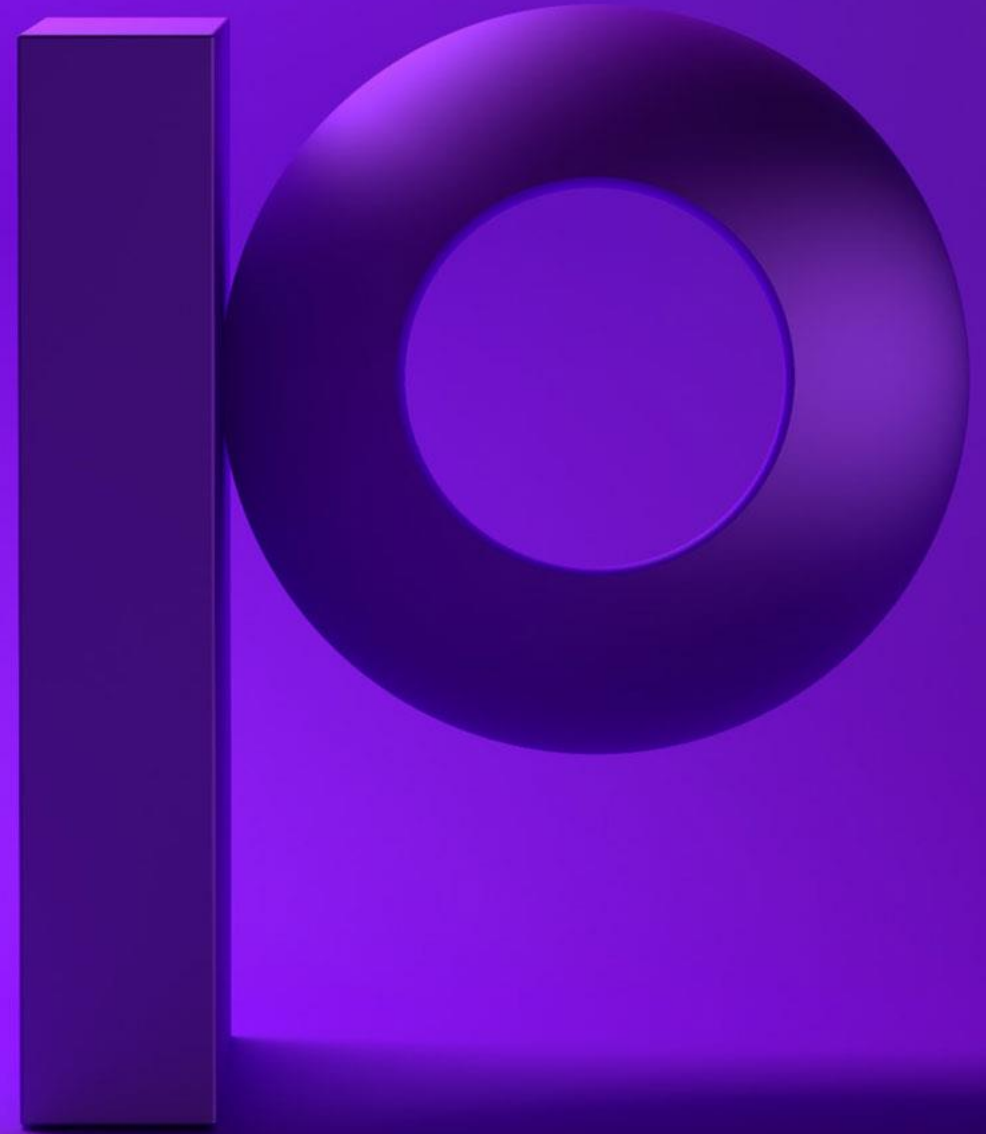


**precisely**

# Applying Hyperautomation to drive business success

Hyperautomation for complex, data-intensive SAP<sup>®</sup>  
processes

Andrew Hayden | Precisely



# Agenda

- Automation, hyperautomation and digital transformation
- Artificial intelligence in automation
- The value of an automation platform
- Key takeaways
- About Precisely

The background features several 3D-rendered geometric shapes in various shades of purple and blue. There are two horizontal rectangular blocks, one at the top left and one at the bottom center. A vertical rectangular block is positioned on the right side. Several spheres of different sizes are scattered throughout the scene, some appearing to be partially cut off by the edges of the frame. The lighting creates soft shadows and highlights, giving the shapes a sense of depth and volume.

# Automation, hyperautomation and digital transformation

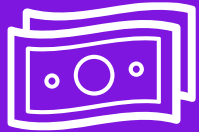


**Technology is a means to an  
end: Data is the currency of  
digital transformation**

- HfS Blog

# Accelerating digital transformation

Data is the fuel for decision-making today



\$1.04 trillion spent  
on Hyperautomation by  
2026



80% of CEOs  
accelerating digital  
transformation



67% spending  
more on technology  
than people



45% of enterprises using  
SAP are leveraging  
automation

Market is growing at 12% per year

# Customer needs:



Be more agile



Go faster



Improve the quality and integrity of your most important data



# The need for improving financial data quality

<22%

Of senior finance executives said they were entirely confident in the accuracy of the data they hold and analyze as part of their role.

