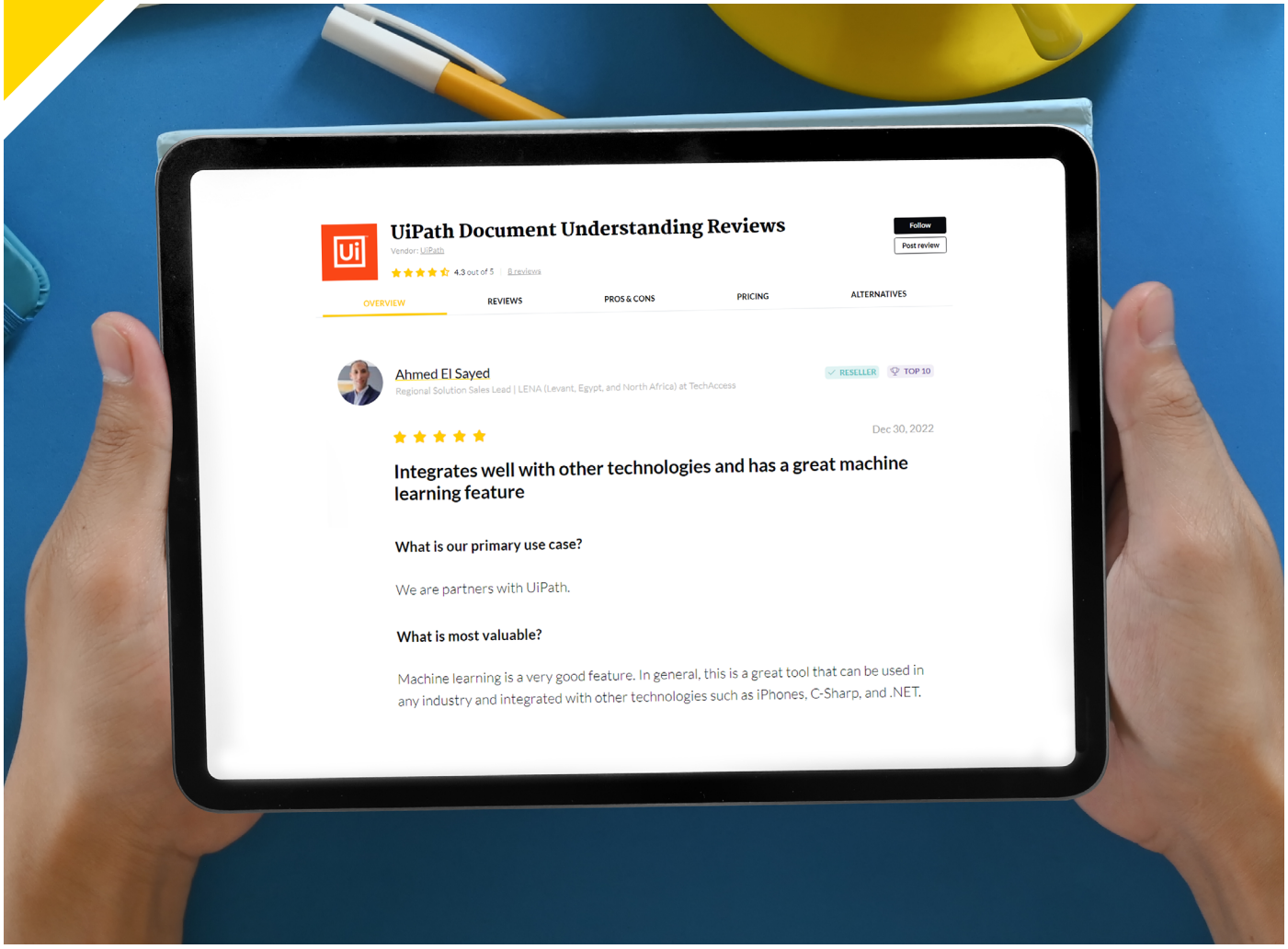
PeerPaper™ Report 2023

Based on Real User Experiences with UiPath

5 Ways Document Understanding Can Improve Your Processes



PeerSpot

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Introduction

Reading documents is often an integral part of a business process. In many cases, the work is manual, repetitive, and prone to error. AI-powered automation offers a solution, as exemplified by UiPath Document Understanding. The tool leverages artificial intelligence (AI) to enable users to delegate their paperwork to robots, with outcomes that include more accurate and efficient document processing. This paper explores the issue, discussing five ways Document Understanding can improve business processes. Based on UiPath user reviews on PeerSpot, it looks at the role of AI in Document Understanding, the potential to increase efficiency and accelerate productivity. By using data extracted from documents in downstream transactions, and integrating Document Understanding with other applications, system owners can improve customer experiences and free employees from mundane chores. With automation at scale, Document Understanding has the potential to drive growth.

Common Document Processing Challenges and Business Needs

Even as businesses go paperless, there is still a great deal of "paperwork" for employees to handle. Information comes into a business on paper or equivalent digital forms. Upon arrival, it needs to be read, interpreted, sorted, and sent to the place in the organization where it needs to be processed or stored. For example, an invoice gets routed to the Accounts Payable team, where it is checked against purchase orders and approved for payment.

The profitability of many businesses is based on their adeptness in managing documents. Some industries, like insurance, are predominantly centered around the processing of paper-based communications or their digital equivalents.

However, as long as people are handling processes manually, the task will be slow, costly, and susceptible to error. Companies focus on average handle time (AHT) for documents, hoping to cut it as much as they can without compromising on customer experience or accuracy. For example, a person who processes sales orders generally needs to go through the process of opening the order, typically attached to an email, examining it and verifying the details. He or she might also need to check for credit holds, report back to the customer that items are out of stock, and so forth. Automated document understanding processes can take over some of these tasks, but usually with human supervision and verification.

Malte H.
Co-Founder & Managing Partner
at OMM Solutions GmbH

"[Document Understanding] helps reduce human error."

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The work is also repetitive and dull, leading to burnout. Problems range from slow and therefore excessively expensive document processing workflows, to unexpected costs arising from document processing errors. While these may seem small, such as when a person receives an email meant for someone else and has to forward it, these errors can add up. Other times, document processing errors can lead to much more significant expenses, for instance, a lawsuit resulting from an overlooked legal notice received in the mail. Figure 1 captures the flow of rework that occurs when there is a document processing error.

