

# Hello

Welcome to the world of digital platforms

 **assistedge** | Discover

[edgeverve.com](https://edgeverve.com)





# AssistEdge Discover

Process intelligence for a connected  
enterprise

# Intelligent process intelligence to identify process & productivity transformation opportunities

AssistEdge Discover, a task and process discovery solution, unlocks insights trapped in business processes and boosts enterprise-wide automation and transformation efforts.

It unobtrusively captures human-machine interactions, understands business process workflows, and delivers actionable process insights that help enterprises make informed decisions, fast track automation and improve operational productivity .



1

Identifies process gaps & variations

2

Fast tracks process optimization and prioritizes automation opportunities

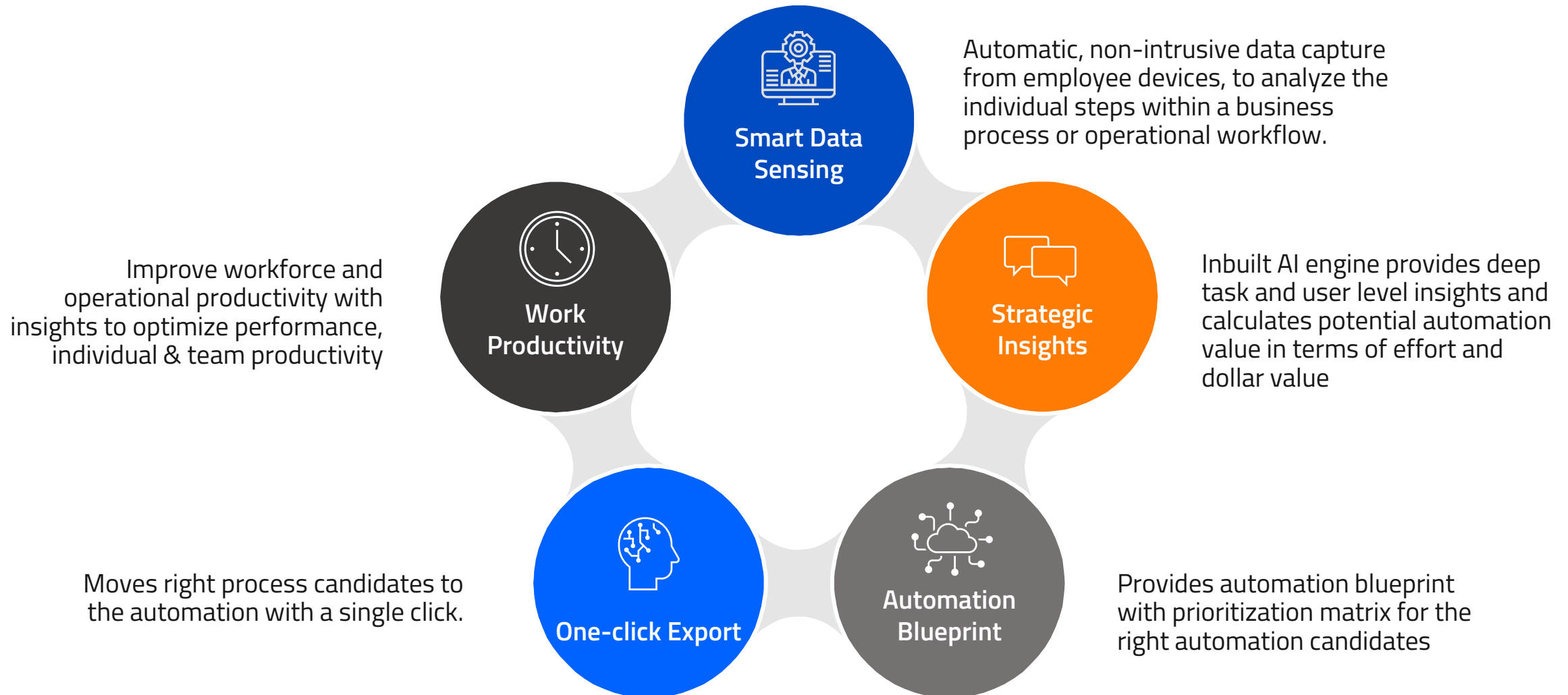
3

Identifies workforce insights and improves user & operational productivity

4

Measures and benchmarks productivity & drives process excellence

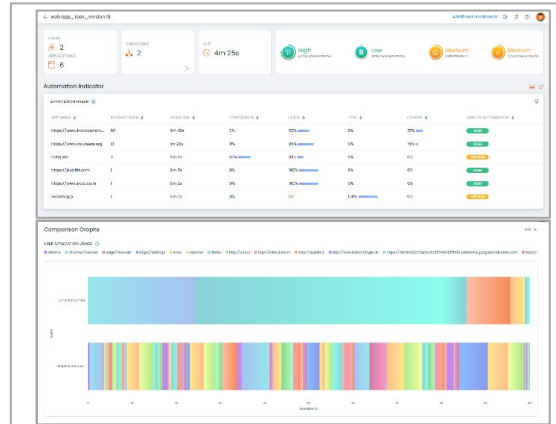
# A continuous loop of process discovery & intelligence



# AssistEdge Discover – Process Insights

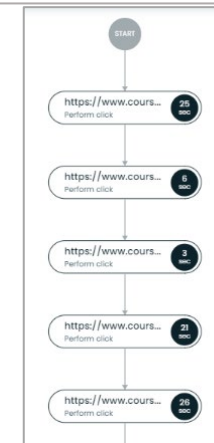
**AssistEdge Discover Process Insights** unlocks insights trapped in business processes with its intelligent process discovery. It enables enterprises identify automation and process transformation opportunities.

Actionable insights for business to expedite value creation



Task & Application Insights

Process maps and metrics to understand automation fitment



Task Maps

Automation priority matrix grades opportunities based on value & feasibility



Automation blueprint, prioritization matrix and funnel

## Business Value Delivered

**Identify process gaps & variations** for data-driven planning of enterprise-wide automation program

**AI-engine driven strategic insights** to calculate potential automation value in terms of effort & dollar value

**Fast track identification of automation opportunities** and improve operational excellence

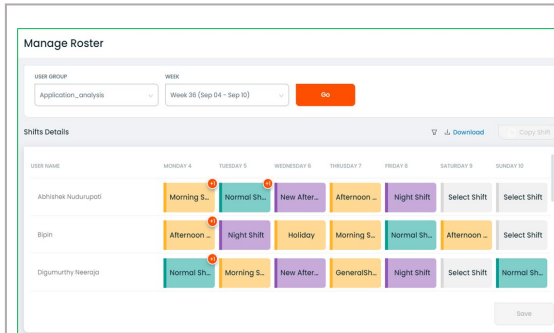
Provide automation blueprint with **prioritization matrix for the right automation candidates**

**One-click automation export** to automatically move the right process candidates for automation

# AssistEdge Discover – Work Insights

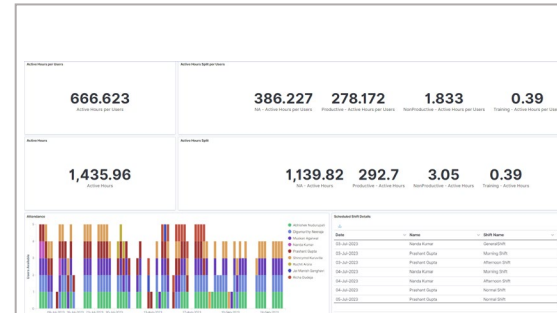
**AssistEdge Discover Work Insights** unravels deep work and workforce insights. It gives last mile visibility on work patterns, application usage, asset utilization and identifies opportunities to optimize performance in the changing world of work.

Define and assign work shifts and rosters



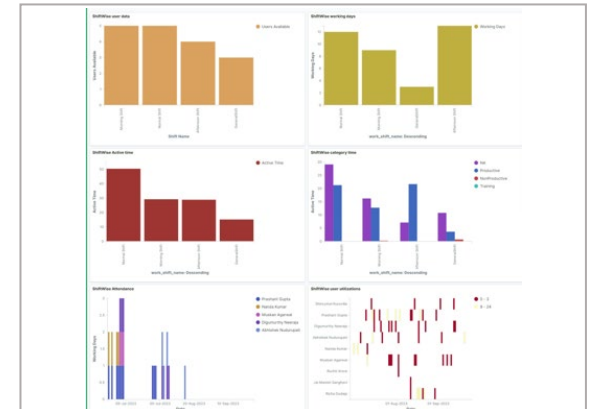
Managers can define and assign shifts and rosters across teams

Identify work patterns across teams and users



Central dashboard to view teams' productivity

Measure individual productivity on core business



Shift wise team insights

## Business Value Delivered

**Measure workplace efficiency** to identify performance irregularities and take corrective actions to maximize output

**Identify opportunities for process automation** for improved operational excellence

**Boost employee and operational productivity** with optimized workloads and productivity tools

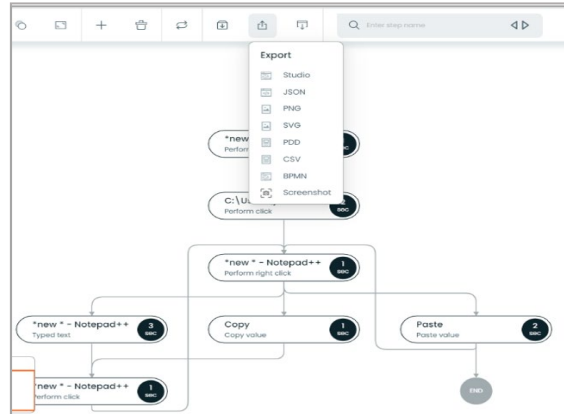
**Enable efficient decision making** with reduced subjectivity and informed, data-driven decisions

**Achieve stronger performance** by sharing best practices and correcting imbalances against benchmarks

# AssistEdge Discover – Auto-Automation

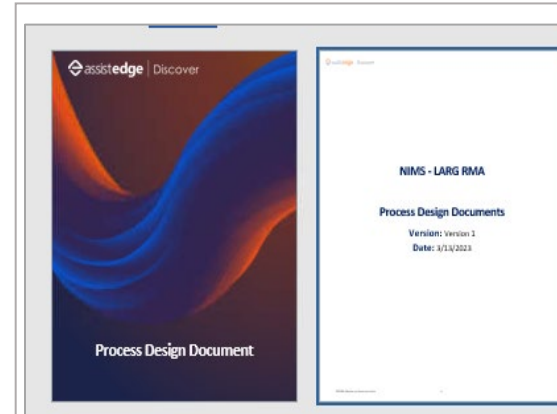
**AssistEdge Discover one-click export to RPA** moves the best process candidates for automation with a single click. It provides a **Connected Automation experience from discovery to automation** with a single click

Experience connected automation with one-click export to Automation Studio



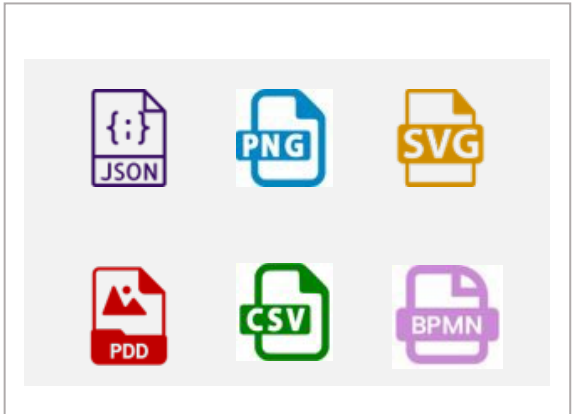
One-click export for Automation

Experience connected automation with one-click export to Automation Studio



Process Design Document (PDD)

Automate with any RPA tool of choice with detailed PDDs exported in multiple formats



Multiple formats supported

## Business Value Delivered

**Fast track automation** by moving the right process candidates to **automation** with a single click

Generate detailed Process Design Document (PDD) & export in multiple formats to **automate with the RPA tool of your choice**

Automated detailed SOP and intuitive knowledge documents that **eliminate manual errors and assure high quality**

**Train new hires and cross-skill users** who are new to processes with step-by-step user training guide

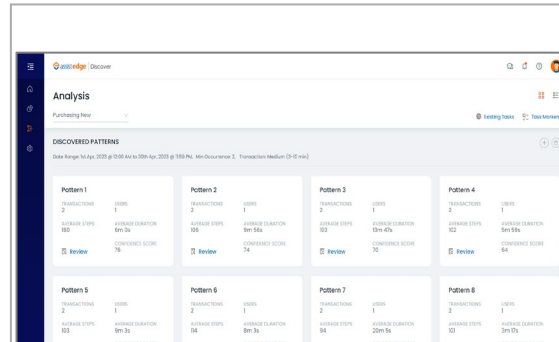
**Facilitate change management** with easy documentation of process changes & save time invested for periodic reviews

# AE Discover – Blackbox Pattern Discovery & Task stitching

## AssistEdge Discover Pattern Discovery with End-to-End Process view

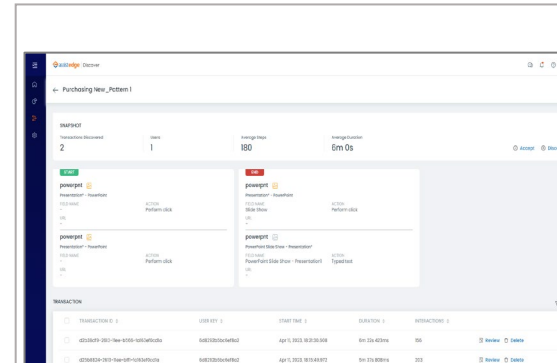
Pattern matching intelligent algorithm, provides efficient and flexible process discovery, powered by an intuitive UI for business users to concatenate the added tasks sequentially to form process maps.

