



AGENTIC AUTOMATION



De Documentos a Decisiones

El poder de la IA en la Automatización y Procesamiento Inteligente de Documentos

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Documents, and communications can be categorized into three areas...

Structured

Fixed-in-format, structured documents are files or data formatted in a consistent and organized manner.

Examples: Forms, passports, licenses, time sheets, etc.



Semi-structured

Semi-structured documents are files or data containing fixed and variable elements (e.g. tables).

Examples: Invoices, receipts, purchase orders, bills, etc.



Move-For-You Co.
We move so you don't need to move

20800 ALMADEN AVE, SUITE 404
SAN JOSE, CA 95120-0520
T: +1 425 555 9876
F: +1 425 555 3456
E: billing@moveforyou-co.com
www.moveforyou-co.com

1 February 2020

PO: NP74006735

Bill To:

Invoice No: 456200-TZE1

Tony Tzeng
12345 Mango Lane
Seattle, WA 98108

INVOICE DETAILS	FEE
Packing services	\$1,282.00
Storage fees (1 month)	\$1,884.00
House move (white-glove service)	\$5,320.00
Vehicle storage and transport	\$5,186.00
Sales tax 10%	\$1,367.20
Total Fee including Tax	\$15,039.20

Unstructured

Unstructured documents are files or data with no fixed format, containing variable elements (e.g. free form text).

Examples: Emails, messages, contracts, agreements, etc.

ISDA®
International Swaps and Derivatives Association, Inc.

CREDIT SUPPORT ANNEX
to the Schedule to the
ISDA Master Agreement
dated as of 04.09.2024
between
The Test Company B and The Official Counterparty C on behalf of all
Funds listed in the Annex to this ISDA Master Agreement
("Party A") ("Party B")

This Annex supplements, forms part of, and is subject to, the ISDA Master Agreement referred to above and is part of its Schedule. For the purposes of this Agreement, including, without limitation, Sections 1(c), 2(a), 5 and 6, the credit support arrangements set out in this Annex constitute a Transaction (for which this Annex constitutes the Confirmation).

