(1) Imagine Austin | Transforming Intelligent Document Processing -

Transcript:

(00:06) all right everyone welcome welcome there's so many people here excited to talk about tax we got an exciting agenda for you guys today we're going to talk about how to file your taxes and different tax laws and things like that I'm just kidding so uh I want to present here we've got Mark really appreciate his time from tax.

(00:24) com he's going to talk about how they leverage IDP Solutions we're going to talk a little bit as well about the evolution of of intelligent document processing to where it's gotten us to to today where we're starting to use be able to use generative AI to be able to process documents and you saw a lot of it of course at the at the U session this morning uh I encourage anyone that is interested to see more about the technology to go to our demo Booth where you can kind of dig into it and see how it works so we're going to

(00:50) kind of touch at a high level also want this session to be interactive so Mark and I are just going to kind of talk uh please feel free if you guys have any questions uh want to go off on a tangent we're happy to so but to kick things off I'm sure you guys have heard this number of times today so just pre Safe Harbor statement we're going to be talking about future capabilities of the product nothing we say here is a guarantee that these features will be in the product so if it's magic don't believe

(01:16) me all right oh there's our turn slide so with that I'll let Mark talk a little about who tax.com is and a little bit about his Division and what they do all right I know we stand between you and a happy hour right now so we're going to make it as quick and easy as possible uh my name is Mark Rodriguez I'm a director in our Innovation group at tax.com tax.

(01:42) com is a subsidiary of Ryan LLC if you haven't heard of Ryan LLC where Global Tax software and service provider tax.com is the software end of the uh of that Spectrum we've been in the market for over 30 years building out software solutions for practitioners by practitioners feel free to go to the next slide where we talk a little bit about you know the different practice areas that we have available from property tax unclaimed property indirect tax transfer pricing grants credits and incentives so if you like taxes you want to talk about taxes you

(02:15) want to talk about software in taxes I am excited to do that but thankfully we're not going to do that today we work in the Innovation group so this is a small piece of the tax.com uh group where we sit closely to our service deliveries the folks that are actually doing the Consulting with our clients looking for tax opportunities we have really three main strategic objectives the first one's Revenue growth we want to look and identify new service lines so we're constantly partnering with our different leaders in

(02:48) our business practices to identify New Opportunities we also want to help them strategic with strategic Sal support so there's questions that they have there's issues that they have with a particular Challenge from a client or a company we want to help them be able to take on that project and we want to provide Market Eminence the middle one is where we spend most of our time this is probably 60 to 70% of our time is around operational excellence looking to drive operational efficiencies within our practices looking at taking our clients

(03:19) from a small our practices from all of the Excel workpapers that they have today to more Enterprise grade Solutions with digital transformation Journeys and then finally helping them with technology enablement programs we have a center of excellence for automation anywhere and we'll talk a little bit more about that but this is where that operational excellence category lives and then finally research and development we want to help with R&D projects we want to do market research lead Innovation thought and workshops

(03:51) and of course if you had to add a sub bullet probably generative AI Explore More there right I'm sure everybody's heard of generative AI by by now show hands there we go we got some hands in there I love it all right I'll learn how to work this button here soon all right so let's talk a little bit about automation anywhere at tax.

(04:16) com we've been using it since 2019 the main catalyst and the reason why we're here today is because we had one Practice Group at practice area that was reviewing 1.5 million invoices a year and our one of the value one of the value differentiators for our group is that we are actually physically looking at those invoices So today we're we're still looking at 1.