Discover repetitive patterns with an intelligent algorithm



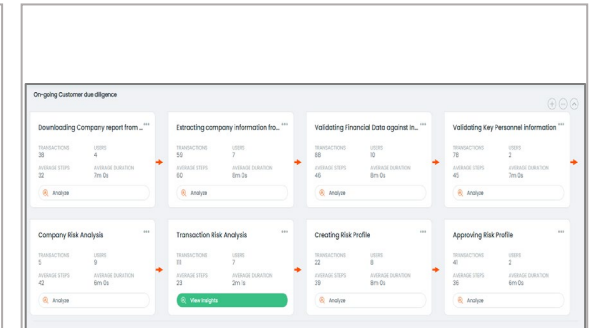
Discover Patterns

Review the auto-detected start and end task markers



Review and update identified patterns as valid tasks

View an end-to-end process map



View tasks stitched into processes for easy analysis

## Business Value Delivered

### Fast track process

**discovery** by helping the SME to pick the relevant pattern and analyze whether this can be called as a task or not.

The **blackbox algorithm identifies patterns** and arranges them in the order of the most frequently occurring first.

The algorithm **identifies the repeating patterns** present in the recordings.

Discovered Patterns are accepted as tasks and are re-arranged to arrive at an **end-to-end process view**.

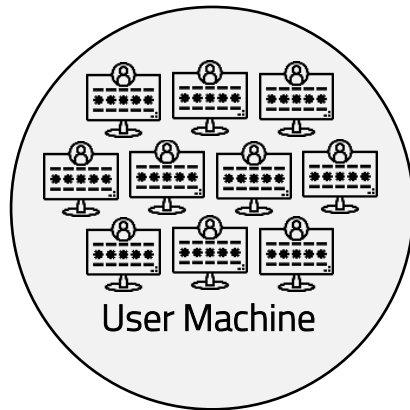
Task Stitching helps business users to **understand processes at the task level** and helps perform task analysis.

# AssistEdge Discover in action

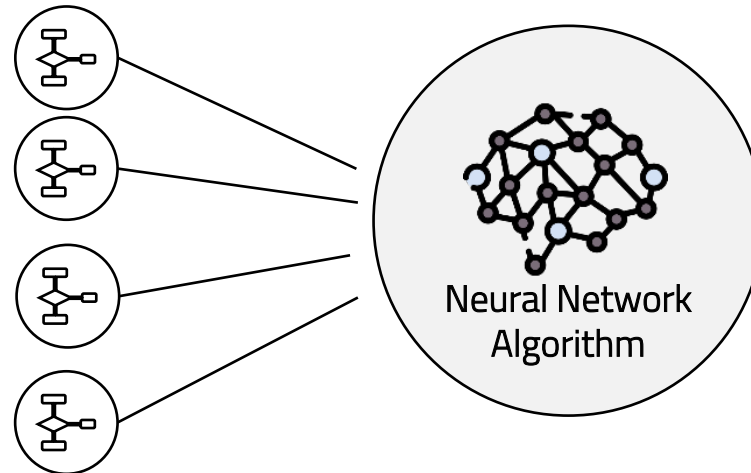
Captures Data, Automatically

Analyzes Empirical Data

Generates Insights and automation blueprint

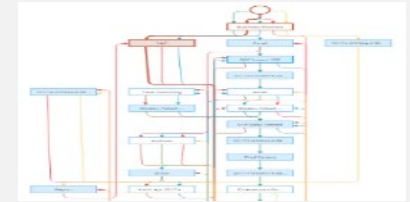


**SENSOR**, installed on user devices captures empirical data from user machine



AI engine **with advanced neural algorithm** analyze empirical data to create actionable process insights

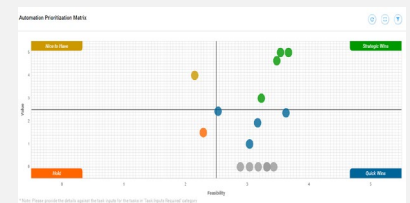
Process Maps & Variations



Insights, Analytics & Reports



Automation Blueprint



# AssistEdge Discover is recognized as a Leader and a Star Performer in Everest Group's Task Mining Products PEAK Matrix® Assessment 2023

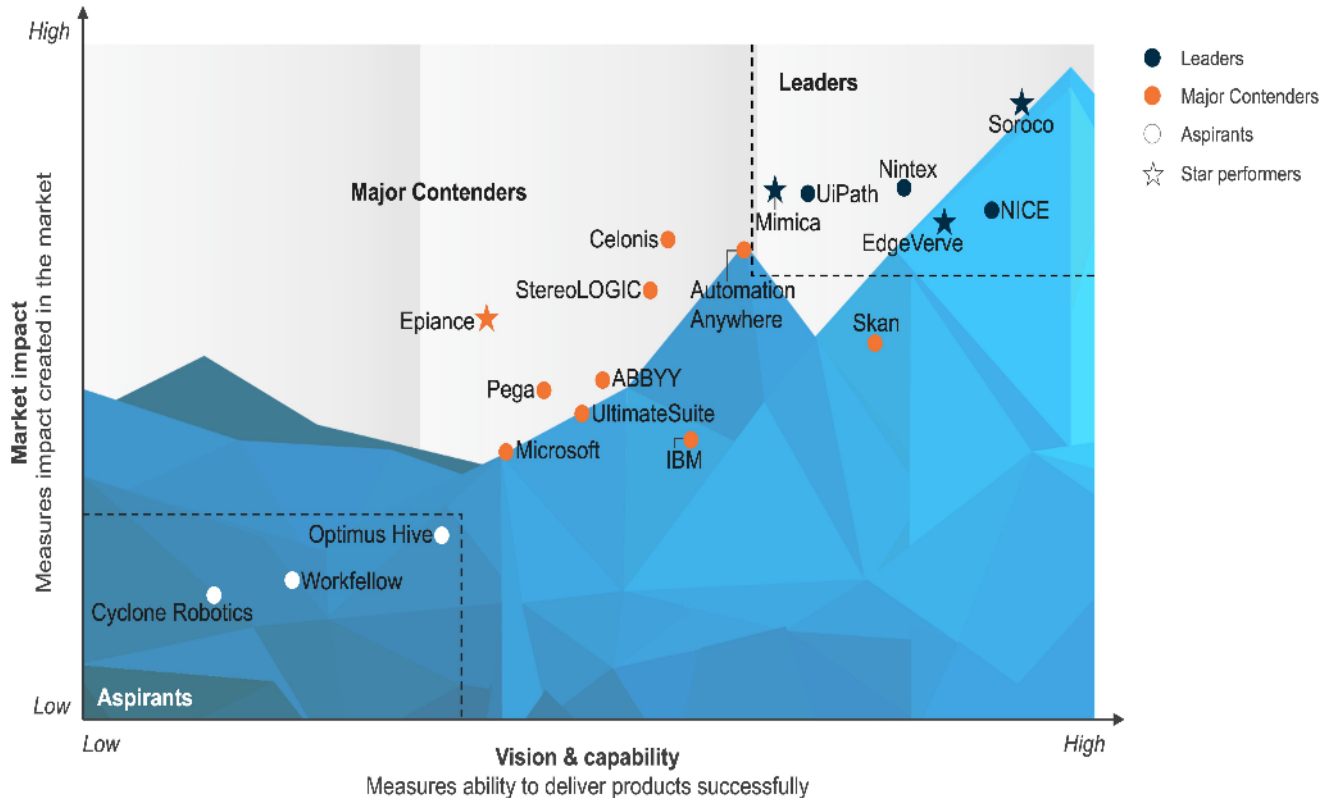
“Strong year-over-year growth in its task mining business and continued investments in enhancing the product’s ease of use, depth & breadth of insights, and integration with its automation capabilities have helped EdgeVerve strengthen its position as a Leader and emerge as a Star Performer on Everest Group’s Task Mining Products PEAK Matrix® 2023,”



Amardeep Modi, Vice President at Everest Group.



Everest Group Task Mining Products PEAK Matrix® Assessment 2023<sup>1</sup>



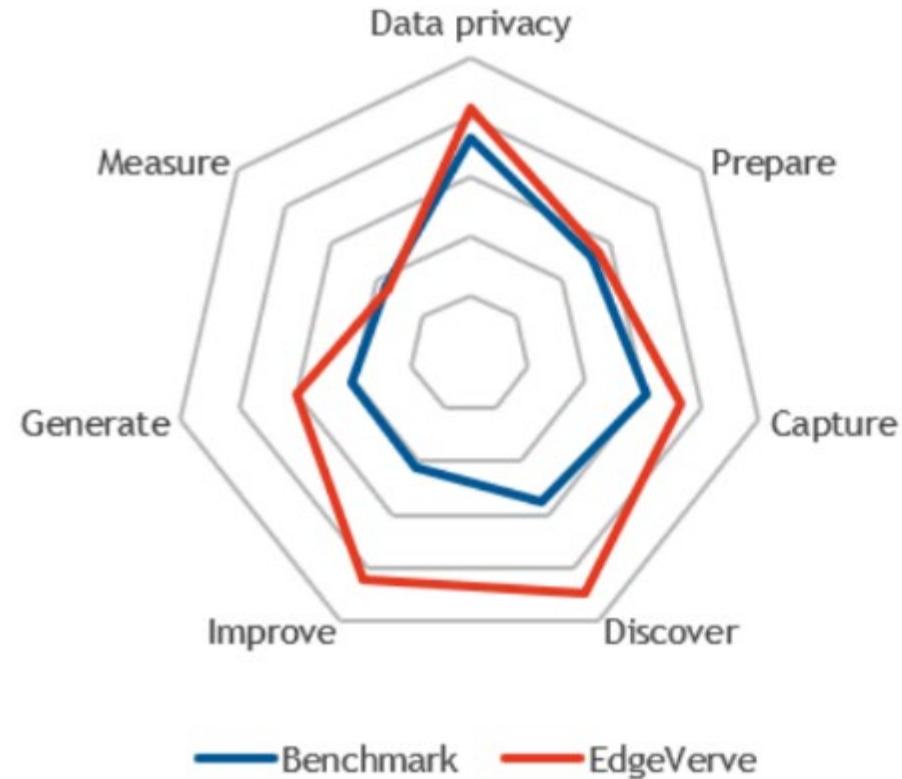
<sup>1</sup> Assessment for Automation Anywhere, Microsoft, Nintex, Pega, and StereoLOGIC excludes detailed provider inputs on this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence(TI) database, ongoing coverage of these technology providers, their public disclosures, and interaction with buyers. For these companies, Everest Group's data for assessment may not be complete. Note: Star Performers are selected based on a relative comparison of providers' performance on the market impact and vision & capability dimensions in the previous and latest PEAK Matrix® assessments. Providers with the highest year-over-year improvement are designated as Star Performers. The Star Performer title does not reflect the overall market leadership position, which is designated through Leaders, Major Contenders, or Aspirants. Source: Everest Group (2023)

This assessment has been licensed to EdgeVerve

# AssistEdge Discover outperforms all benchmarks in IDC Assessment 2023

“AssistEdge outperformed at the benchmark in every category. Its task improvement capabilities are particularly strong, with task simulation features and a BPMN design capability to edit tasks before exporting to AssistEdge RPA studio”

AssistEdge Discover Performance Compared with Task Mining Benchmark



Source: IDC, 2023



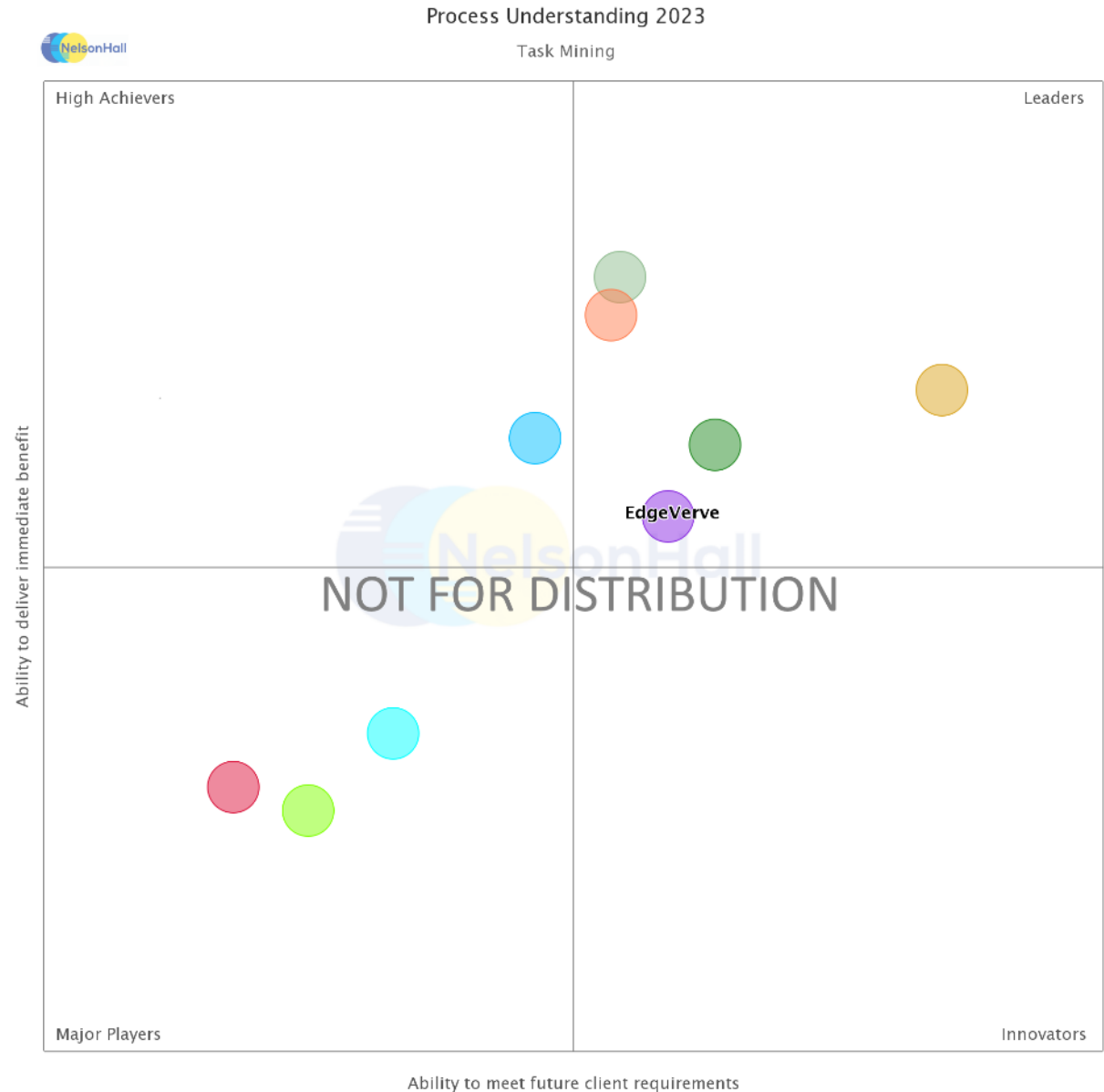
Maureen Flemming, Vice  
President at IDC.

