ATIPXpress

AWS Comprehend AI Implementation

v11.8.0

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Contents

1   AWS Comprehend AI Implementation

Welcome to the AWS Comprehend AI Implementation guide. This document provides comprehensive instructions on how to set up and configure the AWS Comprehend-powered AI Assistant feature in our latest release.

Note: This document is intended for our on-premises customers who manage their own ATIPXpress application. For SaaS customers who purchase the AI Assistant, OPEXUS support will enable their integration.

1.1   AWS Comprehend for SaaS Customers

SaaS customers (using an OPEXUS-hosted version of the application) who purchase the AWS Comprehend integration will have their configuration completed by an OPEXUS Support team member. Simply coordinate with your Project Manager (or other OPEXUS contact) and we'll handle the rest.

1.2   Implementation Methods

There are two (2) implementation methods for AWS Comprehend. Customers will select an implementation method at the time of purchase, as this feature cost is variable depending on the implementation method. The options are:

1. Using OPEXUS AWS Account (**Recommended**): Customers are encouraged to implement this feature using an OPEXUS-provisioned AWS account. We'll do the work for you in setting up AWS and will provide you with a few data points to plug into the application to activate the feature.
2. Use Your Own AWS Account: Customers may elect to use their own AWS account and pay for their use of the service on a per-page basis.

1.3   Implementation Process

To implement the AI Assistant, you'll complete the following activities:

1. *AWS Account*: Connect with OPEXUS support to help set you up with an account we provision, or set up your own AWS account.
2. *Application Configuration*: Guidance on configuring the application settings to ensure optimal performance and integration of the AI Assistant

1.4   Prerequisites

To install the AI Assistant, you must fulfill the following prerequisites:

1. ATIPXpress must be upgraded to v11.7.0 or above.
2. The ATIPXpress API must be installed. This is a requirement for using the application in all versions v11.7.0 and above.
3. You must have AI Assistant license(s) and AWS Comprehend license(s) for your organization, and these licenses must be applied to your application. Contact your OPEXUS Project Manager for your licenses. Once you have your updated license, [follow these steps to upgrade your license](#).
4. You must have an AWS account. You'll either use our OPEXUS account, or you can use (or create) your own.

2   AWS Account

2.1   AWS with OPEXUS

If you elect to use our AWS account for integrating Amazon Comprehend with our application, our support team is here to assist you. Once you decide to proceed with this option, your project manager will coordinate with our support team to provision the necessary access under our AWS organization. Our support team will create a dedicated AWS account for your organization within our organizational unit.

Once the account is set up, we will provide you with the necessary credentials, including the AWS Client ID and Secret ID. These credentials are essential for configuring your environment and enabling the Amazon Comprehend connector within our application.

Once you've got your Client ID and Secret ID, move to Section 3 of this document for next steps.

2.2   Use Your Own AWS Account

This section provides instructions for customers who want to use their own AWS account to integrate Amazon Comprehend with ATIPXpress. At a minimum, you are required to create an account as well as one user within the account to connect to your application.

Optionally, you may elect to create Organizational Units (OUs) to set OU-level policies, etc. This is not mandatory but can be helpful for managing your application's hierarchy. Here's an example hierarchy:

- AWS Organization: **OPEXUS**
    - Organizational Unit: **AX_ Customer_Office_1**
        - Account: **Customer's AWS Account**
            - User: **AX_ai_assistant user**

2.2.1   Create an AWS Account

To sign up for AWS, go to [AWS Sign Up](#) and click **Create an AWS Account**.

Follow the on-screen instructions to complete the account creation process.

Note: You will need to provide a valid email address and payment information.

2.2.2   Set Up AWS Organizations (Optional)

Follow the steps below to create an OU:

1.   After creating your account, sign in to the AWS Management Console.
2.   Navigate to AWS Organizations to set up an organizational unit for your company if not already set up.
3.   Create an organizational unit named AX_AI_Assistant (this is just a suggestion; you can use any organizational unit name).

