# Making documents workflows smarter using Al

# + Tools of HyperAutomation



## Case study: Big bank (>\$200bn assets)

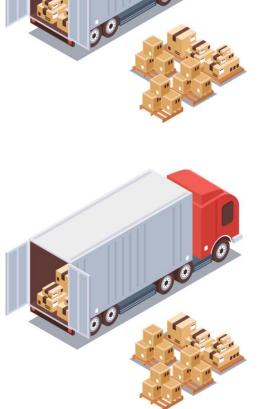
## New regulations

## 

5m pages per year

+2

1 process only for 100 of big clients



## **Complex processing**

### 70 document types 65% unstructured

60 reconciliations and checks per document bundle



## Case study: Big bank (>\$200bn assets)

# -\$500K

savings on document processing on 1 process per annum for 100 of big clients



7.6X less cost18X speed increase

## Case study: Big bank (>\$200bn assets)

**Upsell** \$800K ARR contract

40 processes

1200 documents types

24m pages per annum

Super secure



### **App building platform** for AI document processing

QTY

2

3

-----

John Smith

2 Court Square

\*

DOCUTABLE

All → Document Types → W-2

Default · Document type name: W-2

Update model

#### Average quality of all fields: 91.6% from 23 scores Training date: Oct. 30, 2021, 5:41 a.m. Training samples: 418 🖻 🔵 Table Primary fields **Field Name Global Name Field Type** Values List Description Quality N Empoyee's social fx SSN 98.9% 416 ٠ security number DOCUTABLE Employer identification EIN fx 92.1% 84 \* number (EIN) Workspaces $\checkmark$ $\rightarrow$ Invoice, Receipt $\checkmark$ $\rightarrow$ invoice\_2\_1.pdf Last edited by a\_anastasiya 202 Employer's name Company name fx 96.7% 411 \* 5 Θ $\oplus$ 3 C 1 9 112 $\sim$ A Employer's address Address fx 80.0% 251 \* INVOICE DATE 11/02/2019 John Smith 3787 Pineview Drive P.0.# 2312/2019 Invoice New York, NY 12210 Cambridge, MA 12210 DUE DATE 26/02/2019 ..... **Customer address** 2 Court Square Invoice Total 54.06 Text DOCUTABLE ----Co (?) Ω 8 ~ Q Search in documents DESCRIPTION UNIT PRICE AMOUNT ▼ Bce • → W2 test • [Admin] ② 100.00 Front and rear brake cables 100.00 New set of pedal arms 15.00 30.00 Des 🚞 Filters Group by State and Name ~ DB Be S 🖻 😔 D 03 T Ū Add Document + 8 1 × Tex Labor 3hrs 5.00 15.00 Show markup for Documents Empoyee's social secur... Emplo Divot Mode State Employer's name W-2 Subtotal 145.00 Fro Advanced search ~ > (18) Search... Sales Tax 6.25% 9.06 cab Document Types SAMPLEW-2FORMSTATEUNIVERSIT... 1 NY(2) STATE UNIVERSITY (1) 10-00-0101 16-00 III Folder III Links 10-00-0101 16-00 ✓ STATE UNIVERSITY ... (1) how-to-get-fake-w2-forms.jpg 1 ~ III Documents (all document types) III Document Type $\checkmark$ 12-12 ~ OK(2) ✓ SOME COMPANY N... (1) California-w2-form-2016-ihss\_caovlpr... 1 444-44-4444 Document type guality Invoice california-w2-form-2016-ihss.jpg $\checkmark$ III Status ✓ SOME COMPANY N... (1) 1 444-44-4444 12-12 Receipt III Date Created CA(3) ✓ GINAS PAYROLL CO... (1) 2018\_W2\_Form2.jpg 1 511-11-1120 98-78 III Modified VW-2 III Edited by ✓ UC, LOS ANGELES (1) how-to-retrieve-w2-forms-from-previo\_ 1 123-45-6789 95-60 Folder III id $\checkmark$ III Empoyee's social security 12-34 Arden Home(1) 1 123-45-6789 Employer identification nui $\checkmark$ - -- - - -(all folder) $\sim$ 99-98 Employer's name ~ PZ(1) 221-00-9123 Johnson Technical S... (1) W-2FormAQUICKPEEK.jpg 1 Employer's address $\checkmark$ ~1 1 -00-000 ~ IL(1) Real World Business (1) Sample\_W-2\_Form.jpg 12-22 TE Row Groups Status ---- State 16-89 ~ CO(1) ✓ GREENVALE GARDE... (1) homework-chapter-51-l.jpg 1 III Employer's name