# AssistEdge Discover recognized as a Leader in the Nelson Hall NEAT Report

“Seamless integration with AssistEdge RPA and other RPA platforms for accelerated development and deployment. These include Automation prioritization, optimization potential, user efficiency & conformance to the process at a glance for each process”



Mike Smart, Senior Analyst at  
Nelson Hall



Source: NelsonHall 2023

# AssistEdge Discover – Success Stories

## Transition for large transformation deals

### American transportation MNC

- Identified improvement & automation opportunities through end-to-end process assessment
- ✓ 87% process automation opportunities identified
- ✓ 101 process variations & its impact on AHT identified
- ✓ 90% time & effort reduction in process documentation



## Insights driven transformation

### Large US Telecom company

- Generated process insights, process maps & analysis
- Assessed process maturity & identified processes for optimization
- ✓ 20% improvement in overall agent productivity



## Automation driven transformation

### American healthcare company

- Analyzed business data to identify results-based process prioritization
- Maximized automation ROI by identifying right processes
- ✓ 80+ variations discovered across tasks mined
- ✓ 150+ FTE savings in 3 months
- ✓ Uncovered granular process insights



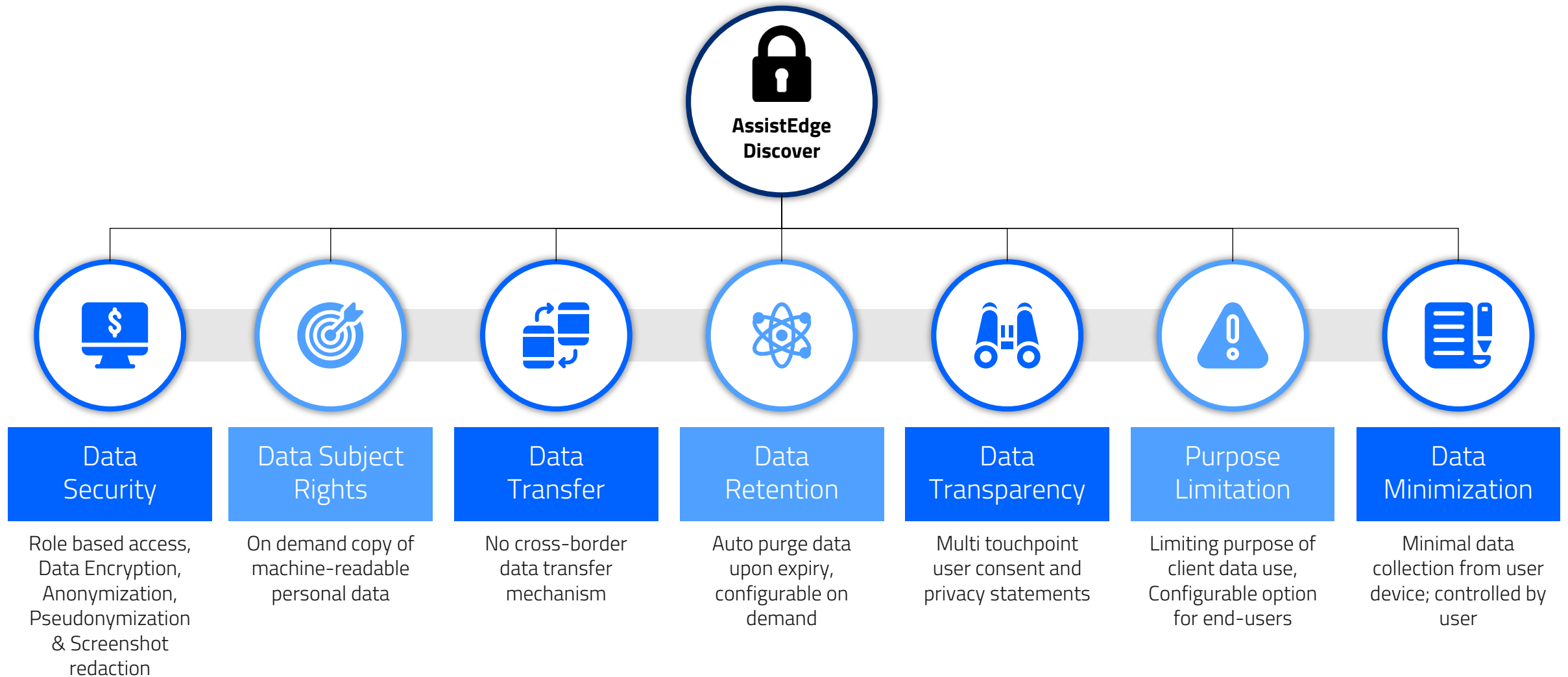
## Work Insights driven transformation

### Global claims management Co.

- Measured performance of rapidly scaling remote teams
- Tracked productivity, identified workload imbalances and other workforce insights
- ✓ 20% improvement in workforce productivity
- ✓ \$10 Mn projected impact on productivity



# Our enterprise-grade security



# Our enterprise-grade security is certified by third-party auditors

Synopsys Inc. attests AssistEdge Discover as a robust platform with a secure architecture

The Synopsys report states, "AssistEdge Discover has adequate controls in place within the application to protect the security of customer information. There are no known open issues with the application or supporting infrastructure that might allow an attacker to compromise the application's user accounts or the application's supporting infrastructure."



Synopsys Inc. conducted secure architecture review and a penetration test on AssistEdge Discover in areas including:



**Data Encryption  
& Management**



**Network  
Segregation**



**Application  
Configuration**



**Authentication &  
Authorization**

# Our approach to POC



- AssistEdge Discover is installed on end-user's device for data collection
- Enterprises can decide what data should be captured
- Captured data is collated securely on product servers
- Discover processes data using neural network algorithm to derive process maps with variations
- Automation Blueprint is generated based on technical feasibility and business value

**Record & mine processes**  
Commence task recording and discovery

## Discover insights

Evaluate insights.  
Identify process cycle time.  
Identify process bottlenecks.  
Identify automation blueprint & opportunities.

