

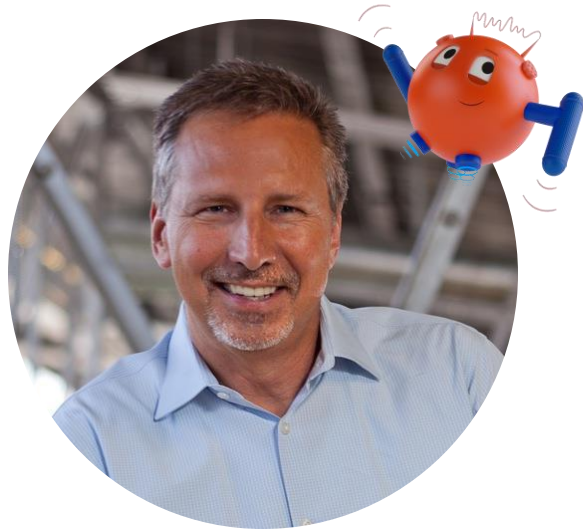
# From R&D to Execution: The future of AI at work

**Dr. Ed Challis – Head of AI Strategy at UiPath**

**Mark Geene – SVP Product at UiPath**

**Luke Palamara – VP AI Products at UiPath**

# Your speakers



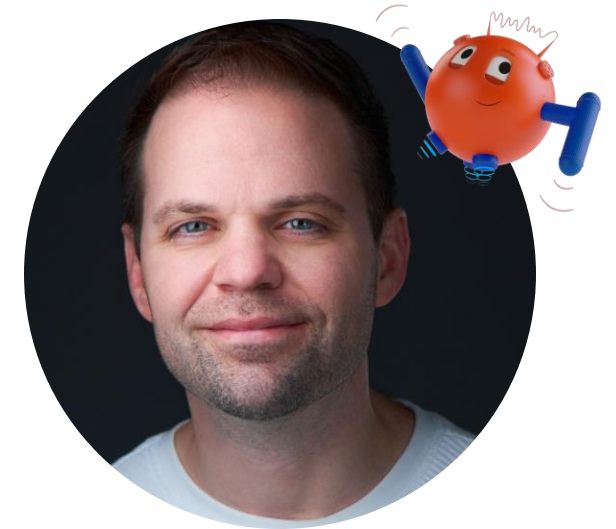
**Mark Geene**

SVP Product at UiPath



**Dr. Ed Challis**

Head of AI Strategy at UiPath



**Luke Palamara**

VP AI Products at UiPath

# UiPath AI Summit: 2024 Edition

**Keynote**  
30-mins

## Keynote Session: Transforming Workspaces with AI-powered Automation



GRAHAM SHELDON  
Chief Product Officer, UiPath



ROWAN CURRAN  
Sr. Analyst, Forrester Research  
Guest Speaker



Kickoff the AI Summit discussing the latest trends across the AI ecosystem and highlighting the newest AI-powered capabilities from UiPath.

**Industry Highlights**  
30-mins

### Banking & Financial Services

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

### Insurance

How AI-powered automation is changing the insurance operating model

### Manufacturing

Innovating through disruption: The new AI paradigm in manufacturing

### Public Sector

AI behind the wheel of public sector innovation

### Health & Life Sciences

Putting AI to work in healthcare and life sciences

**Product Deep Dives**  
45-mins

### UiPath Autopilot

Autopilot in action: Five use cases that supercharge productivity

### AI-powered Discovery

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

### AI-powered Document Processing

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

### Training AI models for IDP

Next-gen AI accelerating intelligent document processing (IDP)