West Way Books (1)

fillable-w2-form-2018.jpg

444-XX-XXXX

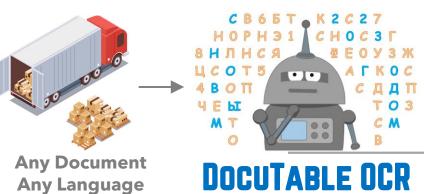
1

441

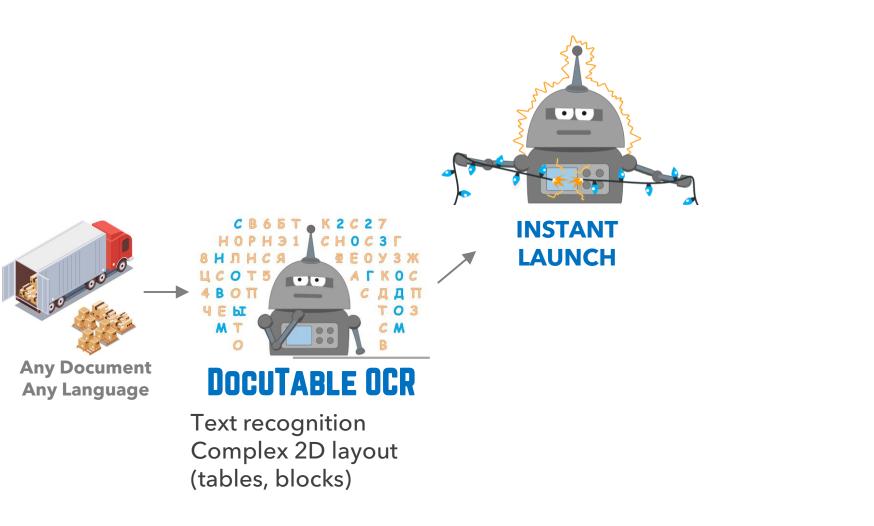
~ NM(1)

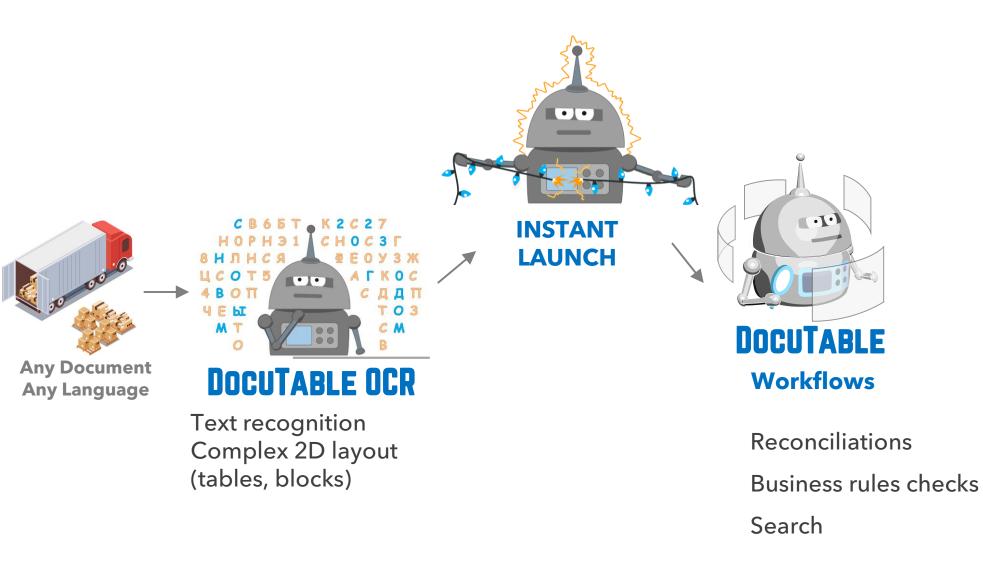
Call status)