(04:40) 5 million invoices we're just doing it in a much more condensed timeline so it's always going to be we're looking at those many documents but we've established a Coe model we have over nearly about 40 bot Creator licenses between onshore and offshore we have 1,500 iqbot learning instances in production yes we just built these as quickly as we can because we love it the standard form templates we've used this uh across sales and use tax property tax and oil and gas for severance tax and other types of uh reports that we need

(05:12) to get extracted and then we also have been using document classifier to do the Sorting has everyone heard of document classifier all right it's a great tool that automation iner has it really think of it as being able to create templates and have feed in a large PDF and it can sort them into the different templates that match so it's document sorting on steroids as I like to say it and then we use the doc automation using those predefined templates from APN voices and even you know playing around with the

(05:46) generative Ai and I I would second if you haven't stopped by the demo Booth over there number two go look at it it's really exciting on what you can do with uh the new release coming out any questions all right everybody knows what tax.com is now so the first thing we want to do is we want to talk about the evolution of intelligent document processing that's what the IDP is in this session so this is one of my favorite slides that's always or images that come up for uh IDP or iqbot it's really stands true today that 80% of

(06:21) your data is is captured in this semi unstructured area so you want to use IDP or intelligent document processing to extract that information and deploy natural language Pro uh processing and different tools and techniques to extract that value from the documents all right we're going to talk about the automation to transformation timeline yes that's a lot of dots on there and if you can't read it it's okay I'm going to go through it so the first where we start is traditional document processing you can imagine this is the

(06:59) man woman going through flipping the documents and actually keying those into a program what why is that a problem well it involves humans there's human errors it's hard to scale it's hard to identify those errors we move on to the basic automation where we're introducing software tools scannings digitizing data you know that's really was a a huge automation back in the 90s of the scanners moving forward to the early 2000s we start to see optical character recognition OCR that's starting to come

(07:35) to play how many of you are familiar with OCR I love it right it's like going to Adobe and hitting contrl F on a PDF I take that for granted that it wasn't there they tell me all the time Mark I remember a day it wasn't well thank god it's not my day anymore you know don't have to do that so moving on from OCR in the mid 2000s we start to see machine learning integration this is what we call our fixed form extractions this is where your standard iqbot templates come into play where you have a predefined

(08:07) template and format and you can now start extracting information from that format moving on to the early 2010s we start to see natural language processing so now you don't have to Define every variation of a word and in the world we live in sorry uh for AP invoices account payable invoices I don't have to denote invoice number invoice NBR invoice hashtag infv hashtag there's a lot of variations of the word invoice and I we actually did a study one time because we were looking at this and we had I think

(08:45) it was like 80,000 invoices the the word invoice number was it came through 180 different ways me OCR you're kind of stuck with what you get so right so instead of a eight B it was an eight it's like okay well hopefully we'll get that and capture that as well so that's where you start to see natur uh natural language processing moving on to the early 2000s you start to see some of the evolutions of IDP platforms and the key distinction here these idb platforms were purpose-built so they weren't

(09:21) flexible adaptable they're really one issue at a time built from an endtoend solution using OCR machine learning learning and NLP we move on to cognitive automation cognitive automation is the ability to start making decisions letting the machine make decisions on the data that was extracted and so you start to see that come up in the mid 2010s and then in late 2010s we start to see Advanced Data extractions the this is similar to Doc automation being able I call these my shotgun models I don't know what they do but I throw up the

(09:59) data and I get something back and I hope I I hope it's good so you see a lot of shotgun models and they're really great in terms of being able to identify more intricate complex structures of documents moving on into the 2020s this is the business process transformation this is where we are today that automation to transformation Journey where we're starting to bring in these uh task-based uh Sol Solutions and take a step back and connect them all together with the technologies that we have available so that's what we're

(10:36) going to talk about later today or Michael's going to talk about at least here in a moment and then we added one more little tidbit at the bottom of the future being able to take that predictive the AI insights and forecast and make proactive decisions on a document that you have that's probably going to be the future maybe something we'll be dealing with shortly any questions or anything to add Michael so I was going to ask so you know you guys of course tax documents are typically structured and things like

