UiPath AI Summit

AI: Behind the Wheel of Public Sector Innovation

AI: Behind the Wheel of Public Sector Innovation

OCTA

Meet the OCTA Team

Eden Wang

Orange County Transportation Authority

Information Systems Department Manager

Katrena Schulze

Orange County Transportation Authority

Information Systems Section Manager

About OCTA

Located in Orange County, California

Serving all of 3.2 million residents in OC including:

- Bus and Rail Transit

- Environmental Programs
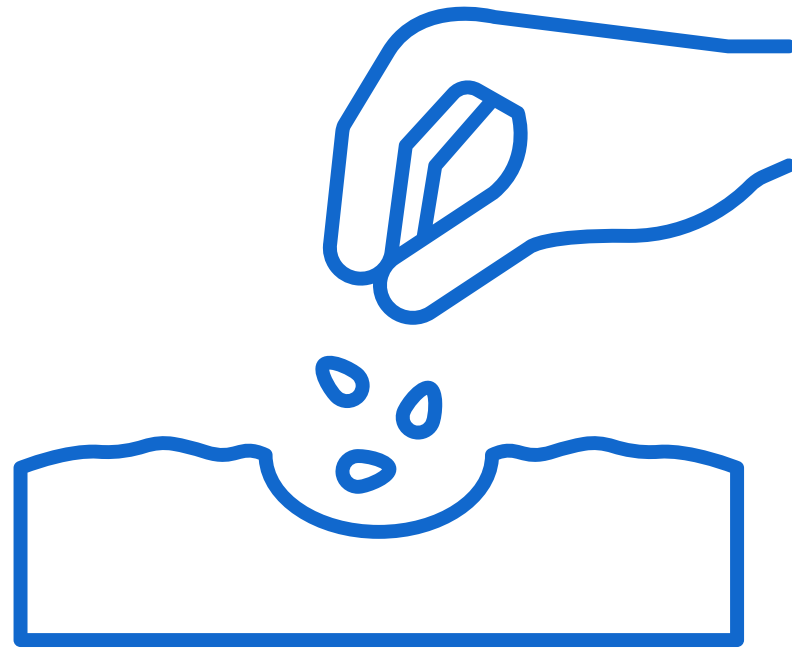
- Express Lanes

- Freeway Expansions

Innovative Projects
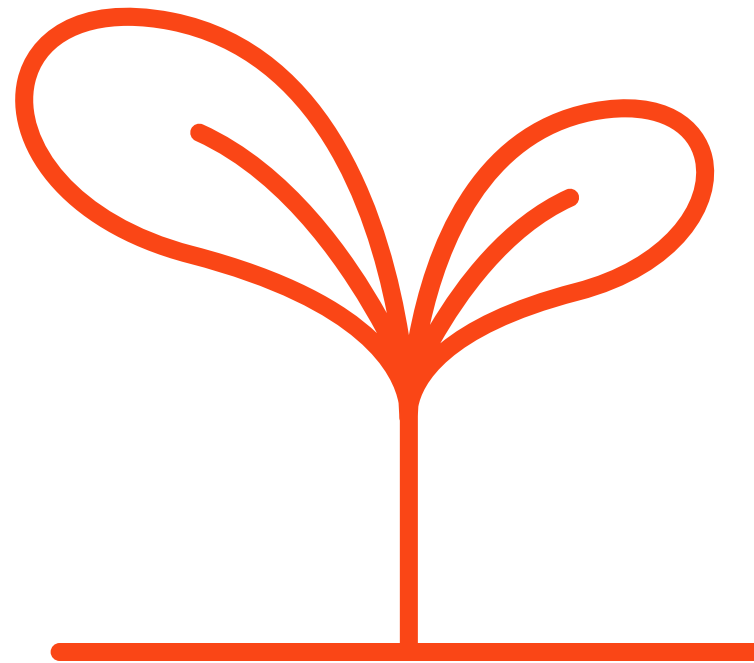
We keep Orange County moving forward by:

- Digital Bus Stops

- Real-time Performance

- Text for Next for Bus Stop Schedule

Key Takeaways

Plant seeds

Create a team

Build Center of Excellence

Planting Seeds
for user adoption

- Create vision for organization

  - Find super users who are supportive

    - Relationship building and trust

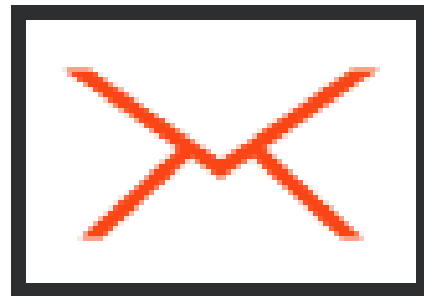   - Be Patient - timing is everything!

Stakeholder Buy-in

- Presentations to Executives

- Use case discovery

- Low hanging fruit- IS opportunities

- Building Relationships
  - Buy in from Accounts Payable

Invoice In-take Processing

Manual Process

Receives
Email

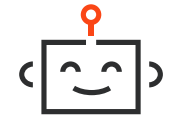Downloads Invoice

Move to Network Drive
Folder

Approximately 30 hours of manual processing a week

RPA & AI Solution

Invoice In-take Processing

Bot runs every 30 mins

Azure/UiPath Classification to see if attachment contains invoice

Confidence under 70% → Action Center

Confidence over 70% run Azure/UiPath data extraction

Mapped and labeled over 300 vendor invoices for machine learning

Solution: Lessons Learned

UiPath Document Understanding

- Extracting data

- Use AI technologies

- Needed for next phase

Machine Learning - Azure Open AI

- Mapped and labeled top 50 vendor invoices
- Trained on over 300 vendor invoices by end of project

Set-up for Success

- Think with the end in mind

- Did not cut corners

Create a Team

01 **Vendor Support**

02 **Communication**

03 **Active Listening**

04 **Built Trust**

05 **Step in When Needed**

06 **Fix Bugs**

Results

Invoices Processed Since Go-Live

2,224

Hours Saved Since Go-Live

390

Go Live: December

OCTA

Automation Center of Excellence

Where do we go from here?

Centralized CoE

- Information Systems oversight
- Automation Hub for project requests

Stakeholder Support

- Internal Technology Review Committee
- Committee decides projects based on ROI

In-sights Dashboard

- Visability to ROI
- Business owners & stakeholders see value in automation

How we are using AI at OCTA

- Microsoft Co-Pilot
- ChatGPT Teams
- Azure OpenAI
- AI Blog/Knowledge Sessions

Q&A

Eden Wang

Orange County Transportation Authority

Information Systems Department Manager
ewang@octa.net

Katrena Schulze

Orange County Transportation Authority

Information Systems Section Manager
kschulze@octa.net