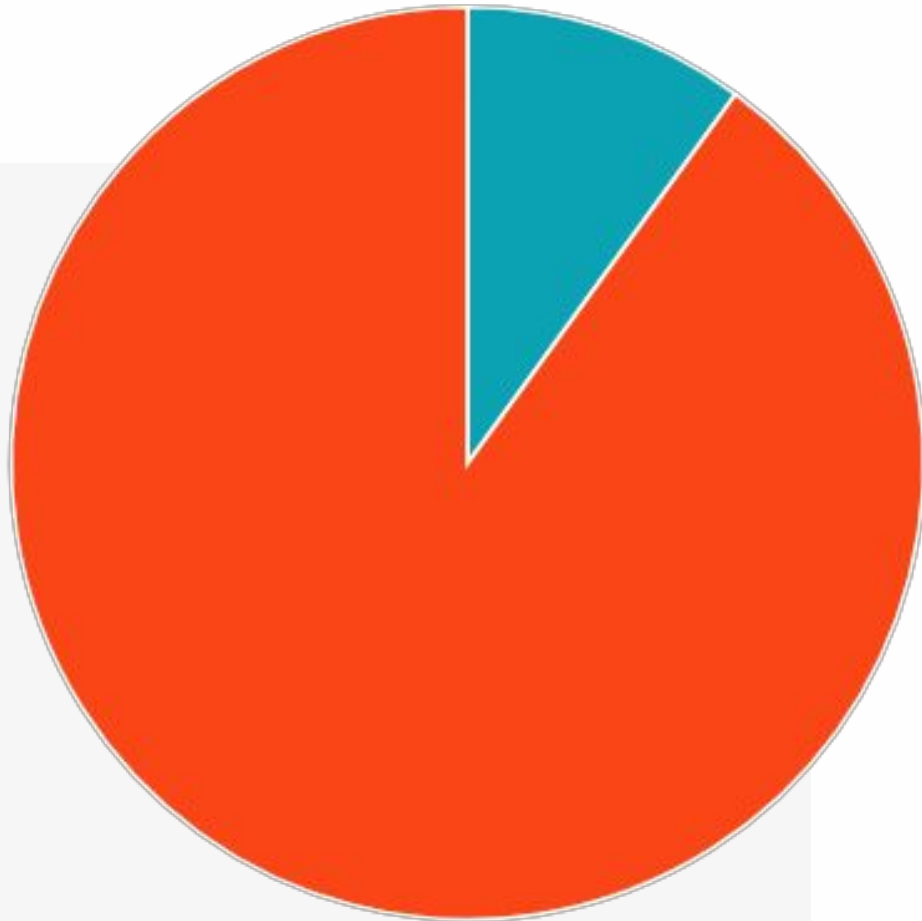
Paragraph 1. Interpretation

Capitalized terms not otherwise defined in this Annex or elsewhere in this Agreement have the meanings specified pursuant to Paragraph 10, and all references in this Annex to Paragraphs are to Paragraphs of this Annex. In the event of any inconsistency between this Annex and the other provisions of this Schedule, this Annex will prevail, and in the event of any inconsistency between Paragraph 11 and the other

Information Classification: Confidential

1 This document is not intended to create a charge or other security interest over the assets transferred under its terms. Persons intending to establish a collateral arrangement based on the creation of a charge or other security interest should consider using the ISDA Credit Support Deed (English law) or the ISDA Credit Support Annex (New York law), as appropriate.
2 This Credit Support Annex has been prepared for use with ISDA Master Agreements subject to English law. Users should consult their legal advisers as to the proper use and effect of this form and the arrangements it contemplates. In particular, users should consult their legal advisers if they wish to have the Credit Support Annex made subject to a governing law other than English law or to have the Credit Support Annex subject to a different governing law than that governing the rest of the ISDA Master Agreement (e.g., English law for the Credit Support Annex and New York law for the rest of the ISDA Master Agreement).

Unstructured and complex data accounts for most enterprise data



■ 90% Unstructured Data ■ 10% Structured Data

Charting a path to the data-and-AI-driven enterprise of 2030 - McKinsey & Company

- **Businesses that unlock their unstructured data can identify new insights, extend automation into new areas, and outperform their competition.**
- For decades, businesses have worked mostly with structured data.
- Unstructured data has long been out of reach for automation, creating inefficiencies and limiting end-to-end process automation.

Current processing methods are not meeting expectations...

Manual processing

- > **Limits business growth and scalability**
Labor-intensive processing limits the ability to scale efficiently and capture market opportunity.
- > **Results in poor customer experience**
Complex, unstructured data mandates human decisioning, slow onboarding, and servicing. This can result in a poor customer experience.
- > **Increase risk**
Higher chance of data input errors, missed information, and incorrect procedures, increases risk.

Not cost effective or scalable

Build your own solution with LLMs

- > **Long-term and hidden costs**
Building an in-house solution requires substantial time and costly expertise. Third-party GenAI models require AI specialists and engineers to fine-tune the chosen model to business requirements.
- > **Maintenance, security, and governance**
When you build a solution, you are solely responsible for complex AI model and platform governance. Every system component requires critical decisions and specialist skills, increasing technical debt and risk.
- > **Talent acquisition and retention**
With AI talent in high demand recruitment can be time-consuming and costly. Talent attrition can also make a system non-performant or non-viable in the long term

Simple to demo, hard to deliver and maintain

Unlock enterprise data

Identify and extract the information you need from documents and communications.