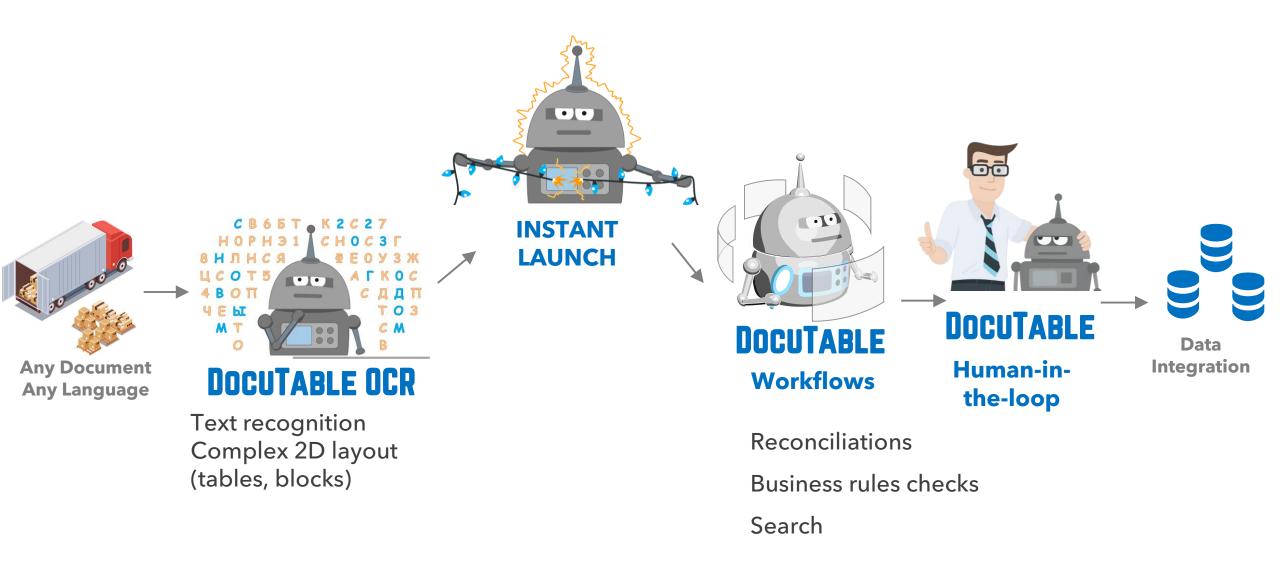
(?) Help

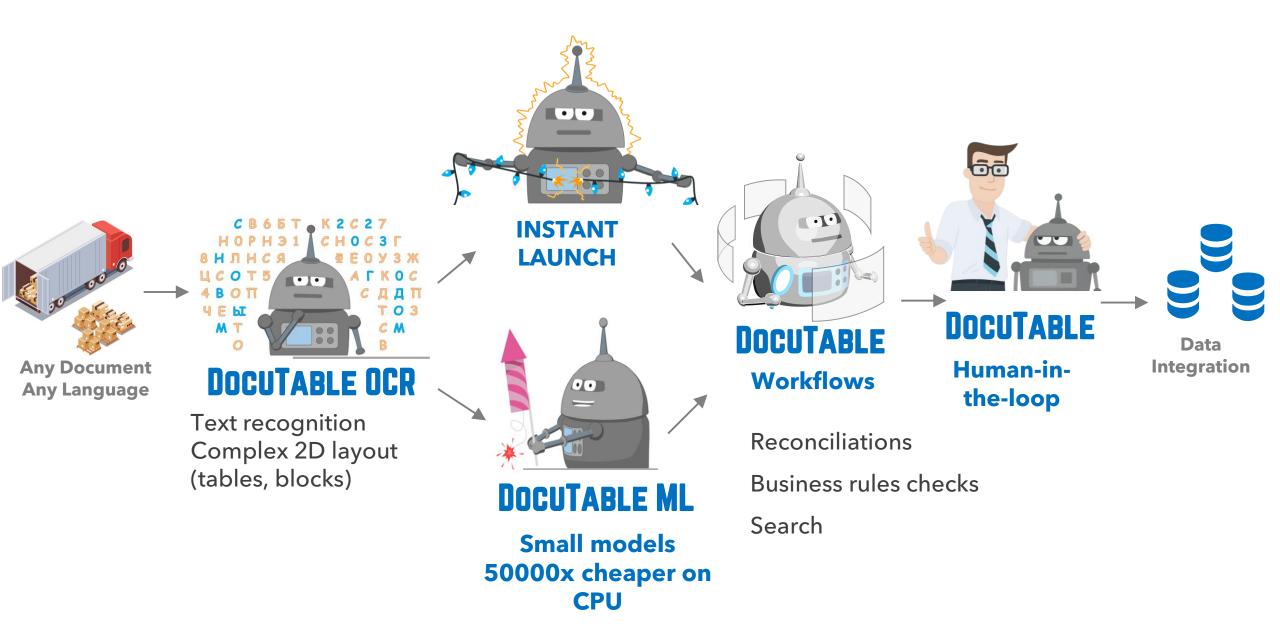


Text recognition Complex 2D layout (tables, blocks)

