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#### Today's speakers





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Sr. Dir, Al/ML Solution Engineering steve.tegeler@uipath.com

#### **UiPath AI Summit: 2024 Edition**



**Keynote** 

#### **Keynote Session: Transforming Workspaces with Al-powered Automation**



GRAHAM SHELDON Chief Product Officer, UiPath



ROWAN CURRAN Sr. Analyst, Forrester Research Guest Speaker



Kickoff the Al Summit discussing the latest trends across the Al ecosystem and highlighting UiPath's newest Al-powered capabilities.

Industry Highlights

### Banking & Financial Services

Next-level operations: Why financial services are banking on AI & automation

#### Insurance

How Al-powered automation is changing the insurance operating model

#### Manufacturing

Innovating through disruption: The new AI paradigm in manufacturing

#### **Public Sector**

Al behind the wheel of public sector innovation

#### Healthcare

Putting AI to work in healthcare

Product
Deep Dives
45-mins

#### **UiPath Autopilot**

Autopilot in action: Five use cases that supercharge productivity

### Al-powered Discovery

Al-powered Continuous Discovery: Finding 'eureka' insights with Al

#### Al-powered Document Processing

Building a successful IDP solution: Best practices from seasoned AI experts

### Training Al models for IDP

Next-gen AI accelerating intelligent document processing (IDP)

### Integration Service & Al Activities

Integration Service: Using connectors and context to power intelligent robots for business

Roadmap & Closing
45-mins

#### Closing Session: From R&D to Execution – The Future of AI at Work









The UiPath AI roadmap and our on-going research and innovation across Generative and Specialized AI.

#### Agenda



1 The full scope of intelligent document processing (IDP)

Reducing your effort through new functionality

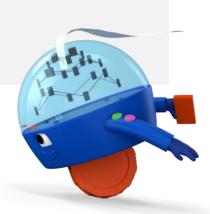
Deployment considerations

O4 Bringing it all together

# The goal of intelligent document processing...

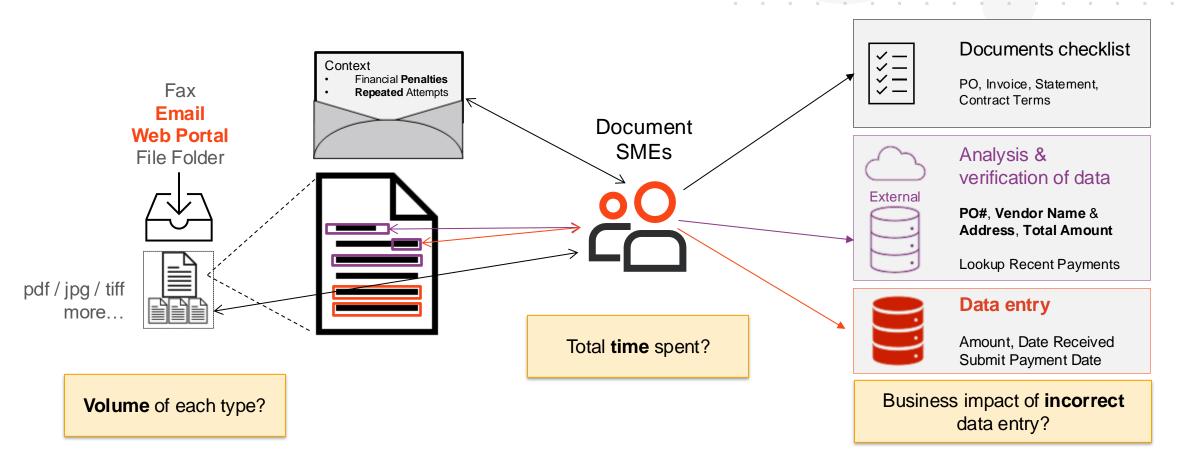


Reduce manual effort in the end-to-end process while producing accurate data



#### The work in manual document processing





#### Historical challenges to automate end-to-end:

Message context critical in processing

Multiple / custom source and destination systems

File type inconsistency & splitting

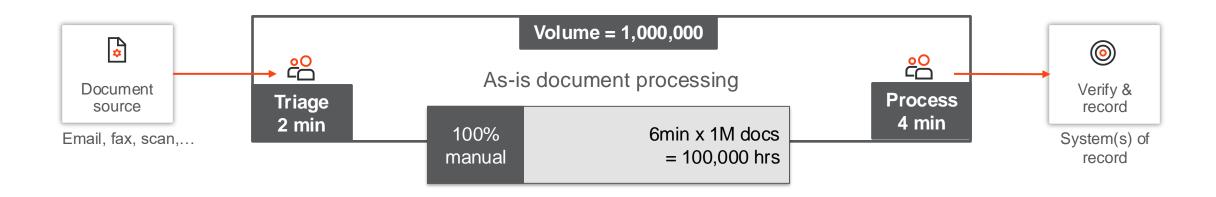
Multiple document types with variable layouts