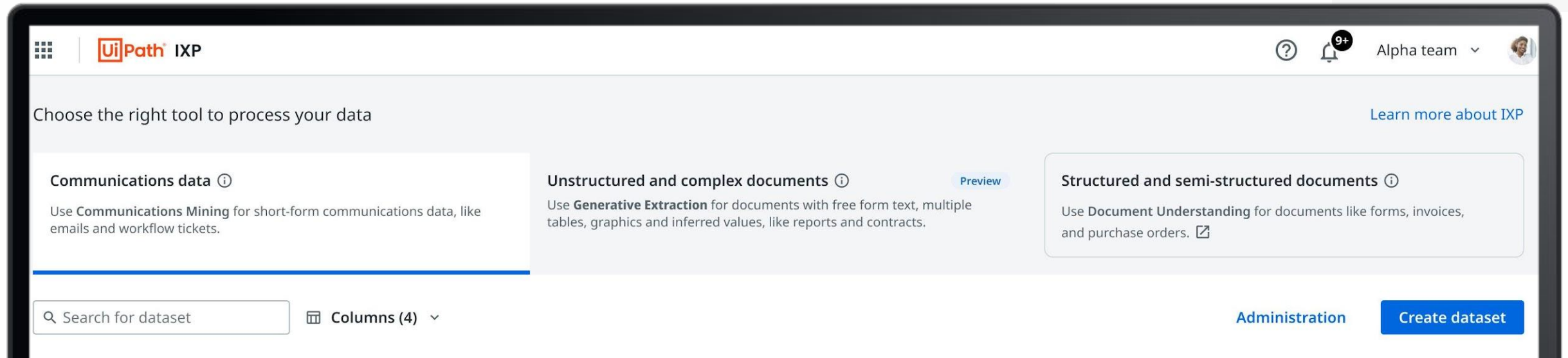
Multi-modal data classification and extraction



New prompt-driven capability for unstructured, and high-complexity documents



Configurable and flexible user experience that leverages GenAI and specialized models to reduce time to production



The impact of IXP



The Business

Transform customer experience

Improve response times and personalization for a superior customer experience.

Increase efficiency

Enhance productivity and efficiency by automating complex processes.

Scale AI

Deploy and scale best-in-class AI - safely, responsibly, and with control.



The CoE

Get started quickly

Deploy, iterate, and improve rapidly and easily with an inference-first experience.

Enhance accuracy

Reduce errors, increase data accuracy to mitigate financial and compliance risks.

Automate more

Increase automation rates, automate more, and extend end-to-end automation into new processes.

1

Receive

Upload documents and connect communication channels



- ✓ Multiple languages
- ✓ Various formats
- ✓ Handwriting
- ✓ Signatures
- ✓ Skewed & low-quality scans
- ✓ Checkboxes
- ✓ Tables
- ✓ Long documents (100+ pages)

2

Understand & extract

Extract the information you need from communications and documents



Extract key intent, sentiment and context data from messages and communications



Extract relevant data from high complexity, varied unstructured documents



Extract relevant data from structured and semi-structured documents

3

Act

Validate extractions if required, initiate automation and downstream processing



Human in the loop

Validate extraction results if required or in case of inaccuracies and exceptions



UiPath Platform

Route extracted data to downstream systems for further processing

Example email: insurance policy updates

New email

Subject Policy Amendment

← Reply → Forward

From Rob Smith <rob.smith@broker.com>

To Dylan Roberts <dylan@insurer.com>

Hi Dylan,

Our client wishes to change their name to John₁ Roberts₁, he's also moved to a new home. The new address is 45 Brillington Lane₁, Doncaster₁, 45 9UX₁.

Can you please amend and issue updated docs? It's policy XE-18294₁, by the way.

And on XF-929381₂, they've also moved, please can you update it to 96 Park Road₂, Sheffield₂, 53 8PL₂

Cheers, Rob

Trusted sender

Send

IXP: understands and extracts the information you need

Label: Policy > Amendment > Address Change

Fields 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

Fields required to enable downstream automation for this process

#	Policy Number	First Name	Last Name
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IXP identifies and extracts the fields relevant to facilitating the end to end automation of multiple labels linked to specific processes / requests.