(11:06) that but also there's a lot of supporting documentation there so how have you guys been looking at generative AI from the perspective of being able to do some of this future State like predictive analysis and things like that yeah absolutely that's a great question so we deal in like I said indirect taxes property taxes Severance taxes one of the things that we've been doing with our Severance taxes we are looking for uh looking at specific contracts and looking at transfer Clauses for we can understand who has the rights to certain

(11:36) deductions or uh taxes and so we're using generative AI to identify those proactively across contracts uh you can imagine our legal team is pretty backed up and we have to send a lot of those requests and so being able to use generative AI to identify those are is been great also we do a lot in the property tax space we are looking for assessments and Noti that we are getting from the states and trying to be able to identify ways so this leads into our process because we're going through we're extracting

(12:08) assessment notification uh documents that we receive and we're putting this into models to identify whether we should appeal those items or not and what's the success of an appeal so those are some of those those end to-end automations that we're using leveraging generative AI so you can help me with my property taxes and definitely Texas yeah Texas is awesome um yeah for those in Texas property taxes is a sore subject so um conne so see if I can make this work there we go so if you think about today like where we're at we're really

(12:51) at a pivot point in this market you know for you know we saw that timeline there for a long time we've used these Technologies right the zonal OC the machine learning natural language processing things like that and the Market's really matur right we're to the point where we're close to two decades where these technologies have been used to process documents but if you remember that Iceberg right these sorts of Technologies work well for those structured documents those semi-structured documents but all that

(13:18) unstructured data which is a large part of what organizations receive you know even though when things are structured like tax forms you end up getting unstructured data and there's just lots of variation and there's lots of challenges when using this technology to be able to process the types of documents because of those variations so you spent a lot of time in in maintenance and overhead like you know Mark you mentioned you guys have 1,500 different essentially groups what we call them an iqbot where you're managing

(13:42) all these templates it's not that it's necessarily hard to set up right it's just kind of time consuming right but in the reality is that a lot of these documents are probably similar they're just different because they're different state documents and things like that right so I see the use of generative AI being a really a pivotal point in this market to really reduce that overhead of being able to one you know process documents that's never seen before without any pre-training and things like

(14:09) that and then secondly really reduce that overhead cost because you're not having to go back and continually train these models right it's not domain specific it's our first you know generative AI solution that we've seen in the market but at the same time I don't want to Discount these Technologies right they're still is a place right gener AI is not going to come in and replace all of these Technologies structure documents using zones is still going to be the fastest cheapest way to do it right uh same

(14:32) thing with semi structure documents things like invoices right there's tons of invoice models we have invoice models here at automation anywhere that we've created use those right those those are going to be the best suited for those those use cases but for us where we've infused generative AI into the technology we believe that we can make those things better right so making the invoice processing better by using the invoice model first and then gen second or just using gen in general right to be

(14:57) able to process these these unstructured documents and I will say it all depends on what you're trying to automate right there's instances where if we're able to take this 1500 uh iqbot learning instances and shave off 80% of the time that's still a value savings for our team we may not be perfect or you know if we have a variety of of invoices and we just need to be able to identify tax gen may be the right solution but if we have one vendor and we are trying to get a spefic specific field that may be

(15:31) uncommon the standard templates work phenomenal for those issues so it really depends on the use case don't think that you know gen is going to replace everything and it's going to solve your problems but you know we use a combination or one of those decisions uh to really Drive our processing so audience participation time so who like Mark has tested generative AI with their documents that wants to share just compared transcripts to what were the asking CEO C we predict B that's great so how are you guys

(16:31) orchestrating that those steps are you isale experiment gotta okay okay so you guys are using and then finalize our so that's a great way to start right so so of course we talked about security risk governance things like that right I think having that human in the loop is super important right and one of the things we've done with document automation as examples where we've infused gen AI is that you know it's not like you're just going in and setting up generative AI by yourself it's just a