Document processing **software maintenance** / FTE specialization

### Step 1: Prioritize *your* unique business value

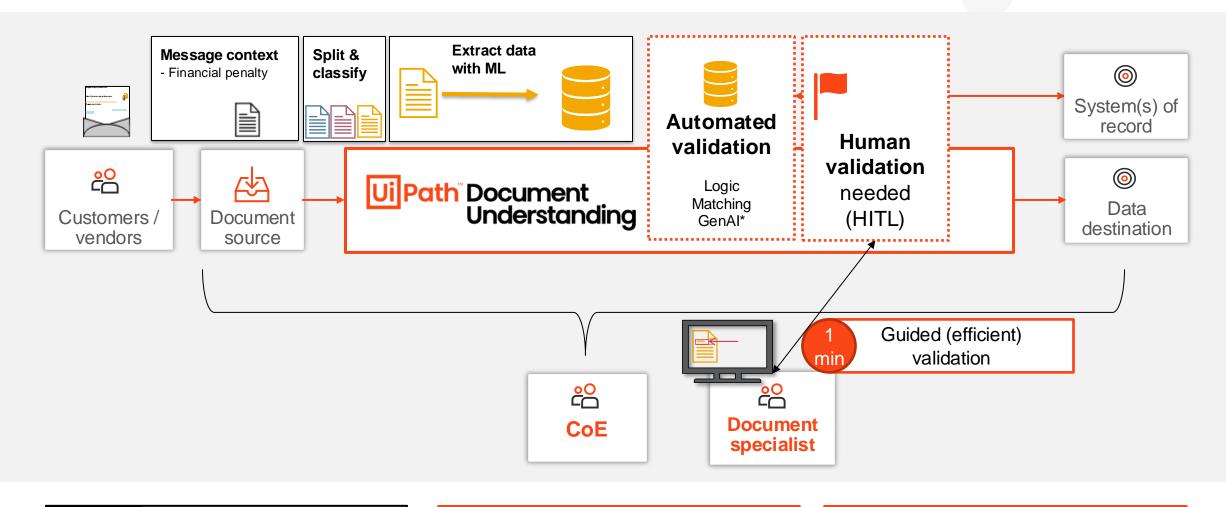


- 1. Increase document processing throughput per FTE
- 2. Decrease processing time end-to-end (SLA)
- 3. Improve data entry **accuracy** (avoid duplication / rework)



#### Step 2: Quantify the value of an automation solution





100% 6min x 1M docs manual = 100,000 hrs

If 100% human verified

1min x 1M =  $\sim$ 17,000 hrs  $\sim$ 83% reduction

If 50% human verified

1min x 500k =  $\sim$ 8000 hrs  $\sim$ 91% reduction

#### Agenda



The full scope of intelligent document processing (IDP)

Reducing your effort through new functionality

03 Deployment considerations

**04** Bringing it all together

# Reduce your effort with the latest IDP functionality





# Increase context awareness

Notes / messages used to increase solution performance



# Optimize ML model training & performance

- > Reduce effort of initial deployment
- Set direction on optimizing performance of your models.

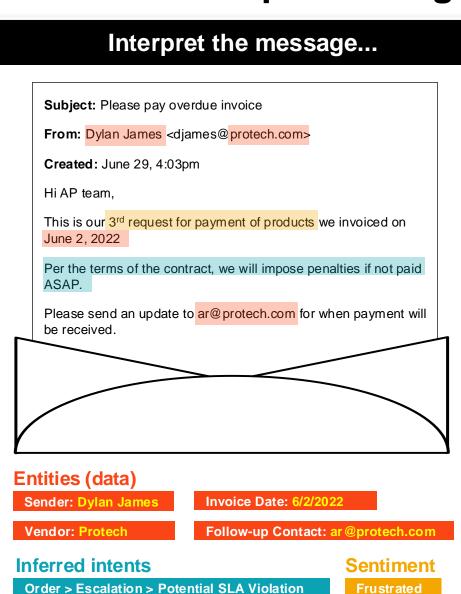


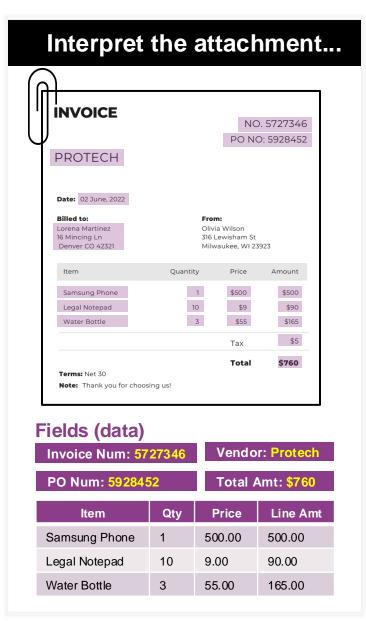
# Apply automated validation

Boost confidence scores
 of extracted data further reducing
 human validation requirements

# Messages / notes can be essential context when processing







#### Use data to automate actions!

PO Number	Invoice Number	Status	Paymen t Date	Amount Paid
5928452	5727346	Paid	6/7/2022	760.00
2938572	3758292	Unpaid		

#### **Query ERP & detect duplicate**

Invoice Number: 5727346

PO Number: 5928452

Status: Paid

Payment Date: 6/7/2022

#### Auto generate email response

Hi Dylan/AR Team,

Sorry the team was not updated earlier. Our systems indicate we paid invoice 5727346 in full on 6/7/2022. Attached is a transaction receipt and address sent to.

# Reduce your effort with the latest IDP functionality





# Increase context awareness

Notes / messages used to increase solution performance



- > Reduce effort of initial deployment
- Set direction on optimizing performance of your models.



