

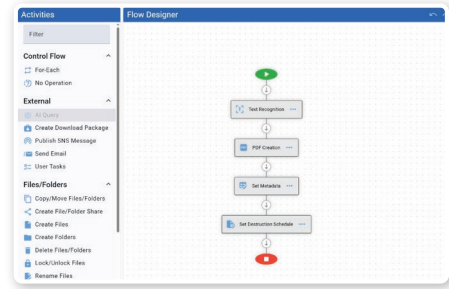
# Quick Start Guide:

## Getting started with Sys.tm® Intelligence and Sys.tm® Flows

New to Sys.tm Intelligence and Sys.tm Flows? This guide will explain how to get started with these easy-to-use Sys.tm capabilities.

### What is Sys.tm Flows?

Sys.tm Flows is an optional Sys.tm service that lets you define a set of flow steps (activities) to automate virtually any business process. Using the low-code/no-code automation builder, you can build custom workflows with little to no coding experience or IT involvement.



### Why Use Sys.tm Flows?

With Sys.tm Flows, you can automate processes such as document routing, data extraction, records retention schedules, approval processes, and more. This built-in business process automation workflow builder can help you speed your business processes, save money, and free employee time for higher value work.


Sign up for Sys.tm and Sys.tm Flows at:  
**[www.sys.tm/signup](https://www.sys.tm/signup)**

By 2030, activities that account for up to **30% of hours worked** across the US economy **could be automated**<sup>1</sup>.

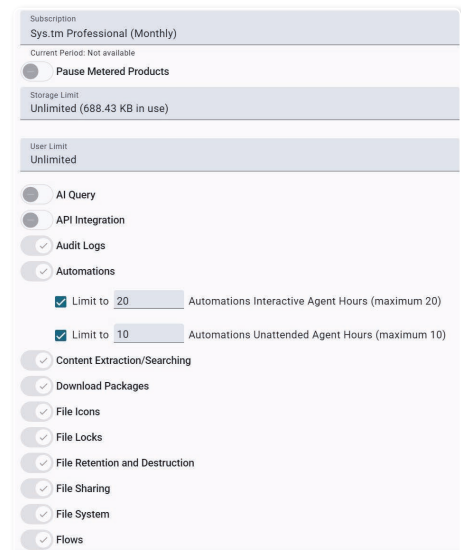
- McKinsey

## 1 Activating Sys.tm Flows

*Note: if you are unable to activate this feature, you may need to contact your billing manager to enable Sys.tm Flows for your user account.*

1. Ensure you have access to Sys.tm Flows by clicking the user icon (  ) in the top right of the page, and choosing "Users and Groups".

- Click the ellipses icon next to your name in the Users window.
- Choose "Permissions"



1. Retrieved from: <https://www.mckinsey.com/mgi/overview/in-the-news/will-generative-ai-be-good-for-us-workers#:~:text=By%202030%2C%20we%20estimate%20activities,analysis%2C%20and%20research%20and%20development.>

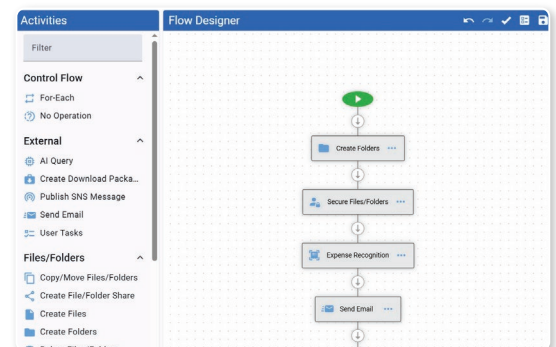
- c. If not already enabled, click the checkbox next to "Flows" to allow access.
- d. Choose "Save".

## 2 Using Sys.tm Flows

1. In the Features panel, select Flows.
2. To create a new Flow, click "Create" on the right side of the page.
3. Enter a name for your Flow, then enter a description of the Flow if needed.
4. You can apply security settings to your Flow by clicking the Security tab at the top of the screen.
5. Once a name, optional description, and optional security settings are added, click "Create" to create your new Flow.
6. To begin building your Flow, click the ellipses icon on the right side and choose "Design".