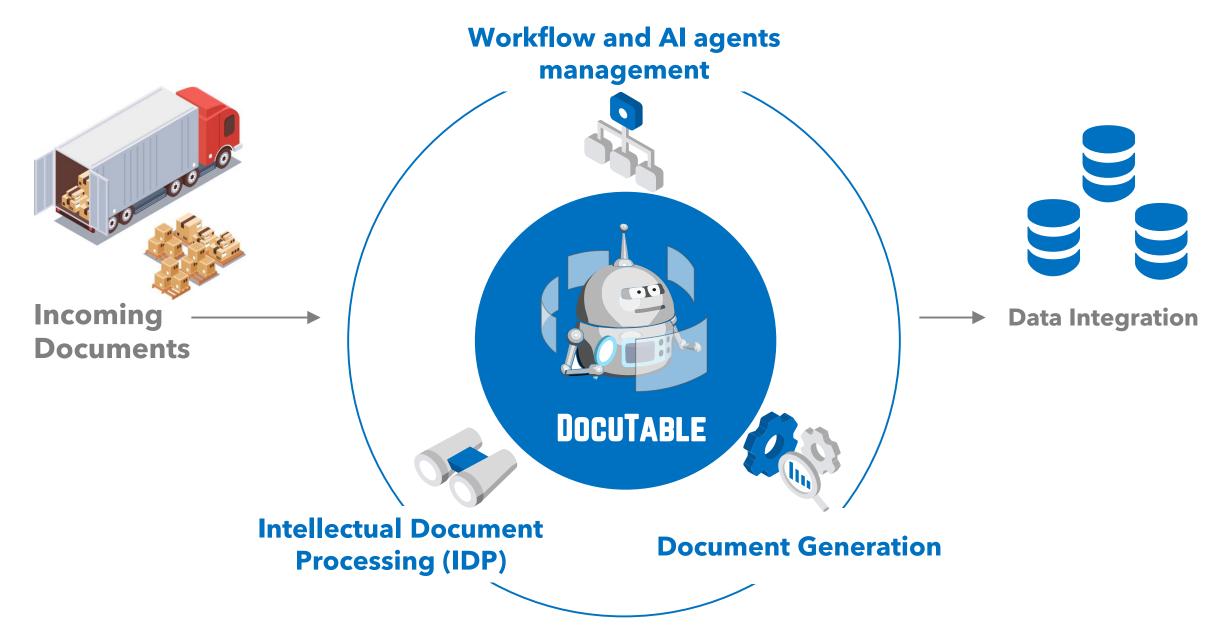








## **DocuTable - document-rich process automation**



# Our target customers receive 500+ incoming documents per day



### **Our champions**

**Director of Procurement** Head of Support Services Head of Operations



## What makes DocuTable unique?

## More raw data

Proprietary **OCR capture more raw data** and boosts data extraction results Cross-document checks and specialized corporate dictionaries (e.g. products, entities) add contextual depth.

More

context

÷

10x less cost

Proprietary deep learning tools to train document model on few examples

## = Best overall accuracy / cost ratio

**AI-FIRST APPROACH** 

## **AI HYPERAUTOMATION**













## POLYMATICA MULTIDIMENSIONAL TABLES

## Al one-click Excel to EPM conversion

Multi-Dimensional Role-based Scalable

	penses :												
Cost	input												8 9 Ø
1.1	A	В	с	D	Ε	F	G	н	I	3	К	L	М
						Measure	amount						
						Period	January	February	March	April	Мау	June	July
	Funds center	Cost center	Partner	Project	Type activity	Account							