KPMG – Facing Forward: The Evolution of the Modern Finance Leader

# Customer wants:



Optimize staff



Reach ROI faster

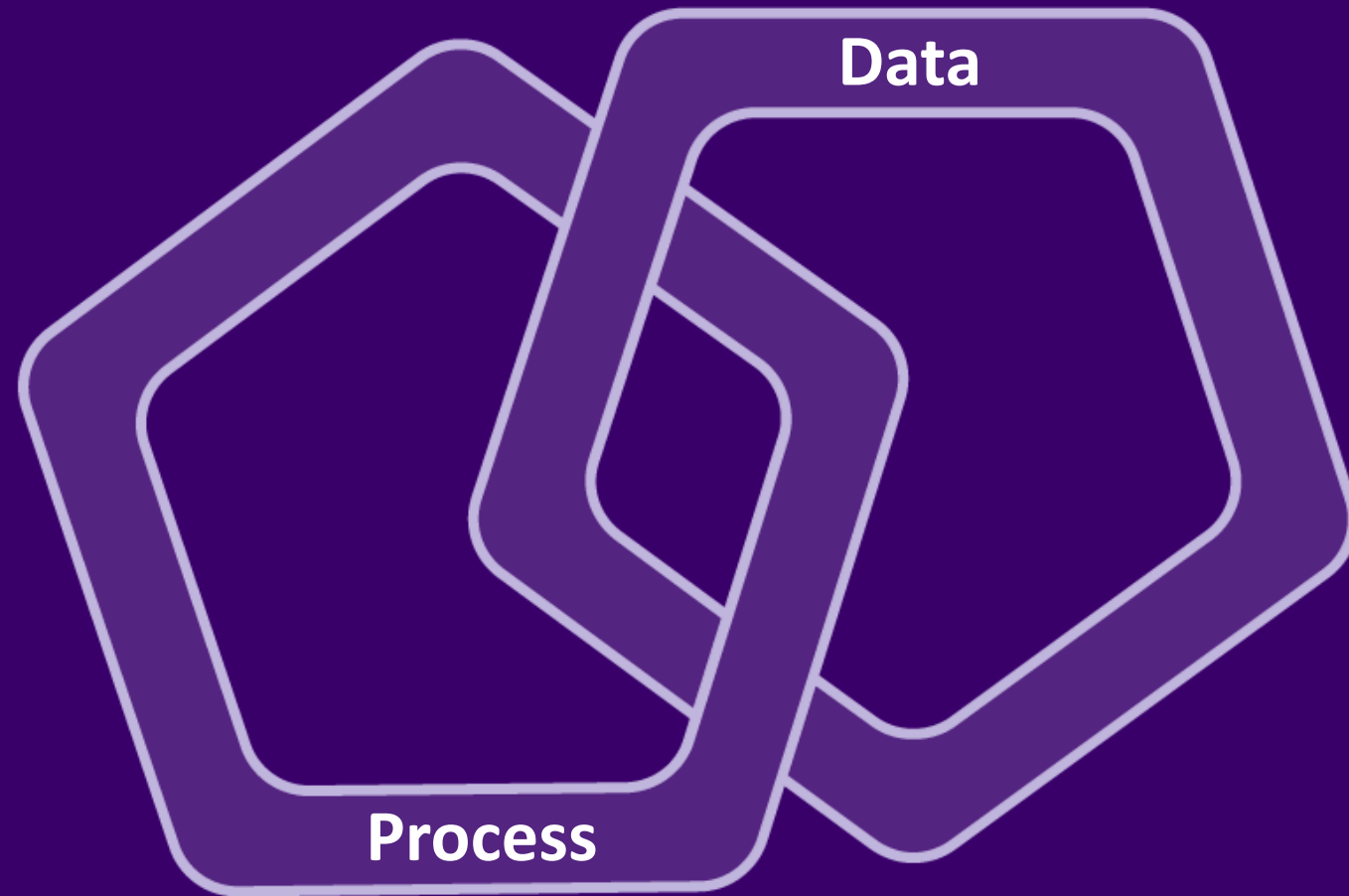


Realize Digital Transformation dream


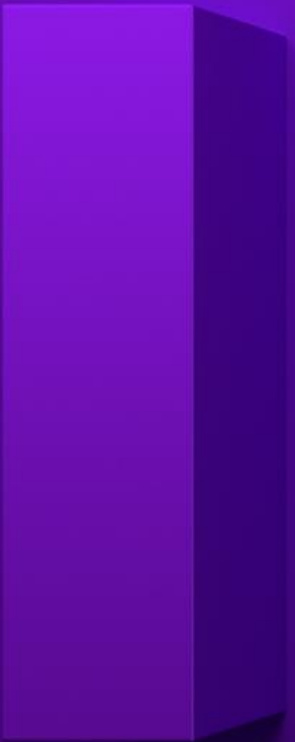




# Interdependence of process and data



Hyperautomation?



