can investigate the reasons.
2. It saves time in going through/parsing the json output
3. The PDF bot highlights the fields visually on the original PDF, saving time spent in mapping the field with the document.
4. It can help identify the few documents with low confidence where human intervention might be needed, similar to validator in IQBot.

2 Key Features



2.1 Command Parameters

- **Standard Forms STP Report: STP Excel Report**
- Base Directory: Path of folder containing the pdfs and json outputs in respective sub-folders.
- Status: Output showing Success or Error.

Standard Forms STP Report: STP Excel Report

Generates STP Excel Report

Base Directory

 Folder location with all documents and json outputs 

Status (optional)

Choose a variable  

Standard Forms STP Report: PDF Report

- Input Folder Path: Path of sub-folder containing the pdf and json output
- Status: Output showing Success or Error.

Standard Forms STP Report: PDF Report

Generate PDF Report for a File Output

Input Folder Path

Path of sub-folder with pdf and json output

Status (optional)

SampleString

2.2 STP Report Output

STP Excel Report gives the below Excel attachment with 2 sheets

Sample Output Attachment:



STPReport.xlsx

Sheet 1: STP Report

SI No	Folder Name	Document Name	Total Number of Fields	Fields with Confidence<90%	Fields with Confidence between 90 and 95%	Confidence >95%	STP(Yes/No)	STP Percentage (>90)
1	Folder 1	CAM-Systematic F	26	4	21	1	No	84.61538462
2	Folder 2	CAM-Systematic F	26	0	26	0	Yes	100
3	Folder 3	CAM-Systematic F	26	0	26	0	Yes	100
4	Folder 4	CAM-Systematic F	26	0	26	0	Yes	100
5	Form 1	Tax year 2020_547	216	24	82	110	No	88.88888889
6	Form 2	Tax year 2020_547	216	14	80	122	No	93.51851852
7	Form 3	Form 1120_PAGE 3	16	2	1	13	No	87.5
8	Form 4	Form 1120_PAGE 3	16	2	1	13	No	87.5
9	Form 5	Form 1120_PAGE 3	16	2	1	13	No	87.5

Sheet 2: Field Level data

A	B	C	D	E	F
SI No	Document Name	Field Name	Field Type	Field Value	Confidence
1	CAM-Systematic F	Investor Name	string	DOROTHY S	0.941
2	CAM-Systematic F	Joint Investor Signature Date	string	DOROTHY S	0.919
3	CAM-Systematic F	Banking Information Opt1	selectionMark	selected	0.95
4	CAM-Systematic F	Representative Signature Date	string	10/21/2021	0.95
5	CAM-Systematic F	Transaction Type SWP	selectionMark	unselected	0.95
6	CAM-Systematic F	Investor Signature Date	string	10/21/2021	0.95
7	CAM-Systematic F	Transaction Type DWP	selectionMark	unselected	0.95
8	CAM-Systematic F	Joint Investor Name	string	unselected	0.919
9	CAM-Systematic F	Nominee	selectionMark	unselected	0.95
10	CAM-Systematic F	Banking Information Opt3	selectionMark	unselected	0.95
11	CAM-Systematic F	Representative Signature	signature	Cerka	0.841
12	CAM-Systematic F	Transaction Type PAC	selectionMark	selected	0.95
13	CAM-Systematic F	Joint Investor Signature	signature		0.95
14	CAM-Systematic F	PACs Box2	string	30	0.93
15	CAM-Systematic F	Account Type	string	TFSA	0.93

PDF output highlights the fields of concern on the original document





Tax year
2020_5471_copy10.p

- Fields with confidence less than 90% are highlighted in red.
- Fields with confidence between 90 and 95% are highlighted in blue.

Important: Fill in all applicable lines and schedules. All information must be in English. All amounts must be stated in U.S. dollars unless otherwise indicated.									
1a Name and address of foreign corporation YUZU UNITED CANADA INC. 5050 TORONTO ROAD MISSISSAUGA CA L4W 5R2 ONTARIO			b(1) Employer identification number, if any FOREIGNUS b(2) Reference ID number (see instructions) FCA940000C c Country under whose laws incorporated CA						
d Date of incorporation 02/01/2017	e Principal place of business CA	f Principal business activity code number 334410	g Principal business activity OTH ELEC COMP MFG	h Functional currency code CAD					
2 Provide the following information for the foreign corporation's accounting period stated above.									
a Name, address, and identifying number of branch office or agent (if any) in the United States			b If a U.S. income tax return was filed, enter: <table border="1"> <tr> <td>(i) Taxable income or (loss)</td> <td>(ii) U.S. income tax paid (after all credits)</td> </tr> <tr> <td>0</td> <td>0</td> </tr> </table>			(i) Taxable income or (loss)	(ii) U.S. income tax paid (after all credits)	0	0
(i) Taxable income or (loss)	(ii) U.S. income tax paid (after all credits)								
0	0								
c Name and address of foreign corporation's statutory or resident agent in country of incorporation DELOITTE & TOUCHE LLP			d Name and address (including corporate department, if applicable) of person (or persons) with custody of the books and records of the foreign corporation, and the location of such books and records, if different HARVEY GREEN						

3 Pre-requisites

- The json output extracted from Standard Forms should be provided as input to the bot
- The pdf document along with its corresponding json output should be placed in each sub-folder

	AnalyzeResult-CAM-Systematic Plan (ENG Sample 03).pdf	11-08-2022 10:28	JSON File	1
	CAM-Systematic Plan (ENG Sample 03) (1)	11-08-2022 10:28	Foxit Reader PDF ...	1

- The main folder should contain only such sub-folders and no-other sub-folders.
- Excel report will be generated in the main folder whose path is passed to the action.
- Only PDF documents are supported as of now