Extract the data you need from...
complex documents

Example document: report including detailed tables, charts and graphs

IXP: understands and extracts the information you need

Search

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CHARLES SCHWAB		DANA JONES TTEE JONES CHARITABLE TRUST U/A DTD 08/22/1973 FBO R JONES		Account Number 1111-9999		Statement Period JUNE 1-30, 2018	
Investment Detail — Money Market Funds [Non-Sweep]							
Fund Name	Quantity	Market Price	Market Value	Current Yield	% of Account Assets		
Value Advantage Fund: VXXXX ^{(M),S}	45,781.7000	1.0000	45,781.70	1.51%	1%		
Total Money Market Funds [Non-Sweep]			45,781.70	1%			
Investment Detail — Fixed Income							
US Treasuries	Par Units Purchased	Market Price Cost Per Unit	Market Value Cost Basis	Adjusted Cost Basis	% of Account Assets Acquired	Unrealized Gain or (Loss)	Estimated Annual Income Yield to Maturity
TREASURY NOTE 7.125% ^(M)	6,000.0000	101.6250	6,097.50	3,043.19 ¹	<1%	3,054.31 ²	427.50
DUE 06/16/20	3,000.0000	N/A	N/A	N/A	02/01/02	N/A	N/A
CALLABLE 09/30/20 AT 105	3,000.0000	102.1467	3,064.40	3,043.19	04/02/02	5.56 ³	6.53%
CUSIP: XX4987BBB							
MOODY'S: AAA							
Cost Basis			3,064.40 ⁴	Accrued Interest: 18.74			
TREASURY NOTE 5.125% ^(M)	2,000.0000	99.1250	1,982.50	1,995.34	<1%	(12.84) ⁵	102.50
DUE 06/16/20	2,000.0000	98.1250	1,962.50	1,995.34	06/01/03	(12.84) ⁵	6.15%
PRE-REFUNDED 09/30/20 AT 105							
CUSIP: XX4987YYY							
MOODY'S: AAA							
							Accrued Interest: 4.49
TREASURY NOTE VAR ^(M)	2,000.0000	99.1250	1,982.50	N/A	<1%	920.00	N/A
DUE 06/16/20	2,000.0000	53.1250	1,062.50		06/09/02	920.00	N/A
CALLABLE 09/30/20 AT 105							
CUSIP: XX4987YYY							
MOODY'S: AAA							
Total US Treasuries			10,062.50	5,038.53 ¹	<1%	3,961.47 ²	530.00
Total Cost Basis:			6,089.40 ⁴				
Total Accrued Interest for US Treasuries: 23.23							
Schwab has provided gain and loss information whenever possible for most investments. Cost basis may be incomplete or unavailable for some of your holdings. Please see "Endnotes for Your Account" section for an explanation of the endnote codes and symbols on this statement.							
Page 5 of 21							

▼ 15 Not confirmed ☐

Brokerage Account > Investments

▲ 16 Not confirmed ☐

Investment Position ☐

XX4987BBB

Reference: x

Number of Units ☐

6,000.0000

Reference: x

Market Value ☐

19

Reference: x

Market Value ☐

6097.50 USD

Reference: x

Extract the data you need from...
semi-structured & unstructured documents

Example document: utilities bill

IXP: understands and extracts the information you need



Account Summary

Bill Date

6/29/2020

Customer Name

JAMEY TODESCO

Account Number

80-50874-478

Service Address

352 PALMER ROAD, WARE MA 1082

Service Period

5/11/2020 to 6/10/2020

Due Date

7/20/2020

Account Balance

360.00

Bill Detail

Service	Meter Reading		Usage	Amount
	Previous	Present		
PREVIOUS BALANCE:				30.00
WATER	480,000	488,000	5,000	300.00
METER CHARGE				20.00

Pay in person: 1350 Turret Drive, Machesney Park

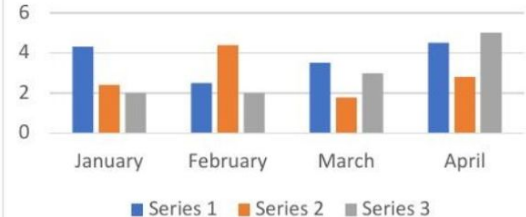
Pay by phone: 24 hours a day, 7 days a week, call 877-42-896

Pay online: visit our website northparkwater.org

Automatic Payments (FREE): Visit our website

Online and phone payments are charged a convenience fee of \$2.50

Chart Title



Month	Series 1	Series 2	Series 3
January	4.2	2.5	2.0
February	2.5	4.5	2.0
March	3.5	1.8	3.0
April	4.5	2.8	5.0

Regular fields	Column fields	Add field ▼
B	Billing Name	☐
	JAMEY TODESCO	
I	Billing Address	☐
	1350 TURRET DR 2301 MARKET ST, PHILADELPHIA PA 4567 FLOWER ROAD	
N	Name Vendor	☐
	Swa	
A	Account Number	☐
	80-50874-478	
O	Invoice Number	☐
T	Total	☐
	360.00	
D	Date	☐
	2020-06-29	
U	Due Date	☐
	2020-07-20	

We are entering the agentic era, where AI agents, automation, and people combine to perform more complex autonomous business workflows



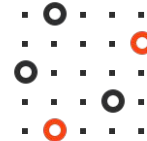
Agent receiving IDP model output as an input

Documents/messages are processed using IDP and these outputs are sent to an Agent as inputs to execute some agentic reasoning/logic



Agent querying IDP as a repository to complete a task

Agent has access to IDP project as a tool/index to do Q&A (e.g., how many contracts were processed in Q4, what was the average contract amount, etc.)