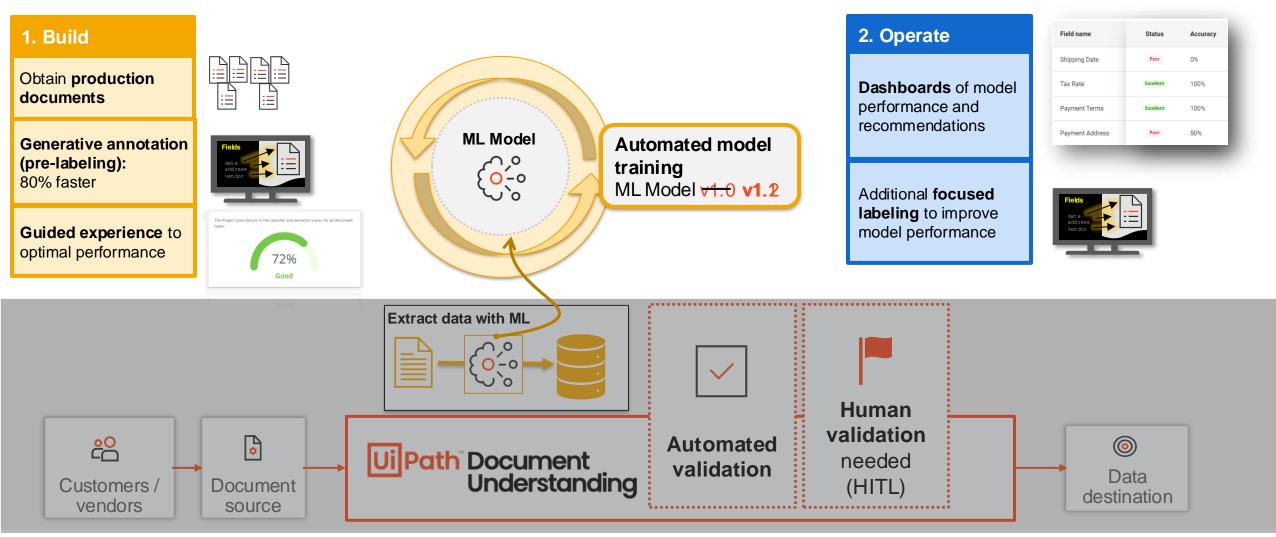
# Apply automated validation

Boost confidence scores
 of extracted data further reducing
 human validation requirements

#### **Active learning: How it works**

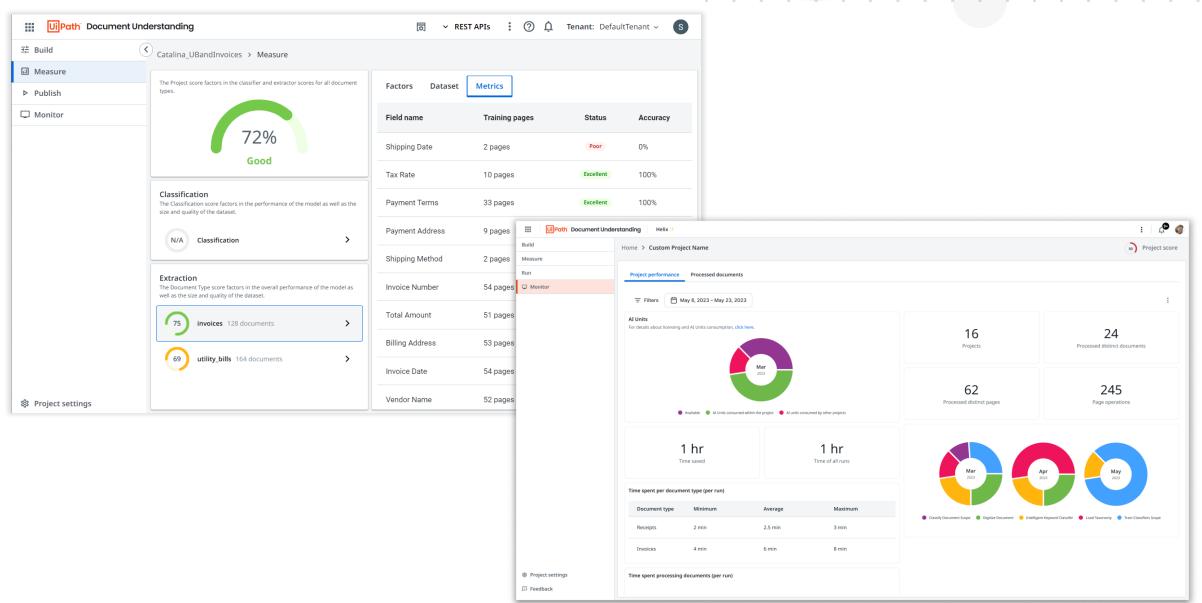
The next-gen experience for training & monitoring ML solutions





### **Active learning in practice**





# Reduce your effort with the latest IDP functionality





# Increase context

Notes / messages used to increase solution performance



# Optimize ML model training & performance

- > Reduce effort of initial deployment
- > **Get direction** on optimizing performance of your models.