### Integration Service & AI 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



DR. EDWARD CHALLIS  
Head of AI Strategy, UiPath



MARK GEENE  
SVP Product, UiPath

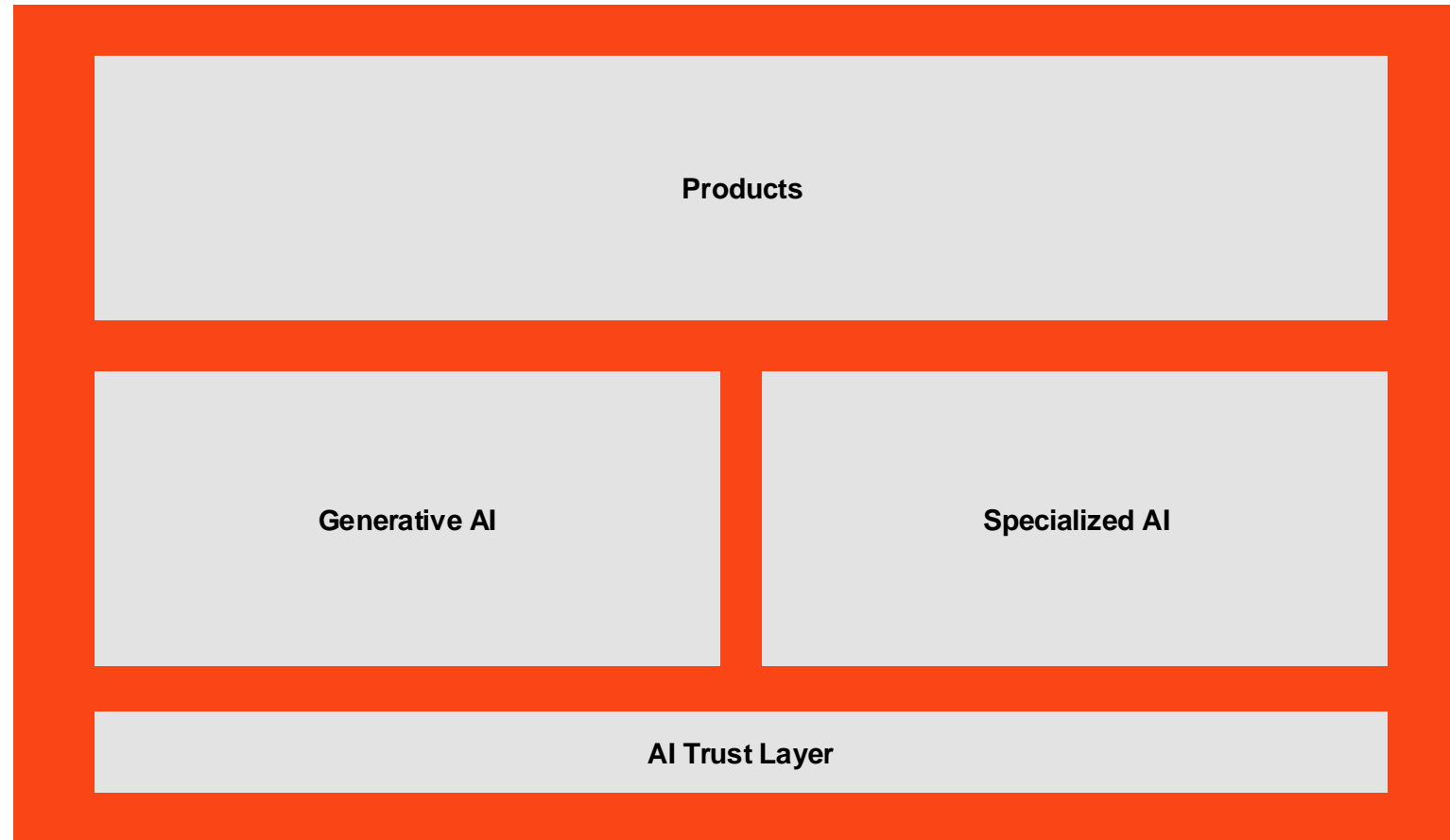


LUKE PALAMARA  
VP, AI Product Management, UiPath



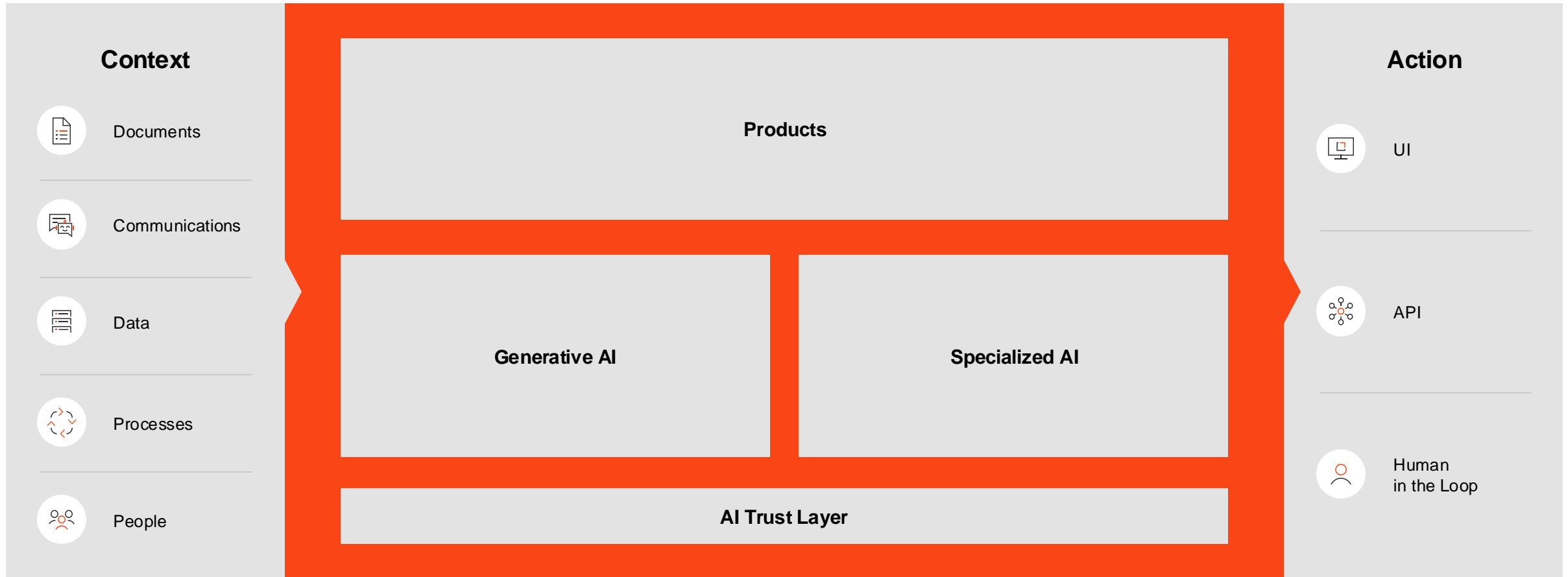
The UiPath AI roadmap and our on-going research and innovation across Generative and Specialized AI.

# AI-powered Automation











**Open | Flexible | Responsible**

# AI-powered Automation



**Open | Flexible | Responsible**

# Open and enterprise-ready GenAI in your automations

GenAI Connectors		Models
	OpenAI	GPT-3, GPT-3.5, GPT-4, <b>GPT-4V</b>
	Azure Microsoft OpenAI	GPT-3, GPT-3.5, GPT-4
	Amazon SageMaker	Falcon (Hugging Face*), Llama2 (Meta*) <b>any other custom AWS model</b> <i>AWS SageMaker is in Public Preview</i>
	Amazon Bedrock	Titan, Claude2 (Anthropic*), Jurassic, <b>Llama2</b>
	Google Vertex	PaLM2, <b>Unicorn, Gemini, Gemini Vision</b>
	<b>IBM WatsonX</b>	<b>Granite, Llama2,</b> Built by <b>IBM</b> using <b>UiPath Connector Builder</b> ( <i>Public Preview</i> )
	Anthropic	Claude2, Claude Instant
	Connector Builder	Build your own AI-based connector

# Announcements recap



## UiPath® Autopilot™

**Autopilot™ for Devs – Studio & Apps** *Public preview now*

**Autopilot™ for Testers** *Public preview now*

**Autopilot™ for Communications Mining** *Private preview now*

**Autopilot™ for Process Mining** *Private preview now*

**Autopilot™ for Everyone** *Private preview now*

## UiPath® Document Understanding™

**UiPath DocPath LLM** *Public preview Q2*

**Active Learning** *General availability April*

**Generative Extraction** *General availability Now*

**Generative Validation** *General availability April*

**GenAI Activities** *Public preview now*

**GenAI Solution Accelerators** *Public preview April*

## UiPath® Communications Mining™

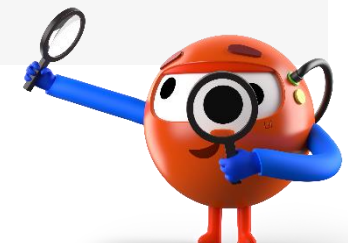
**UiPath CommPath LLM** *General availability April*

**Zero-Shot Discovery** *Public preview April*

**Generative Extraction** *General availability April*

**Extended Language Support** *General availability April*

**Context Grounding** *Private preview April*

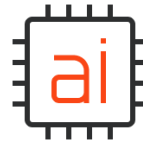


# UiPath uniquely brings AI + automation together for a seamless end-to-end platform



## Documents & communications

70+ pre-built models to analyze and process different types of documents and communications across industries and domains.