## Capture data

Commence data capture from users' machine using Discover

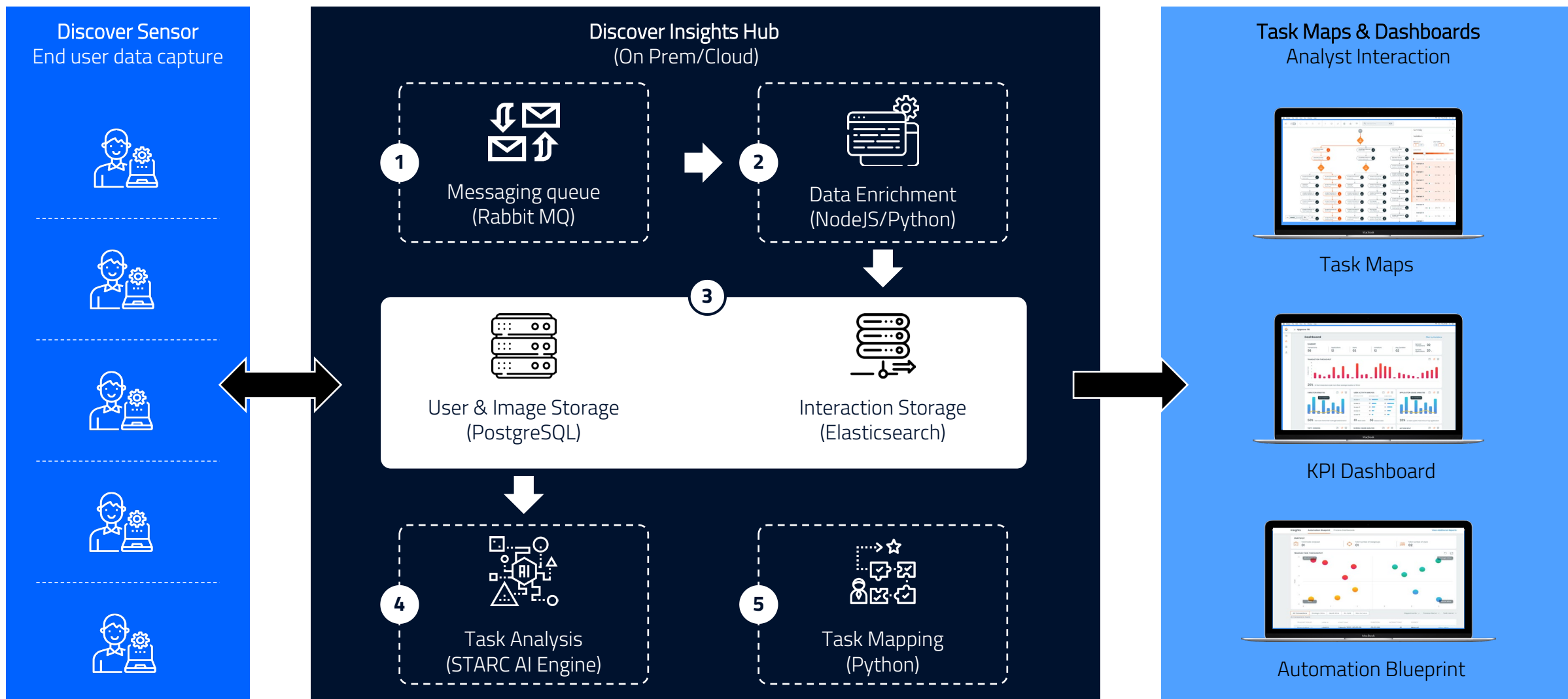
## Configure Discover

Setup Discover components on server, and install on desktop. Setup reports

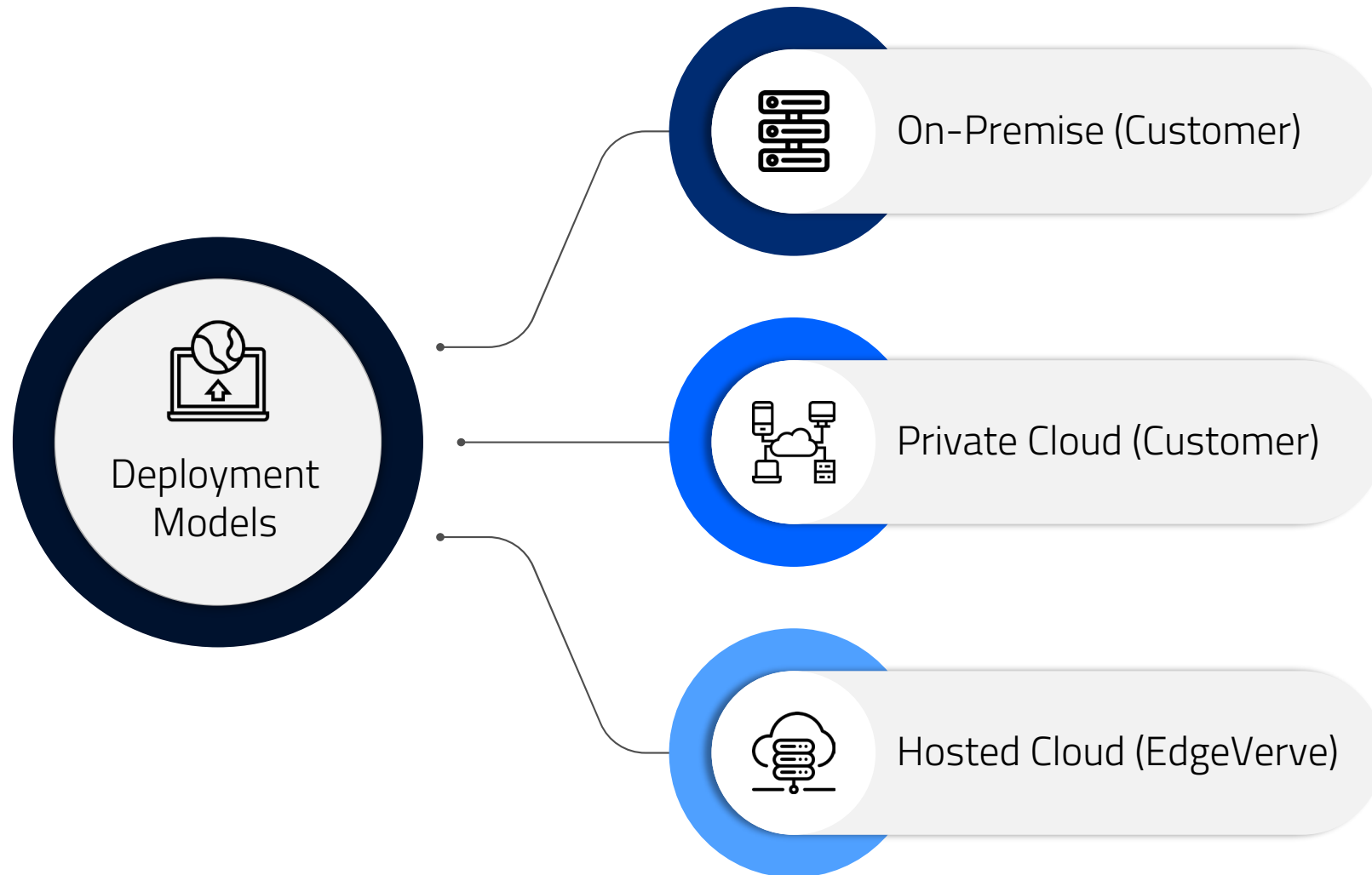
## Identify Process

Identify processes for evaluation and target user groups

# AssistEdge Discover – Product Architecture

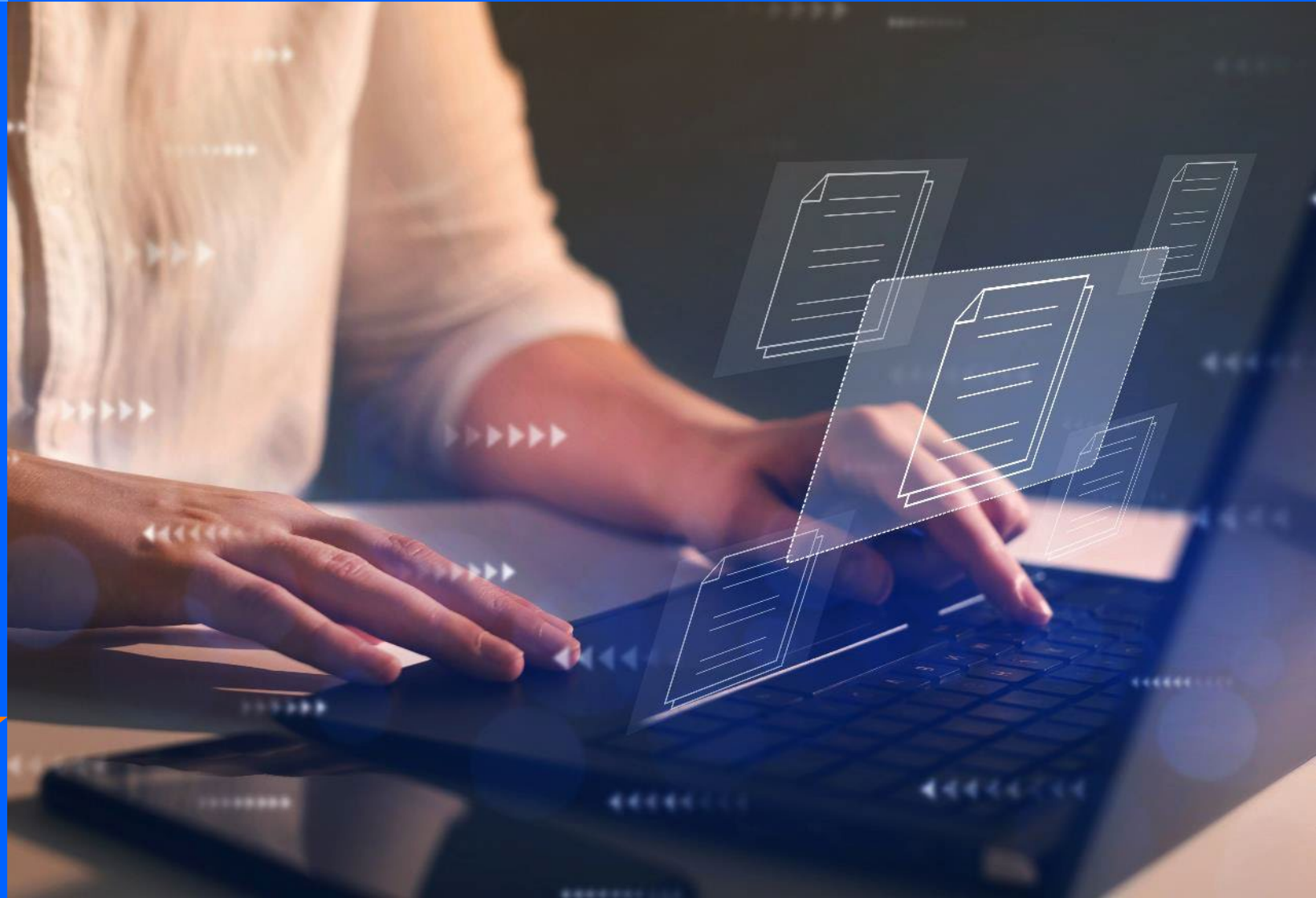


# Deployment models for different customer needs



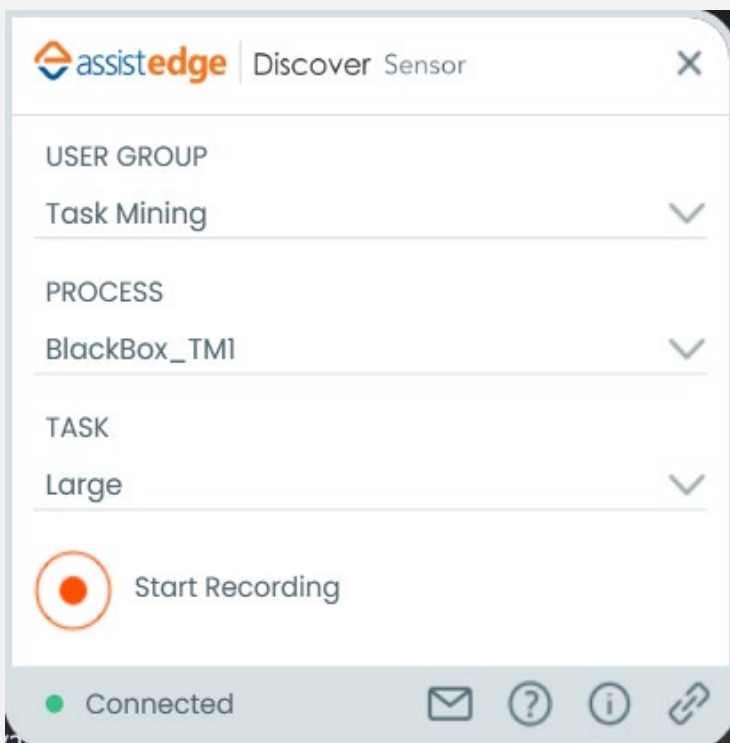
# AssistEdge Discover

Process Insights  
Snapshots



# Data collection and preparation

Captures granular user actions at an application level

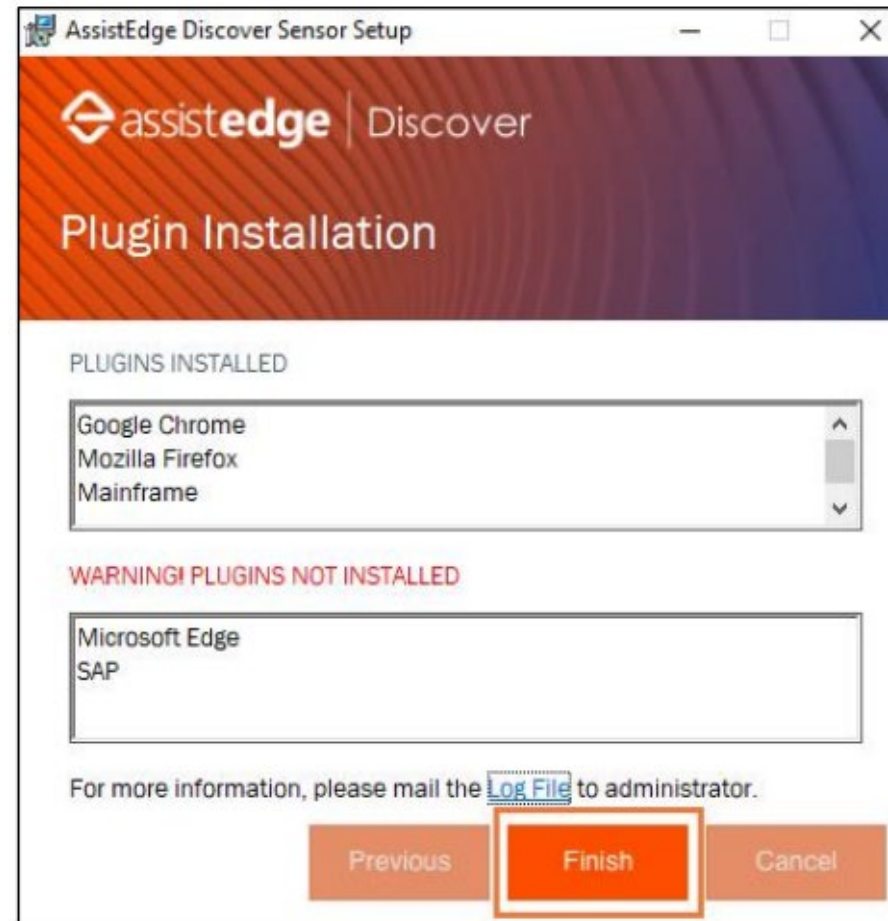


The screenshot shows the 'Review Interactions' window of the AssistEdge application. It displays a table of 33 interactions found. The table has columns for APP NAME, SCREEN NAME, DUR / TIME, ACTION, URL, FIELD ID, FIELD NAME, FIELD VALUE, FIELD TYPE, FIELD SIGNATURE, and ACTION TYPE. The table is filtered to show interactions for the 'explorer' and 'winword' applications. The top of the window has a 'DefaultTask' header and a close button (ESC X). The bottom right corner has 'Remove Screenshots' and 'Download' buttons.

|                          | APP NAME                | SCREEN NAME         | DUR / TIME           | ACTION            | URL                                     | FIELD ID         | FIELD NAME          | FIELD VALUE      | FIELD TYPE    | FIELD SIGNATURE | ACTION TYPE |
|--------------------------|-------------------------|---------------------|----------------------|-------------------|-----------------------------------------|------------------|---------------------|------------------|---------------|-----------------|-------------|
| <input type="checkbox"/> | explorer                | -                   | 818ms                | -                 | -                                       | -                | -                   | -                | -             | -               | -           |
| <input type="checkbox"/> | explorer                | RecordingWind...    | Feb 24, 2023, 11:... | Perform click#... | -                                       | 50033            | -                   | -                | Shell_TrayWnd | -               | Click       |
| <input type="checkbox"/> | explorer                | Task Switcher#...   | Feb 24, 2023, 11:... | Perform click#... | -                                       | 50007            | Document1 - W...    | -                | -             | -               | Click       |
| <input type="checkbox"/> | winword                 | -                   | 1s 764ms             | -                 | -                                       | -                | -                   | -                | -             | -               | -           |
| <input type="checkbox"/> | winword                 | Document1 - W...    | Feb 24, 2023, 11:... | Perform click#... | -                                       | 50004            | Page 1 content...   | -                | -             | -               | Click       |
| <input type="checkbox"/> | winword                 | Document1 - W...    | Feb 24, 2023, 11:... | Typed text###...  | -                                       | 50004            | Page 1 content...   | cbsvtCZC+JS6L... | -             | -               | KeyPress    |
| <input type="checkbox"/> | explorer                | -                   | 8s 175ms             | -                 | -                                       | -                | -                   | -                | -             | -               | -           |
| <input type="checkbox"/> | explorer                | Task Switcher#...   | Feb 24, 2023, 11:... | Perform click#... | -                                       | 50007            | AssistEdge   Dis... | -                | -             | -               | Click       |
| <input type="checkbox"/> | http://10.73.120.161... | -                   | 11s 311ms            | -                 | -                                       | -                | -                   | -                | -             | -               | -           |
| <input type="checkbox"/> | http://10.73.120.161... | AssistEdge   Dis... | Feb 24, 2023, 11:... | Perform click#... | http://10.73.120... :nth-child(1) > ... | Selected < ##... | -                   | -                | input - text  | -               | click       |

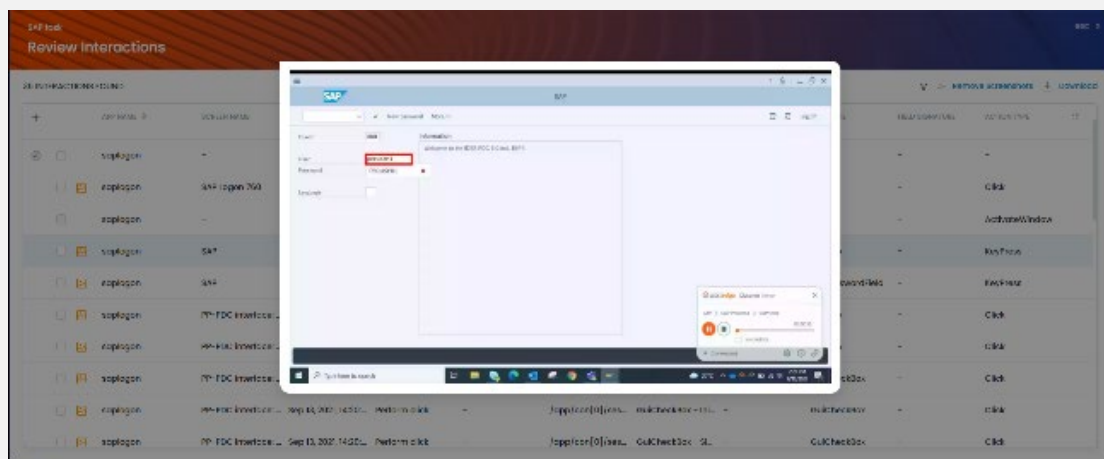
# Data collection and preparation

Discover supports multiple browsers

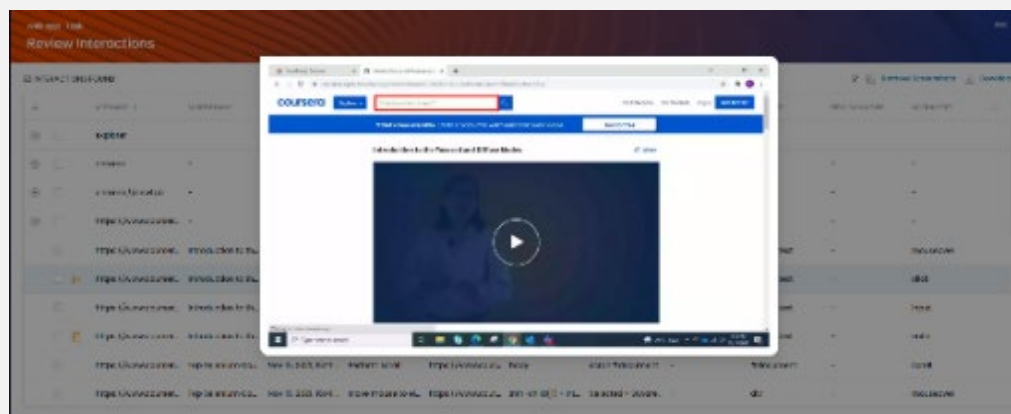
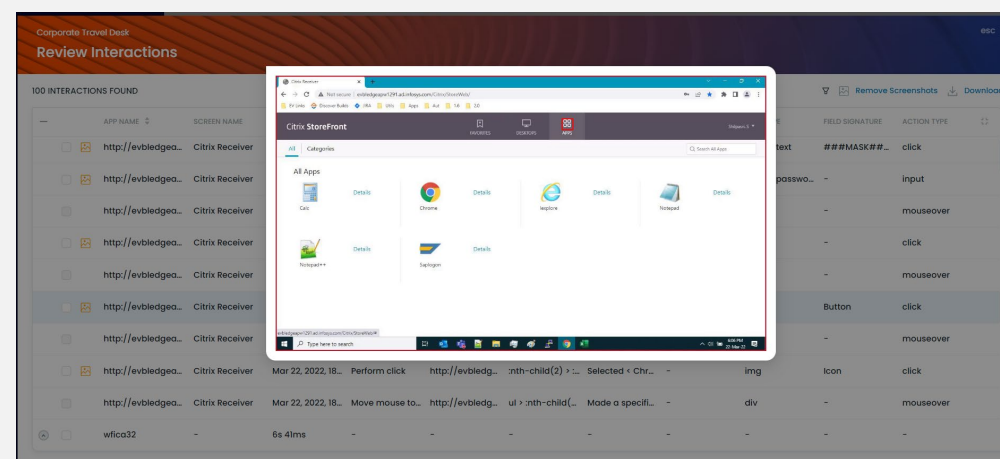


