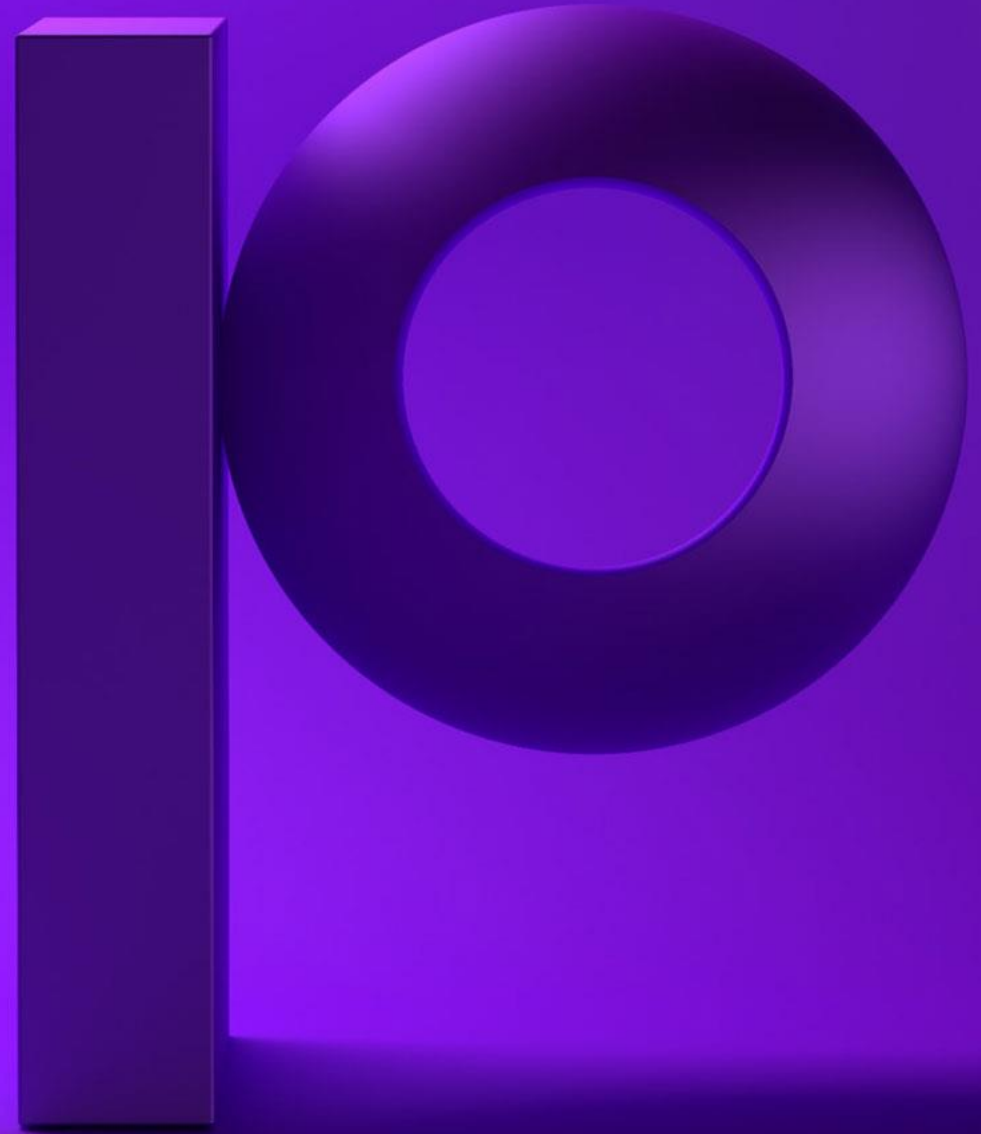


precisely

Applying Hyperautomation to drive business success

Hyperautomation for complex, data-intensive SAP[®]
processes



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 attached to or near the rectangular blocks. The lighting creates soft shadows and highlights, giving the shapes a three-dimensional appearance.