## Embedded Generative AI

Generative AI, paired with Specialized AI to reduce training and validation time, providing faster time to value.



## UiPath Business Automation Platform

IDP as part of the leading enterprise automation platform that connects hundreds of data sources and enables taking actions at scale.



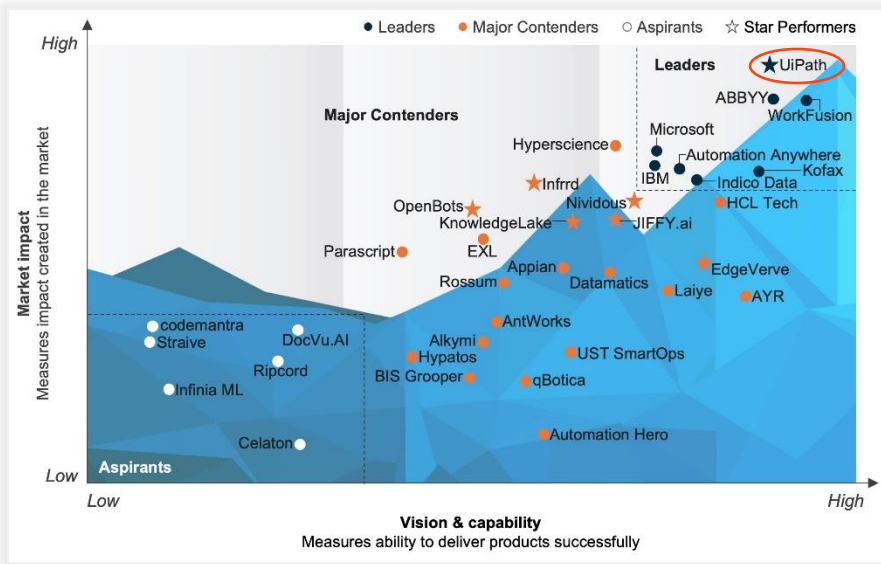
## Recognized IDP leader

UiPath is a leader in product, vision, strategy, and market impact across multiple categories in respected analyst firms including Everest, Gartner, Forrester, and more.



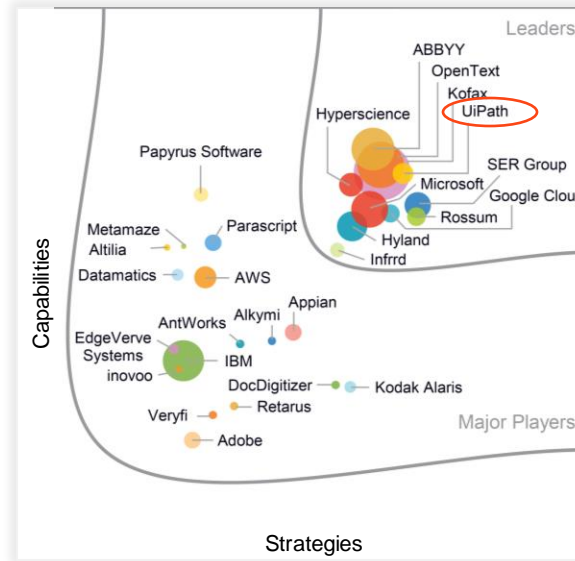
# UiPath is a 3x Leader in IDP

By Everest Group, IDC, ISG, Gartner, and more



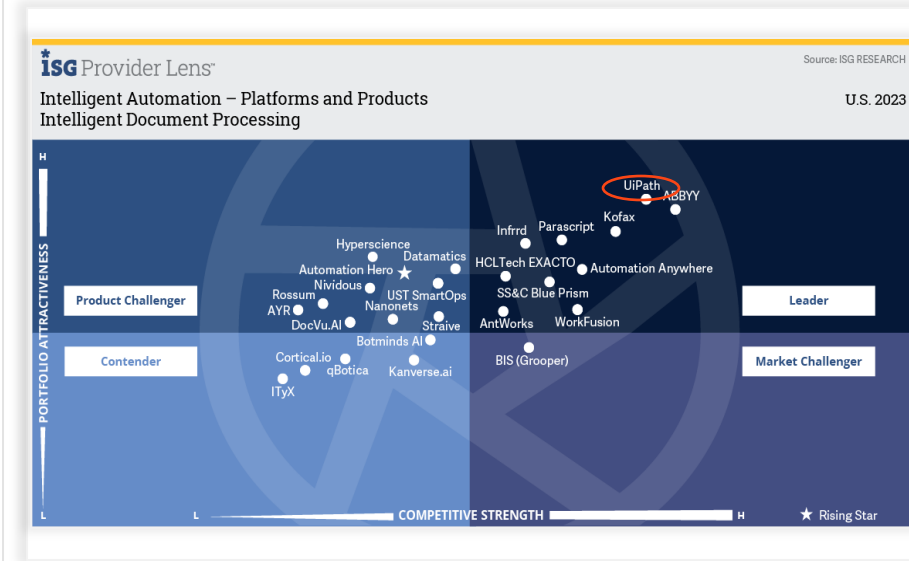
Everest Group Intelligent Document Processing (IDP) Products PEAK Matrix® Assessment 2023

“UiPath offers a holistic intelligent automation platform that combines IDP, RPA, process mining, task mining, process orchestration, and AI- / ML-based capabilities, including communications mining for NLP and unstructured data processing.”



IDC MarketScape: Worldwide Intelligent Document Processing (IDP) 2023-2024 Vendor Assessment

“Customers and partners give UiPath high marks for its ability to support and deliver accurate IDP outputs across a range of document types and use cases.”