**Hyperautomation** is a business-driven, disciplined approach that organizations use to rapidly identify, vet and automate as many business and IT processes as possible. It involves the orchestrated use of multiple technologies, tools or platforms

Gartner



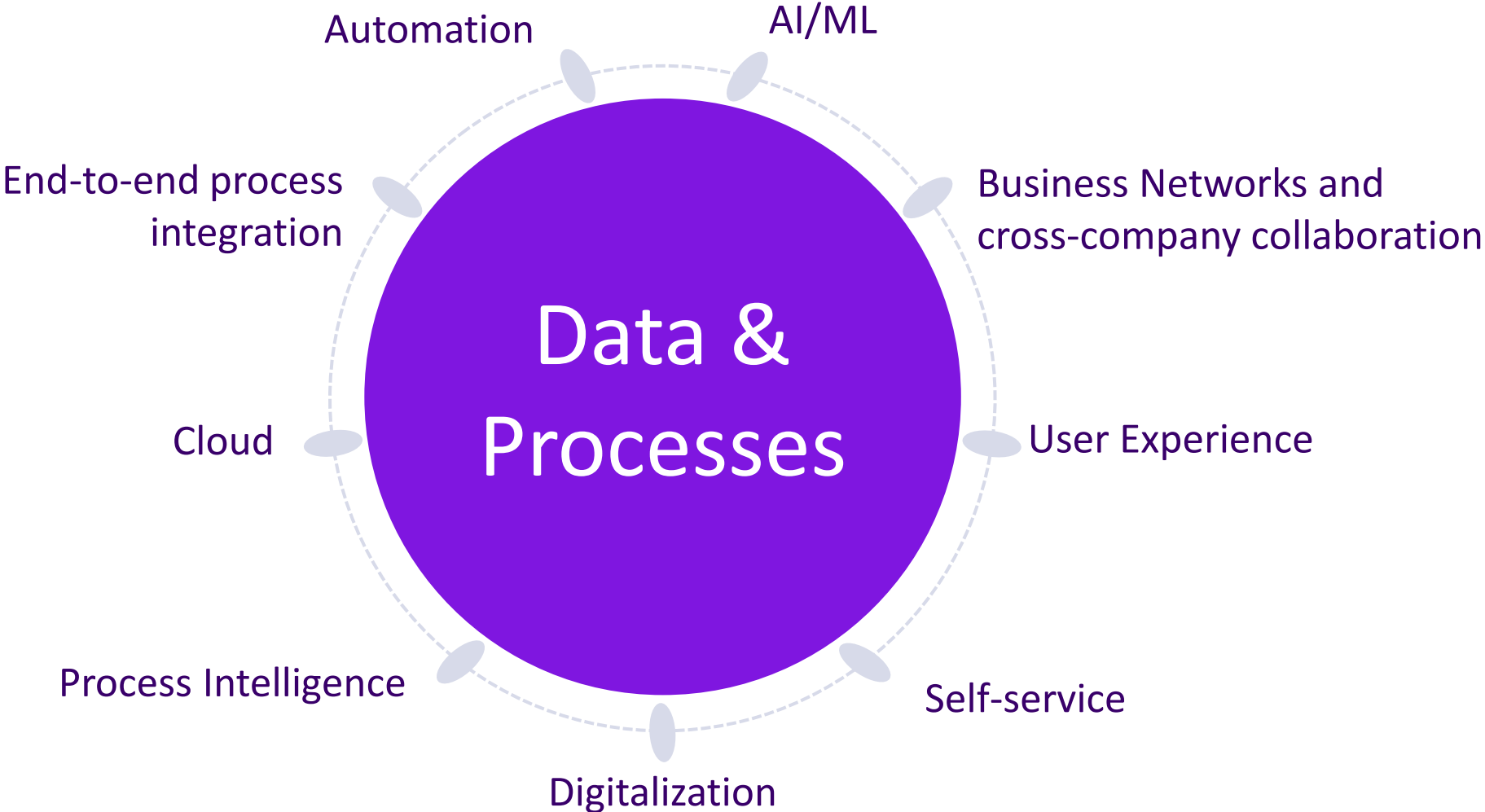
**We have Blue Prism and  
Precisely Automate and we  
choose the best tool on a  
case-by-case basis.**