(17:14) feature that's there right and we give you a controlled measurable way to send those prompts you're only sending the text of the document and not even all the text of the document things like that but starting off the way you did makes a lot of sense right so you can kind of test it out get comfortable with it but then leverage you know an automation platform ideally us to you know manage that IND end process manage that hum in the loop you know sort of situation so right that is a good point yeah try

(17:45) to find use cases that you're not you know the data is not sensitive right so in that case public data things like that but of course you know these technologies that are available today from Amazon you know Microsoft and Google they're you know they're fairly secure State they are secure um you know these are you know Services just like any other service you would buy from these hyperscaler vendors you know that are available to you so I saw some more hands back here anyone else want to share okay

(18:18) um so when you look at using generative AI for business and it kind of kind of to your point there it makes a lot of sense right there are areas where you it makes a lot of sense to use it and there are of course areas where we want to be a little bit cautious right and of course security is a big thing you know one of the things we do of course with our integration is that you know nothing we send is stored nothing we send is saved nothing we send is used to train a model right um so that's really important but when you're looking at it

(18:46) just from a business perspective right uh of course composition right that's what everyone thinks of a generative AI it's going to you know create our emails things like that but the other piece of course is information extraction right so we're leveraging this technology again to extract information off documents and get those key elements summarizing documents as you mentioned you know that's a great example of of the use case and then of course code generation right we saw a lot of use cases where you know we're going to be

(19:12) able to start creating automations using generative AI but the areas where you want to be cautious of of course is it's not a search engine it's not open-ended right you know this article here is kind of funny is usefully wrong it's not always right right and that's where we see the co-pilot application being really important part of any sort of generative AI product or solution that you guys build uh just to ensure that you know you have those human eyes on it and then you can add all the layers of

(19:39) validation and thing like things like that against your systems of record so let's dig a little bit deeper into how we process documents with generative AI because it's not really just about taking documents and just sending it to it and be like okay let's you know see see what comes back um part of the reason is that you you know it's it's it can hallucinate as we talked about right so the more data you give it you know the more open-ended you are as far as information that's coming in uh

(20:09) the less likely you you're actually able to get the result you want or predictable results right and at the same time too as I mentioned earlier you know let's not discount existing Technologies you know when it comes to semi-structured documents structure documents things like that we could augment those capabilities with large language models but in this case we don't want to Simply look at them as replacing those those large language models but the first step in the process really is important for us is that we

(20:33) structure these documents before they're sent right so we OCR the document we be OCR we structure that text and we send that structure with the prompt that you've defined you know that question you have and then we ask for structure back it's going to make it more accurate it's going to make it more predictable it allows us to send only the information that needs to be sent to the models right and it helps us with the limitations of situations where where there's only so much data right you can

(21:00) send to these models uh there's there's limits you can't send a 100 pce contract but if you needed something out of the contract we can break that text up and we can only send the information that you need this also helps in another way right governance right so we're controlling what's being sent you're seeing what the prompt is there and that's it right it's not an open-ended chatbot chat GPT interface sort of thing right you're simply asking questions about the data that's on the document

(21:25) and then we were returning those results of that data on the document and then of course incorporating that with the other engines you know we talked about classification you know splitting engines that we have as well pre-processing Etc and that human in the loop to then in turn you know go validate this so again highly recommend you know go see the demo in the demo Booth uh downstairs to get to see it in action um wow you can't read that but if you could read that um so you know essentially it's as simple as asking a

(21:57) question and it it seems almost too simple you're like really that it works it works it does right and for me you know I've been in this space for 18 years now you know I've seen all the different Technologies I've set it up in so many different ways this is It's just so simple and it seems like it shouldn't be this simple but if you could read this text you could see here so this is our interface you know the control room U you know we have a query box here and that's where you put your prompt again

(22:21) it's controlled right all the integration all that work behind the scenes we do to you know to structure the document all the pre-processing things like that is managed for you you simply come in here and use natural language text and of course you can play around with the prompts you know you can different formats things like that but again it's fairly easy and one of the most important things we have as well again you probably can't read it here but the the rules right so the field level rules the document level rules so