Automation, hyperautomation and digital transformation

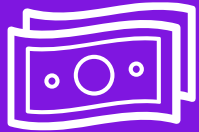


**Technology is a means to an
end: Data is the currency of
digital transformation**

- 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



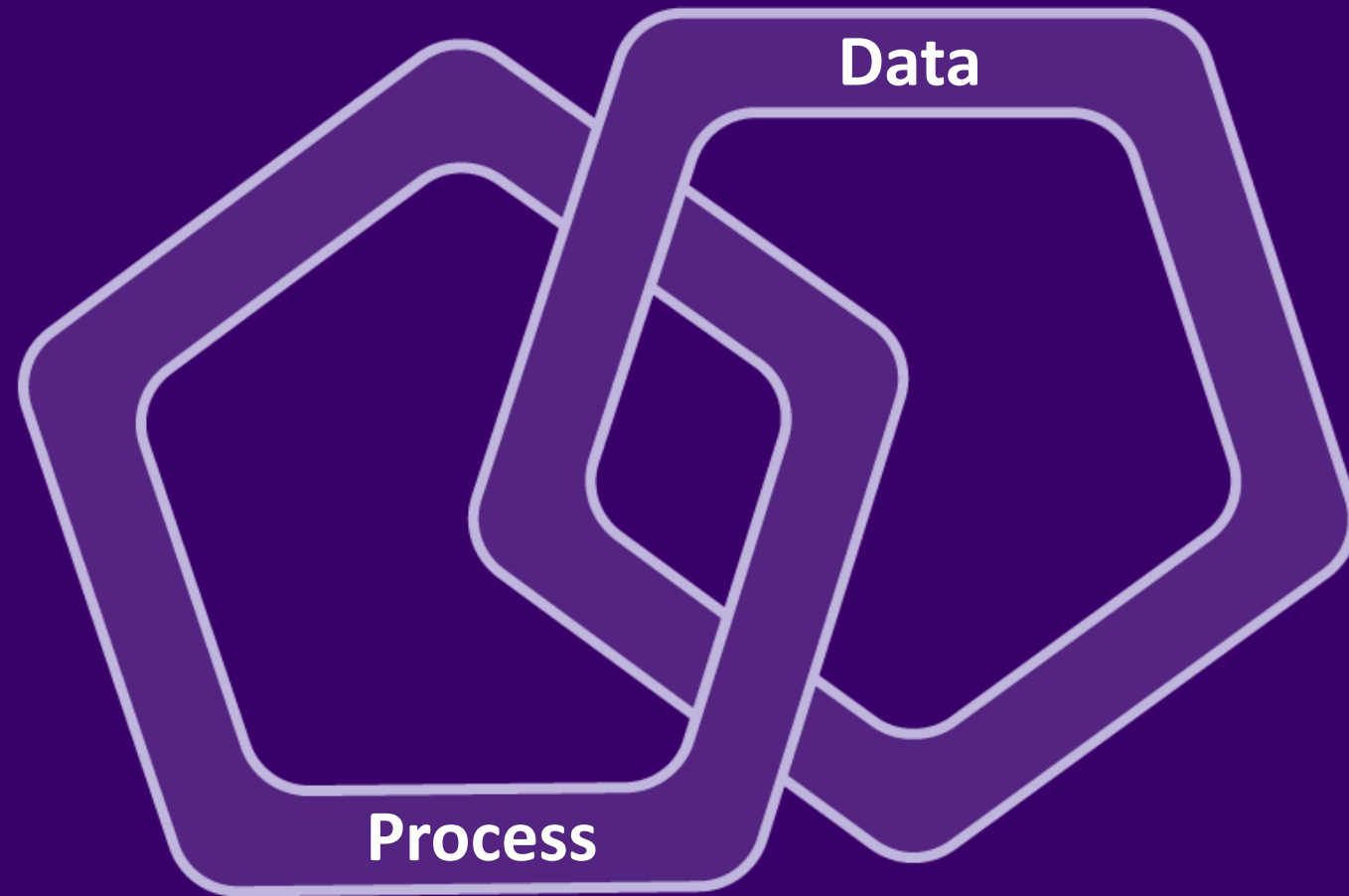