**Robotics Program Director** – Global beverage and spirits  
company

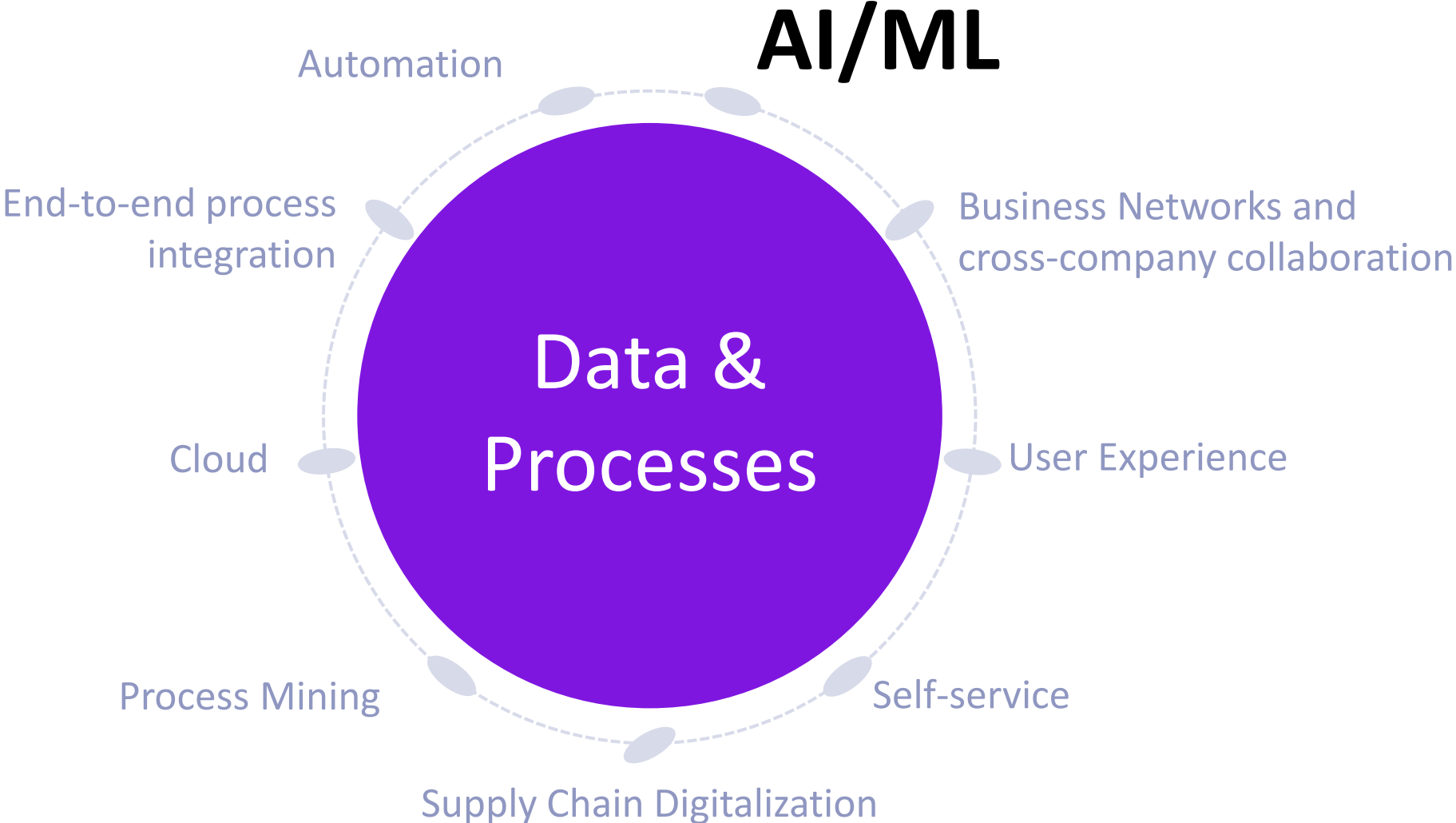
# Artificial Intelligence

The background features several abstract 3D-rendered geometric shapes in various shades of purple and blue. There are two spheres, one in the upper right and one in the lower left. A horizontal rectangular block is positioned in the upper left. A vertical rectangular block is on the right side. A small vertical rectangular block is located in the center, partially overlapping the text. The overall aesthetic is modern and minimalist.

# Digital Transformation journey



# Digital Transformation journey



# AI comes in various flavors

	<b>Generative AI</b>	<b>Predictive AI</b>
<b>Goal</b>	Create new content	Make accurate predictions
<b>Algorithms</b>	Complex algorithms and deep learning based on LLMs	Statistical algorithms based on machine learning and observations
<b>Output</b>	New content such as text, images, music, etc.	Predictions such as the likelihood of a field value or routing destination



# Master Data Creation

Constant new materials creations and changes

Highly manual, complex process with lots of possible data entry error points

**New Finished Goods**

Project Name \* Red valentine chips Project Owner Heather Oebel Process Name NPI-FinGoods-000078

1 Plan Ready

**Supply Planning Copy From Properties**

Base UOM: PC Material Group: 01514 Old Material Number: 78911 Gross Weight: 75

Weight Unit: G-Gram Net Weight: 70 Volume: 0.500 Volume Unit: L-Liter

Select Property: All [Update Table](#)

**Supply Planning New Finished Goods Properties**

0 Validation Errors [Export to Excel](#) [Upload Excel Data](#) [Add new item](#)

ID	Material Number	Industry Sector *	Material Type *	Description *	Base UOM *	Material Group	Old Material Number	Gross Wt	Weight Unit	Net Wt	Volume
1		F-Food	FERT	Organic blue tortilla chips - snack	PC	01514	78911	75	G	70	0.500
2		F-Food	FERT	Organic red tortilla chips - snack	PC	01514	78911	75	G	70	0.500
3		F-Food	FERT	Organic yellow tortilla chips - snack	PC	01514	78911	75	G	70	0.500
4		F-Food	FERT	Organic white tortilla chips - snack	PC	01514	78911	75	G	70	0.500
5		F-Food	FERT	Organic blue tortilla chips - 5oz	PC	01514	78911	75	G	70	0.500
6		F-Food	FERT	Organic red tortilla chips - 5oz	PC	01514	78911	75	G	70	0.500

# Master Data Creation

To improve data quality, companies typically set out to define 100s of data validation rules

The screenshot displays the SAP 'Query Copy From Material' interface. A purple callout box with the text 'Embed your business rules to improve data quality' points to the validation results window. The main window shows a table of material data with columns for ID, Industry Sector, Material Type, Plant, and Stor Loc. A validation results window is open, showing a table with columns for Page, Column, Current Value, and Validation Error. The table lists three errors: a description exceeding 40 characters and two invalid sales organization options ('abc' and 'fert').

