

# UiPath AI Summit

Next-gen AI accelerating intelligent document processing (IDP)

# Your speakers



**George Barnett**

Product Management Director,  
UiPath



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Senior Product Manager,  
UiPath

Documents and communications are key to everyday enterprise tasks across different business units – from finance, HR, to legal.

**Intelligent document processing (IDP)** offered by UiPath leverage AI to automate such processes end-to-end.

### Enterprise

- > Hiring & onboarding processes
- > Finance processes
- > Sales & order management processes
- > Customer service & support processes

### Banking & Financial Services

- > KYC – Know Your Customer
- > Mortgage application & processing
- > Client & customer onboarding
- > Trade settlement & amendment processes

### Insurance

- > KYC – Know Your Customer
- > Underwriting processes
- > Claims handling & processing
- > Customer queries & communications

### Healthcare

- > Patient registration & processing
- > Consent and assent processes
- > Health insurance claims
- > Health history

### Public Sector

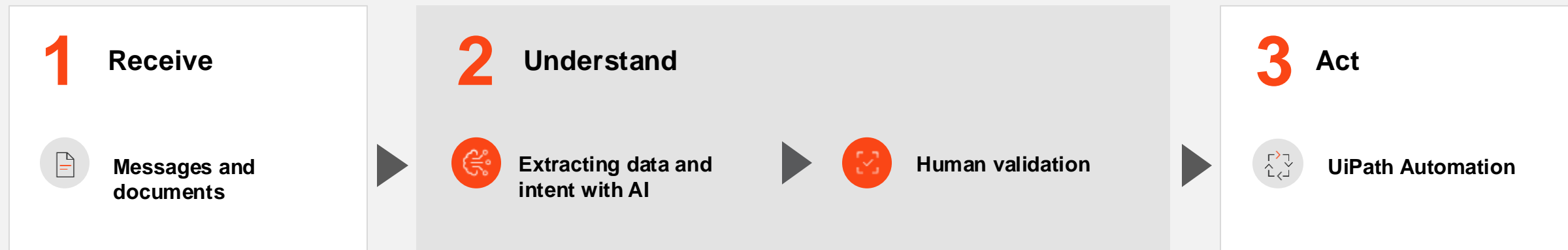
- > Immigration application & processing
- > Benefit application & processing
- > Unemployment verification & processing
- > Citizen questions & feedback

### Manufacturing

- > Sales & order management processes
- > Accounts payable & accounts receivable
- > Purchase order processing
- > Customer & vendor communications