Reach ROI faster




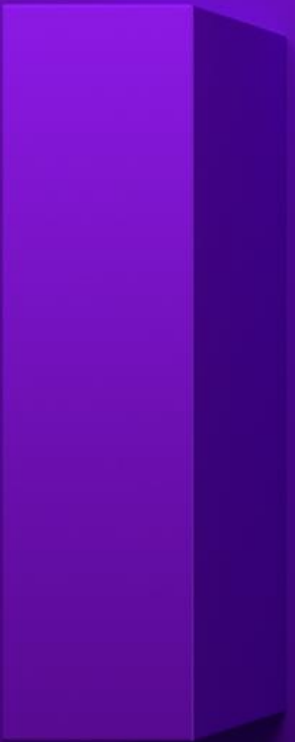
Realize Digital Transformation dream



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



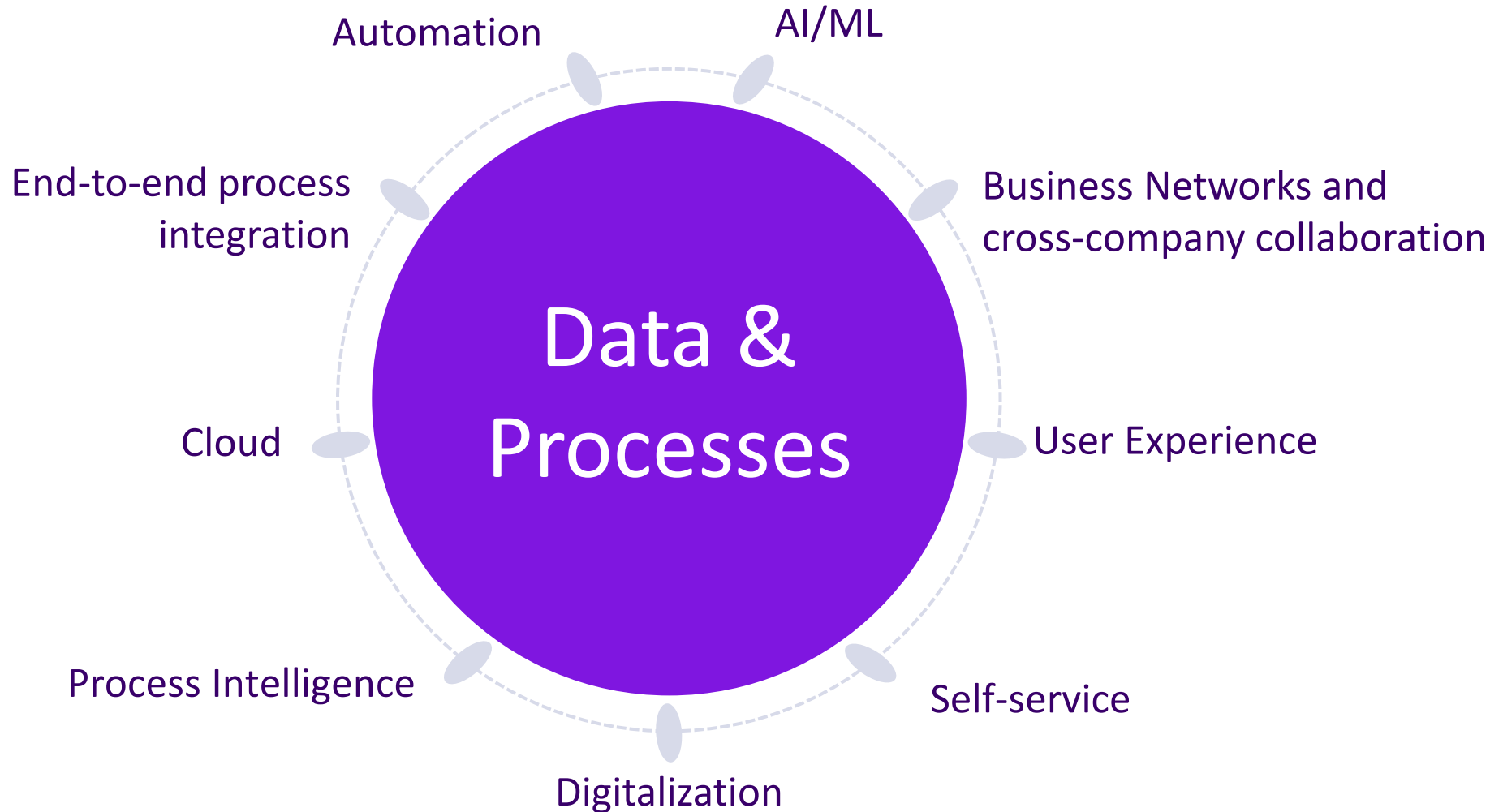
**We have Blue Prism and
Precisely Automate and we
choose the best tool on a
case-by-case basis.**