ISG Provider Lens™ Intelligent Automation - Platforms and Products - Intelligent Document Processing

“UiPath combines RPA, OCR, Machine Learning, and Natural Language Processing to deliver industry-leading capabilities for automated document processing.”

# Generative Extraction

Generative AI can answer questions and summarize content which works perfectly for free-form unstructured documents and communications – eliminating the need to train custom ML models.

Understand and safely automate complex messages and documents at scale. Identify multiple requests, extract the relevant data and, crucially, understand the relationships between them.



General availability in March



General availability in April



## Email containing multiple requests:

**Subject:** Policy Amendment | **Created:** June 29, 8:33pm

**From:** Rob Smith <rob.smith@broker.com>  
**To:** Dylan Roberts <dylan@insurer.com>

Hi Dylan,

Our client wishes to change their name to John<sub>1</sub> Roberts<sub>1</sub>, he's also moved to a new home. The new address is 45 Brillington Lane<sub>1</sub>, Doncaster<sub>1</sub>, 45 9UX<sub>1</sub>. Can you please amend and issue updated docs? It's policy XE-18294<sub>1</sub>, by the way. And on XF-929381<sub>2</sub> they've also moved, please can you update it to 96 Park Road<sub>2</sub>, Sheffield<sub>2</sub>, 53 8PL<sub>2</sub>

Cheers, Rob

### Extracted as:

**Label:** Policy > Amendment > Address Change

**Entities** required to enable downstream automation for this process

#	Policy Number	Address Line	City / Town	Postcode
1	XE-18294	45 Brillington Lane	Doncaster	45 9UX
2	XF-929381	96 Park Road	Sheffield	53 8PL

**Label:** Policy > Amendment > Name Change

**Entities** required to enable downstream automation for this process

#	Policy Number	Last Name	First Name
1	XE-18294	Roberts	John

# Generative Annotation

Generative AI predicts field annotations for your samples, accelerating annotation from a week to a day or two for complex scenarios, or down to minutes for simpler forms.

Home > Warranty Claim Project > Build > invoices 64 Project score

Filter  :dictions ⚙️

**Regular fields** | Table fields

+ New regular field

- N Vendor Name
- V Vendor Address
- B Billing Name
- I Billing Address
- O Invoice Number
- D Invoice Date
- A Total Amount

**INVOICE**

Stark Innovations  
1931 Dancing E

Invoice Date: 1 Jan 2019  
Invoice Nr.: 9000156  
AB Number: 2323454566

Field Name: N Vendor Name

Delete Confirm

Description	Quantity	Unit Price	GST	Amount AUD
Laundry Wizard	14.00	900.00	10%	12,600.00
Subtotal				12,600.00
TOTAL GST 10%				1,260.00
<b>TOTAL AUD</b>				<b>13,860.00</b>

UiPath Document Understanding™

General availability now

UiPath Communications Mining

General availability now



# Generative Validation

Up to 200% increase in automation rate.

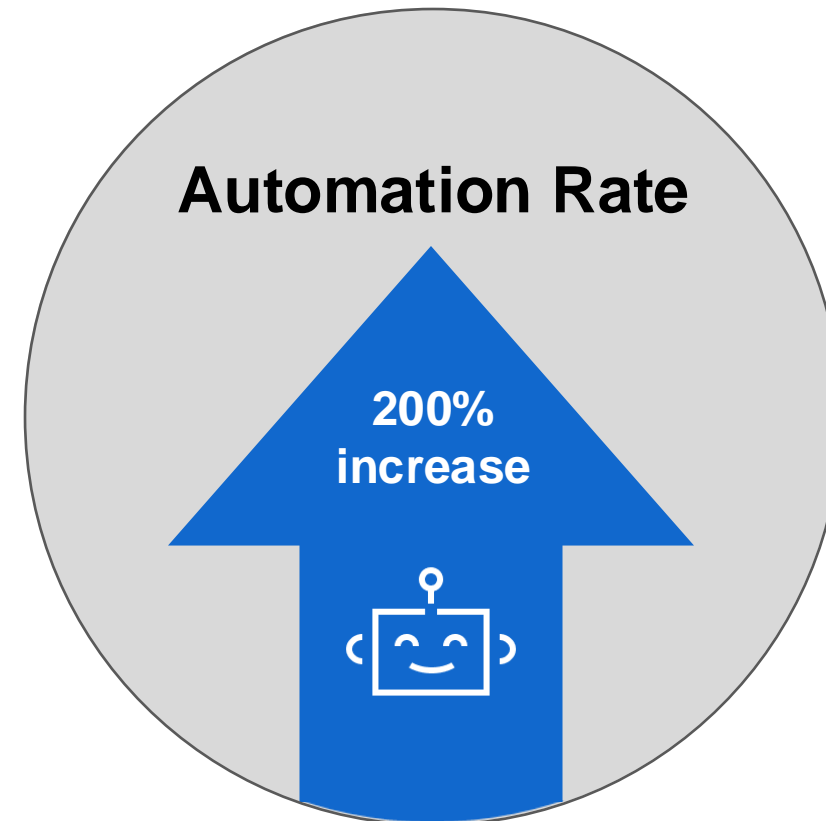
With Generative AI used to confirm the output of Specialized AI, the overall automation rate increases and the average handle time decreases – reducing the time spent on human validation.

UiPath Document Understanding™

General availability in April



Take the pressure off your teams, and get a 'second opinion' from Generative AI



Source: Test by UiPath AI R&D on a diverse set of enterprise documents

# Active Learning

*Training smarter, not harder.*

Active learning employs an iterative process between annotators and model to reduce the amount of data required to train an ML model.