# End-to-end intelligent document processing (IDP) solution



**Documents & communications**

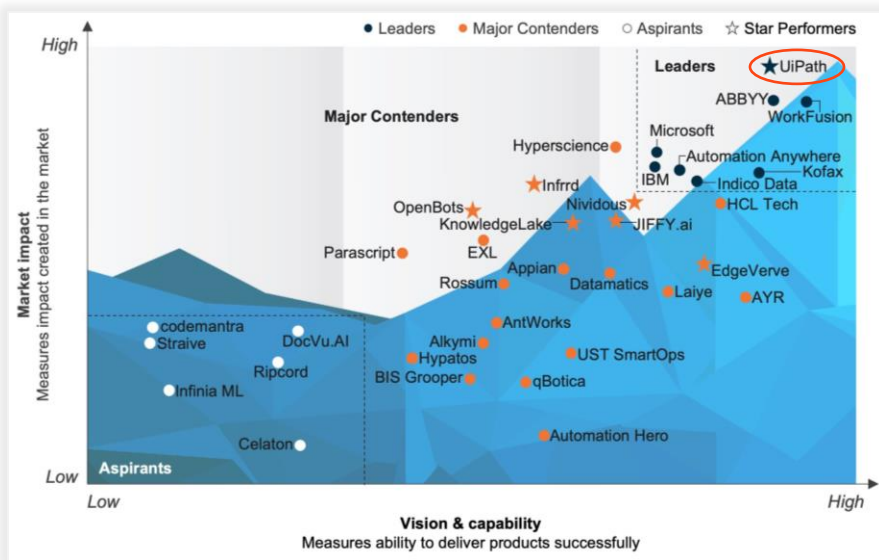
**State-of-the-art AI capabilities**

**UiPath Business Automation Platform**

**Recognized IDP leader**

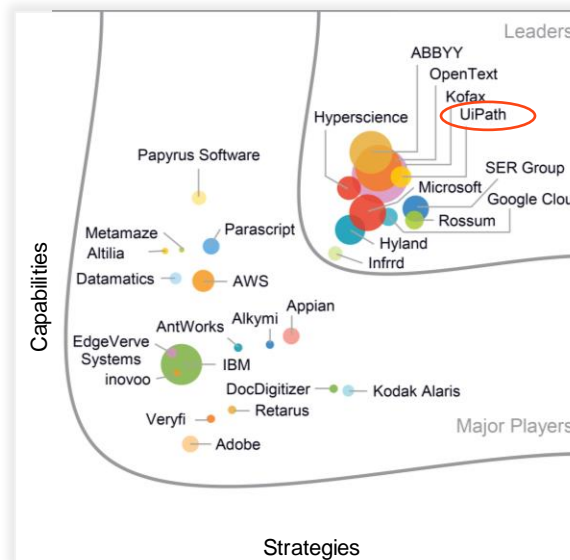
# UiPath is a 3x Leader in IDP

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



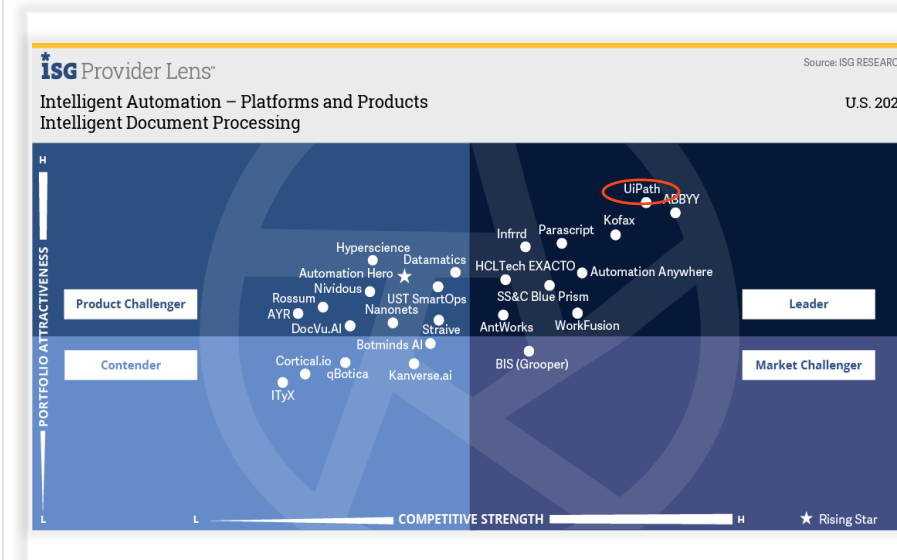
Everest Group Intelligent Document Processing (IDP) Products PEAK Matrix® Assessment 2023

“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.”