# Capture data across systems and apps

## SAP data capture



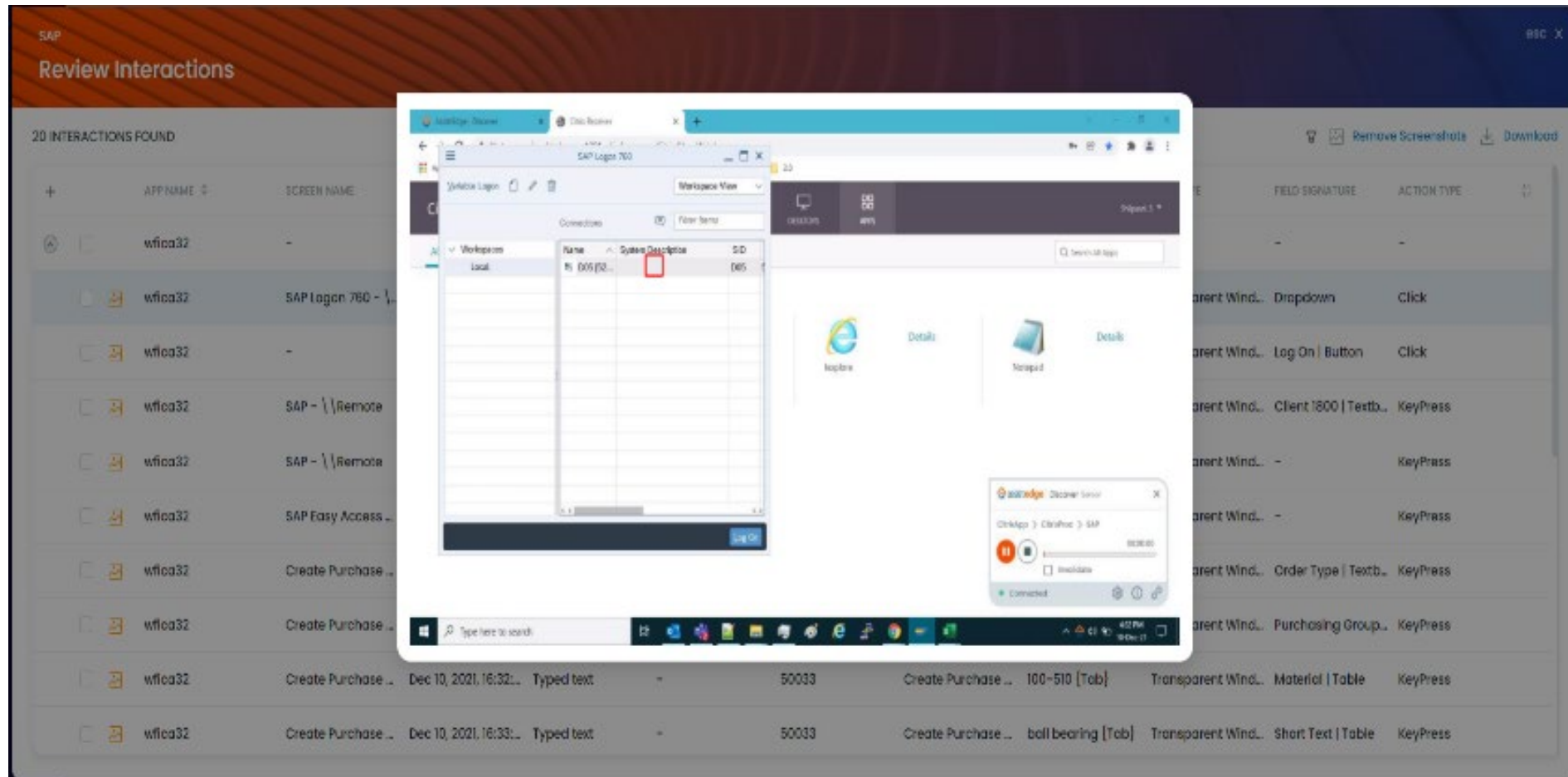
## Data capture using Citrix



## Web data capture

# Capture user control information

Computer vision for capturing screenshots and control level (field signature) information



The screenshot displays the SAP Review Interactions tool interface. The main window shows a list of interactions found, with columns for APP NAME, SCREEN NAME, and ACTION TYPE. A detailed view of a specific interaction is shown in the foreground, highlighting the 'FIELD SIGNATURE' and 'ACTION TYPE' for a 'Create Purchase' action. The detailed view includes a table with columns for Name, System Description, and ID, and a list of actions with their corresponding field signatures and action types.

| APP NAME | SCREEN NAME                               | ACTION TYPE |
|----------|-------------------------------------------|-------------|
| wfica32  | -                                         | Click       |
| wfica32  | SAP Logon 760 - \                         | Click       |
| wfica32  | -                                         | Click       |
| wfica32  | SAP - \Remote                             | KeyPress    |
| wfica32  | SAP - \Remote                             | KeyPress    |
| wfica32  | SAP Easy Access ..                        | KeyPress    |
| wfica32  | Create Purchase ..                        | KeyPress    |
| wfica32  | Create Purchase ..                        | KeyPress    |
| wfica32  | Create Purchase .. Dec 10, 2021, 16:32:.. | KeyPress    |
| wfica32  | Create Purchase .. Dec 10, 2021, 16:33:.. | KeyPress    |

# Define data collection parameters

Setup parameters for capturing data at granular levels, such as apps, device, software, USB, network.

Discover

Data Templates: Task Mining

Template name \*

SELECT THE USECASE  

Task Mining

[Advanced technical settings](#)

**Manual Data Capture**  
 Enable sensing or data capture through Discover Sensor

ON

**Computer Vision**  
 Enables video capture of transactions

OFF

**Auto-Automation**  
 Enables variation export for task automation

OFF

**Auto Data Capture**  
 Capture data in background for auto-sensing

ON

**Screenshot**  
 Capture screenshot while sensing data

ON

Quick tips

What this usecase is all about?

This use case offers automatic or manual data collection and assist the BA to unlock the latest business values trapped in the executive processes. You can also enable features such as computer vision and auto-automation.

Cancel

Save

Save & Assign User

TEMPLATE NAME \*

This is a custom template. Feel free to edit the configurations to suit your team's needs.

Application

Device

Software

USB

Network

**SENSOR CONFIGURATION**

**Application Event Data**  
 Activate configuration options to capture interactions during process recording

ON

**Process Sensing**  
 Enable sensing or data capture through Discover Sensor

ON

**Application Switch Events**  
 Only application switch events will be captured

OFF

**Screenshot**  
 Capture screenshot while sensing data

OFF

**Background Data**  
 Capture data in background for auto-sensing

ON

**Data Length**  
 Specify maximum length of data to be captured

**Idle Time Threshold (Min)**  
 Time threshold for a user to be considered 'idle'

**Data Push Interval (Min)**  
 Time interval of data to be pushed to the server

**Enable Auto-Automation**  
 Enables variation export for task automation

OFF

Save & Close

# Define privacy for data capture

Setup allow / block list for apps and manage privacy

The screenshot displays the 'Privacy Management' section of the AssistEdge interface. The top navigation bar includes the AssistEdge logo and a 'Discover' link. The main header is 'Privacy Management', with sub-tabs for 'Application Allow/Block', 'Privacy Policies', and 'Privacy Configuration'. The 'Application Allow/Block' tab is active, showing a list of applications on the left and a configuration table on the right. The application list includes 'BlackBox\_TM12', 'BlackBox\_TM2', 'BlackBox\_TM3', 'DefaultGroup', 'Purchasing-Samp ...', and 'Task Mining'. The configuration table has columns for 'APPLICATION NAME', 'APPLICATION TYPE', 'CONFIGURATION', and 'LAST UPDATED'. The 'Allow' mode is selected, and a table entry for 'Excel' is shown with type 'EXE' and configuration 'excel'. A 'Download' button and an 'Allow Apps' button are also visible.

assistedge Discover

## Privacy Management

Application Allow/Block Privacy Policies Privacy Configuration

BlackBox\_TM12

BlackBox\_TM2

BlackBox\_TM3

DefaultGroup

Purchasing-Samp ...

Task Mining

Default Allow Block

The chosen mode will ONLY be applicable.

☐ Capture non-allowed application names

| <input type="checkbox"/> | APPLICATION NAME ↕ | APPLICATION TYPE ↕ | CONFIGURATION ↕ | LAST UPDATED ↕           |     |
|--------------------------|--------------------|--------------------|-----------------|--------------------------|-----|
| <input type="checkbox"/> | Excel              | EXE                | excel           | 27th Feb, 2023 @ 3:50 PM | ... |

Download + Allow Apps

# Define business categorization of apps

Categorize apps as per business need

Categorize the applications to create custom reports



| <input type="checkbox"/> | APPLICATION NAME ⇅                   | CATEGORY ⇅ | SUB CATEGORY ⇅ |
|--------------------------|--------------------------------------|------------|----------------|
| <input type="checkbox"/> | https://www.livestrong.com           | Productive | ▼              |
| <input type="checkbox"/> | https://www.thefreedictionary.com    |            | ▼              |
| <input type="checkbox"/> | https://ogs.google.co.in             |            | ▼              |
| <input type="checkbox"/> | https://www.aeroflot.ru              |            | ▼              |
| <input type="checkbox"/> | procexp64                            |            | ▼              |
| <input type="checkbox"/> | https://payments.makemytrip.com      | Productive | ▼              |
| <input type="checkbox"/> | https://www.indianhealthyrecipes.com |            | ▼              |
| <input type="checkbox"/> | sqlitestudio                         |            | ▼              |
| <input type="checkbox"/> | https://www.tutorialspoint.com       |            | ▼              |

Learning

Bank

Directory

Flight Booking

Train Booking

Analysis

Documentation

Presentation

# Define exclusions and standardizations

## Application exclusion

| APPLICATIONS                                    | TRANSACTIONS | INTERACTIONS PER TRANSACTION | STATUS   |
|-------------------------------------------------|--------------|------------------------------|----------|
| <input type="checkbox"/> chromeos/newsflash     | 46           | 1                            | Excluded |
| <input type="checkbox"/> explorer               | 37           | 2                            | Included |
| <input type="checkbox"/> https://www.google.com | 33           | 2                            | Included |
| <input type="checkbox"/> newschopp              | 35           | 2                            | Included |
| <input type="checkbox"/> https://www.zeitsun.in | 15           | 20                           | Included |
| <input type="checkbox"/> outlook                | 13           | 10                           | Included |
| <input type="checkbox"/> https://www.zeitsun.in | 9            | 27                           | Included |

## Transaction exclusion

| TRANSACTION ID                                                | TOTAL INTERACTIONS | UNIQUE INTERACTIONS | STATUS   |
|---------------------------------------------------------------|--------------------|---------------------|----------|
| <input type="checkbox"/> b7f6e622-bd72-4bd3-9d75-b1da78db7c1a | 144                | 126                 | Included |
| <input type="checkbox"/> fd5e46ba-9e2b-4a02-31a0-d754ca75ddae | 137                | 102                 | Included |
| <input type="checkbox"/> c37705e-f047-481e-905e-bd9100190393  | 122                | 103                 | Included |
| <input type="checkbox"/> 5e632e68-c0d2-40c3-9e60-b66d5a591e1f | 101                | 79                  | Included |
| <input type="checkbox"/> bd127027-c7b1-4267-b2b0-9e57029e8d60 | 107                | 84                  | Included |
| <input type="checkbox"/> v0b2422a-bd7f-448e-b257-cd20c94e2530 | 107                | 88                  | Included |
| <input type="checkbox"/> 8e10240f-110c-4436-b65b-325-b4d7c69f | 101                | 67                  | Included |

## Interaction Standardization

| TABLE SUMMARY   Transactions: 176   Total Interactions: 5556   Unique Interactions: 2958                                                                          |                       |                                     |         |          |               |  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|-------------------------------------|---------|----------|---------------|--|
| INTERACTION DETAILS                                                                                                                                               |                       |                                     |         |          |               |  |
| APPLICATION                                                                                                                                                       | SCREEN NAME           | WEB URL                             | REQUEST | RESPONSE | USER ACTION   |  |
| chromeos                                                                                                                                                          | NewsFlash             | -                                   | 50000   | 200000   | Webview click |  |
| outlook                                                                                                                                                           | Mail - Outlook        | -                                   | 50000   | 200000   | Webview click |  |
| newschopp                                                                                                                                                         | Unread - Newschopp    | -                                   | 50004   | 200000   | Webview click |  |
| https://www.zeitsun.in                                                                                                                                            | Page - Zeitsun        | https://www.zeitsun.in/page-zeitsun | 50000   | 200000   | Webview click |  |
| newschopp                                                                                                                                                         | Search                | -                                   | 50004   | 200000   | Typed text    |  |
| newschopp                                                                                                                                                         | Documents - Microsoft | -                                   | 50000   | 200000   | Webview click |  |
| outlook                                                                                                                                                           | Mail - Outlook        | -                                   | 50000   | 200000   | Typed text    |  |
| https://www.zeitsun.in                                                                                                                                            | Page - Zeitsun        | https://www.zeitsun.in/page-zeitsun | 50000   | 200000   | Webview click |  |
| <div> <input type="checkbox"/> Standard         <input type="checkbox"/> Custom         <input type="text" value=""/> <input type="button" value="Apply"/> </div> |                       |                                     |         |          |               |  |