(22:48) traditional IDP Solutions return a confidence level I'm sure you guys have heard of that before so the confidence level essentially is a percentage that returned by the algorithm says whether or not it felt confident that it extracted that information properly well these models don't return a confidence right because they're not ADP Solutions so we have to be able to add business rules to it otherwise you'd have to have a human just check every single one of them and we don't want to do that but we make it really easy where

(23:13) you can you know just click here in the same tab you can add different rules and you can do things like check for you know patterns formats uh empty values and things like that and use co-pilot you know to have to allow that user to be able to manage those exceptions and that's where co-pilot comes into play I think you know this is it seems so simple in a way right just embedding this technology in these applications but it's so powerful right you know if you think about how you want to add new technologies in your organization AI

(23:47) capabilities and you think oh wow I've got to go create systems you know new applications things like that I have to train the users on these applications you have change management you have resistance from the users and using these applications but what if you know in this example you want to be able to process documents whether it be structured semi-structured unstructured and if there is an exception to any of the validation rules that you've created or things like that you simply embed that in their application that they use

(24:14) every day right so you don't have to retrain them on anything and in the end the user doesn't even know you're using generative Ai and they don't care right they just know that those are being processed and you can expose that directly into your applications of choice again super powerful again you know users don't have to learn something new all they have to learn how to do is click the button new little box in the corner and then they can validate those documents so you guys have seen this a

(24:44) lot over the past couple days but you know I want to reiterate here right so when we talk about automating documents it's not in a silo right it's really as part of a platform it's it's around the process orchestration you know we're not an independent standalone own document processing solution we see document automation as a core component to helping you automate your tasks your specifically your document intensive task right um so whether it be you know integrating into you know an into in workflow or

(25:12) whatever it may be what's great about this tool is that it's it's built into the system right it's not a separate product that you install it's simply as you saw available to you uh in the control room and it's a feature that you can just drop you know document extraction directly into your processes I have a question Michael so what's the difference between doc Automation and generative AI in the context of automation anywhere so that's a great question because it's so document

(25:39) automation is you know kind of a verb right you automate documents but it's also the name of our product right and document automation is a a feature right in in the platform generative AI is just a component right it's just an engine it's like saying we're using an OCR engine or or we've built a document specific parser like an invoice or something like that um so you know in the context of the users who are doing the development or the end users right they really don't know or won't know

(26:05) that it's using generative AI or and and they really shouldn't care at the same time too so I ask just briefly what is the difference between document Automation and IQ someone's going to ask the question that's great uh so the so the the main differences between it are first the architecture right so IQ question what's the difference between doent Automation in iqbot hey I still owe you a drink forget um so iqbot is a standalone application right so that was our first generation intelligent document

(26:39) processing solution it was bolted on you know essentially you know into the workflow um what we've done with document automation is kind of rethink how intelligent document processing works right so as opposed to being a separate application we've integrated it directly into the platform right so it's just a feature it's there if you have a license for it you can use it um and then secondly we've also added a lot more capabilities than what you see with IQ bot right so we've added lots of new

(27:05) engines we've Incorporated other thirdparty engines as well from our partners like Google and then of course we've added some of this generative AI capability but we've architected it such that you can actually bring in many many different engines uh and and we continue to create a platform that's open which allows us to incorporate you know these different models very easily into the solution so again the main thing is the architecture I would say there uh and and then the second piece is just the general

(27:34) capabilities right so with document automation we can really support any document type and I use any is a strong word because of course there's going to be like you can't scribble across a piece of paper let process that but you know we've really expanded the you know use cases with the different you know engines that we've added to the solution one more if it's not too long what when you say the engine is the engine part of document a or one thing before you answer I I think of it a little bit simpler I think of iqbot