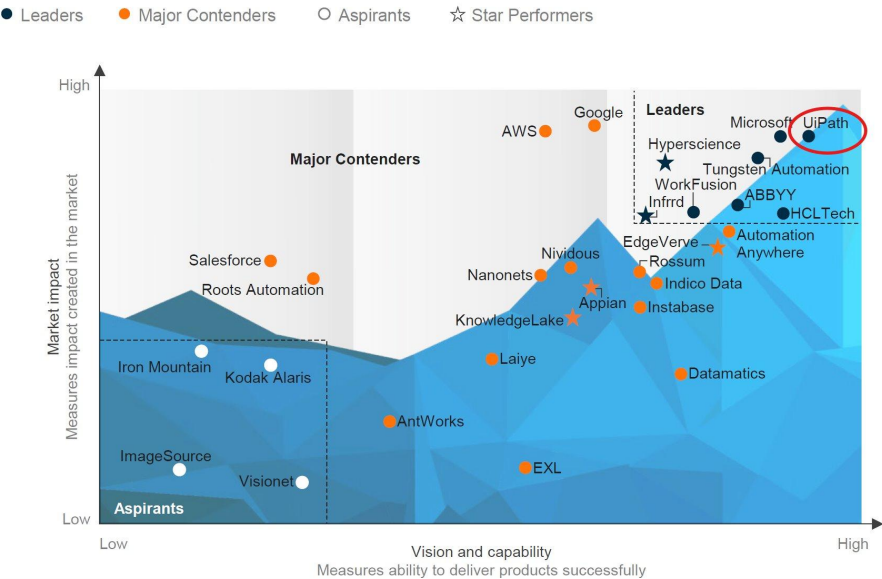
Agent selecting to use an IDP model for a task

Agent has access to IDP models as tools to process documents/messages as part of the agent run...

UiPath is a leader and innovator in IDP



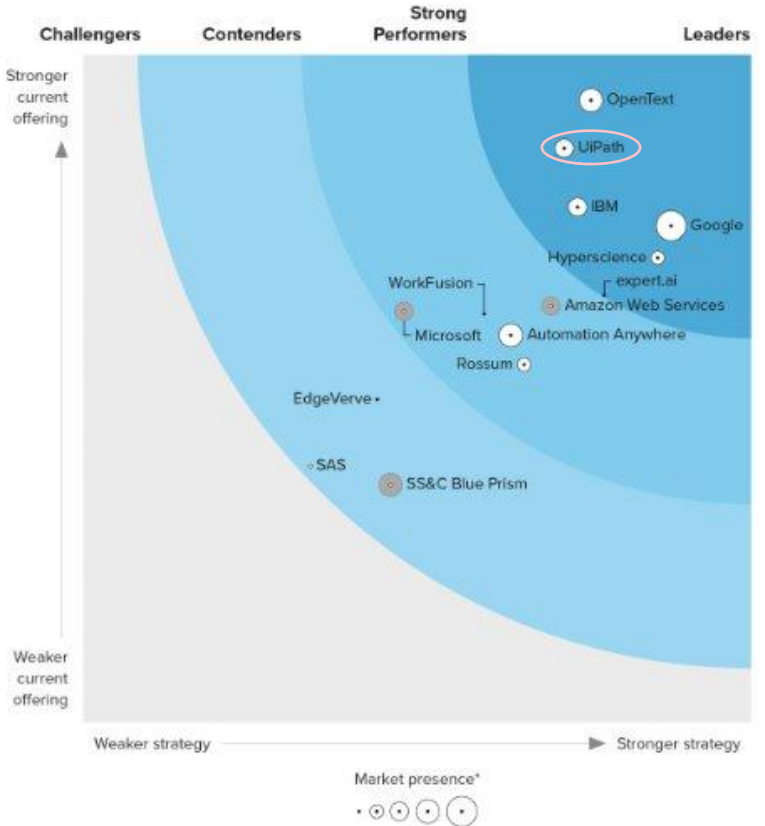
Everest Group IDP Products PEAK Matrix® Assessment 2025¹