# Task discovery and analysis

Define start and end markers

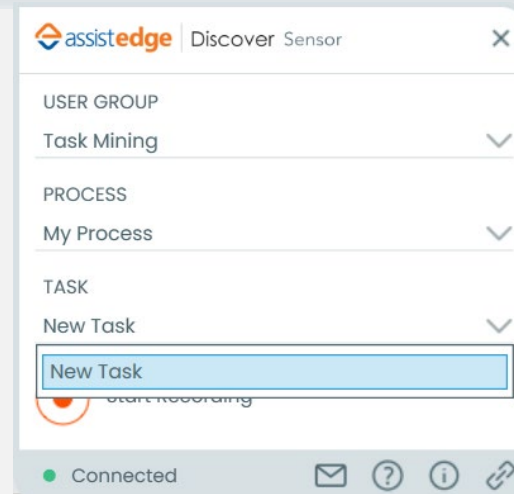
Start Markers

End Markers

Marker Set 1

Edit Delete

|   | App Name                                                                                   | Screen Name | Time                 | Action | URL | Field ID              | Field Name       | Field Value         | Field Type       | Action Type |
|---|--------------------------------------------------------------------------------------------|-------------|----------------------|--------|-----|-----------------------|------------------|---------------------|------------------|-------------|
| + |  saplogon | SAP         | Nov 09, 2021, 20:... | -      | -   | /app/con[0]/ses[0]... | GuiPasswordField | E8TJ9VCBH+u+x8Gw... | GuiPasswordField | Click       |



Manual classification method

# Define the start and end of tasks

Setup task markers for marking the start and end of processes

CitrixApp etc X

## Create Task Marker

USER NAME:  SELECT DATE & TIME:  →

☒ Start Marker ☐ End Marker ☐ Assign a task

50 Interactions found included task data

|   | APP NAME               | SCREEN NAME         | DUR / TIME               | ACTION        | URL                         | FIELD ID                     | FIELD NAME                 | FIELD VALUE | FIELD TYPE | ACTION TYPE |
|---|------------------------|---------------------|--------------------------|---------------|-----------------------------|------------------------------|----------------------------|-------------|------------|-------------|
| + | lockapp                | -                   | 12s 867ms                | -             | -                           | -                            | -                          | -           | -          | -           |
| + | mstsc                  | -                   | 16s 831ms                | -             | -                           | -                            | -                          | -           | -          | -           |
| + | http://10.73.89.88:... | -                   | 9s 567ms                 | -             | -                           | -                            | -                          | -           | -          | -           |
| - | http://10.73.89.88:... | AEDiscoverSensor*.. | Dec 13, 2021, 10:35:0... | Perform click | http://10.73.89.88:8080/j.. | html                         | Searching for <AEDiscov... | -           | html       | click       |
|   | Equals                 | Equals              |                          | Equals        | Equals                      | Equals                       | Equals                     | Equals      | Equals     | Equals      |
|   | App Name               | Screen Name         |                          | Action        | URL                         | Field ID                     | Field Name                 | Field Value | Field T... | Action Type |
| + | http://10.73.89.88:... | AEDiscoverSensor*.. | Dec 13, 2021, 10:35:1... | Perform click | http://10.73.89.88:8080/j.. | #jenkins > :nth-child(9) ... | Selected < Logs > on AE... | -           | div        | click       |
| + | mstsc                  | -                   | 33s 341ms                | -             | -                           | -                            | -                          | -           | -          | -           |
| + | http://10.73.89.88:... | -                   | 18s 670ms                | -             | -                           | -                            | -                          | -           | -          | -           |
| + | mstsc                  | -                   | 1m 23s 644ms             | -             | -                           | -                            | -                          | -           | -          | -           |

# Apply task markers

Procurement\_Amz\_Small

esc X

## Apply Task Marker

SELECT DATE AND TIME

Start Date &amp; Time

→ End Date &amp; Time



MIN. OCCURRENCE OF TRANSACTION \*

10

AVERAGE TRANSACTION DURATION \*

Select



APPLY

MARKER JOB STATUS

[Refresh Status](#)

| START TIME ↕            | END TIME ↕              | TYPE ↕ | STATUS ↕  | CREATED ON ↕             |                        |
|-------------------------|-------------------------|--------|-----------|--------------------------|------------------------|
| 4th Oct, 2023 @ 5:30 AM | 5th Oct, 2023 @ 5:29 AM | Auto   | Completed | 5th Oct, 2023 @ 12:30 PM | <a href="#">Review</a> |
| 4th Oct, 2023 @ 5:30 AM | 5th Oct, 2023 @ 5:29 AM | Auto   | Completed | 5th Oct, 2023 @ 12:30 PM | <a href="#">Review</a> |
| 4th Oct, 2023 @ 5:30 AM | 5th Oct, 2023 @ 5:29 AM | Auto   | Completed | 5th Oct, 2023 @ 12:30 PM | <a href="#">Review</a> |
| 2nd Oct, 2023 @ 5:30 AM | 3rd Oct, 2023 @ 5:29 AM | Auto   | Completed | 3rd Oct, 2023 @ 12:30 PM | <a href="#">Review</a> |
| 2nd Oct, 2023 @ 5:30 AM | 3rd Oct, 2023 @ 5:29 AM | Auto   | Completed | 3rd Oct, 2023 @ 12:30 PM | <a href="#">Review</a> |
| 2nd Oct, 2023 @ 5:30 AM | 3rd Oct, 2023 @ 5:29 AM | Auto   | Completed | 3rd Oct, 2023 @ 12:30 PM | <a href="#">Review</a> |

Close

# Task discovery and analysis

## Blackbox Process Discovery

Provide inputs to discover tasks

Discover Tasks

esc X

DATE RANGE \*

Start Date & Time → End Date & Time

MINIMUM OCCURRENCE OF TRANSACTION \*

5

AVERAGE TRANSACTION DURATION \*

Select

Note: Initiating a new discovery will remove previously discovered tasks.

Discover

Review patterns discovered

assistedge Discover

Analysis

Purchasing New

Existing Tasks Task Markers

DISCOVERED PATTERNS

Date Range: 1st Apr, 2023 @ 12:00 AM to 30th Apr, 2023 @ 11:59 PM, Min Occurrence: 2, Transaction: Medium (3-10 min)

Pattern 1

TRANSACTIONS  
2

AVERAGE STEPS  
180

Review

USERS  
1

AVERAGE DURATION  
6m 0s

CONFIDENCE SCORE  
76

Pattern 2

TRANSACTIONS  
2

AVERAGE STEPS  
106

Review

USERS  
1

AVERAGE DURATION  
9m 56s

CONFIDENCE SCORE  
74

Pattern 3

TRANSACTIONS  
2

AVERAGE STEPS  
103

Review

USERS  
1

AVERAGE DURATION  
13m 47s

CONFIDENCE SCORE  
70

Pattern 4

TRANSACTIONS  
2

AVERAGE STEPS  
102

Review

USERS  
1

AVERAGE DURATION  
5m 59s

CONFIDENCE SCORE  
64

Pattern 5

TRANSACTIONS  
2

AVERAGE STEPS  
103

Review

USERS  
1

AVERAGE DURATION  
9m 3s

CONFIDENCE SCORE  
56

Pattern 6

TRANSACTIONS  
2

AVERAGE STEPS  
114

Review

USERS  
1

AVERAGE DURATION  
8m 3s

CONFIDENCE SCORE  
46

Pattern 7

TRANSACTIONS  
2

AVERAGE STEPS  
94

Review

USERS  
1

AVERAGE DURATION  
20m 5s

CONFIDENCE SCORE  
34

Pattern 8

TRANSACTIONS  
2

AVERAGE STEPS  
101

Review

USERS  
1

AVERAGE DURATION  
3m 17s

CONFIDENCE SCORE  
20

# Task discovery and analysis

Accept / discard / review & edit patterns

The screenshot displays the AssistEdge Discover interface for analyzing a task pattern. The interface includes a sidebar with navigation icons, a top header with the AssistEdge logo and user profile, and a main content area.

**Pattern Overview:** Purchasing New\_Pattern 1

**SNAPSHOT Summary:**

| Transactions Discovered | Users | Average Steps | Average Duration |
|-------------------------|-------|---------------|------------------|
| 2                       | 1     | 180           | 6m 0s            |

Buttons: [Accept](#) [Discard](#)

**Pattern Details:**

**START**

- powerpnt** (Presentation\* - PowerPoint)  
FIELD NAME: - ACTION: Perform click  
URL: -
- powerpnt** (Presentation\* - PowerPoint)  
FIELD NAME: - ACTION: Perform click  
URL: -

**END**

- powerpnt** (Presentation\* - PowerPoint)  
FIELD NAME: Slide Show ACTION: Perform click  
URL: -
- powerpnt** (PowerPoint Slide Show - Presentation\*)  
FIELD NAME: PowerPoint Slide Show - PresentationI ACTION: Typed text  
URL: -

**TRANSACTION Table:**

| TRANSACTION ID                                                | USER KEY         | START TIME                 | DURATION     | INTERACTIONS |                                               |
|---------------------------------------------------------------|------------------|----------------------------|--------------|--------------|-----------------------------------------------|
| <input type="checkbox"/> d2b38df9-2613-11ee-b566-fa163ef0cd1a | 6d8292b5bc6ef8a2 | Apr 11, 2023, 18:21:30.608 | 6m 22s 423ms | 156          | <a href="#">Review</a> <a href="#">Delete</a> |
| <input type="checkbox"/> d25b8824-2613-11ee-bf1f-fa163ef0cd1a | 6d8292b5bc6ef8a2 | Apr 11, 2023, 18:15:49.972 | 5m 37s 808ms | 203          | <a href="#">Review</a> <a href="#">Delete</a> |

# Task discovery and analysis

Stitch tasks and visualize the process

ESC X

Edit Process

PROCESS NAME \*

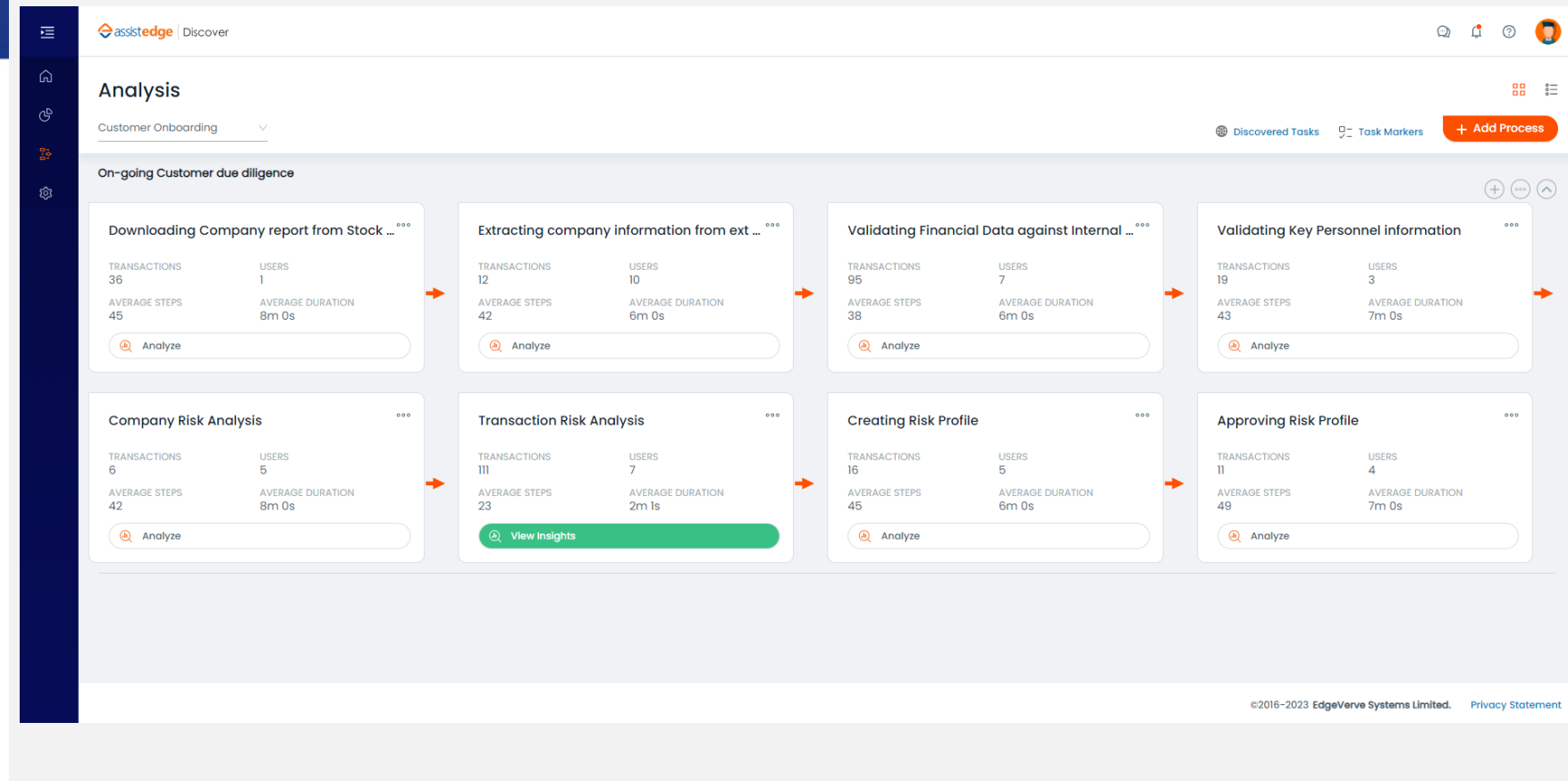
On-going Customer due diligence

| Task Sequence | TASK NAME                          | EST.TIME (in min) |   |
|---------------|------------------------------------|-------------------|---|
| 1             | Downloading Company report from St | 5                 |   |
| 2             | Task 2                             | 5                 |   |
| 3             | Task 3                             | 4                 |   |
| 4             | Task 4                             | 5                 |   |
| 5             | Task 5                             | 7                 |   |
| 6             | Task 6                             | 4                 | + |