**Embed your business rules to improve data quality**

Page	Column	Current Value	Validation Error
2	Description	Org. yellow tortilla chips - party size bag	Max length of Material Description is 40 characters
1	Sales Org	abc	Invalid Option: abc
2	Sales Org	fert	Invalid Option: fert

# Challenges in establishing business rules

Heavy reliance on SMEs and tacit knowledge

Gaining cross-functional alignment is time consuming

Covering edge cases in a rule is difficult

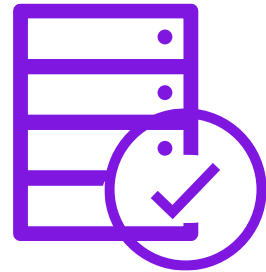
Even rules do not achieve 100% data quality

What if you could eliminate the need for many of these rules by using Machine Learning?

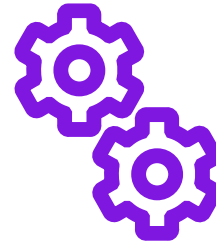
# Master Data Creation with ML



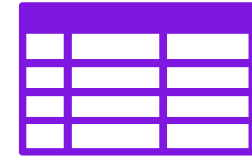
New Account  
creation request



User enters  
minimum  
number of input  
fields



ML predicts output  
fields based on  
delivered input  
fields



ML output fields are  
used to pre-  
populate and  
validate form fields

# Benefits of Machine Learning

- Improve data entry and decision making through recommendations
- Improve data quality through ML-based checks
- Create rules and predictions that are not possible without ML
- Reduction of hard-coded rules
- Reduce complexity to determine business rules
- Reduce time to value in solution development

# Why Precisely Automate?

# Precisely Automate Platform

## Automate Evolve

### WORKFLOW-ENABLED PROCESS AUTOMATION

Automate and streamline SAP processes using workflows

- Advanced form and workflow capabilities
- Advanced data stewardship capabilities via web forms
- Data automaton and management (Excel – SAP)
- Extensive Audit and ROI reporting
- Detailed process analytics
- Process governance
- Centralized management
- Server-side file management and execution
- Attended or unattended automation
- Business-focused, low-code environment

Business users work  
in Excel or web forms



## Automate Studio

### STANDALONE DESKTOP

Exchange data with SAP quickly and easily using Excel

- Data creation and maintenance
- Data migration
- Operational reporting
- Data stewardship

Business users work in Excel



# A complete automation platform

## Data Automation

### Excel to SAP

Exchange data with SAP quickly and easily using Excel



## Process Automation

### Excel Workflow

Automate and accelerate SAP business processes through Excel file management workflows

### Form & Workflow

Automate and accelerate SAP business processes with integrated forms and workflows



# Manage SAP data using Excel

Why stop using the finance and accounting tool of choice?

FI-CO processes often:

- Requires specific training
- Finessy manual processes
- Complex multi-screen transactions and processes

The screenshot shows an Excel spreadsheet interface for managing SAP data. The title bar indicates the file is 'FB50\_JournaEntry-with Split - YClient.dsm - Excel'. The ribbon includes 'Wishuttle Run' with various options like 'Write Headers', 'Log on', 'Backup Data', 'Start SAP GUI', 'Skip Indicator', 'Validate', 'Schedule', 'Simulate', and 'Debug'. The spreadsheet content is organized into several sections:

- RUN RESULTS:** Contains buttons for 'Convert to Split Tab' and 'Document Attachment'.
- DOCUMENT HEADER:** A table with columns: Company Code\*, Document Date in Document\*, Posting Date in Document\*, Reference Document Number, Document Header Text, Document Type\*, Balance Check, and Clear Logs. The data row shows: 1000, 9/24/2018, 9/24/2018, 8301, Header Text Here, SA, BALANCED.
- DATA INPUT:** A table with columns: ID, VALIDATE LOG, \*General Ledger Account, \*Debit/Credit Indicator, \*Amount in document currency, Sales Tax Code, Tax Jurisdiction, Item Text, Cost Center, Order Number, Profit Center, and Work Bn Structure (WBS E). The data rows show a list of 14 line items with varying amounts and cost centers.