# Latest IDP capabilities accelerating time to value

# 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

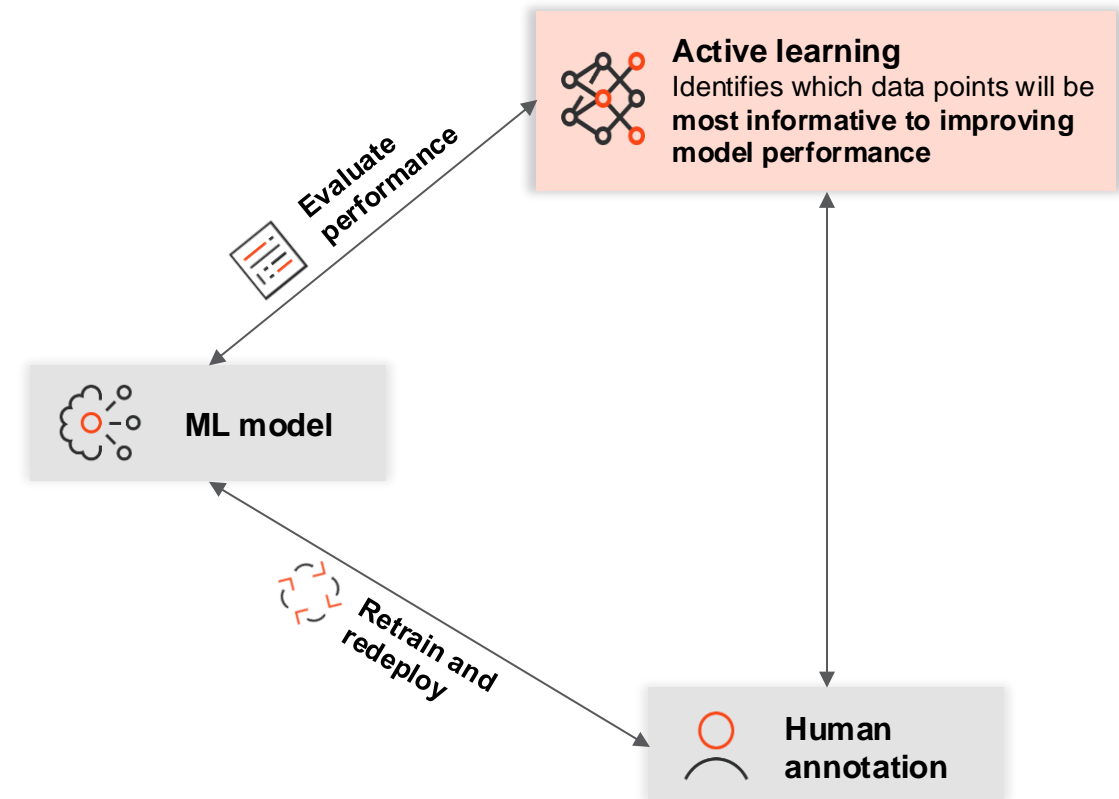
 **Document Understanding™**

Available in public preview

 **Communications Mining**

Available in general availability

## How does it work?



# 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.



Available in general availability



Available in public preview

## 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

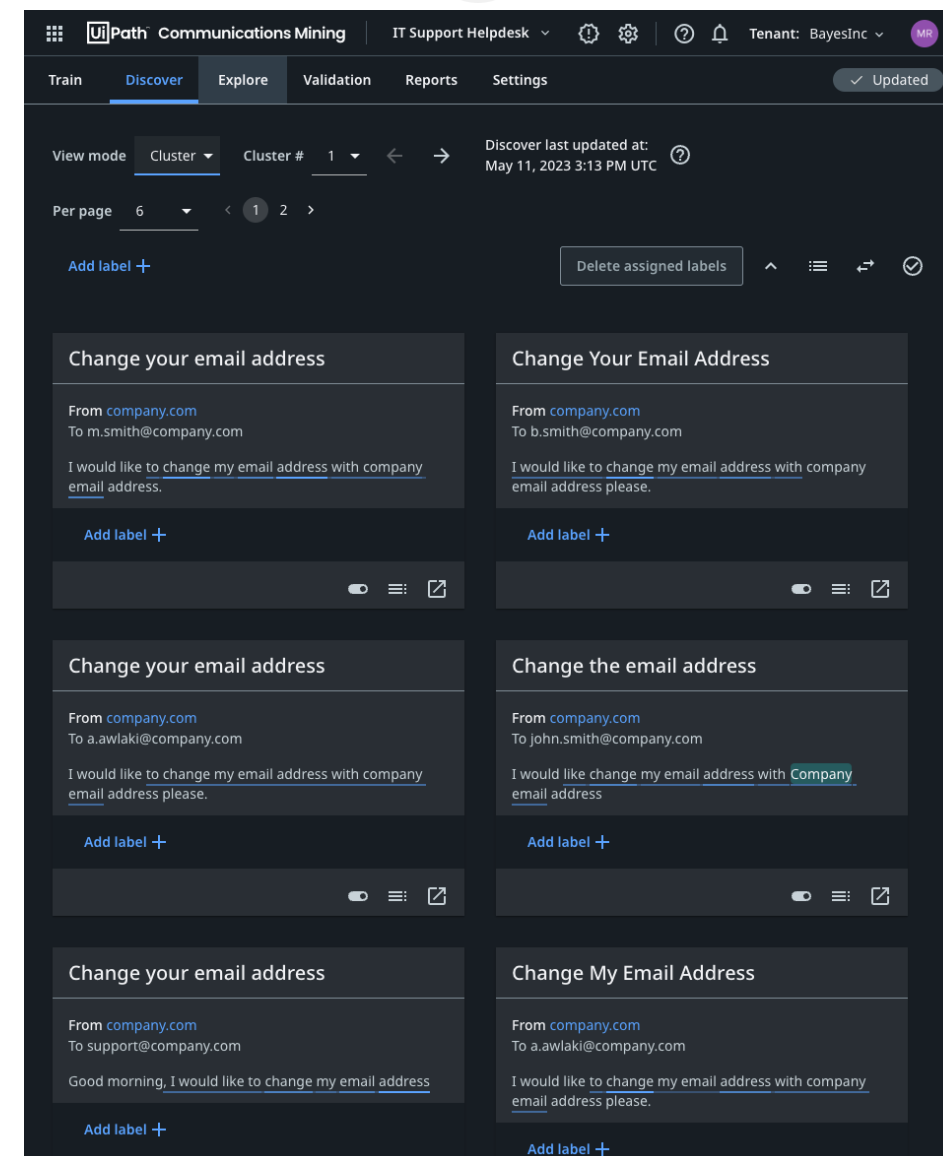
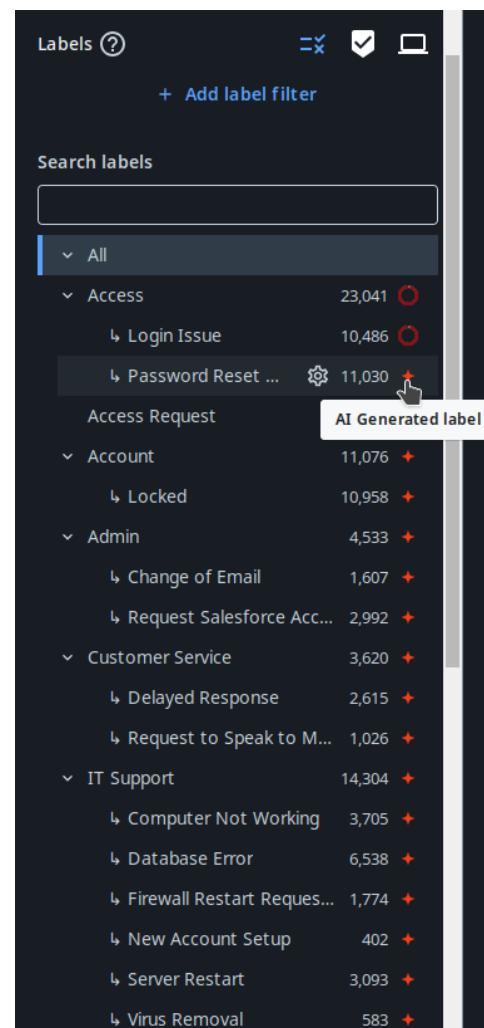