1	CF0_13	MVZ_26	Partner_33	Project_8	Type activity_4	Account_11	555	1 063	6 016	3 353	5 072	1 135	4 592
2	CF0_13	MVZ_36	Partner_87	Project_5	Type activity_5	Account_33	9 000	9 966	8 396	4 574	1 256	3 866	2 396
3	CFO_15	MVZ_14	Partner_94	Project_5	Type activity_5	Account_19	4 046	3 073	2 298	1 325	1 955	6 239	3 691
4	CFO_16	MVZ_16	Partner_50	Project_9	Type activity_5	Account_65	4 887	9 686	4 407	7 056	1 198	6 285	3 405
5	CF0_17	MVZ_50	Partner_84	Project_9	Type activity_3	Account_48	4 498	2 995	8 758	1 119	9 455	3 241	3 444
6	CFO_18	MVZ_25	Partner_39	Project_8	Type activity_1	Account_91	1784	6 862	8 792	4 483	6 880	9 844	5 048
7	CFO_2	MVZ_49	Partner_80	Project_9	Type activity_3	Account_25	8 721	7 070	3 018	1 891	7 571	1 627	2 377
8	CFO_4	MVZ_22	Partner_88	Project_5	Type activity_4	Account_70	5 776	2 975	2 018	9 796	9 283	8 451	1 196
9	CFO_6	MVZ_10	Partner_59	Project_9	Type activity_5	Account_99	3 877	7 919	3 132	6 170	3 785	1 318	3 676
10	CFO_7	MVZ_35	Partner_34	Project_8	Type activity_2	Account_10	6 426	5 486	6 362	1 479	5 878	3 749	5 456