# A complete automation platform

## Data Automation

### Mass data management

Exchange data with SOR quickly and easily using Excel



## Process Automation

### Excel Workflow

Automate and accelerate business processes through Excel file management workflows

### Form & Workflow

Automate and accelerate business processes with integrated forms and workflows

# Manage journal entries using Excel

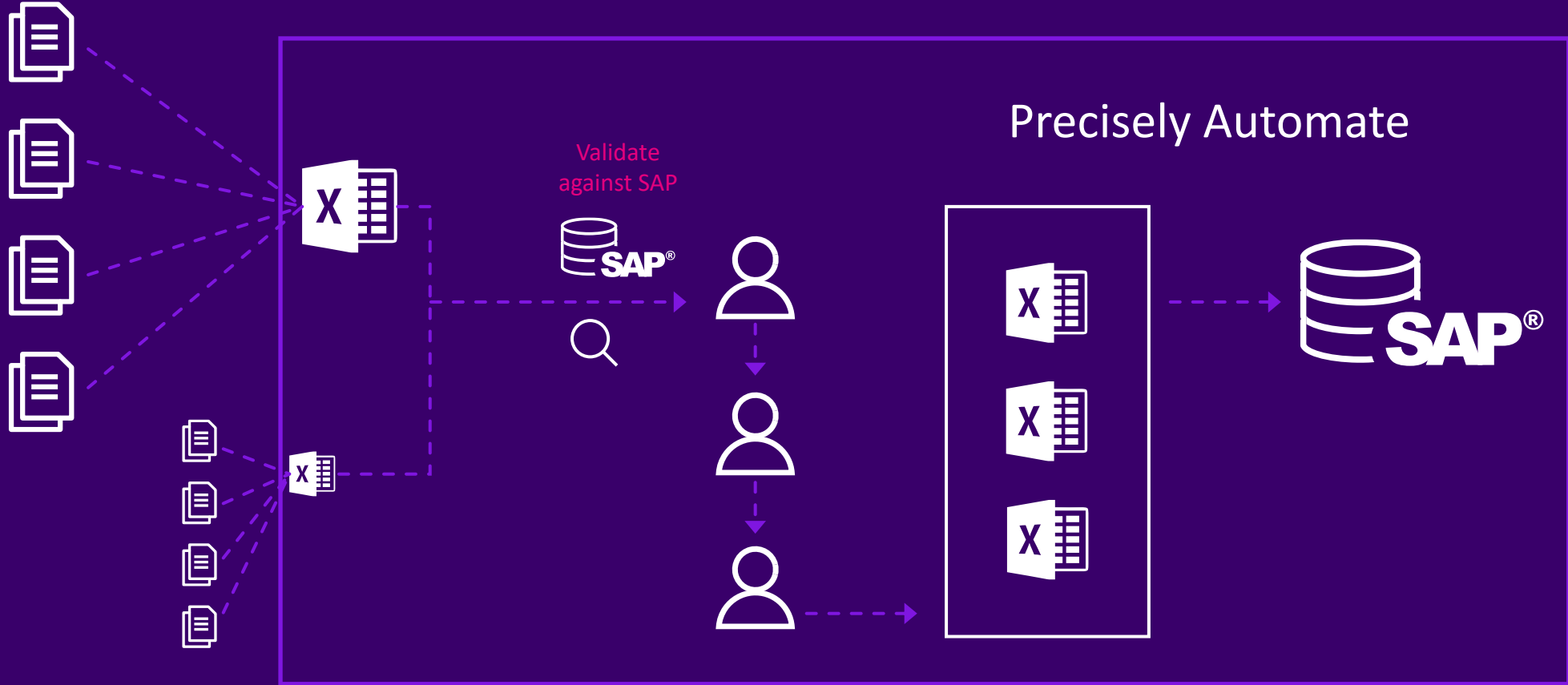
Flexible, desktop journal entry automation

The screenshot shows an Excel spreadsheet with the following sections:

- RUN RESULTS:** Includes buttons for 'Convert to Split Tab' and 'Document Attachment'.
- DOCUMENT HEADER:** Contains fields for 'Company Code', 'Document Date in Document', 'Posting Date in Document', 'Reference Document Number', 'Document Header Text', and 'Document Type'. It also includes 'Balance Check' (showing 'BALANCED') and 'Clear Logs' buttons.
- DATA INPUT:** A table with columns: ID, VALDATL LOG, \*General Ledger Account, \*Debit/Credit Indicator, \*Amount in document currency, Sales Tax Code, Tax Jurisdiction, Item Text, Cost Center, Order Number, Profit Center, and Work Bin Structure (WBS). The table contains 14 rows of data.

ID	VALDATL LOG	*General Ledger Account	*Debit/Credit Indicator	*Amount in document currency	Sales Tax Code	Tax Jurisdiction	Item Text	Cost Center	Order Number	Profit Center	Work Bin Structure (WBS)
16	D	473000	\$	1000.00			Line Item 1		3110		
17	D	473000	\$	1000.00			Line Item 2		3110		
18	D	473000	\$	1000.00			Line Item 3		3110		
19	D	473000	\$	1000.00			Line Item 4		3110		
20	D	440000	\$	1000.00			Line Item 5		3110		
21	D	473000	\$	1000.00			Line Item 6		3110		
22	D	473000	\$	1000.00			Line Item 7		3110		
23	D	473000	\$	1000.00			Line Item 8		3110		
24	D	473000	\$	1000.00			Line Item 9		3110		
25	D	473000	\$	1000.00			Line Item 10		3110		
26	D	473000	\$	1000.00			Line Item 11		3110		
27	D	473000	\$	1000.00			Line Item 12		3110		
28	D	473000	\$	1000.00			Line Item 13		3110		
29	D	473000	\$	1000.00			Line Item 14		3110		