IDC IDC MarketScape for Unstructured Intelligent Document Processing, 2024

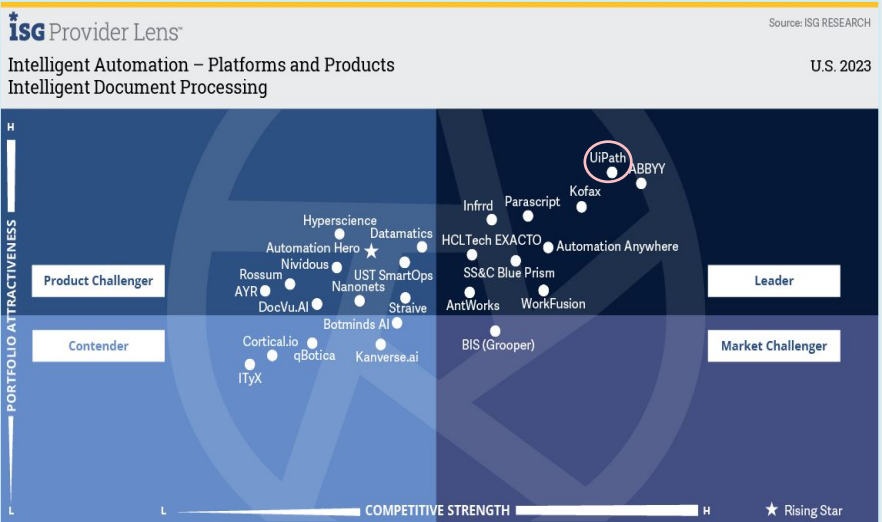


FORRESTER The Forrester Wave™: Document Mining And Analytics Platforms, Q2 2024

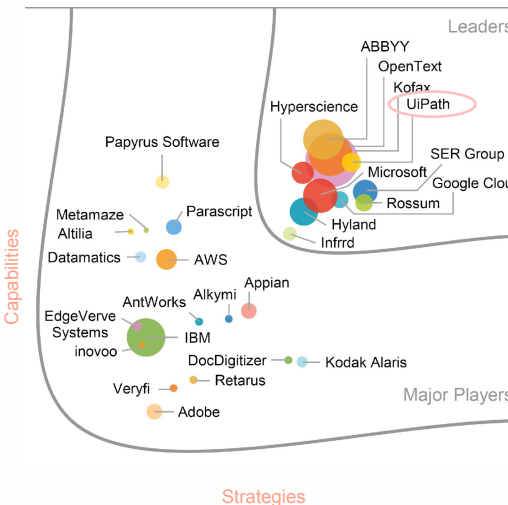


*A gray bubble or open dot indicates a nonparticipating vendor.

Source: Forrester Research, Inc. Unauthorized reproduction, citation, or distribution prohibited.



IDC IDC MarketScape for Intelligent Document Processing, 2023



Use cases & customer stories

Processes run on documents,
communications, and other types of content...



Enterprise

- **People operations & HR**
Recruitment, onboarding, benefits etc.
- **Finance & accounting**
Accounts payable & receivable etc.
- **Service & support**
IT helpdesk, customer service etc.



Healthcare

- Patient registration & processing
- Consent and assent processes
- Health insurance claims
- Physician statements



Retail & eCommerce

- Customer complaints
- Refund requests
- Customer queries
- Product feedback



Real Estate

- Leases
- Mortgages
- Tenant communications
- Property appraisal reports



Finance/Banking

- KYC – Know Your Customer
- Front, middle, & back office mailboxes
- Brokerage statements & messages
- Loan applications



Manufacturing

- Sales & order management
- Product specifications
- Customer & vendor communications
- Shipping information



Insurance

- Insurance policies
- Insurance claims
- Coverage denial letters
- Customer queries & communications



Technology

- Service agreements
- Licensing
- Incident reports
- Customer service & support

Customer Highlight – Paychex

Boosting employee productivity, speed to resolution, and improving the client experience



Industry: Outsourced HR, payroll and services
Solution: IXP - communications capability and UiPath Robots

Challenge

- Operations, services, and support teams at Paychex were receiving unprecedented client demand over email, putting pressure on agents and leading to delays in response times which threatened SLAs.
- As a result, Paychex wanted to find a way to utilize its people more effectively, providing a better service—faster and more efficiently.