(28:03) as template based models where I have to go and predefine where am I going to find this this field and that field and when we're using doc automation they have models in there that already Define those for you now you can bring iqbot standard templates into the dock automation because the dock automation is not only the extraction piece but also that uh that component that shows you the PDF and the reviewer capability for the human in the loop so that human in the loop extraction that's considered the the document automation but for me

(28:40) the models are really what drives the difference is the iqbot is purely a standard template based approach whereas uh doc automation has the ability for these other models that are more uh machine learning driven and you can you know predef it identifies the field for you those keys and values one not necessarily you need not use the other at the same time true yeah yeah and Mark makes a good point like you know if you have iqbot today you can actually use it inside of document automation because we see it as that engine right but if you

(29:09) don't have IQ today you can just go straight to do correct yeah and and and to your question too around what is what do I mean by engines right so we look at the extraction is there's no really no one siiz fits all to extraction right there are different capabilities in the market that work for certain different document types and things like that so what we wanted to do architecturally is really create platform that allows you to bring in all of these different methods in which you can extract data

(29:33) from documents without you having to do all the integration and and call apis and stuff like that right we've kind of built that all into the platform thank you thanks question so it's it's not yeah it's not OCR right so we OCR the document first before we send it to generative AI but from an integration standpoint yes I mean you can kind of think of the same thing right it's just kind of another engine we use behind the scenes but it's not an OCR engine right we have to OCR the document first and then we send the text

(30:31) so not the actual document image we just send the text to the generative AI engine very well it up gotr piece there you got it learning so where F window so it's it's a method and I'll let you it's kind of a method of doing the extraction right so one method of doing the extraction could be like the key value pairs right so you've got in document Automation in iqbot aliases right so that's your your key word um and you can do patterns and things like that so you can think of gener AI is

(31:24) just another method of doing extraction so instead of having to do the key value payer machine learning you just do prompts you just ask questions essentially so but Mark did you have yeah no I exactly right and I think of generative AI is almost like a classification engine it's going to go and identify those schemas for you so you don't have to have a pre-defined as we said invoice number invoice NBR it's already going to know that because it's been trained on other documents so it it's it's not taking it's not taking the

(31:54) OCR and capturing it like IQ B today with relationships of how you know far away is it from other key wordss and values it's truly looking at the text to infer those uh those uh extraction tools right but iqbot still something I I get you on the training of the groups and you're like it looks exact same but now it's a brand new group I got to go train it it's a mess I get what you're saying now so instead of me having a process around inv around and I have to feed it in directly only now you're

(32:43) I and and Doc automation used to have was model driven right so it had again purpose-built models one for AP invoices one for driver's license now with Gen generative AI it basically just uses the llm model to identify and it's already seen those types of documents so you're prompting it with the questions and the elements to extract for it can render on the doc automation component yeah and as long as the question across all documents is the same like to your point like if you have different doc types

(33:16) then yeah but if you have some Doc types where it's like I need these certain fields or these certain fields and then you create a specific model or Lear we call learning instance for that particular document to do that extraction so and to all the other that you have already yeah exactly so question back so right um so we found so we've got and of course that's kind of more on the OCR side of things right I'm sorry question no problem John so he's saying does document automation handle handwritten

(33:52) documents and he said hyperscience does a good job with that right um so we have Incorporated the Google Vision OCR engine we found that it does a really good job of handwriting but we continue to add you know different engines so you know if you guys come to us and say look you know this like let's say a hyperscience engine works really really well for handwriting you know could we potentially add that we could look at that as an option but right now we have Abby and Google Vision as the two options so yeah that's a great Point uh

(34:28) I should have put a slide on that but I uh you know we've been talking a lot about generative AI but actually with this release with that 30 release which will we'll start launching next month uh we've got a lot of new things we've we've added to it uh so we've added some new pre-built um models so there's bills of leting arrival notices packing lists and I'm missing the fourth one what is it Alex way bills yeah and we bills um so that uses a combination of kind of traditional you know machine learning