Instructions

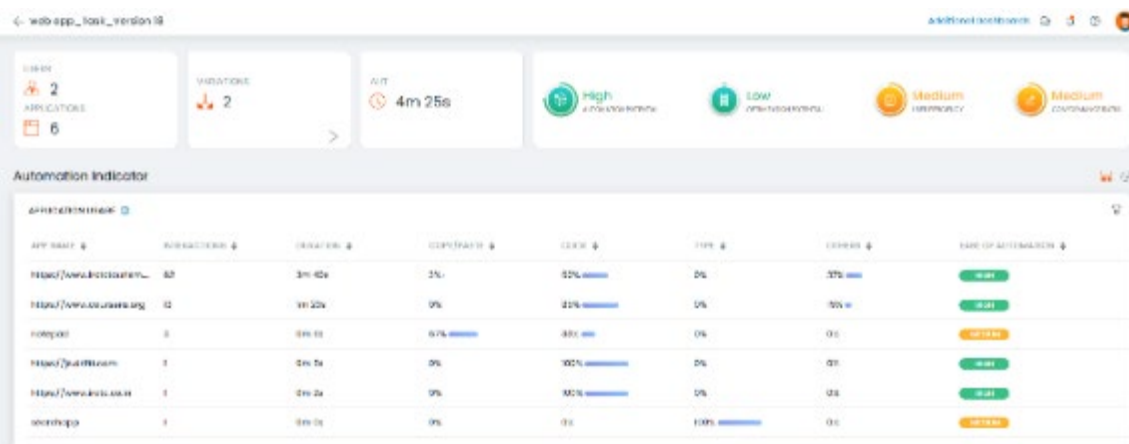
To reposition the items, click the move symbol(just a click) scroll down to place of choice, and click to reposition.

Update

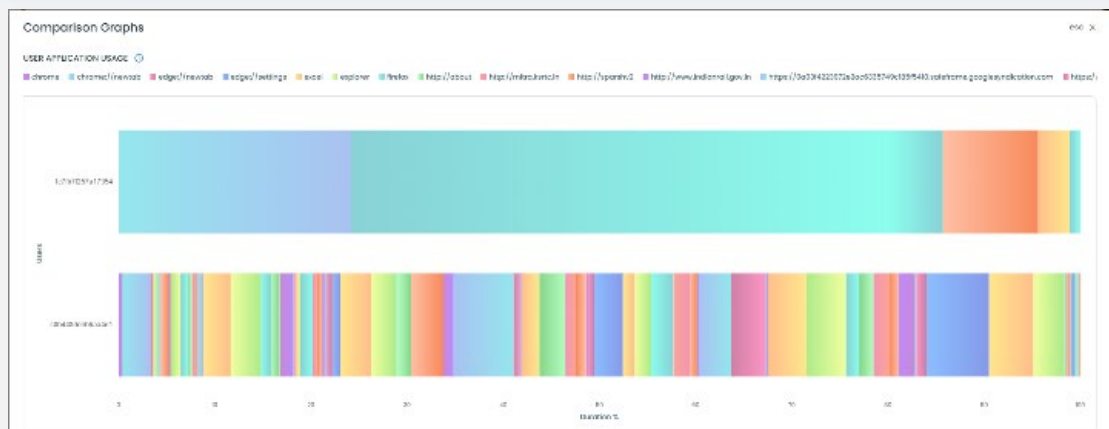


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# Task discovery and analysis