- 80% faster model training
- Reduction of data samples for annotation.
- A guided experience (no ML or coding skills needed)
- Monitoring model performance

UiPath Document Understanding™

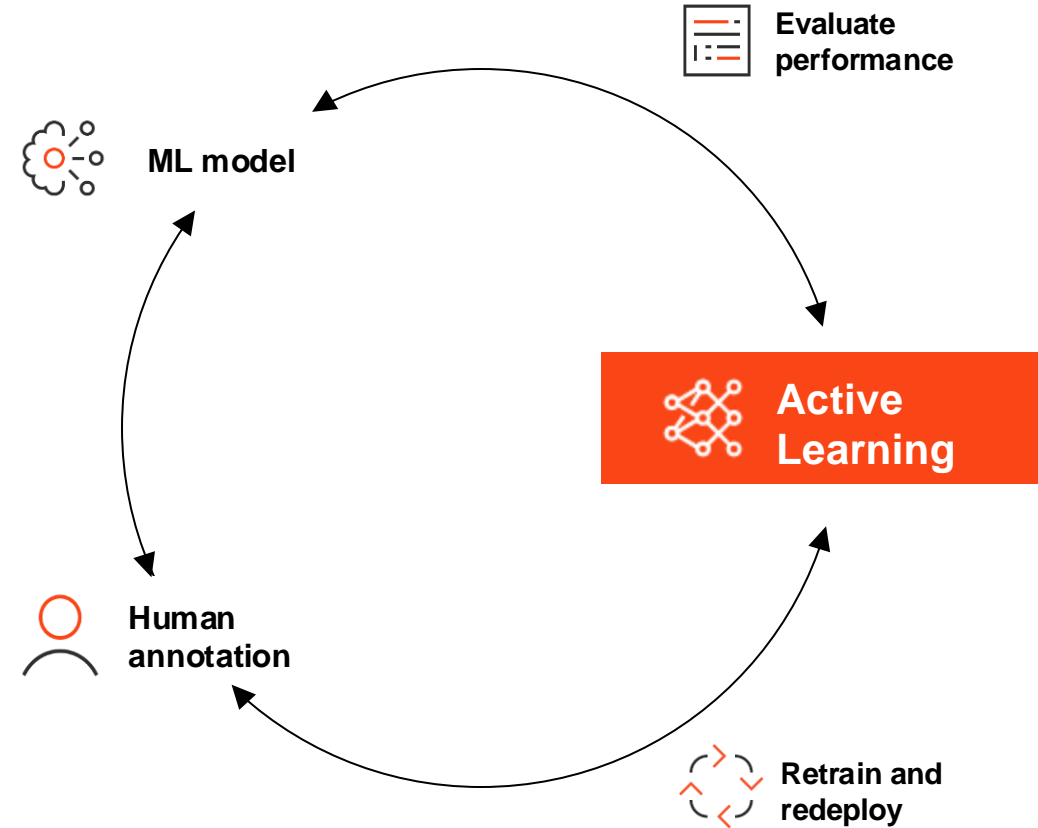
General availability in April

UiPath Communications Mining™

General availability now



## How does it work?



# Intelligent document processing

## UiPath® Document Understanding™

Generative Annotation	General availability now
Generative Classification	General availability now
Generative Extraction	General availability March
Generative Validation	General availability April
Active Learning	General availability April



## UiPath® Communications Mining™

Generative Annotation	General availability now
Generative Extraction	General availability April
Extended Language support	General availability April
Zero-Shot Discovery	Public preview April
Autopilot™ for Communications Mining	Private preview now

# UiPath LLMs

Increased accuracy | Unstructured data | Accelerated time to value

## UiPath® Communications Mining™

### UiPath CommPath



Process communications of varying complexity, including multiple requests and additional context

General Availability April

## UiPath® Document Understanding™

### UiPath DocPath



Process any document out-of-the-box with little to no training required, including lengthy unstructured data and tables

Public Preview Q2

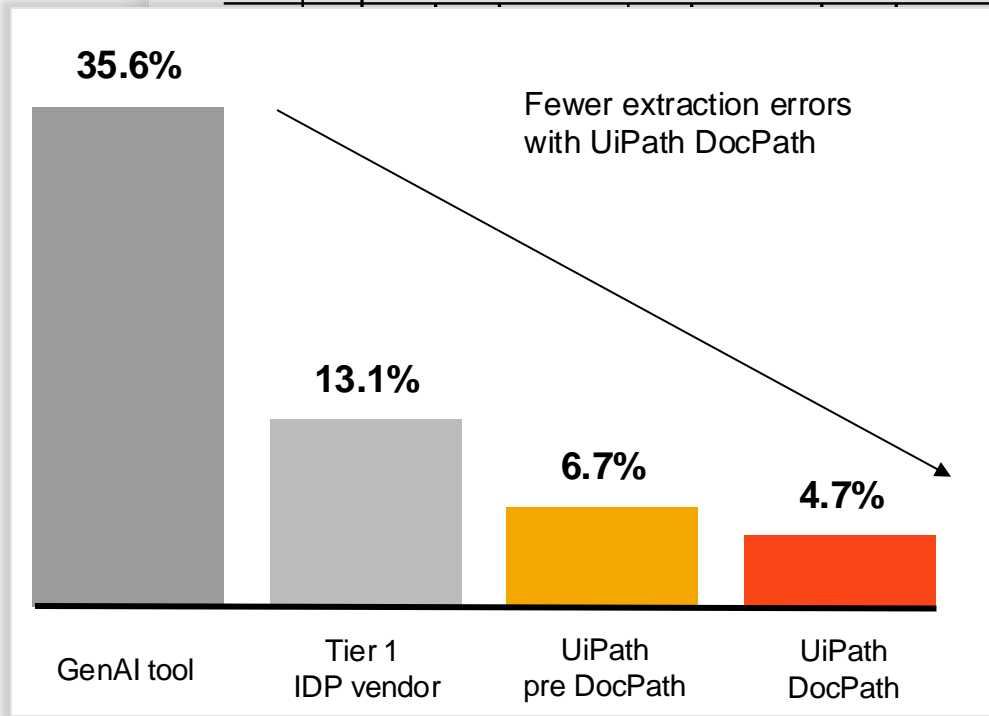
# UiPath DocPath

A generative large language model specialized for a large and diverse set of enterprise documents.