2.2.3   Create an AWS User for Integration

1.   Go to the IAM (Identity and Access Management) service in the AWS Management Console.
2.   Select Users from the sidebar and click Add User.
3.   Enter AX_ai_assistant (this is just a suggestion; you can use any name as the username). This standard name helps identify the user designated for Amazon Comprehend access within our application.

2.2.4   Assign Permissions

For the AWS user you created, attach the ComprehendReadOnly policy to allow necessary access.

1.   Navigate to the **Permissions** tab.
2.   Click **Add permissions.**

3. Select and add the **ComprehendReadOnly** policy.

2.2.5   Generate Access Keys

1. Go to the *Security credentials* tab for the AWS user account.
2. Click **Create access key** to generate an access key and a secret access key.
3. Copy and securely store these keys as they will be required for configuring the integration.
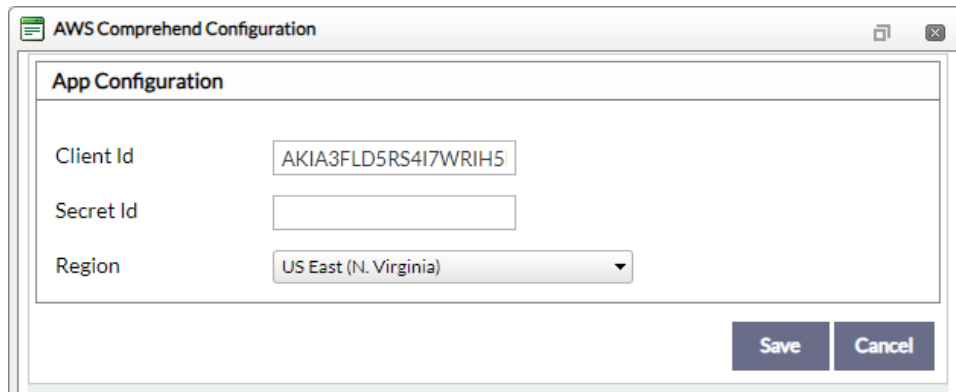
3 Application Configuration

Follow the steps below to configure your application for AWS Comprehend.

3.1 AWS Comprehend Configuration

1. Log in to the application as an administrator and access **Administration > System Administration > AWS Comprehend Configuration**:

2. Under *Client Id*, copy and paste the Access Key, generated in step 3 of Section 2.2.5 (or provided to you by OPEXUS, if using the OPEXUS AWS account).
3. Under *Secret Id*, copy and paste the Secret Access Key, generated in step 3 of Section 2.2.5 (or provided to you by OPEXUS, if using the OPEXUS AWS account).
4. Use the *Region* drop-down to select which geographic location you'd like to use for search.

Note: Selecting an option closer to your data center can help optimize speeds when using AWS Comprehend.

5. Click **Save** to save the configuration.

3.2 AI Roles and Permissions

There are three types of AI user permissions within the application:

1. *AI Config Application Role Permission*: Users with the AI Config application role permission can view and edit three AI configuration pages. Click the links below to learn more about these configuration pages:
    a. AI Redaction Templates
    b. Redaction Knowledge Base
    c. AI Trainers
2. *AI User Role*: Application users who are allowed to use the AI Assistant feature within document management. This is a license-based role, and all AI users must have an active license.

3. *AI Trainer Role*: A subset of the AI Users, AI Trainers are selected to feed redaction data into the Redaction Knowledge Base, which contains a repository of all redactions performed by AI Trainer to identify patterns and frequently encountered data.

3.3 Using the AI Assistant

There are two main components to the AI Assistant feature. AI Redaction Templates and applying these templates to documents in Document Management. Follow the links below to learn more about using the AI Assistant with AWS Comprehend.

[Using AI Assistant with AWS Comprehend](#)

[Using the AI Assistant](#)

[AI Redaction Templates](#)