# Apply automated validation

Boost confidence scores
 of extracted data further reducing
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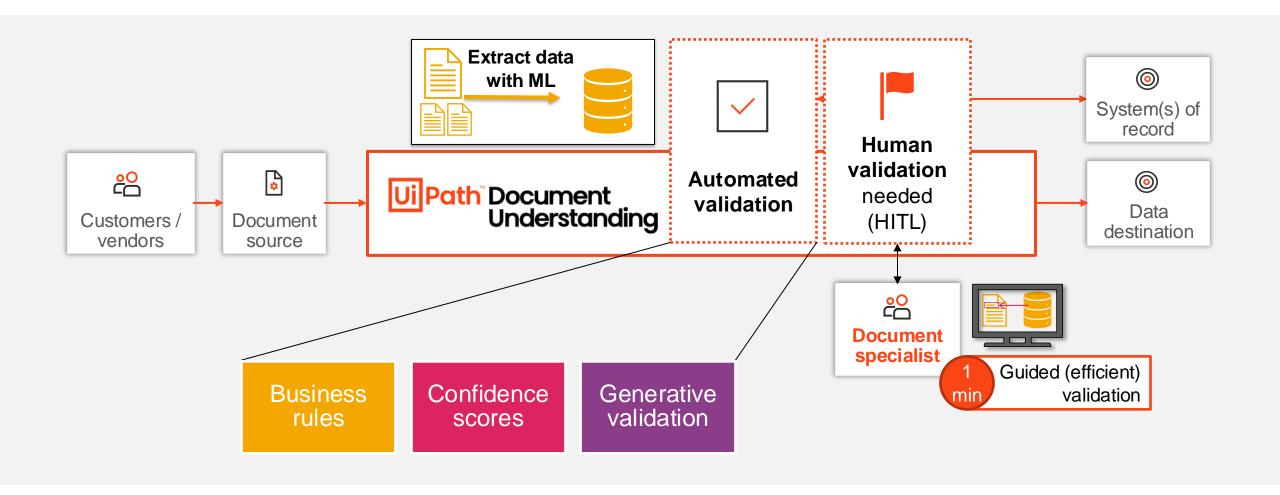
# Increasing automated validation

Business rules, generative validation, and confidence scores



#### Minimize manual intervention





### Business rules when you can, and human in the loop when you must



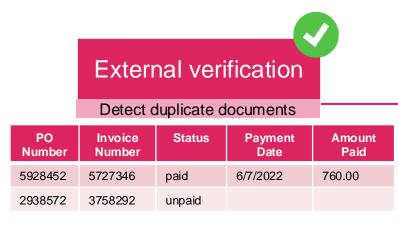


Document fields = Email entities

Subject: Please pay overdue invoice No. 5727346

From: Dylan James <djames@protech.com>

Created: June 29, 4:03pm



**INVOICE** 

**PROTECH** 

Date: 02 June, 2022 Billed to:

Lorena Martinez 16 Mincing Ln Denver CO 42321 From:

Olivia Wilson 316 Lewisham St Milwaukee, WI 23923

Item	Quantity	Price	Amount
Samsung Phone	1	\$500	\$500
Legal Notepad	10	\$9	\$90
Water Bottle	3	\$55	\$165
		Tax	\$5

Total

\$760

NO. 5727346

PO NO: 5928452

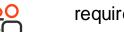
Total = Line items + Tax

Basic math

Terms: Net 30 Note: Thank you for choosing us! No business rule

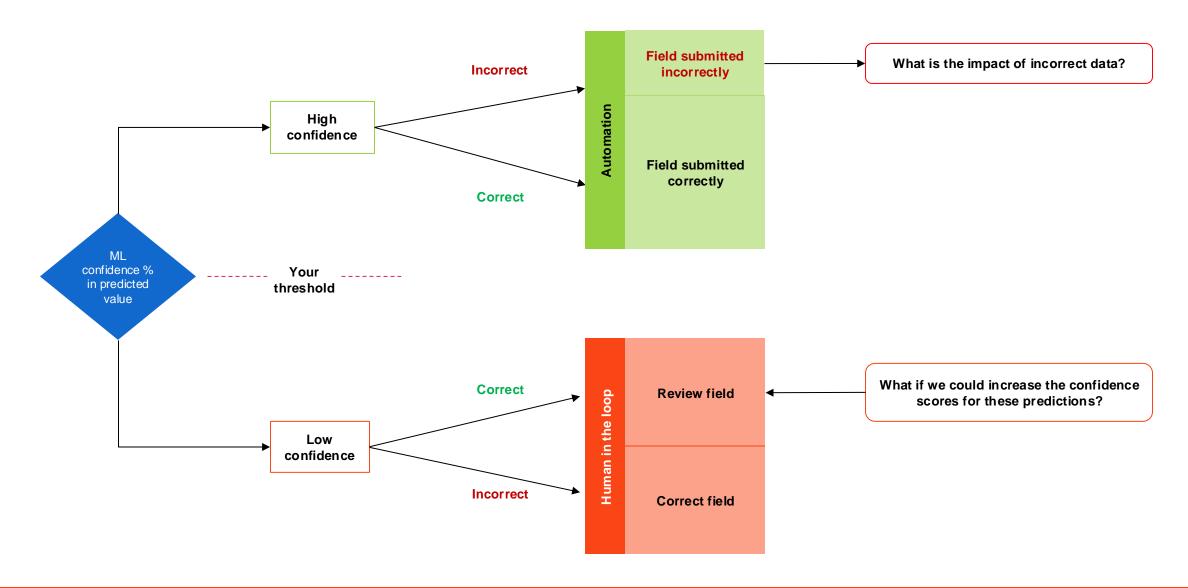
Use confidence score

Is human in the loop required?