(34:56) approaches as well as of AI of course like we've added that unstructured document type another very common request we've seen is scripting right so it's something if you have iqbot you could do that in the past so now in30 you can add scripts to manipulate uh the extraction pre as well as post validation as well um Alex what what else am I missing of what we're doing 30 that's SDK oh yeah that's right the SDK so the other big one too is is uh a software development toolkit um as you saw you know especially in the early

(35:32) days of document automation where we've integrated different engines we started with Google like we've got google.ai and things like that and that's an integration that we built but what we've done now is we've opened up the platform is if you have a customer or or you guys have you know your own IDP solution of choice that you say I've already got this could I integrate it into you know the automation success platform this new SDK allows you to do that so if you can create a a package to call another

(35:59) solution as a service right you can actually now incorporate that package and build a learning instance with that package uh and leverage of course co-pilot leverage our validation interfaces and things like that so it really opens the door to expand if you you know have a solution where you got a really complex document type and you found like this one engine that no one knows about um you know as long as they have you know apis that you can call to do that extraction you be able to do that with this new SDK

(36:29) capability and the great thing is as a developer you have all of this of course under one umbrella right it's one interface where you manage all your different document types regardless of your extraction all right any other questions in as far as redacting the information or just tax contain so as far as and that's uh here Alex I'll give you a microphone that's a great question for you um so I don't know if you guys heard the question so is so Phi data right so when you're sending you know information

(37:22) like a tax from a tax document to the generative AI models how are you handling this are you sending that information across or or can we redact some of that information so real quick let introduce Alex so he's one of the product managers for document automation so he's our resident kind of more technical [Applause] expert hello guys can you hear me um this is a pretty complex question so if you do not don't want to expose that personal information with like third party Services just don't use them so we

(38:00) have our models that are that are running on premises so you can use Ab OCR that can be executed just on your local machines and you can use invoice or other models user defined models that also will be executed on your local machines so in this case the data doesn't go outside of your premises but in some cases um if you need to process that data SSN is not basically big problem if you have um Security review from your company that they agree to send specific data to that location uh and we can provide you

(38:43) certificates that we have like so 2 certificate type two we have other DPA agreements that we expose what exactly we do with your data so we do not use your data we don't uh use content of from documents for training we don't send that data to anyone else so we like honestly expose what we do with that data and if your Security review uh okay with that so you can you can use those services but it it should be like a specific decision like what kind of extraction providers can be used in your specific

(39:22) case Simple Solution don't use third party engines it will be on your local machines if you want to use third party you need to pass that Security review make sense all right any other questions hang on John let me get let me ask him so we're going GA in next month right but we have been testing it you know for some time now and developing it you know for this past year um and you know we've been testing it with customer documents and and had some early customers that have been using it so good luck it works pretty well I mean it's

(40:10) uh it's surprising to be honest with you because everyone like that knows me I'm I'm skeptical of you know these types of Technologies and I I was impressed so um yeah and you can see that you on the boot so you can go to the demo and see that a lot yeah so as a service are you users toed Alex question um so I don't I don't do we have any fed ramp with the platform so we had plans to to uh certificate and that fed ramp stuff but uh it took too much time you need to find like a sponsorship or something like that that

(40:55) that will help you to do that and I think it's still in plans but not finished yet you going to you going to help the sponsor perfect yeah so we've got seven different SKS now no it's actually to you're right yeah um no so you you'll actually be excited to learn that it's just part of the the existing document automation SC so if you are an existing document automation customer you get the new gni stuff it's included now yeah aome question uh you do not by default no so it's a separate license and skew

(42:00) any other questions great questions by the way I like audience participation but if you only have iqbot talk to yourselves rep and get into doc automation because it it helps it truly does so don't don't forget that you're saying doc automation is a more intelligent version essentially of IQ especially classification can look and has yeah so that you're saying to we do so we've actually we came out early this year with a new Advanced classification engine as well um so we've always had