# Excel workflow for Journal Entry



# A complete automation platform

## Data Automation

### Mass data management

Exchange data with SOR quickly and easily using Excel



## Process Automation

### Excel Workflow

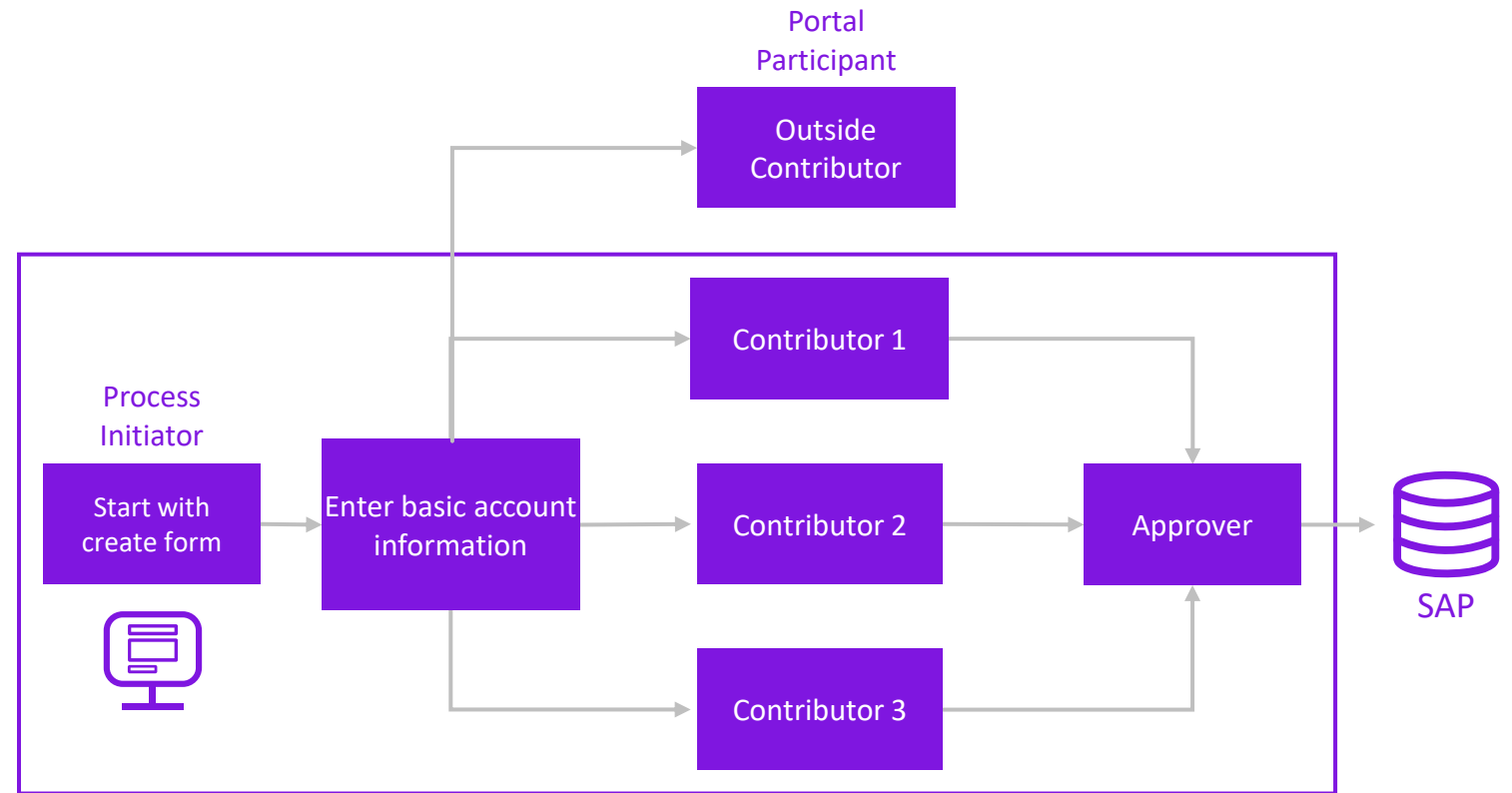
Automate and accelerate business processes through Excel file management workflows

### Form & Workflow

Automate and accelerate business processes with integrated forms and workflows

# Form & Workflow

Automate account creation with forms and workflow across multiple contributors



Automate Evolve

# The Automate platform delivers: Hyperautomation



Workflow



Connectivity (APIs)



Self-service



Data Management



Cloud deployment



Governance



Low-code development



Attended & unattended automation



Forms



Data quality

The background features several abstract 3D-rendered geometric shapes in various shades of purple and blue. These include a large horizontal rectangle at the top left, a sphere to its right, a vertical rectangle on the right side, a sphere below the top-left rectangle, a sphere to the left of the vertical rectangle, a sphere below the top-right sphere, and a square at the bottom left. The shapes have soft shadows and highlights, giving them a three-dimensional appearance.