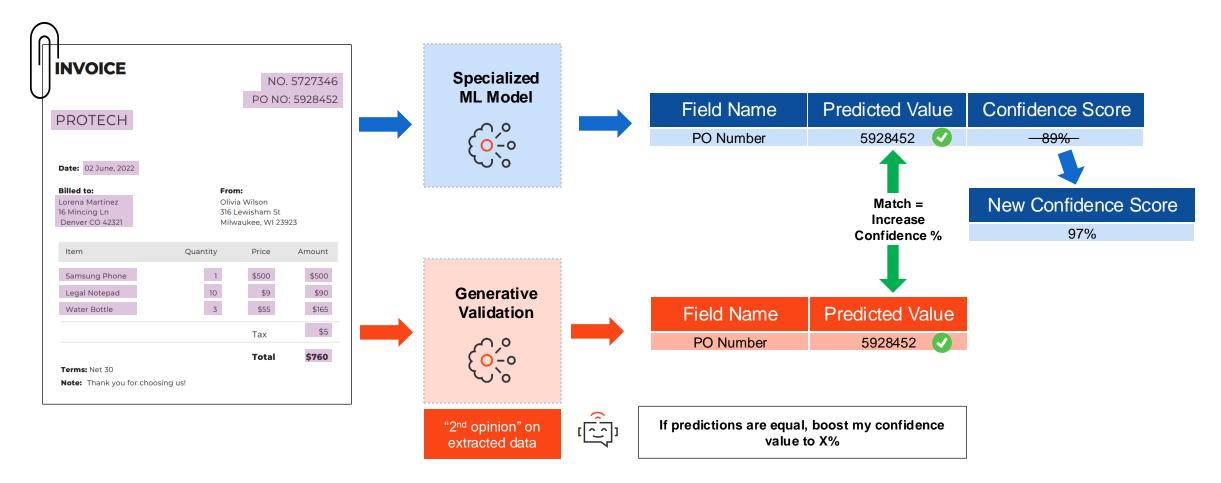
# What does confidence score look like in practice?





# Boosting confidence scores with Generative validation

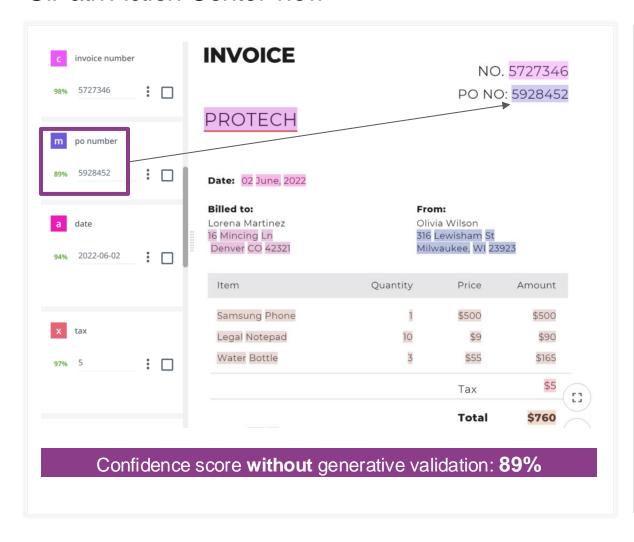
A "2<sup>nd</sup> opinion" to maximize your automation potential



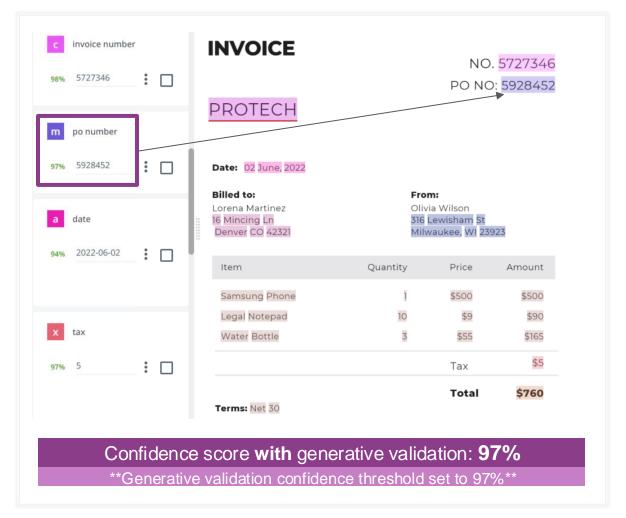


# Boosting confidence scores with generative validation

#### **UiPath Action Center view**







# Reduce your effort with the latest UiPath IDP functionality





#### **Business rules**

- Primary mechanism for deciding when to trigger human in the loop (HITL)
- Reduce need for confidence score thresholds



#### **Confidence scores**

- Indicator of a model's certainty or uncertainty
- Understand impact of an incorrect value to define field thresholds



 Boost confidence scores of extracted data to reduce human-in-the-loop requirements.