Solution

- Paychex combined UiPath IXP and automation to auto-route inbound emails to the right resource, cutting the time taken for work to enter workflow and significantly reducing the time agents spent on triage.
- Paychex also used UiPath IXP to improve visibility and oversight over all of its service processes. The payroll and services provider now has unprecedented process insight and visibility, able to discover new automation and improvement opportunities.

Improved client and employee experience, reduced resolution time

\$15 million

in business value
returned in the first 18
months

30 million

client emails processed by
IXP communications
capability

Replicable scenario for services providers with large services or support functions with high levels of client demand, internal, and external communications.

Customer Highlight – ThermoFisher Scientific

AI-driven automation provides a scalable solution that accelerates processing time and improves accuracy



Industry: Scientific Instruments

Solution: IXP – semi-structured & structured documents capability and UiPath Platform

Challenge

- Thermo Fisher realized it needed to digitally transform in order to maintain operational excellence and deliver speed at scale. They wanted to use automation as a key strategic lever to do more with less and stay competitive
- They needed to improve efficiency for payment processes - invoices and payments were a particular concern. They needed to ingest and process data in multiple formats and create a repeatable, scalable workflow.

Solution

- UiPath IXP capabilities understood and extracted data from PDFs such as invoices, purchase orders, and related documents. UiPath Action Center validates extracted data and highlights missing information.
- As a result, 53% of invoices are processed without human involvement, reducing processing time by 70%. Other groups are replicating the solution.

[Link to extended case study on uipath.com](https://uipath.com/case-study/thermo-fisher-scientific)

824,000

Invoices processed annually

15%

Reduced error rate via automated data collection

70%

Reduction in time needed to process invoices

“The solution has delivered a 70% reduction in the time it takes to process invoices, with about 53% of all invoices being handled without any human involvement.”

Luis Cajiao
Senior Manager, Smart Automation GBS

Processes Automated

Automated invoice processing, purchase-to-pay (P2P), record-to-report (R2R), order-to-cash (O2C), HR, procurement, and customer care operations

Customer Highlight – Canon

Transforming finance with AI-powered automation



Industry: Scientific Instruments

Solution: IXP – semi-structured & structured documents capability and UiPath Platform

Challenge

- Managing a large vendor network and upwards of 5,000 invoices per month—many received on paper for small dollar amounts—can be challenging. Human error and multiple exceptions were common.
- While Canon had a basic automation workflow in place, human interventions were a regular occurrence; the system delivered only 35%-40% accuracy. It all added up to an inefficient process and three-to-four month invoice backlog.

Solution

- Canon decided to try a different route —using AI-enabled UiPath IXP and UiPath Action Center to manage exceptions. Supported by UiPath partner, Greenlight Consulting, Canon built a customized machine learning (ML) model for invoice processing.
- Less than nine months after deploying the solution, Canon had processed approx.40,000 invoices, reduced human intervention below 10%, and freed up almost 6,000 staff hours to dedicate to other critical tasks.

4,500

Invoices processed monthly

3-4 month

Invoice backlog eliminated

90%

Straight-through processing

“UiPath I am impressed with the efficiency and accuracy AI has brought to our operations. It's clear that the power of AI has enabled us to streamline our processes, freeing up time and resources for other critical tasks. Looking forward, we plan to expand our use of AI to further optimize our workflows and enhance our overall business performance.”

Thomas Earvolino
Director of Financial Systems &
Process Improvement

Processes Automated

Invoice processing

“In less than nine months after deploying the UiPath solution, we processed about 40,000 invoices, or about 4,500 monthly. We initially had a goal of processing 75% without human intervention, but achieved about 90% straight-through processing during that time period.”

Thomas Earvolino
Director of Financial Systems, Canon USA