## **POLYMATICA PRODUCTS**

### **Polymatica Dashboards**

Reports and dashboards builder

### **Polymatica Analytics**

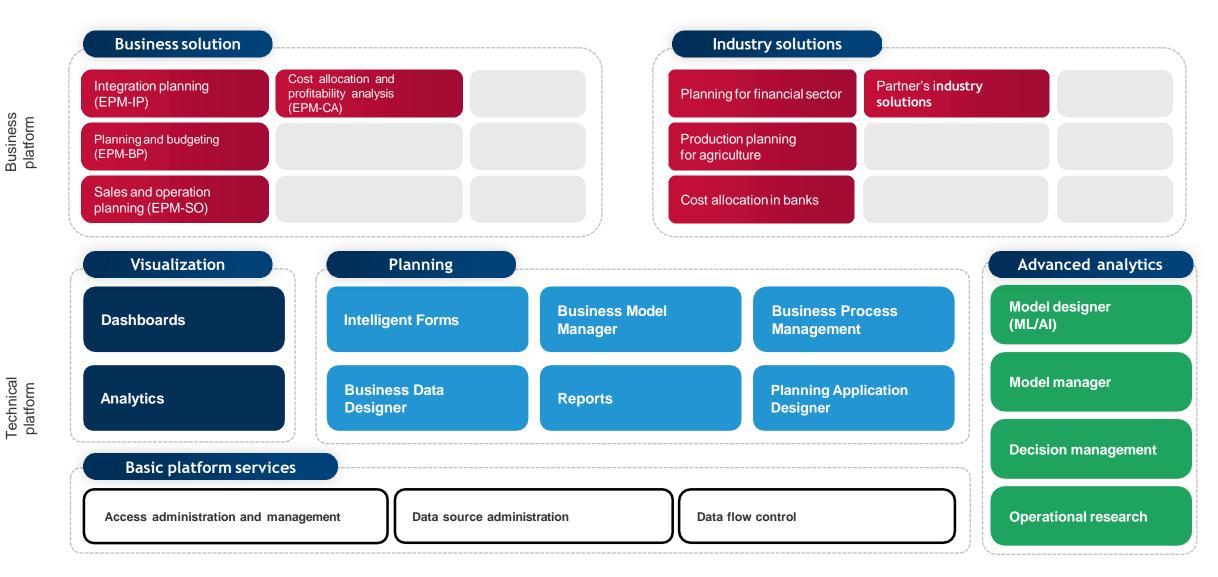
Multidimensional analysis and Data Mining on Big Data

### **Polymatica EPM**

Business platform for automatization of strategic planning and budgeting processes

<sup>o</sup>ølymatica M

## **POLYMATICA EPM FOR PLANNING**



## **No-Code development**



## Al one-click business process creation

	]	Список атрибутов		Ответственный 🛛 🔵	Отдел продаж	
ples-request		Id * Тип C Множестви samples-request-name Text X V C Обязатель			Отдел маркетинга	
Имя		Имя Наименование продукци			Добавить	
Запрос на выписку образцов продукции						
Запрос на выписку ооразцов продукции						
Запрос на выписку образцов продукции			Oreate a busines			
Запрос на выписку образцов продукции	Define status	es> 5	Create a busines	s process		
4		es> 5	Create a busines	s process		
4		es> 5	Create a busines	s process		
Запрос на выписку образцов продукции	Define status	es> 5	Create a busines	s process		

## 100+ pre-built modules

### and project solutions

- Contract management
- Service Desk
- Counterparties management
- HR
- BPMS
- External portal
- Meetings
- Tasks and assignments
- Legally significant electronic document management