#### Agenda



The full scope of intelligent document processing (IDP)

Reducing your effort through new functionality

03 Deployment considerations

**04** Bringing it all together

#### **Deployment considerations**





# Roles & responsibilities

- Document SME / team
  - Define success
  - Solution collaboration
    - Data field requirements
    - Business rules
    - Confidence %
  - Human-in-the-loop (HITL) tasks
- CoE / automation team
  - Owners of end-to-end automated process
  - ML model health and monitoring



# Solution performance

- Collect key metrics
  - Identify steps which impact solution performance
  - Reasons for HITL
- Value reporting
  - Corelate solution performance and prove business value

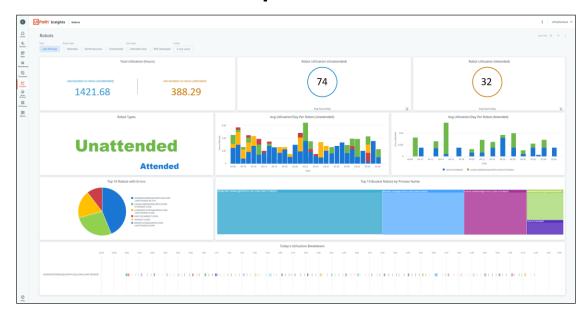


#### **Tools to help**

- Active learning
  - Embedded tools to optimize ML performance
- UiPath Insights
  - Out of the box dashboards for business value
- UiPath Process Mining\*
  - Automated analysis of solution performance

# What is usually asked after implementing an IDP solution?

#### **Operations**



"How do I track my team's operations?"



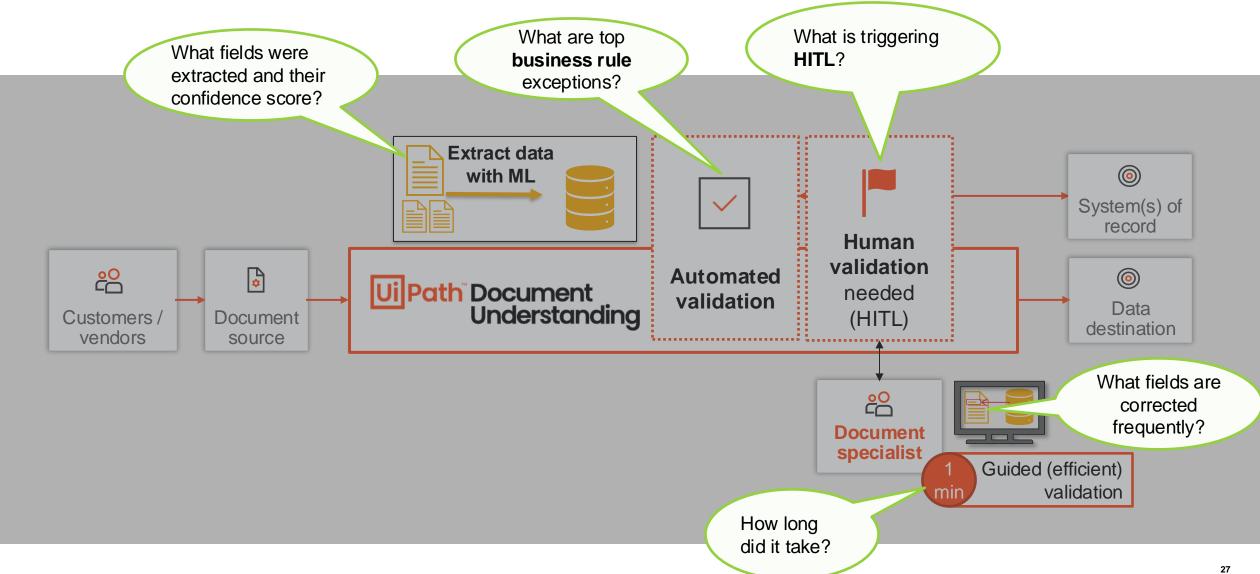
#### **Business value reporting**



"How can I be sure my automations bring my internal stakeholders value?"

#### Questions which will come up after a deployment

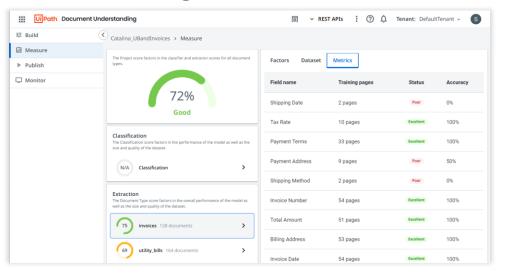




#### IDP monitoring options in UiPath Platform



#### **Active learning**

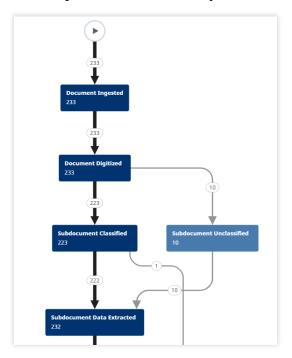


- Track project performance metrics like:
  - Model performance
  - Al Unit consumption
  - Exception rates