- **Little to no training time:** up to 10x training effort reduction, with many use cases requiring no annotation
- **More accurate extraction:** 45-76% error rate reduction compared to marketing leading Generative AI models
- **Complex tables:** 30-65% less errors compared to other IDP and Generative AI vendors



Staffing Agency: Prolink Staffing		<b>TIME SHEET</b>	
Staffing Agency Email: timesheets@prolinkstaff.com		Staffing Agency Tel: 1(866) 777-3704	
<b>FACILITY</b>		<b>CDPH/EMSA</b>	
Location Name: TVRC HQ		Deployment Order #: Prolink-TVRC -00040	
Department: EMSA		Assignment Type: TVRC-00042	
Facility Address: 2050 Country Club Drive, Holtville, CA		Other: _____	
Zip Code: 92250			
<b>CAREGIVER</b>			
First Name: Martin		Last Name: Penueles	
ID #: 1243346		Weekly Guaranteed Hrs.: 60	
Title/Specialty: EMSA ADMIN LEAD		Other: _____	
<b>FACILITY SPECIFIC TIME</b>		<b>NON-FACILITY TIME</b>	
		Facility Supervisor's Initials	Type
			Hours
<b>STAFFING AGENCY (NON-FACILITY TIME) AUTHORIZATION:</b>			
Supervisor Name: _____			
Supervisor Signature: _____			



Source: Test by UiPath AI R&D on a diverse set of enterprise documents



# UiPath CommPath

A generative large language model specifically built and trained for enterprise communications data.

- **Automate more:** increase automation rate, extract complex data, and understand the requests, fields and the relations between them
- **Lower training effort:** 2-3x less training effort for the same levels of accuracy compared to conventional Entity training
- **Fine-tune:** CommPath can be fine-tuned to extract specific fields and drive performance



**Policy Amendment**

anne.rayner@broker.com  
To admin@insurer.com

Hi Steve,

Hope you're well mate,

Our client wishes to change their name to John<sup>3</sup> Roberts<sup>3</sup>, he's also moved to a new home, the new address is 45 Brillington Lane<sup>1</sup> Doncaster<sup>1</sup> S45 9UX<sup>1</sup>.

Can you please amend an issuee updated docs? It's policy XE-182943<sup>1, 3</sup> by the way

And on XF-929381<sup>2</sup> they've also moved, please can you update it to 96 Park Road<sup>2</sup>, Sheffield<sup>2</sup>, S5 8PL<sup>2</sup>.

Cheers

Policy > Amendment > Address Change  Policy > Amendment > Insured Name +

-0.1 QoS    -0.6 Tone

**Generative Extraction**

Policy > Amendment > Address Change	Policy Number	Address Line	Town / City	UK Postcode
1	XE-182943	45 Brillington Lane	Doncaster	S45 9UX
2	XF-929381	96 Park Road	Sheffield	S5 8PL

Policy > Amendment > Insured Name	Policy Number	First Name	Last Name	Actions
3	E-182943	John	Roberts	<input type="checkbox"/> <input checked="" type="checkbox"/>

Define extraction field

# UiPath DocPath & UiPath CommPath

Built for enterprise automation. Robust security, compliance and governance paired with comprehensive controls and guardrails.

- **Enterprise control:** superior controls and safeguards compared to standard generative LLM processing
- **Standardize output:** specify and normalize necessary output formats for automation
- **Optimize performance:** balance precision vs. recall for optimal performance



Public preview Q2



General availability April



# AI centers of excellence & research



Bucharest, Romania



London, United Kingdom



Seattle, United States



**Professor  
David Barber**

Distinguished AI Scientist at UiPath

---

Director of the UCL Centre  
for Artificial Intelligence

---

Fellow of the  
Alan Turing Institute



**Professor  
Oren Etzioni**

Chair, Artificial Intelligence  
Advisory Board at UiPath

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Professor at the  
University of Washington



**Professor  
Sarah Chasins**

Principle Applied Scientist at UiPath

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Assistant Professor of EECS  
at University of California

# Large Action Models (LAM)

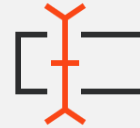
Current state of the art LLMs (GPT4, Llama 2, etc.) are trained on web text and image data.

To truly unlock enterprise productivity, we need:

- Large Generative models that can take Actions – LAMs
- LAMs trained on realistic enterprise environments not just web data
- LAMs that understand all modes of enterprise data (apps, docs, structured data + text)
- To take actions – e.g. click, type, submit API calls
- To be easily fine-tunable and controllable