- Access passes
- Finance

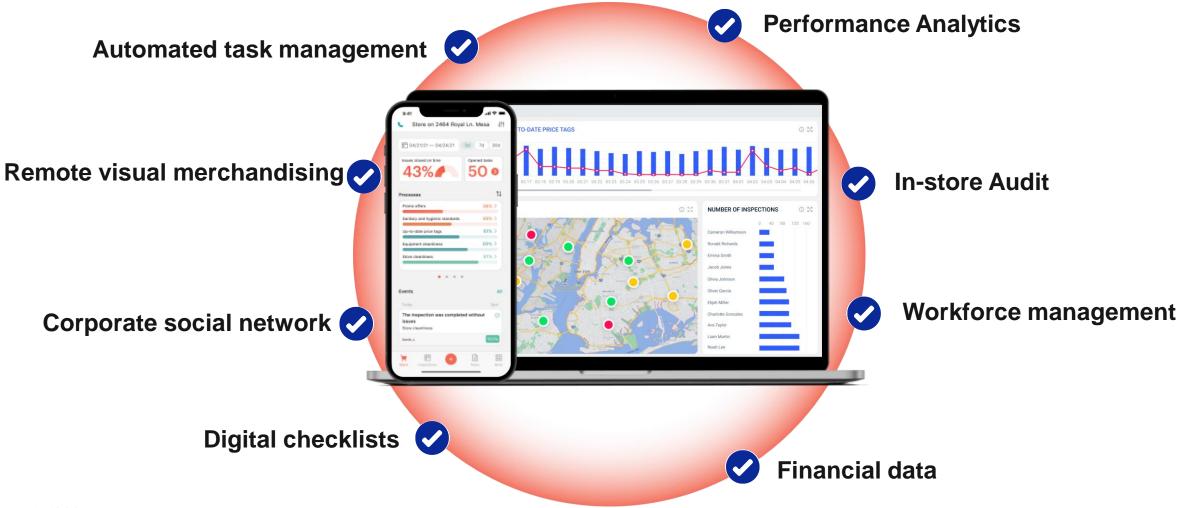
CRM

- Memos
- Claims
- Compliance
- Credit pipeline
- Business trips
- Powers of attorney and machine-readable powers of attorney



🗮 🕂 Создать					
		Журнал "Заявки на подб	ор" 🗙 Домашняя страница 🗙	Журнал "Договоры" 🗙 🛛 Журнал "Задачи подчиненных"	* Х   Оргструктура 🗙
CITECKecos		Домашняя страница			
Задачи		Hernomunu er hanninta			
🛍 Активные задачи	21	• Активные зада	ЧИ Перейти →		
🛇 Завершенные задачи		Действия над	21 ~ • •		
🛱 Задачи подчиненных	22				
Разделы		🗌 ~ Приоритет	Название задачи	Документ	Тип документа
🖽 орд	~	Средний	Согласование директора	Договор №12	Договор
🛱 Поручения	~	Низкий	Согласование директора	Договор №14	Договор
🖬 Договоры	~	Высокий	Подписание компанией	Договор №23	Договор
🛛 Корреспонденция	~				
📽 CRM	~	Средний	Согласование	Внутренний документ № 12	Внутренний документ
🗭 Совещания	~	Средний	Наложить резолюцию	Входящий документ № 8	Входящий документ
🖬 Офферы	~	Низкий	Подписание ЭЦП	Внутренний документ № 11	Внутренний документ
Пропуска	~	Высокий	Согласование директора	Договор №17	Договор
• Релизы	~	Низкий	Создание протокола	Совещание №3	Совещание
Service Desk	~	Высокий	Задача на проверяющего	Поручение: Провести аудит договорной документации	Поручение
Оргструктура		Средний	Подтверждение аннулирования	Договор №5	Договор
🛱 Оргструктура		1-10 из 21 < > 10	~		
Справочники					
Общие	~	• Новостной порт	гал		
Статистика документов					
<b>III</b> Внутренние, исходящие до.	)	Дата и время	Валюта Погода		
Статистика по договорам	м	Hanas	H HORCESS	0.10000	
🛃 Договоры		HOBOC'	ги деловог	'О МИРА Рубрики	Компании Персо
KPI					
() Договоры. Значения КРІ		29.01.202	24 11:30		
<ul> <li>Договоры. Отклонения КРІ</li> </ul>		Клю		ювления Citeck	
<ul> <li>Договоры. Отчет КРІ</li> </ul>		КЛЮ	AGRPIG OOH	овления спеск	
Э Договоры. Количество					

### **QVALON RETAIL PROCESS MANAGEMENT**



## **ROBIN RPA**





#### **ROBIN Studio**

Creating a robot using **No-Code** and\or **Low-Code** constructor

#### **ROBIN Robot**

**Robot** execution by event or by schedule

#### **ROBIN Orchestrator**

Monitoring and control of robots in the organization

### Digital worker

Integrated **Ai-components** (processing of speech, documents, messages) in a single robot scenario