Robotics Program Director – Global beverage and spirits
company

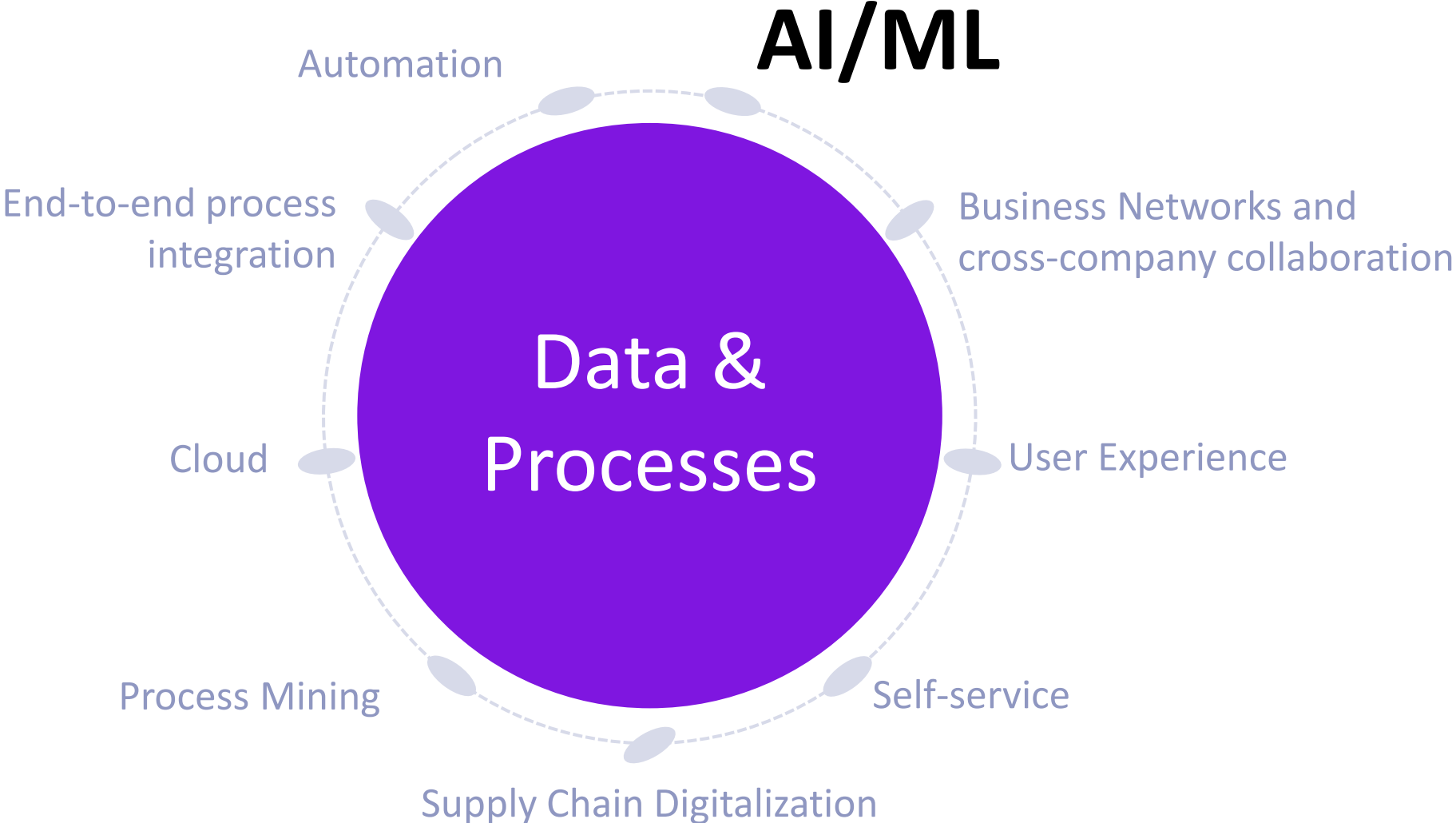
Artificial Intelligence

The background features several 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