## 3 Designing Your Flow

1. Drag and drop your desired activities from the Activities panel on the left side to the Flow Designer panel on the right side.
2. To edit activities properties, click the ellipses icon to the right of any activity and select "Properties".
3. Make changes to Properties as needed. When finished, click "Ok".
4. Continue dragging and dropping desired Activities from the Activities panel and configuring properties as needed.
5. When all desired Activities have been added, click the Save icon in the top right of the Flow Designer to save your new Flow.
6. A new window appears, asking "Would you like to publish this new version?". Select "Yes" to publish your Flow.

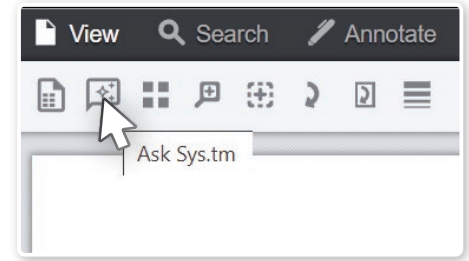


*Note: For best results, fully plan and define the process that you want to automate before you begin building the flow. Configure the flow and activities first, and then set the version properties.*

## What is Sys.tm Intelligence?

Sys.tm Intelligence is an optional Sys.tm service that lets you utilize Artificial Intelligence (AI) to recognize documents by type, automatically extract information from invoices, receipts, identification documents, and more. You can ask Sys.tm Intelligence questions about information in text, images, documents and videos to identify trends and create summaries and reports.

See the [Sys.tm pricing sheet](#) for pricing details on Sys.tm Intelligence. Follow the steps below to get started.



## Why Use Sys.tm Intelligence?

With Sys.tm intelligence, you can leverage the power of built-in Artificial Intelligence (AI) to help you increase productivity, improve data accuracy, automate manual tasks like data entry, and get answers to questions fast using AI query.

Sign up for Sys.tm and Sys.tm Intelligence at:  
**[www.sys.tm/signup](http://www.sys.tm/signup)**

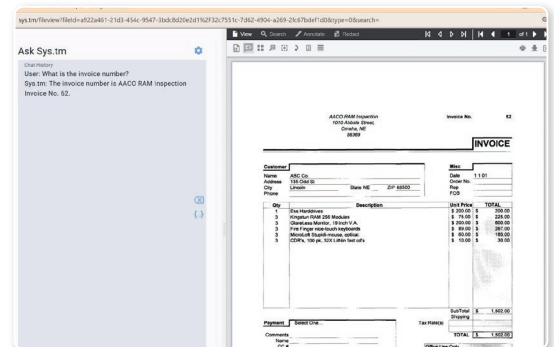
**42%**  
of decision-makers  
struggle to identify  
and get access to  
**the right data<sup>2</sup>.**

- Forrester

## 1 What AI Features are Included with Sys.tm?

Sys.tm Intelligence includes AI Query and AI-enabled recognition, both of which can be manually triggered within Sys.tm. You can also embed AI-powered features within your Sys.tm Flows, allowing you to automate the following AI features: AI Query, Expense Recognition, Identity Recognition, and Text Recognition.

First, we will introduce the AI features that can be manually triggered. Then we will explain how to embed AI activities within Sys.tm Flows.



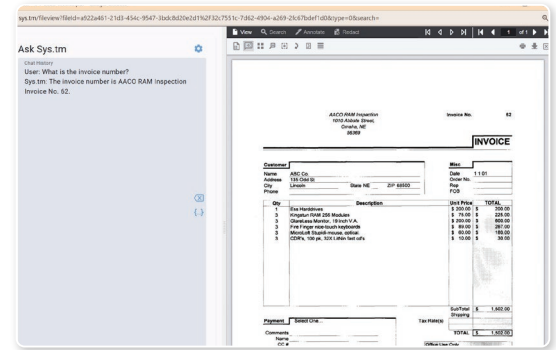
2: Retrieved from: [https://inrule.com/wp-media/resources/ebooks/InRule\\_Forrester\\_Wrong\\_About\\_Operationalizing\\_AI\\_FINAL.pdf](https://inrule.com/wp-media/resources/ebooks/InRule_Forrester_Wrong_About_Operationalizing_AI_FINAL.pdf)

## 2 How to Use AI Query

*Note: if you are unable to activate this feature, you may need to contact your billing manager to enable Sys.tm Intelligence for your user account.*

1. Ensure you have access to Sys.tm Intelligence by clicking the user icon in the top right of the page, and choosing "Users and Groups".