## Multi Modal Inputs

Automation Command  
Textual User Context



Application Interface



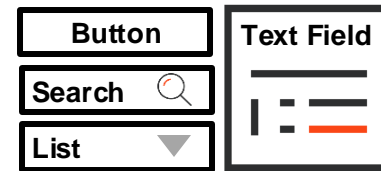
Unstructured Data



Large Action Model



Control Actions  
Outputs



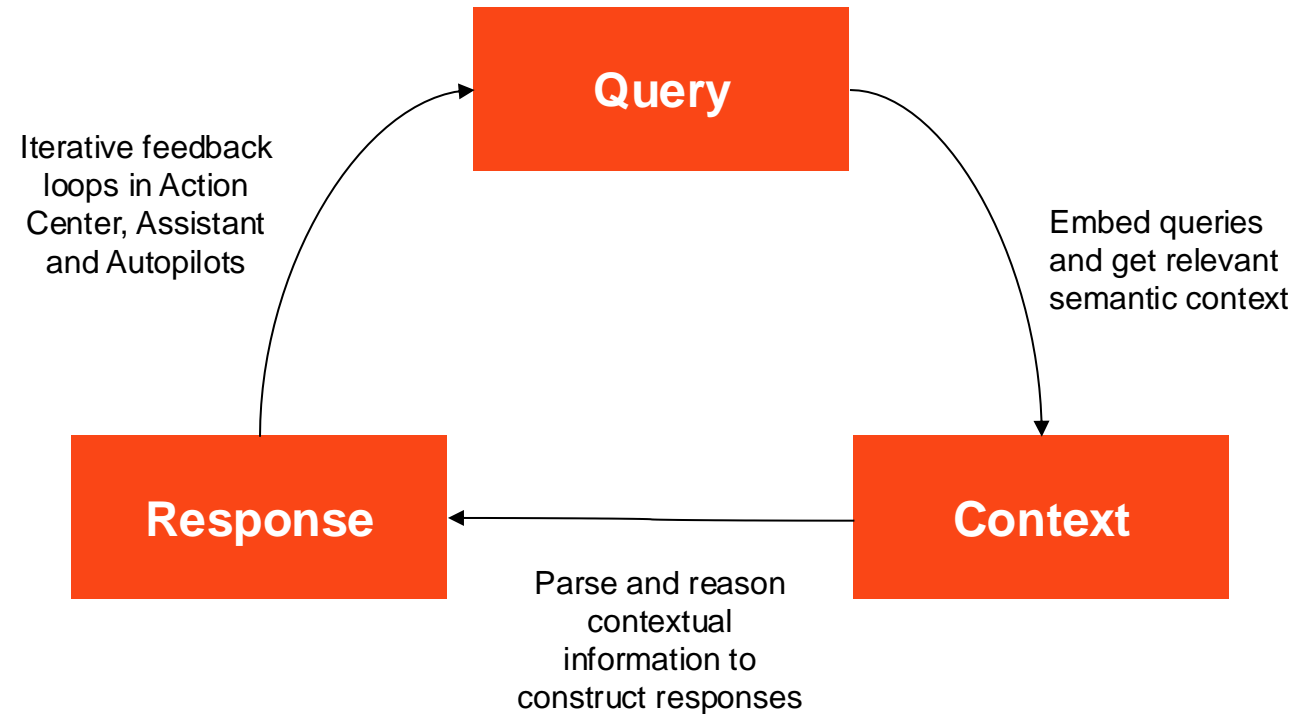
◀ Navigation ▶



# Context, Control & Grounding

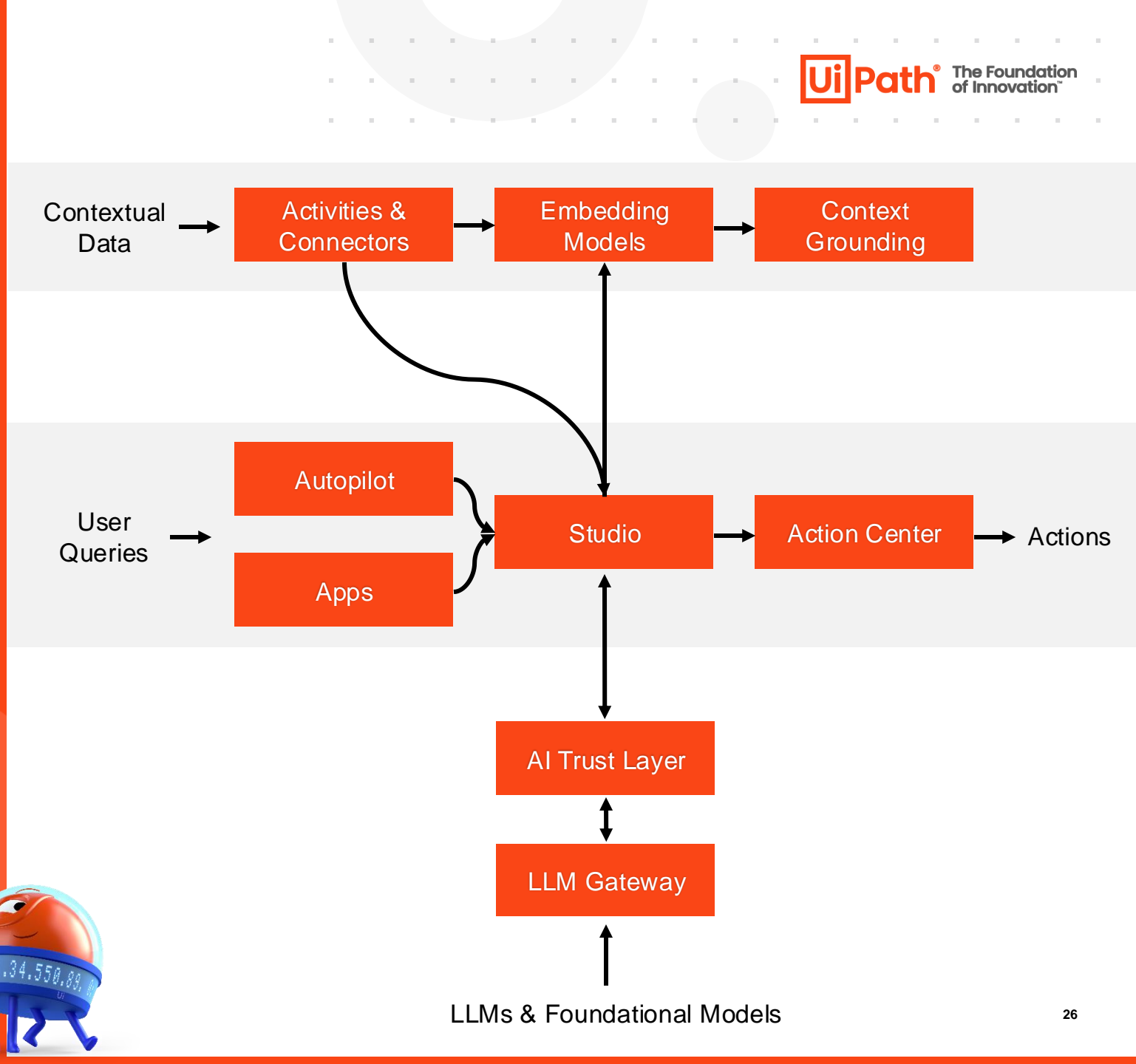
## Retrieval Augmented Generation:

- Overcomes LLM context window limitations
- Reduces risks of hallucination through reference to ground truth data stores
- Gives Generative apps access to specialized and proprietary knowledge sources
- Gives Generative apps access to up to date sources of information
- Enables positive feedback loops between data stores and user-queries



# Bring business context to your automations

- Context Grounding – empowers R.A.G. for context grounding in automations
- AI Trust Layer – brings governance, control, and auditability to UiPath GenAI experiences
- UiPath Activities and Connectors – provides devs access to relevant contextual data in UiPath and customer-managed knowledgebases
- Autopilot and Apps - surface data to users when and where they need it
- Action Center – human in the loop to ensure additional security for business-critical actions



# GenAI Activities

Deliver business automation value with GenAI.