#### **UiPath Insights**

- Correlate collected metrics to
  - Business value
  - Solution performance

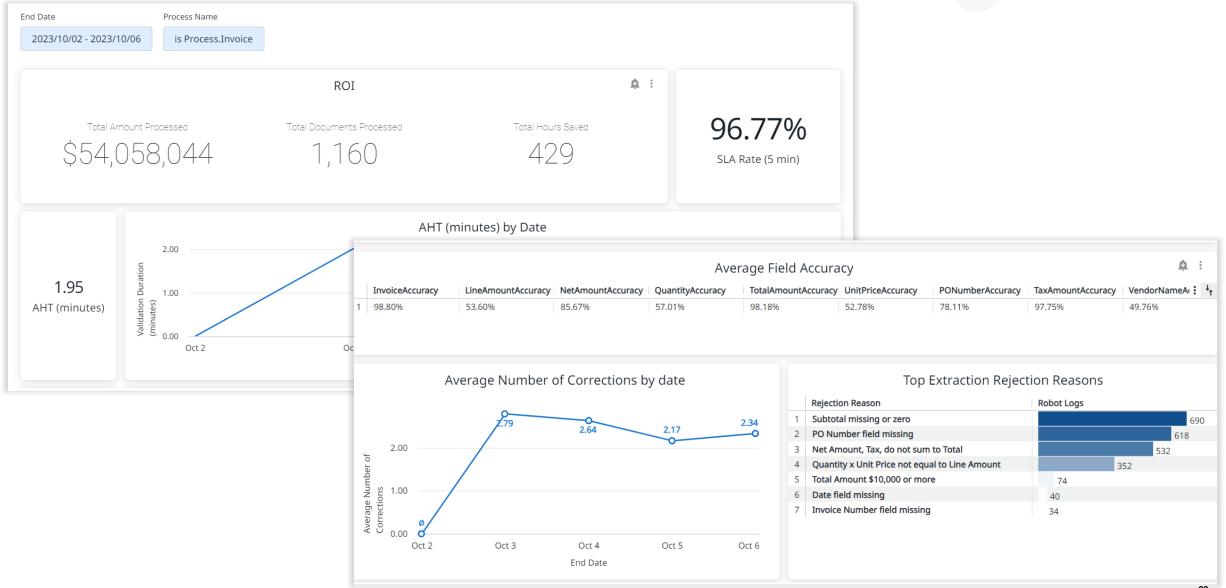
# Process Orchestration (private preview 2024.4)



- Uncover inefficiencies and opportunities for automation optimization automatically
- Analyze trends, uncover root causes, and quantify impact on business value

#### **Insights**

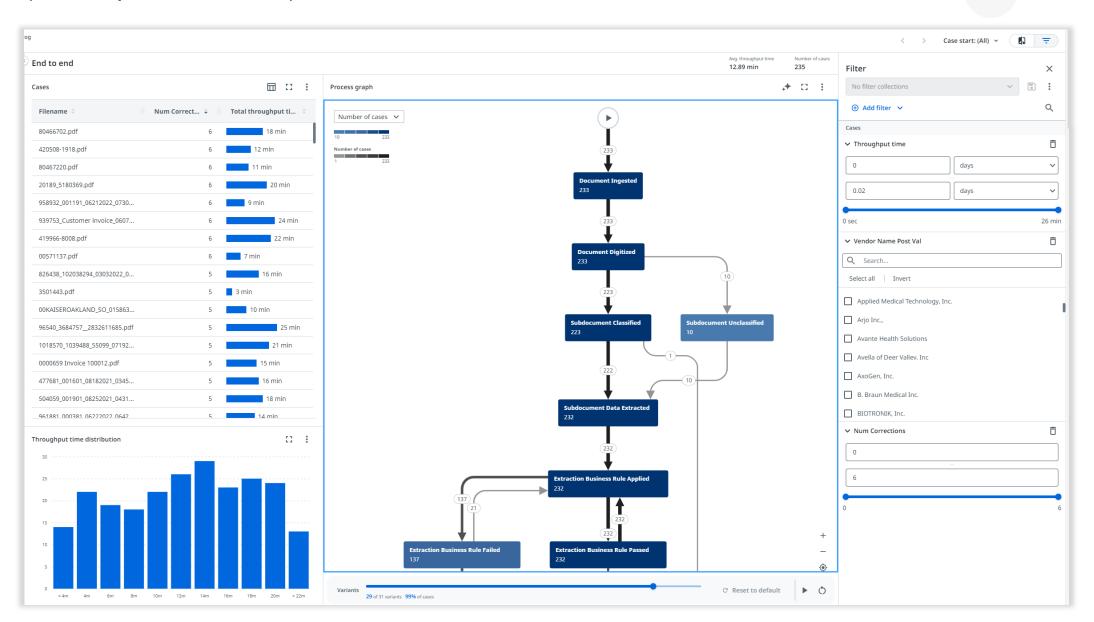




### **Process Orchestration & Document Understanding**

(Private preview 2024.4)