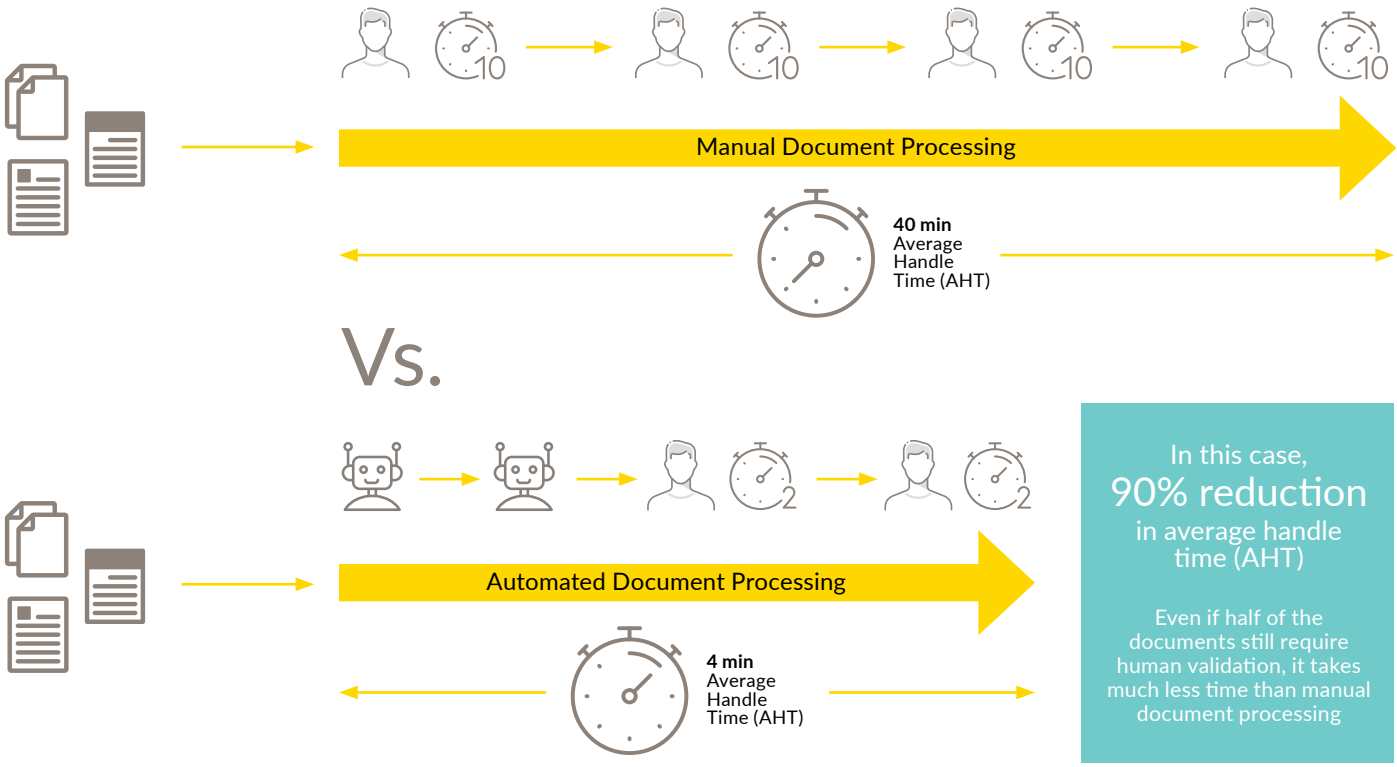

Figure 1 - How document process works, comparing manual with automated processes and their impact on average handle time (AHT).

5 Ways Document Understanding Can Improve Business Processes

Technologies that can understand documents have the potential to improve the efficiency and accuracy of business processes. With the addition of AI-powered automation for documents, outcomes are poised to improve even more. Such technologies can assist humans in automating complex and cognitive tasks. When the document understanding solution enables citizen developers and robotic process automation (RPA) developers to create intelligent document understanding workflows, more stakeholders can benefit from the technology than is possible if only specialized professionals are able to build intelligent automations.

UiPath stands out in this arena. Its Document Understanding solution provides end-to-end intelligent document processing automation capabilities. From document ingestion to the application of document understanding frameworks, UiPath makes document data actionable.

With all of this in mind, consider the following five ways Document Understanding can improve business processes:

#1—Increase Efficiency

Document Understanding enhances efficiency, mostly because it saves time. The AHT for a document drops when intelligent automation takes over some or most of the human manual tasks. AI-powered automation also reduces errors, thus saving time otherwise lost in correction processes. An RPA Developer at Automatorr, a small tech services company, addressed the cost and time reduction potential of AI-powered automation. He said, "It [Document Understanding] has reduced a lot of human error. For example, in the project that I'm working on, people were putting the invoice information on a daily basis. There were more than 20 invoices per day, and each invoice had more than 100-line items. Humans would do a lot of mistyping on the number of packages or the number of items in the package. After we applied the document understanding solution there, we can handle around 90% of invoices, and all of them are correct."

Reduces Human Error

A Sr. RPA Developer at Capita, a tech services company with over 10,000 employees, had a similar experience. His company had between 20 and 25 agents manually processing invoices. He stated, "Obviously, a team of that size has a large cost associated with it." With a high volume of invoices to handle, the team was not able to deliver on all the work. He added, "There are approximately 250 vendors sending invoices to our customer to process the data, which translates to about 1,000 documents being sent on a daily basis, to be processed by only 25 people. It was a huge task. With this level of volume, people tend to get frustrated."

Capita implemented AI-powered automation with UiPath Document Understanding. This has enabled the company to reduce the team to six people, whose job is to monitor the bots. He said, "For example, they check to make sure that the data being fetched using document understanding is at par. We have set the minimum confidence of the documents being scanned at 90% and each day, a report is generated and sent to the customer. Overall, it was a very cost saving implementation."