## Marketplace

**Ready-to-use** software robots and a service model for using RPA from the "cloud"

## **ROBIN RPA**

0.0) QuickTests	5		<u> </u>
/≣ C#	≉ రర్ద్⊀ లో జి.ఓ		
nguyên	Sơ đồ dự án		
	QuickTests		т
i 🗊 🔿	Sơ đồ dự án		0
		CÀI ĐẶT	i.
	Tổng quan	Ngôn ngữ	Tiếng Việt (Việt Nam) 🔗
	Tạo hành động	Chế độ hoạt động	Nhà phát triển robot     Thiết lập hành động
	Trình duyệt	Tự động lưu 🛈	Moi O phút
		Tim kiểm đổi sánh 🕧	
		Dọn dẹp tài nguyên 🕕	V
	5		
	Tất cả các thay đổi đượ	ực lưu tự dọng	
	Tất cả	ên hành động hoặc số	

### ROBIN Robotic Intelligence 2.20.2 63988 (2.2.0.0)

#### Cài đặt

ri email	khi quá trình th	ực thi hoà	n tất
Cài đặt ki	ết nối máy chủ thu	•	
Máy chủ		×	✔ Sử dụng SSL/TLS
Cổng	0	×	
Người gửi		×	Không có xác thực
Đăng nhập		×	
Mật khẩu	nhập mật khẩu	o	

#### Danh sách người nhận thông báo về việc thực thi robot



💌 Thực hiện không thành công

×

DOCUTABLE	Q Search		? Help	¢	~ ~		
All ▼ → Demo Invoice, Receipt ▼ [Admin]							
😇 Filters Defa	Select a folder			×	Add Document +		$\odot$
Show markup for:							
Unknown Type 🔹	~ Q,		:	AZ			
Advanced search $\vee$	Name	Owner	Last modified				Columns
Document Types	Name	Owner	Last modified				mns
Search in: Document Types	Invoices	me	Apr 21, 2022				
(all document types)	ivoice-Example.png	me	Feb 20, 2023				▷ Filters
Unknown Type							ors
🔽 No Type	invoice-template-us-mono-black-750px.pdf	me	Feb 15, 2023				
V Invoice	609d5d3c4d120e370de52b70_invoice-Ip-light-border.pdf	me	Feb 15, 2023				
Receipt							
▲ Folder	invoice-template-us-mono-black-750px.pdf	me	Feb 15, 2023				
Search in: Folder	609d5d3c4d120e370de52b70_invoice-lp-light-border.pdf	me	Feb 15, 2023				
✓ (all folder)							
▲ Status	Invoice, Receipt	Anastasiya Petelina	Oct 13, 2021				
Search in: Status	Invoice 4.pdf	Svetlana Kulabukhova	Aug 25, 2021				
🗹 (all status)							
				<b>D</b> ·			
	Jpload your documents th	rough Go	poale	Driv	'e		
Selected: 0 documents (out of 0)			9.0		Ť		

-

Clear filters

<ul> <li>"Test" - DocuAero</li> <li>X +</li> </ul>							~ - Ø	×
← → C ⓐ app.docuaero.com/pro	ject/test/					Q 🖻 🖈 👳	⊘ 🛪 🗊 🖬 🚯	:
Docu <mark>aero</mark>	Q Search					(?) Help	Q ×	
All → Testing <a>[Admin]</a>								
Filters	Default view ~	% C T D B		Ū		<u> </u>	Add Document +	
Q Search in documents	Documents	Folder Links	Document Type	Date Created	Modified	Edited by	Status	
Show markup for:								
Unknown Type 🔹								Columns
<ul> <li>Document Types</li> </ul>								ns
Search in: Document Types								
🗹 (all document types)								
🔽 Unknown Type								
🔽 No Туре								
☑ Maintenance Job Order (MJO)								
VP Used Parts								
🔽 Authorized release certificate				No Rows To Show				
Vork Order (WO)								
✓ Barcode								
🗹 Maintenance Job Card (MJC)								
Certificate of conformity								
🔽 Job Card (JC)								
MJO attach	_		13					
Certificate set	How	DocuAe	ro proce	sses aircraft	t records			
Selected: 0 documents (out of 1)						1		
Clear filters								

Contraction of the second seco