(42:41) the classifier with iqbot but the new Advanced engine what it does is allows you to do things like Define rules so look for certain keywords and phrases in a document so you can be more granular making it more intelligent essentially put into it and um and and just some more advanced kind of machine learning capabilities as far as like giving it samples for especially unstructured content or even things like invoices which are complicated because they all look the same right and they're not yeah but they're not so it's it's a little

(43:10) more intelligent you know from that standpoint and that's you know it's it's a package right so it's not necessarily part of document automation but we look at it as part of like the UN toin Sol yeah solution flow yeah they didn't have that 5 years ago when we did this and so if you know just the maintenance alone is is worth going to Doc automation because if I can you know there's no need for me to go and retrain groups of only three documents right and we're doing that today because we're trying to

(43:39) keep up with uh keeping clean the production instances but if I was just to use this and only for those troubled documents have a secondary process to use iqbot that would be a much better approach for us now so just uh you know if you haven't played around with it encourage you to play with it that if you can even get the geni component now right that's a part of it it's just uh even better so certainly take a look at it thank you for all information yeah thank you yeah you have a lot of experience with

(44:13) type of project the process of training the model we have learning thatn all as AEL that responsibility to the process owner or you have AAL support team that help the process owner for several so of course it depends on the model right so with the like for example the invoice model right use this kind of standard machine learning capabilities it's really the users as they're validating those documents it just learns over time so use an administrator don't necessarily have to go in and train it now when you first set it up

(44:51) you'll probably train you know some of the larger higher volume ones um but then like with generative AI for example you don't have to train anything right you literally just give it prompts it doesn't have to have any context or anything like that so it's it's much much easier just from an overhead administrative standpoint um of course there are still like fixed forms capabilities in the product as well right so with what we call standard forms you can add five samples of a fixed form document and it'll be able to

(45:17) use zon OCR to extract that too but you have options ideally you know you know to Mark's point you know if you can use gen it's a lot less overhead there's a lot less maintenance because you don't have to train anything all right any other questions so it's on what floor is that fifth floor oh it's third floor so it's third floor uh demo booth number two it's right across from the uh Ballroom keynote sessions y okay you do not NOP so yeah it it it so it uses open AI uh on Azure so the open AI

(46:07) Services it's our instance so you don't need to buy the licenses or anything like that so it's all included yes and no and I guess and that's a good question for for Alex because um you know the the engines themselves you know don't care about the language themselves but I think you know there are some limitations right just in the interfaces and things like that from a language standpoint but yes currently in the user user interpace you will see English only but basically I try that with different languages if we are

(46:40) talking about gen specifically that model GPT model can extract data from different languages I even tried with Japanese and it works um but in the user underface it will be English only we will expose that later so that's the you our plans to add more languages especially European languages but currently you will see English only but you can ask questions and prompts using different languages and it will be able to handle that and uh uh good news that we use Google Vision OCR for that and it supports multi language documents even

(47:17) if document contains several languages in one document it will be able to extract that properly to follow will it translate to English for any orlo usually it's not our use case the translation I mean you can do translation then as a post-processing step like in RPA automation right so you can translate it using the same GPT or other services but even before validation you can do that I mean it's kind of a step that you can put between extraction and validation but it's not automatic 29 28 uh all right well one more

(48:18) question good question it depends I think um by the end of October like all tenants globally should be updated that's that'll be our Target date so it will be available for cloud only right now and on premise version we'll support gen in sub subsequent release that is January December January yeah and if if it's in the I don't know if you have it today okay so if you have a Sandbox environment it has already been updated it got updated last week so you can start using it in the sandbox okay all right well thanks

(49:10) [Applause] everyone

YouTube

https://www.youtube.com/watch?v=qNa8i7iNjB4