Salah R.
Chief Innovation Officer
at Imbassy

"Document Understanding has made a massive difference by analyzing and extracting everything from user submissions, then putting it into tickets and generating customer satisfaction scores."

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Rahul S.
RPA Assistant Manager
at PwC India

"With the help of Document Understanding and UiPath Action Center, we created an excellent workflow for our client. It also gives us better accuracy."

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This user further elaborated on the use case, saying, "The artificial intelligence and document understanding features are very good and have been helpful when it comes to processing handwritten or unstructured [data], especially when there is a high volume and it is repetitive."

"It helps reduce human error," said a Co-Founder and Managing Partner at OMM Solutions GmbH, a small tech services company. "This is mostly seen after UiPath has been implemented because people are not usually willing to admit their mistakes." He went on to explain that UiPath frees an average three to five percent of employee time per month for more value-driven tasks.

At PwC India, the Indian branch of the global consulting firm, UiPath Document Understanding was described as a "game changer" by an RPA Assistant Manager. He shared, "One of our clients has manual billing that needs to be processed. With the help of Document Understanding and UiPath Action Center, we created an excellent workflow for our client. It also gives us better accuracy. Now, there are hardly any exceptions in the client's billing documents that are being processed."

Some PeerSpot members were able to quantify savings and return on investment (ROI) from Document Understanding. For example, an AVP, Technology & Solutions at Cygnet Infotech, a comms service provider with over 1,000 employees, revealed that his company had an ROI of around 40% to 50%, which he described as "really good."

"It has reduced the costs of our automation operations by 5% to 8%," said a Junior Consultant Automation Developer at a tech services company with more than 50 employees. This has been partly due a reduction in human error. He added, "We are now able to improve our document understanding. We are also able to read handwriting with 90% to 95% accuracy. There is no intervention of humans in the onboarding process, and HR is now free for other work. The joining process, appointment letters, document verification, and other things are automated."

Previously, the company's document verification process would take an hour for a single employee. Now, he said, "They're now using their free time to upscale and broaden our company's business. They can take on extra work or projects during their office time." He also shared those employees liked the solution, giving it a rating of 4.8 out of 5 in terms of employee satisfaction.

Saves on Costs

#2—Enables People to Add Unique Value to Automated Processes

One of the main appeals of intelligent automation is its potential to free human beings from repetitive, uninteresting tasks and make them available for more valuable work. Document Understanding users are having this experience, with a Partner at Reveal Group, a consultancy with more than 50 employees, sharing, "Overall, automating the mundane and the repetitive allows people to do people things. Things like invoice processing and using Document Understanding to do that, enable your accounts payable team to look at the exceptions and do exception-based processing, which requires human judgment."

Frees Up Staff

He elaborated on this example, explaining that keying an invoice and working out who to send it to for approval should be based on business rules. He said, "If it's not rules-based, it's probably an error or a miscommunication with the vendor who's sending it. Maybe it's a mismatch to the PO [purchase order], and that requires human judgment. Therefore, just getting it out to a human to do that at the right time is critically important."

He further remarked that UiPath lets users create business rules, such as checking if the PO and invoice numbers match, if total is a sum of the items, or if the vendor's name exists in the database. This helps with straight through processing that ensures higher accuracy of the results as well as timely human validation.

Capita's Sr. RPA Developer offered further insights into the nature of attended automation, which blends human- and machine-based processes. He said, "In my almost five years of experience, I have not come across a scenario where the automation could be purely unattended. In the use case with the invoices where we used document understanding, there was still a minimally sized team of five people in place after the implementation. They monitor the processes and if the criteria of 90% are not met then the invoice will be rejected and sent back to the vendor. In this case, attended automation is really helpful."

Improves Accuracy

#3—Leverages AI to Automate More

AI lets software robots learn how to understand documents and interpret data based on customer data samples. This is the essence of AI-powered automation. A Strategic Architect for IPA at Visionet Systems Inc., a software company with more than 5,000 employees, explained how it all works. Visionet Systems advertises itself an intelligent process automation (IPA) "shop." In this context, they work on Document Understanding projects, using their sandbox to, as he put it, "pump our clients' data into the Document Understanding frameworks and intelligent form factors to prove that the solution works."