	Generative AI	Predictive AI
Goal	Create new content	Make accurate predictions
Algorithms	Complex algorithms and deep learning based on LLMs	Statistical algorithms based on machine learning and observations
Output	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

Northwest Holdings

New Finished Goods

Project Name * Red valentine chips Project Owner Heather Oebel Process Name NPI-FinGoods-0000078

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 of errors:

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

The main table below the validation window shows material data with a red error message 'Invalid Option: abc' next to the Sales Org field in row 7.

ID	Industry Sector	Material Type	Plant	Stor Loc	Material Description
1	F-Food	FERT	1000	0001	
2	F-Food	FERT	1000	0001	
3	F-Food	FERT	1000	0001	
4	F-Food	FERT	1000	0001	
5	F-Food	FERT	1000	0001	
6	F-Food	FERT	1000	0001	
7	F-Food	FERT	1000	0001	Organic yellow tortilla chips - 5oz
8	F-Food	FERT	1000	0001	Organic white tortilla chips - 5oz
9	F-Food	FERT	1000	0001	Organic blue tortilla chips - 7oz
10	F-Food	FERT	1000	0001	Organic red tortilla chips - 7oz

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

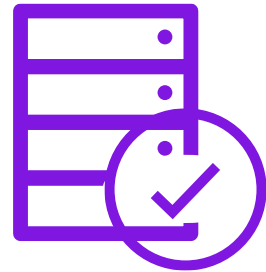
Even rules do not achieve 100% data quality

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

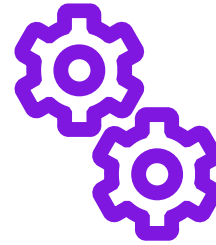
Master Data Creation with ML



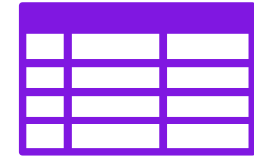
New Account
creation request



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
- Finicky manual processes
- Complex multi-screen transactions and processes

The screenshot shows an Excel spreadsheet with the following sections:

- RUN RESULTS:** Includes 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, 8001, 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 Bm Structure (WBS E). The data rows show 14 line items with varying amounts and item texts.