Empowering business teams  
to make an impact



# Automate business-critical data processes

and any business process across your SAP landscape



---

Materials  
management &  
product launches



---

Customer onboarding  
& maintenance



---

Vendor onboarding &  
maintenance



---

Finance & accounting  
data and processes



---

Plant maintenance  
assets, plans &  
processes

# Materials

Examples of the Automate Platform delivering customer value delivered through material master and related processes

## 50%-75%

Reduction in time to market

- Agility and speed
- Increases competitive advantage

## 90%

Reduction in cost to process materials changes

- Lower costs
- Maintain current staffing levels
- Faster ROI

## 90%

Time reduction in materials data collection

- Agility and Speed
- Increased competitive advantage

## \$1.3 million

Savings in materials management productivity

- Measurable ROI
- Optimize process

# Customer & Vendor

How the Automate Platform is helping SAP enterprises optimize customer and vendor management

## 97%

Reduction in time to create a customer

- Agility and speed
- Increases competitive advantage

## 6 Days

Eliminated from customer create process

- Speed
- Improved employee productivity

## 87%

Reduction in time needed to qualify vendors and materials

- Speed
- Process visibility
- Improved productivity

## 75%

Reduction in SAP data entry time

- Agility and speed
- Improved process efficiency

# Other Use cases

Value delivered through the Automate platform across the SAP landscape

## 9 months

Return on investment in Automate

- Measurable ROI
- Sustainable approach to automation

## 1.4 Million

Pricing records changed with no additional headcount

- Agility
- Improved staff productivity

# Replace paper

with online Evolve forms for processing customer refunds

- Improved customer satisfaction
- Increased process visibility
- Reduced time of refund by up to three weeks

## 20,000

Journal entries processed during 4-day close window

- Speed and improved data quality
- Auditability
- Team continued to work in Excel



# Automate platform: Benefits



Agility



Speed



Improved data  
quality



Process visibility



Business team focus



Automation  
flexibility



Scalability



Proven track  
record

# Make an impact across your business



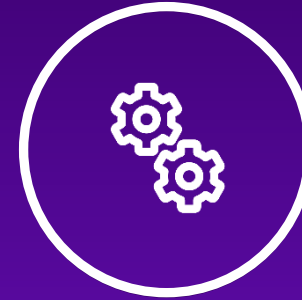
Financial  
Accounting



Controlling



Sales and  
Distribution



Materials  
Management



Plant  
Maintenance



Asset  
Management



Project Systems



Production  
Planning



Quality  
Management



Human  
Resources

# Wrap-up

# Key Takeaways

Hyperautomation success depends on adopting a best-of-breed portfolio approach

- Automation is key to addressing organizational needs and wants for data integrity
- Artificial Intelligence and Machine Learning will drive digital transformation
  - There are different types of AI/ML
- The Precisely Automate platform has the capabilities to be the heart of a successful Hyperautomation strategy
- We have an established track record of delivering automation success for our customers
- Our focus is on complex, data-intensive, master data use cases that are centered on SAP ERP



Winshuttle is now  
part of Precisely,  
the leader in data  
integrity

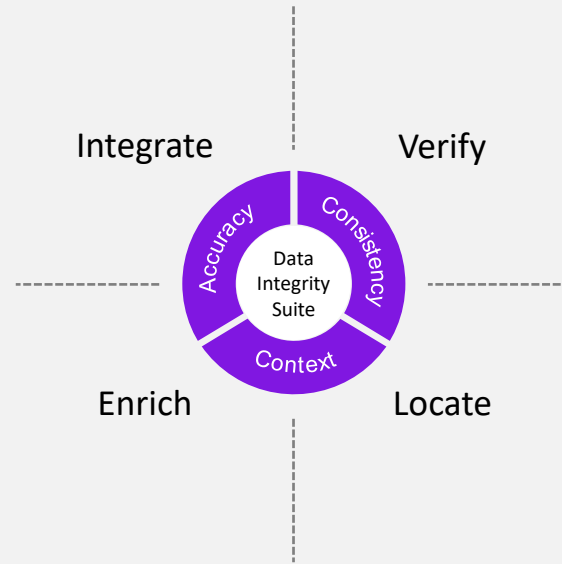
A large, 3D-rendered graphic of the word "no" in a dark purple color. The "n" is a simple vertical bar, and the "o" is a thick, rounded ring. The graphic is positioned behind the word "precisely".

precisely



## The global leader in data integrity software

Our data integrity software, data enrichment products, and strategic services deliver accuracy, consistency, and context to power confident business decisions.



# 12,000

customers

Customers in more than  
**100** countries

# 99

of the Fortune 100

# 2,500

employees

### Brands you trust, trust us



### Data leaders partner with us



Questions?

The image features a solid purple background with several 3D-rendered geometric shapes. At the top left is a horizontal rectangular block. To its right is a sphere. Further right is a vertical rectangular block. In the center, there is a vertical rectangular block and a sphere. At the bottom left is a sphere and a horizontal rectangular block. At the bottom right is a vertical rectangular block. The text 'Thank you!' is centered in the middle of the composition, and the word 'precisely' is positioned at the bottom center, partially overlapping the bottom rectangular block.

Thank you!

**precisely**