- Click the ellipses icon next to your name in the Users window.
- Choose "Permissions"
- If not already enabled, click the checkbox next to "Intelligence" to allow access.
- Choose "Save".



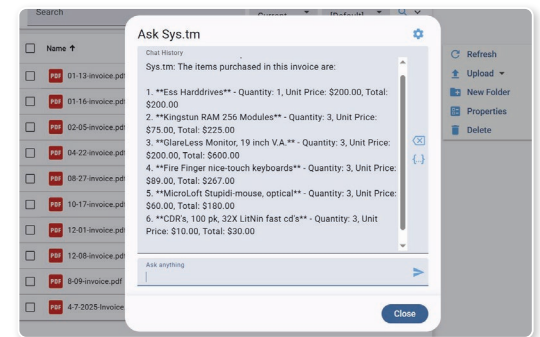
2. Navigate to the file stored in Sys.tm you'd like to use for Artificial Intelligence (AI) query.


3. Click the ellipses icon on the right side of that file.

4. Choose "Ask Sys.tm".

5. You can also launch the AI prompt window while previewing a file by clicking the chat bubble icon (  ) in the top row of the preview window.

6. A prompt window will appear, where you can enter questions about information within the file or document, such as "What is the total of this invoice," "Create a summary of this document," or "Tell me what was ordered," and Sys.tm Intelligence will provide an answer to your question.

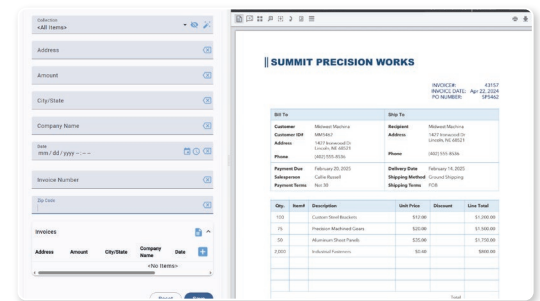




7. You can adjust the settings for Sys.tm Intelligence by clicking the settings icon (  ) in the top right of the Ask Sys.tm window. Here, you can choose between different Foundational AI Models and configure advanced settings. All of these settings will influence the results of your AI queries. See the [Sys.tm Pricing Sheet](#) for details on each Foundational AI Model option.

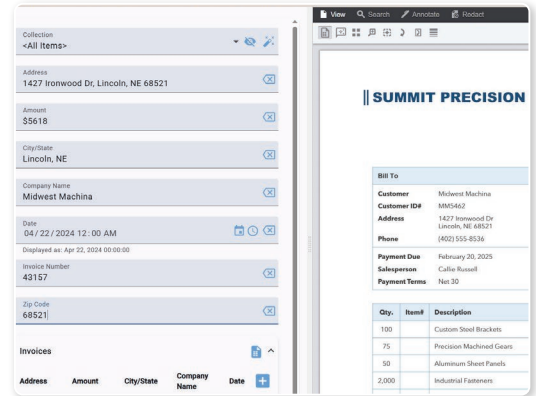
## 3 Using Sys.tm AI-Enabled Recognition

1. In Sys.tm, navigate to the file you'd like to extract information from.

2. Click on the file and open the preview window to view your document.



3. In the top-left of the screen, select the "Toggle Metadata" button (  ), which will open the metadata preview window.
4. In the metadata window, select the magic wand AI Extract Metadata button (  ).
5. A pop-up window appears, asking you to choose an AI model and data source. Leave default settings and choose the "Extract" button in the bottom-right.
6. You will now see your document's metadata automatically fill the fields in the metadata window.
7. Click "Save" to save your file's metadata.



## 4 Using Sys.tm Intelligence in Sys.tm Flows

You can also utilize Sys.tm Intelligence within automated processes you build in Sys.tm Flows. This allows you to leverage the power of AI automatically, without having to manually trigger AI activities.

To do this, you can drag and drop AI Activities from the left Activities panel to the Flow Designer on the right when designing Flows. AI activities that can be added to Flows include: AI Query, Expense Recognition, Identity Recognition, and Text Recognition.