AI Functionality

An Automation Engineer at a manufacturing company with over 10,000 employees provided an example, which involves a bot processing the PDF version of an invoice. Their solution has "the capability to scan an invoice and then pick out the required fields, such as the name of the vendor, the details of the products being sent, or the cost of the product."

He added, "There is an AI functionality that allows a user to program the required fields to be extracted, and the bot automatically follows those rules and extracts the data. Therefore, the AI functionality of Document Understanding is another important attribute that I personally like about UiPath."

"We use the AI functionality because it makes it feasible to automate processes that are quite complex," said an Application Development Specialist at a tech services company with over 10,000 employees. The natural language processing (NLP) in Document Understanding enhances UiPath's capabilities and allows his team to automate more processes overall.

He added, "Previously, when we were doing a specific task, we may not have been able to fully automate it. With the help of AI, we can do more. In previous iterations of our bots, before the AI features were used, we were not able to get all the information that we needed from PDF files. This is specific to certain use cases. The AI functionality generally gives us more data, whether from document understanding, computer vision, or otherwise."

Application Development Specialist
at a tech services company with
10,001+ employees

"We use the AI functionality because it makes it feasible to automate processes that are quite complex."

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Data Extraction

#4—Extracts Data That Can Be Used in Downstream Workflows

PeerSpot members praised Document Understanding for its ability to extract data from documents for use in downstream workflows. An Associate Project Manager at InfoBeans Technologies, a tech services company with more than 500 employees, shared that Document Understanding helps them read PDF files and "extract the data into different types using different extractors." For example, he said, "there is an MLextractor [Machine Learning Extractor] and other types that allow you to pinpoint fields and determine which should be accepted. Based on the confidence level, it gets better every time. In this way, the feature has helped us a lot." Figure 2 captures this process at a high level.

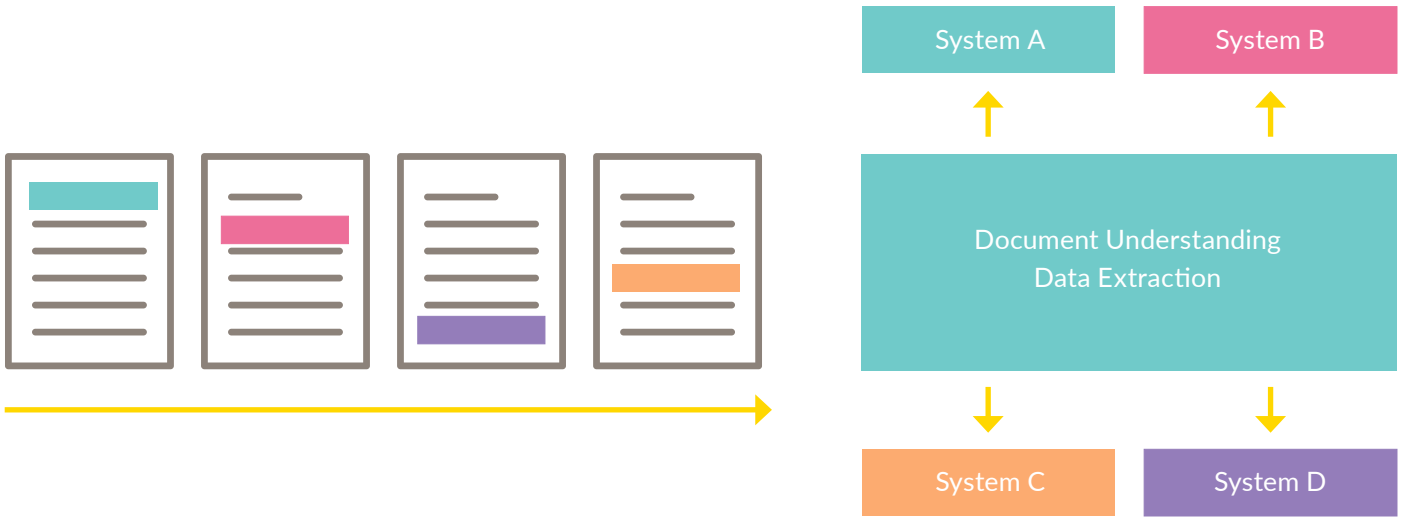

Figure 2 - Data extraction can pull data from documents and feed it selectively to integrated systems.