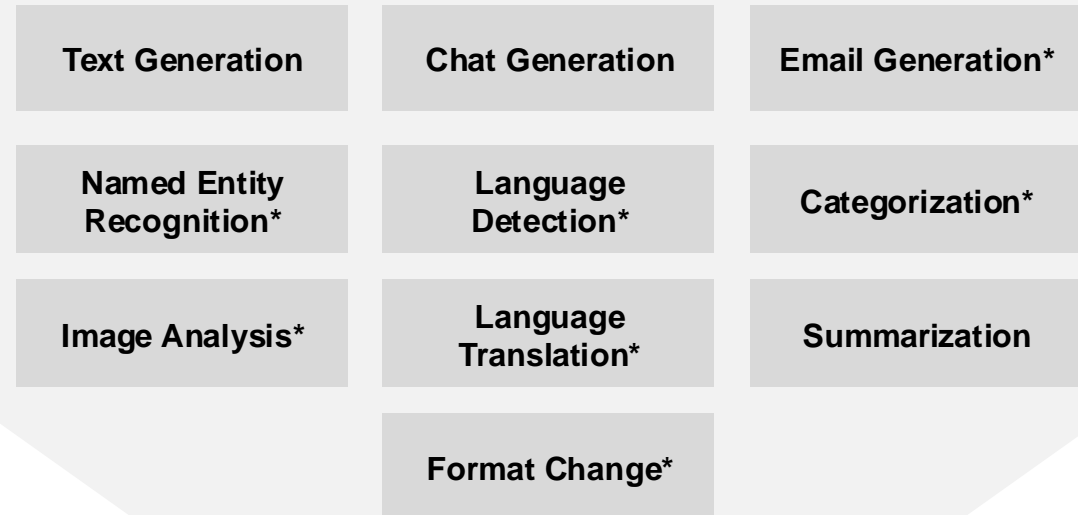
Activities making it easy to access, develop with, and leverage high quality AI predictions in automation workflows.

- Access to UiPath-managed LLMs and other LLM lifecycle tools (R.A.G., Prompt Evaluation, Proof of Knowledge, etc.)
- Configurable with Action Center for Human in the Loop review
- Supported by UiPath AI Services products for data grounding, governance, and monitoring

Public Preview Today



## GenAI Activities



\*Planned

## AI Trust Layer

PII Filtering – Context Grounding

## UiPath-managed LLMs



# UiPath GenAI Solution Accelerators

Ready-to-use building blocks, crafted for high-value business use cases.

- Each package includes easy-to-follow diagrams, a basic overview, setup instructions, and workflows that are ready to be set up
- Comprehensive technical packages that lay the groundwork based on best practices
- Reducing the discovery, design, and development phases



## Test Data Anonymization



## Automation Summarization



## Public Information Books



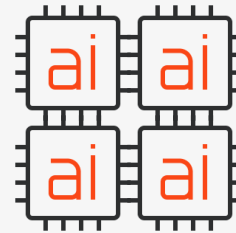
## Social Media Catalyzer



# Takeaways: Keys for success when deploying GenAI in your automation program



**Context**



**Models**



**Action**

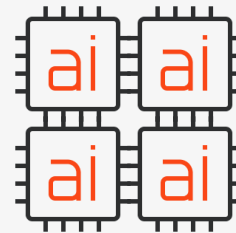


**Trust**

# Takeaways: Keys for success when deploying GenAI in your automation program



**Context**



**Models**

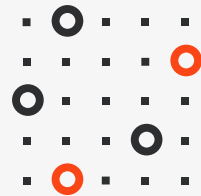


**Action**



**Trust**

# Takeaways: Keys for success when deploying GenAI in your automation program



**Context**



**Models**

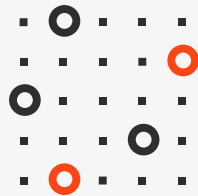


**Action**

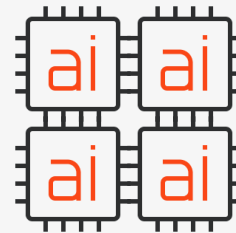


**Trust**

# Takeaways: Keys for success when deploying GenAI in your automation program



**Context**



**Models**

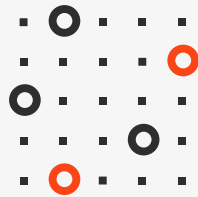


**Action**

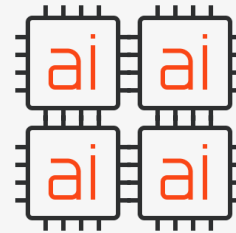


**Trust**

# Takeaways: Keys for success when deploying GenAI in your automation program



**Context**



**Models**



**Action**



**Trust**

# Announcements recap



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# UiPath AI Summit: 2024 Edition

**Keynote**  
30-mins

## Keynote Session: Transforming Workspaces with AI-powered Automation



GRAHAM SHELDON  
Chief Product Officer, UiPath



ROWAN CURRAN  
Sr. Analyst, Forrester Research  
Guest Speaker



Kickoff the AI Summit discussing the latest trends across the AI ecosystem and highlighting the newest AI-powered capabilities from UiPath.

**Industry Highlights**  
30-mins

### Banking & Financial Services

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

### Insurance

How AI-powered automation is changing the insurance operating model

### Manufacturing

Innovating through disruption: The new AI paradigm in manufacturing

### Public Sector

AI behind the wheel of public sector innovation

### Health & Life Sciences

Putting AI to work in healthcare and life sciences

**Product Deep Dives**  
45-mins

### UiPath Autopilot

Autopilot in action: Five use cases that supercharge productivity

### AI-powered Discovery

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

### AI-powered Document Processing

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

### Training AI models for IDP

Next-gen AI accelerating intelligent document processing (IDP)

### Integration Service & AI 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



DR. EDWARD CHALLIS  
Head of AI Strategy, UiPath



MARK GEENE  
SVP Product, UiPath



LUKE PALAMARA  
VP, AI Product Management, UiPath



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



# Learn more about UiPath



## UiPath Business Automation Platform

Learn more today at:  
[www.uipath.com](http://www.uipath.com)



## Start an Enterprise Trial

Speak to your Account Executive about starting an Automation Cloud Enterprise Trial



## Gallery of customer achievement

UiPath is helping organizations worldwide save millions of hours by working smarter  
[www.uipath.com/gallery-customer-achievement](http://www.uipath.com/gallery-customer-achievement)