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

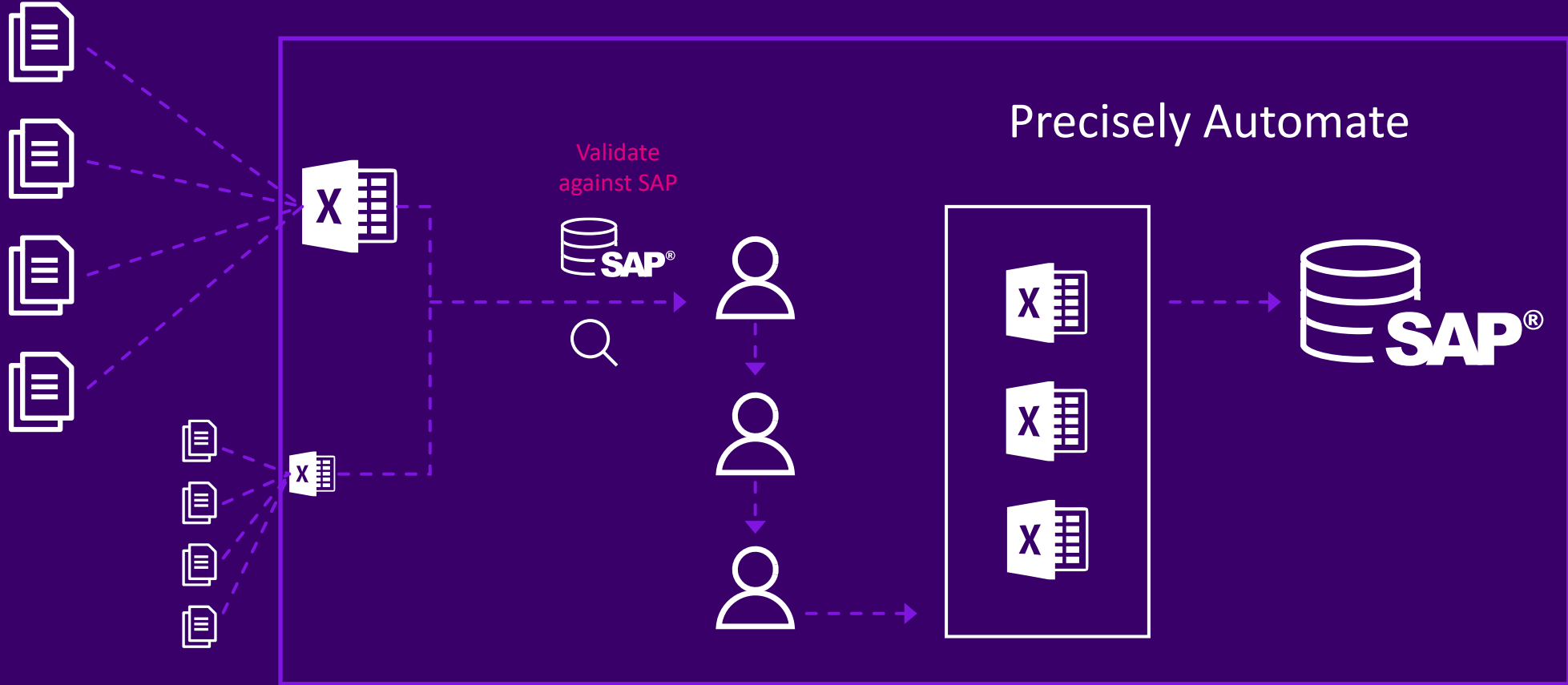
Flexible, desktop journal entry automation

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, each with a unique ID and a 'Line Item' description.



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

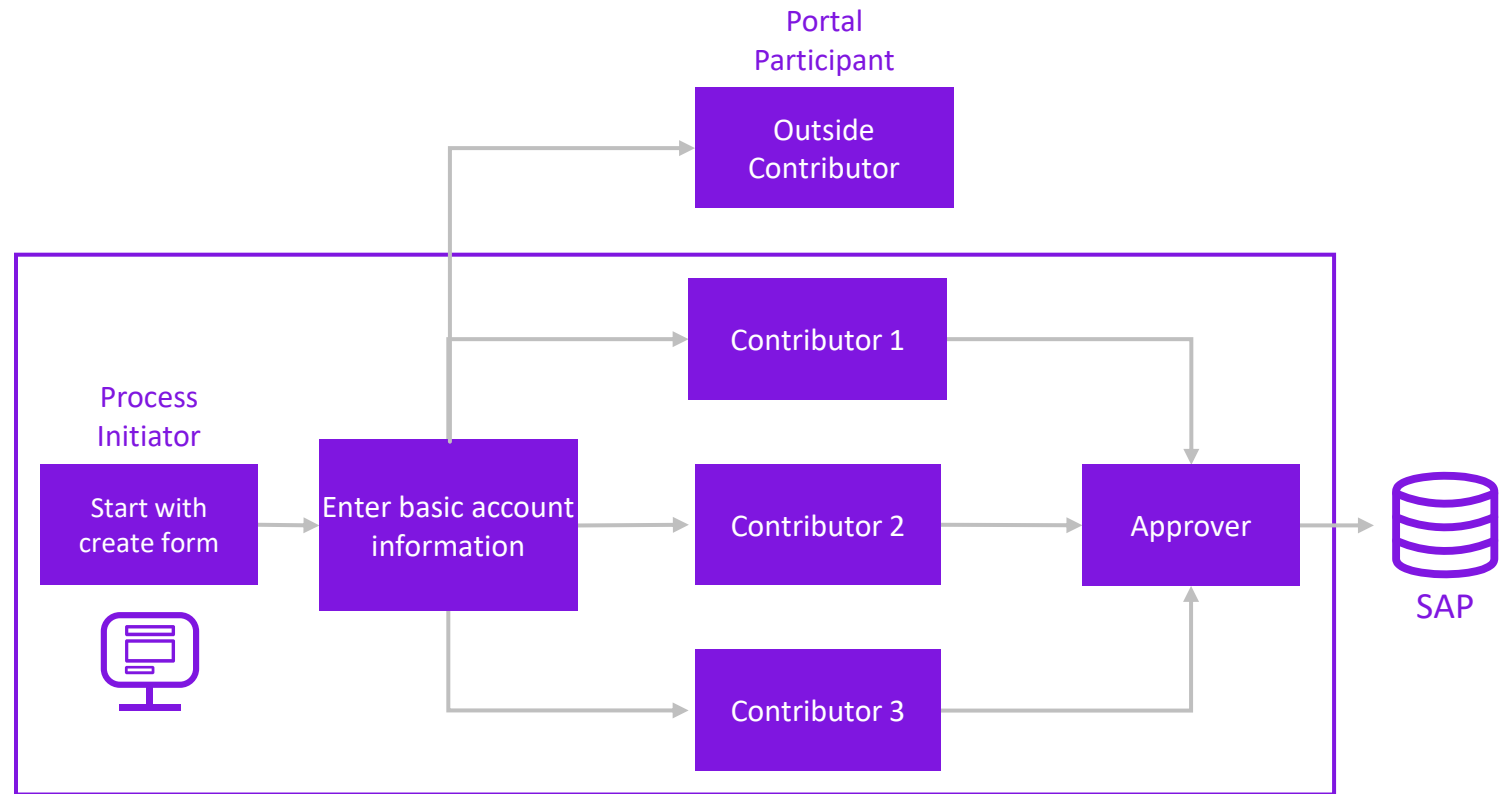
Automate and accelerate business processes through Excel file management workflows

