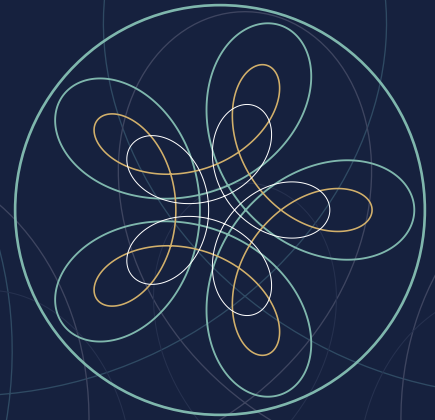


International Institute of Applied AI Technology



Course guide for AI-IDP

Certified AI Intelligent Document Processing Specialist

Design, train and run document capture that reads forms, invoices, correspondence and records, with measured accuracy and controlled human review.

About this guide

Design, train and run document capture that reads forms, invoices, correspondence and records, with measured accuracy and controlled human review.

This guide sets out what the AI-IDP examination covers and how to prepare for it. It assumes you already practice document capture and automation, and concentrates on what changes when AI is part of the work.

How to use it

Work through the modules in order. Each one sets out the ideas, lists the topics the exam can test, and ends with an exercise. Do the exercises on your own projects where you can: the exam questions are written around the same situations.

Who it is for	Capture specialists, automation developers, operations analysts and solution architects.
Recommended experience	Experience with document capture, scanning, OCR or workflow tools.
Study time	About 24 hours
Exam	12 multiple-choice questions in 30 minutes, online. Pass mark 9 correct.
Certification	Valid for 3 years, with a printable certificate and a verifiable credential number.

Learning outcomes

When you have completed this program you will be able to:

- Analyze a document population and design a capture approach
- Choose among templates, trained models and language models for extraction
- Set confidence thresholds and validation rules
- Design human review stations that are efficient and accurate
- Measure straight-through processing and field accuracy
- Integrate capture output with records and line-of-business systems



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Module 1. Document populations

Module 2. Extraction approaches

Module 3. Validation and confidence

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Module 5. Measuring performance

Module 6. Integration and records capture

Preparing for the exam



Module 1

Document populations

Sampling and analyzing the documents before choosing any tool.

Topics covered

- Structured, semi-structured and unstructured documents
- Volume, variety and image quality
- Sampling for analysis
- Document classes and splitting

Exercise

Analyze a sample of 100 documents and group them into classes with volume estimates.

Self-check

Before moving on, check that you can explain each topic above to a colleague in two or three sentences, and say how it would apply on a project you know.

Your notes



Module 2

Extraction approaches

Templates, trained extraction models and large language models each suit different document types and volumes.

Topics covered

- OCR and ICR fundamentals
- Template and zonal extraction
- Trained extraction models
- Language-model extraction and its risks

Exercise

Recommend an extraction approach for three document classes and explain the choice.

Self-check

Before moving on, check that you can explain each topic above to a colleague in two or three sentences, and say how it would apply on a project you know.

Your notes



Module 3

Validation and confidence

Rules and thresholds decide what goes straight through and what a person checks.

Topics covered

- Field-level and document-level confidence
- Cross-field and lookup validation
- Threshold tuning against error cost
- Handling hallucinated values

Exercise

Write validation rules for an invoice: totals, tax, supplier lookup and date checks.

Self-check

Before moving on, check that you can explain each topic above to a colleague in two or three sentences, and say how it would apply on a project you know.

Your notes



Module 4

Human review design

Review stations that show the person what to check and capture their corrections for retraining.

Topics covered

- Exception-only review
- Keying versus verifying
- Capturing corrections
- Reviewer productivity and accuracy

Exercise

Sketch a review screen that lets a clerk confirm five fields in under twenty seconds.

Self-check

Before moving on, check that you can explain each topic above to a colleague in two or three sentences, and say how it would apply on a project you know.

Your notes



Module 5

Measuring performance

Field accuracy, document accuracy and straight-through rate, measured against a ground-truth set.

Topics covered

- Ground-truth sets
- Field and document accuracy
- Straight-through processing rate
- Cost per document

Exercise

Calculate straight-through rate and field accuracy from a set of sample results.

Self-check

Before moving on, check that you can explain each topic above to a colleague in two or three sentences, and say how it would apply on a project you know.

Your notes



Module 6

Integration and records capture

Passing results to downstream systems and filing the source image as a record with its metadata.

Topics covered

- Export formats and APIs
- Filing to records systems
- Audit trail of capture decisions
- Retention of images and extracted data

Exercise

Design the integration that files each processed document with its extracted metadata and capture audit trail.

Self-check

Before moving on, check that you can explain each topic above to a colleague in two or three sentences, and say how it would apply on a project you know.

Your notes



Preparing for the exam

The AI-IDP exam has 12 multiple-choice questions drawn at random from every module. You have 30 minutes and need 9 correct answers to pass.

Before you start

- Finish every module's exercise. Most questions describe a situation and ask what a practitioner should do.
- Re-read the module summaries: they state the main idea each question is built on.
- Set aside uninterrupted time. The timer keeps running if you leave the page.
- Have this guide to hand. The exam is open book, but you will not have time to look up every answer.

Taking the exam

Log in to your account on the Institute's website and choose Take the exam. Check that your name is shown exactly as it should appear on your certificate. Your result is shown as soon as you submit, and if you pass, your certificate and credential number are issued straight away.

If you don't pass, you can try again after 24 hours. Each attempt draws a different set of questions.