An RPA UiPath Trainee at a small non-profit organization provided useful detail about Document Understanding's data extraction features, noting, "I've trained the system to read different types of invoice formats." With his training, Document Understanding can read separate invoices, receipts, utilities, and so forth. He added, "I've used the solution to create processes for invoice reconciliation."

He went on to describe how he can use OCR for PDF extraction, among many features. He said, "I love Document Understanding. You can see whether a document is valid or not. You can accept or reject. I came up with a .NET background. I used to write so many lines of code for doing a certain thing. Here, you have a loop. You don't need so much code."

He compared this experience with the way things used to be when he worked for a gas utility in the UK. He said, "At that time we used a read-through data driver, and got the Excel data, and again validated everything. However, for that, we used to write around two, three pages of code. Now, using UiPath, you just do a real Excel activity, and you get the entire sheet. Automation has made our lives easier."

Geetishree R.
RPA UIPath Trainee at a non-profit with 11-50 employees

"I love Document Understanding. You can see whether a document is valid or not. You can accept or reject."

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Salah R.
Chief Innovation Officer
at Imbassy

"[Document Understanding] can automate ticket handling and responses. This has saved thousands of hours."

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Imbassy, a tech services company with more than 50 employees, has put Document Understanding to work generating AI-powered analysis that extracts information from submitted images and data. According to their Chief Innovation Officer, this capability enables UiPath to improve customer service and user experience. He said, "It can automate ticket handling and responses. This has saved thousands of hours. Document Understanding has made a massive difference by analyzing and extracting everything from user submissions, then putting it into tickets and generating customer satisfaction scores."

Capita's Sr. RPA Developer gave a sense of scale to Document Understanding's ability to extract data. Capital was working with approximately 250 different samples of purchase invoices, many in different formats. One might be a native PDF file, whereas another could be a scanned PDF, and yet another might be a simple handwritten invoice that was converted into a PDF based on a picture that was taken from a mobile device. He commented, "We were receiving these invoices from our client and they wanted to extract data from them. It was accomplished by using the Document Understanding features in UiPath."

#5—Integrates With Other Systems

Document Understanding is better able to improve business processes when it integrates with other enterprise systems, such as enterprise resource planning (ERP), human resources (HR) systems, and the like. This was what mattered to a UiPath Solution Architect at a financial services firm with over 10,000 employees. He said, "The integration is quite fluid. We can directly call a Document Understanding model and then give it to ML [machine learning] passer and then get the results out. It's smoother for integration."

For his team, UiPath is a separate solution, but it can talk to other services. And, importantly, he said, it "doesn't restrict you to the passer, but that's how the ML features within Document Understanding help us."

A Robotics Engineer Lead at Phoney-Tech similarly noted that Document Understanding, "has excellent integration with third-party tools." His company uses ServiceNow, which is connected to UiPath, and, as he said, "they have fantastic integration" which has resulted in savings of roughly 91,000 hours in the current year. He shared, "Automation is a critical time-saving solution for us."

Hamdhan K.
Robotics Engineer Lead
at Phoney-Tech

"[Document Understanding] has excellent integration with third-party tools."

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Third-Party Integration

Conclusion

AI-powered automation enables software to understand and process documents in many use cases. People can now delegate paperwork to software robots, while robots still go to humans for validation when it's needed. By applying AI-powered automation with tools like UiPath Document Understanding, businesses can speed up document processing workflows, reduce errors, and increase efficiency. Employees can focus on more valuable tasks. As Document Understanding users on PeerSpot shared, these outcomes are attainable, particularly if the toolset can integrate with other enterprise systems and extract data for use in downstream processes.

About PeerSpot

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