# Zero-shot discovery

Minutes to value with automatic model training

- Automatically train a model using identified themes as labels with no input from users other than uploading data to a dataset.
- Out-of-the-box discovery and analytics and minutes to value.
- Models can then be finetuned and tailored to customer needs as usual.



# Demo time!

# Customer request processing with IDP

## Use case

Customer support agents manually process each customer request coming to their inbox, review the documents, validate the request, make corresponding decision, and take action – respond to the customer and fulfil their request. That used to take a lot of time.

**1** Extract the intent of the request and the reasoning from the customer **email**

UiPath Communications Mining

**2** Process the attached documents – a **proof of purchase** and an **ID card**

UiPath Document Understanding

**3** Check on the customer's **warranty contract** to validate their request

UiPath Document Understanding

# What do our users say about training models with active learning?

“The implemented result substantially **improved the user interface** to enabled an operator to focus on the task at hand instead of a lot of distracting back and forth of screens and mouse movements.”



Michael Gray

Senior Manager, Digital Transformation Services - Intelligent Automation, Canon Business Process Services

“I found that the enhancements created a **much smoother experience** in terms of assigning the fields and reaching the desired results. This task was accomplished **much quicker than before**.”



Bill Hutto

Senior Innovation Deployment Manager, DistributionNOW

“Active learning proved to be **75% faster** over 50 documents and offered a better user experience, with quicker understanding and **less manual work** due to automated suggestions [generative annotation]. From an implementer / delivery services perspective this means we can reduce our delivery timelines to clients, and also give them more options for **cost savings** if they want to provide the annotators from their side.”



Lewis Goldenberg

RPA Lead Consultant, Greenlight Consulting

# Latest in intelligent document processing

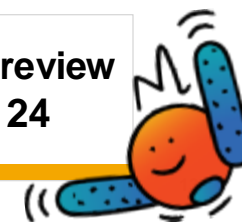
## **UiPath** Document Understanding™



Generative Annotation	<b>GA October 23</b>
Generative Classification	<b>GA October 23</b>
Generative Extraction	<b>GA October 23</b>
Generative Validation	<b>GA April 24</b>
Active Learning	<b>GA April 24</b>

## **UiPath** Communications Mining™

Generative Annotation	<b>GA October 23</b>
Generative Extraction	<b>GA April 24</b>
Extended Language Support	<b>GA April 24</b>
Zero Shot Discovery	<b>Public Preview April 24</b>
Autopilot™ for Communications Mining	<b>Private Preview April 24</b>





# Learn more about intelligent document processing

## **UiPath**® Document Understanding™

[uipath.com/document-understanding](https://uipath.com/document-understanding)

## **UiPath**® Communications Mining™

[uipath.com/communications-mining](https://uipath.com/communications-mining)

## Start an Enterprise Trial

[uipath.com/product/free-trials-and-downloads](https://uipath.com/product/free-trials-and-downloads)