#### Agenda



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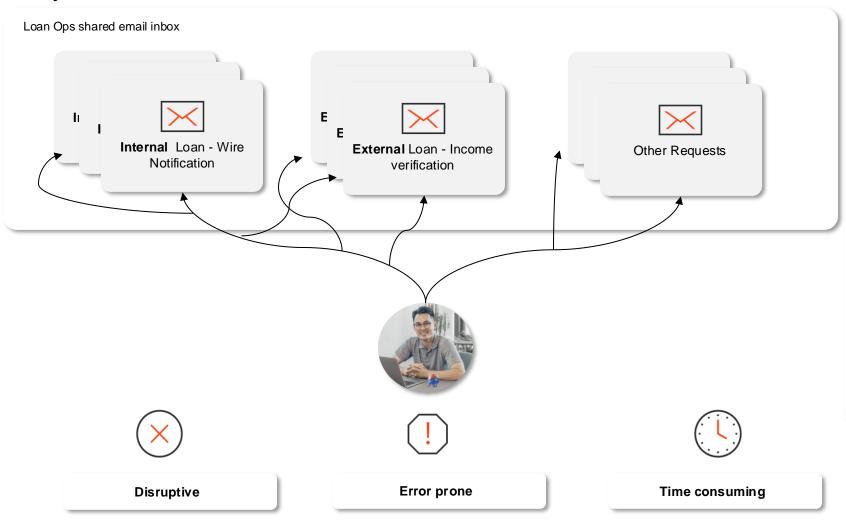
03 Deployment considerations

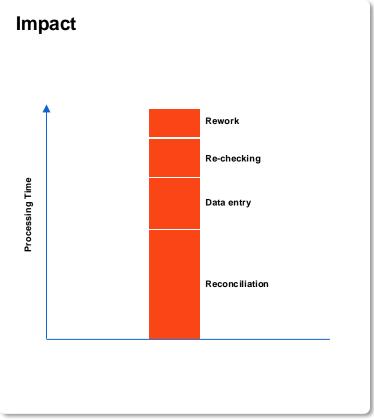
O4 Bringing it all together

### **Loan Ops – Mortgage Origination**



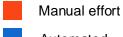
#### **Today**





### Improve operations workflows





Automated



# Reduce volume of emails processed manually

#### How?

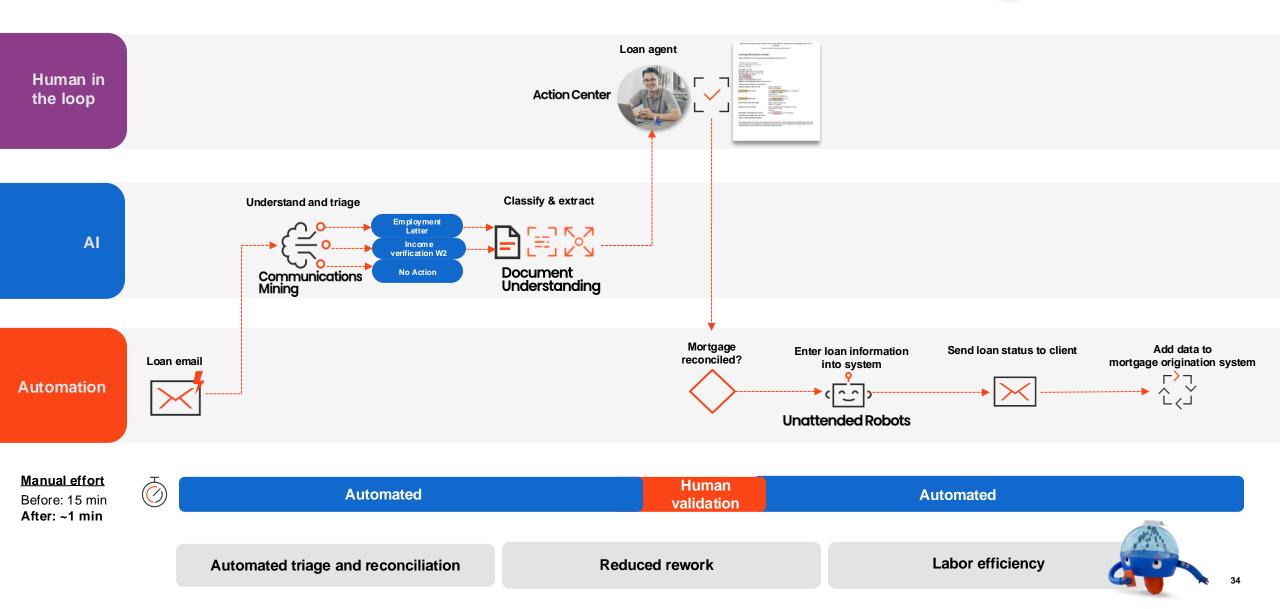
- Automate transactional requests such as wire notifications that must be reconciled
- Uncover the types of requests to prioritize for automation
- Remove no-action required emails
- Triage emails to the appropriate stakeholders
- Identifying and resolving the root cause of issues, thereby reducing the volume of associated emails



#### **Loan Ops – Mortgage Origination**

Ui Path® The Foundation of Innovation

Solution overview



# Demo



#### Ready to get started?



#### **Step 1: Quantify business value**

# Primary business challenge to solve

- FTE hours
- Data SLA
- Accuracy

# Volume of documents & layout diversity

- Structured
- Semi-structured
- Production samples

## **Current average handling time**

- Document source / triage
- Data verification
- Data input

#### Ready to get started?



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#### **Step 2: Architect the solution**

### **Create process design** document

- Src/Dst Systems
- Data SLA
- Accuracy

#### **Architect Business Rules**

- With Document SME
- Cost of bad data

#### Agree on "success"

- Architect metric creation
- Chose a monitoring tool

# Learn more about intelligent document processing





uipath.com/document-understanding

# Ui Path Communications Mining

uipath.com/communications-mining

#### **Start an Enterprise Trial**

uipath.com/product/free-trials-and-downloads