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 in the center, a vertical rectangle below the center sphere, a sphere at the bottom left, and a square at the bottom center. The lighting creates soft shadows and highlights, giving the shapes 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



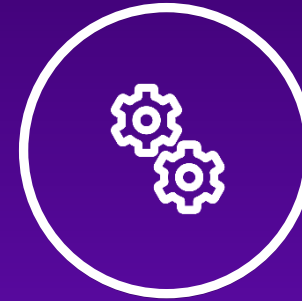
Financial
Accounting



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



2023 State of SAP Automation Report

A Comprehensive Survey of Business
and IT Leaders



precisely.com/AutomationReport2023



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

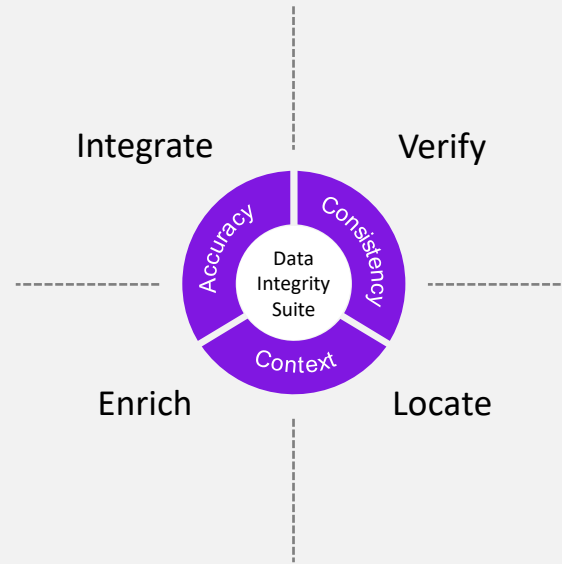
A large, 3D-rendered graphic of the word "no" in a dark purple color. The letters are thick and blocky, with a slight shadow cast on the surface below them. The "o" is a ring shape.

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 background is a solid dark purple. Scattered throughout are various 3D-rendered geometric shapes in lighter 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 in the center, a vertical rectangle below the center sphere, a sphere at the bottom left, and a horizontal rectangle below the center sphere. The shapes have soft shadows, giving them a three-dimensional appearance.

Thank you!

precisely