← Task Insights



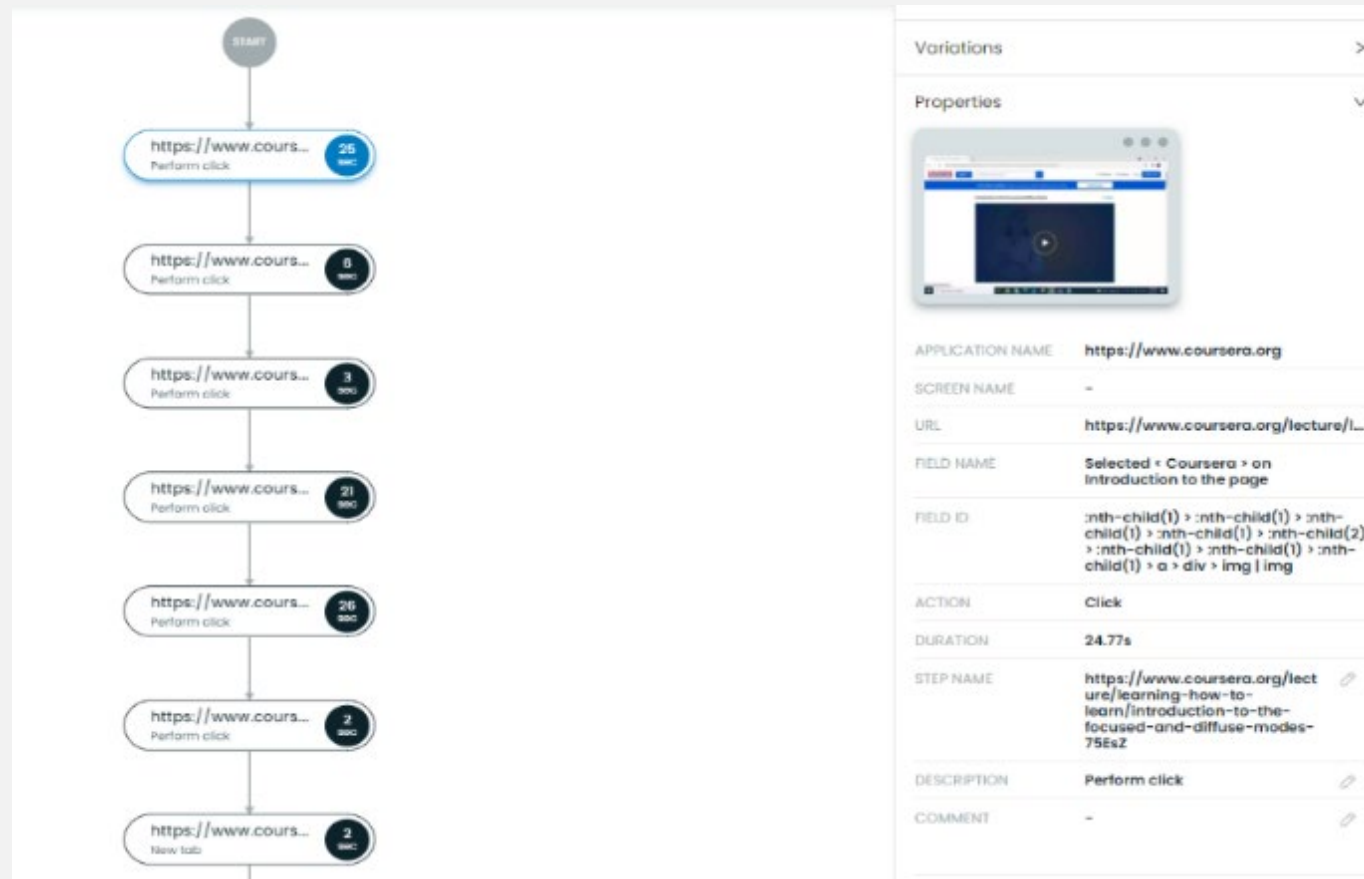
← Application Insights

Task Maps →



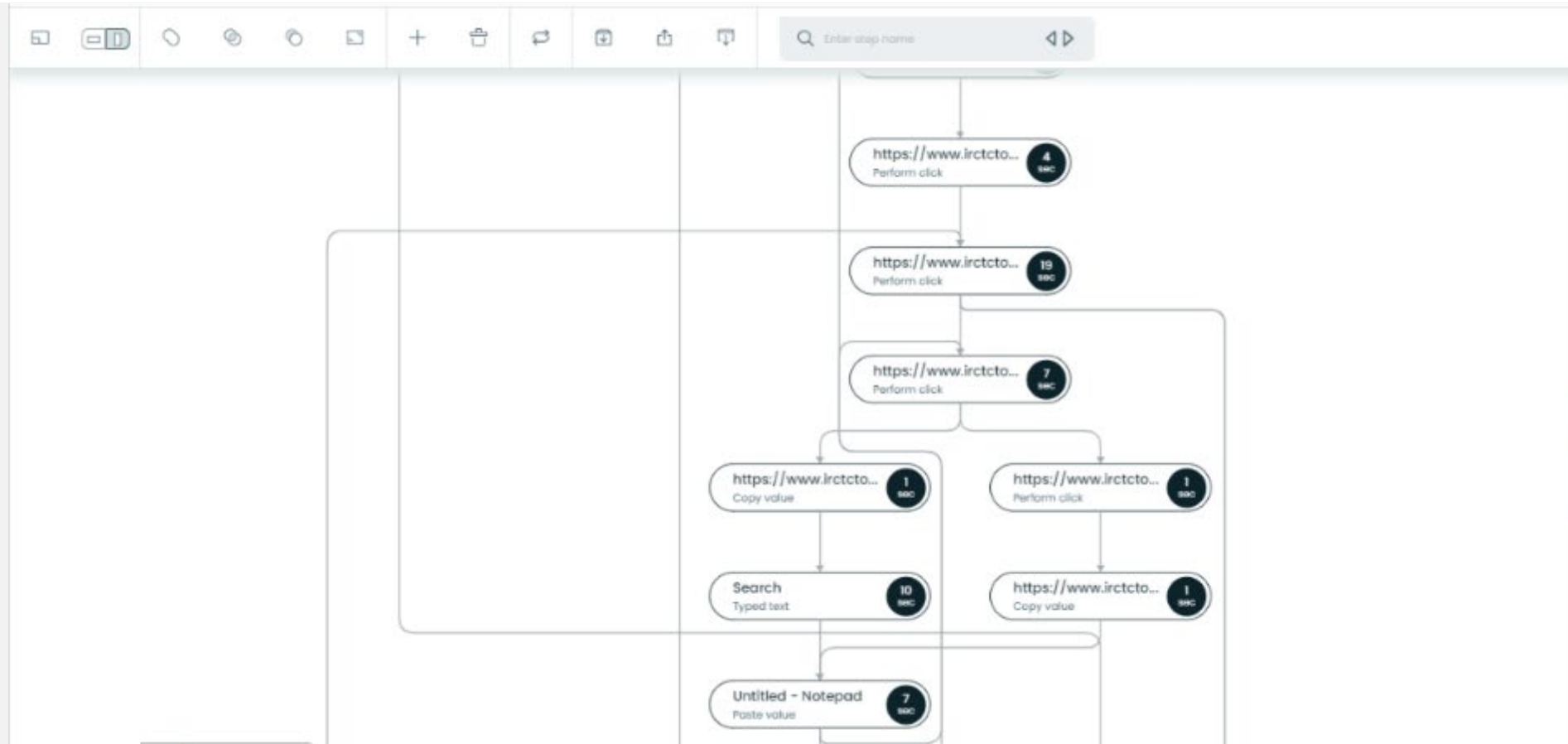
# Task discovery and analysis

Add notes and description for easy reference



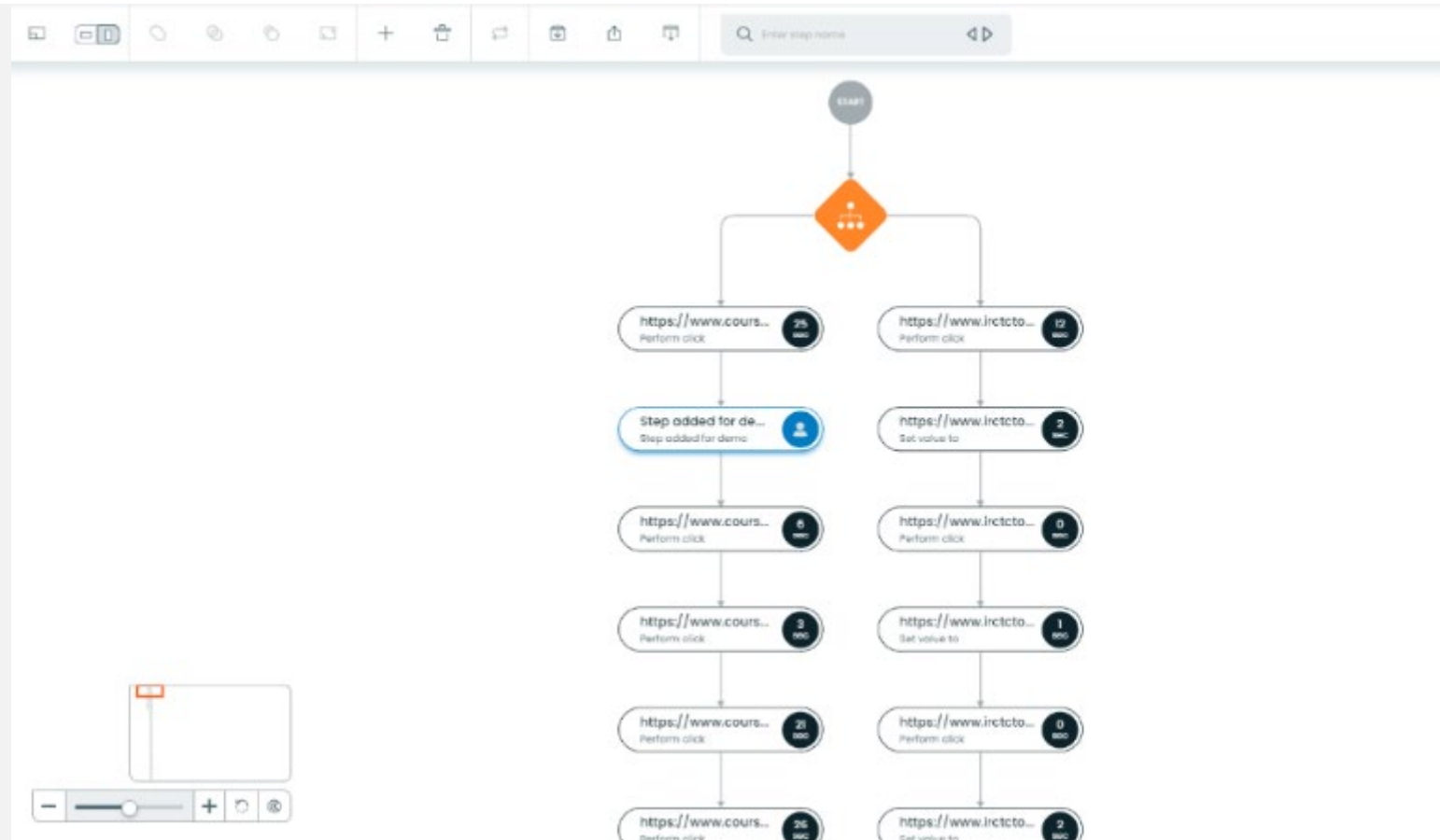
# Task discovery and analysis

Automatically detect process loops



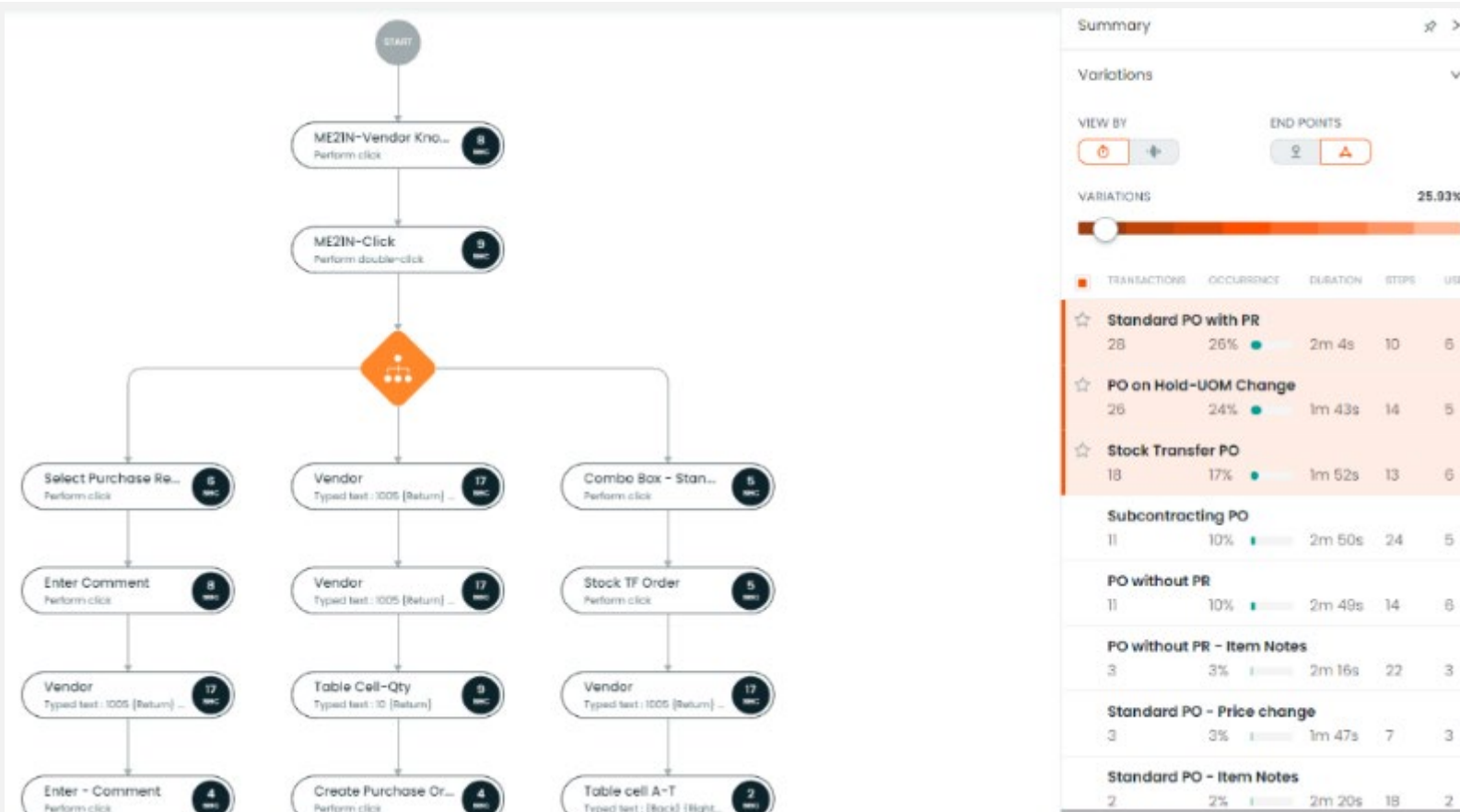
# Task discovery and analysis

Review process discovered and add steps to complete/correct it



# Task discovery and analysis

Compare process variations



# Task discovery and analysis

Define benchmarks to measure user efficiency

### Settings

Step Name   Variation Adjustment   Conformance Adjustment   **Benchmarks**

User Key

Custom

---

AVERAGE DURATION PER TRANSACTION

0

AVERAGE TIME SPENT ON APPLICATION

0

UNIQUE APPLICATION COUNT

0

Reset

Cancel

Save

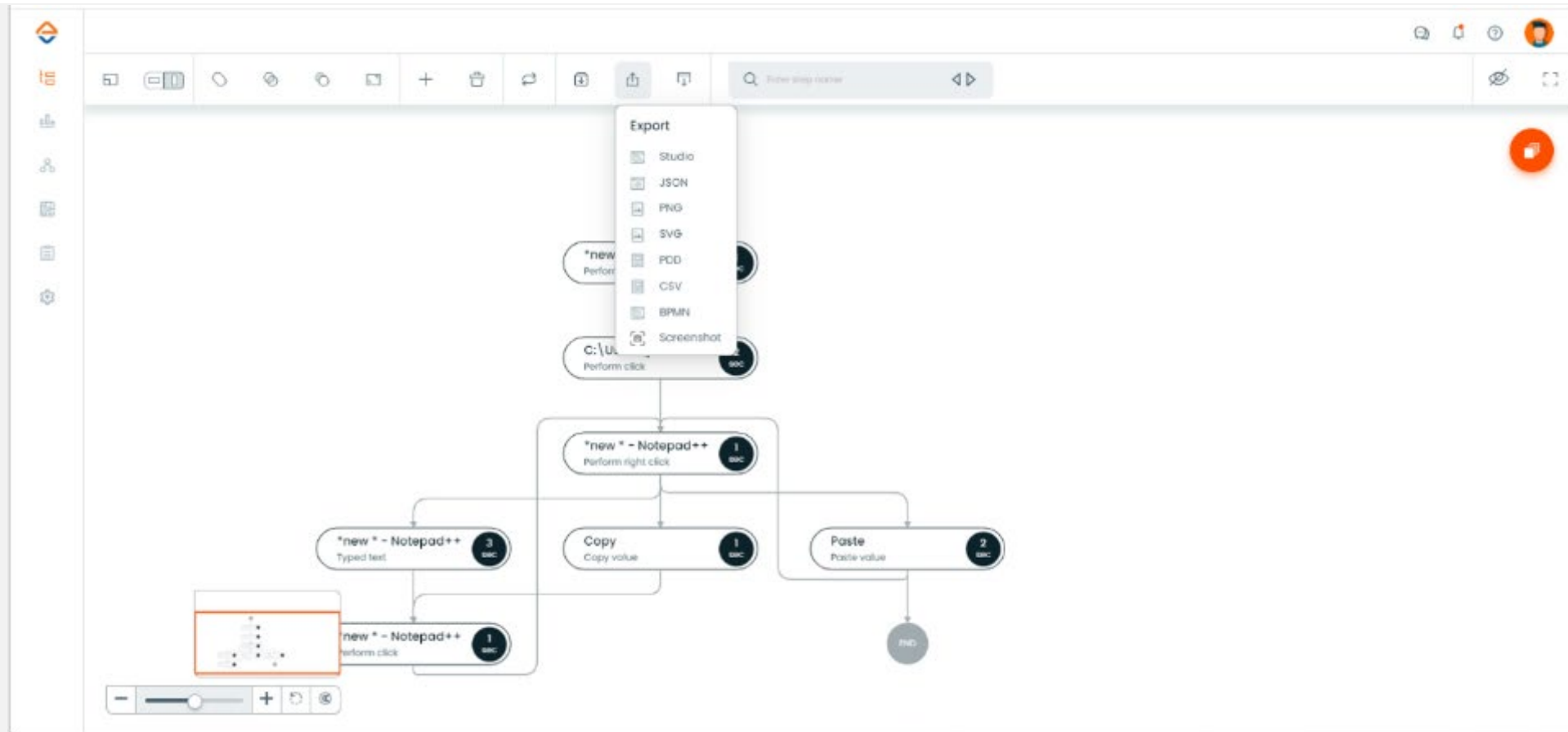
### User Efficiency Benchmark



High

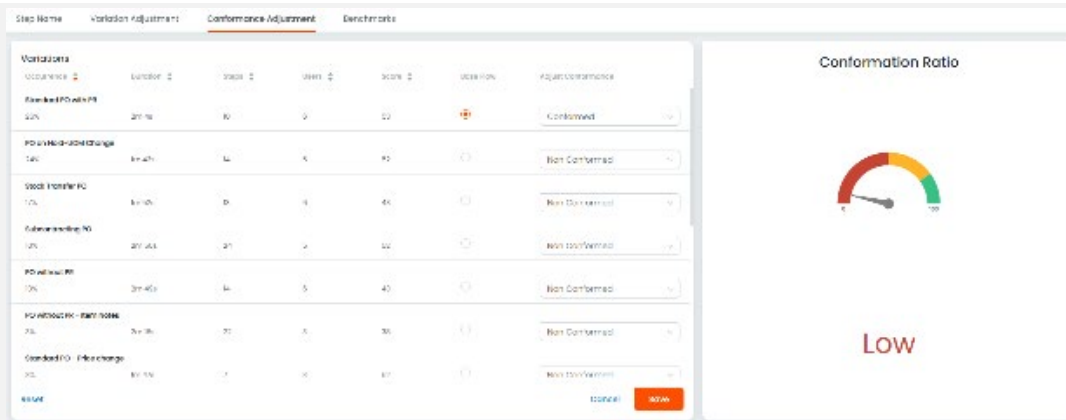
# Task discovery and analysis

One-click export of discovered process to Process Design Documents (PDD)

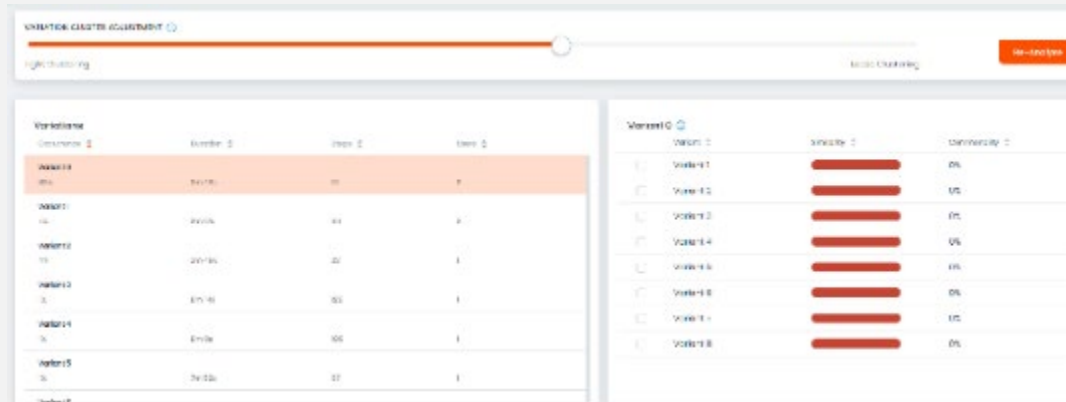


# Enhance task mining with manual inputs

## Conformance Adjustment



## Adjust similarities and commonalities



## Step deviation

| Automation Optimization Conformance Step Properties |             |                      |
|-----------------------------------------------------|-------------|----------------------|
| Standard PO with PR                                 |             |                      |
| LOW STEP DEVIATION                                  |             |                      |
| Adjust Conformance                                  |             |                      |
| Steps                                               | Application | Common With Baseflow |
| Step 1                                              | saplogon    | YES                  |
| Step 2                                              | saplogon    | YES                  |
| Step 3                                              | saplogon    | YES                  |
| Step 4                                              | saplogon    | YES                  |
| Step 5                                              | saplogon    | YES                  |
| Step 6                                              | saplogon    | YES                  |
| Step 7                                              | saplogon    | YES                  |
| Step 8                                              | saplogon    | YES                  |
| Step 9                                              | saplogon    | YES                  |
| Step 10                                             | saplogon    | YES                  |

# Simulation – What-if analysis

## Simulation Creation

← Simulations

Reset

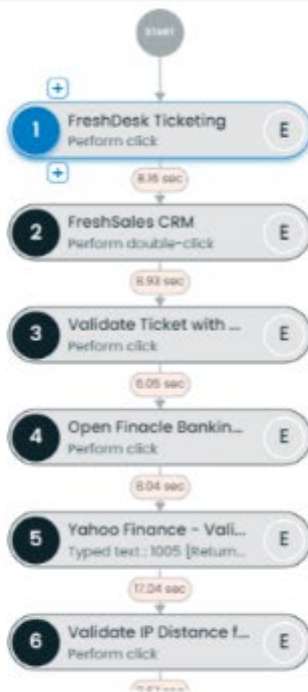
SIMULATE

Variations

| Occurrence                                | Duration | Steps | Users | Score | Exclude                             |
|-------------------------------------------|----------|-------|-------|-------|-------------------------------------|
| <b>New Retail customer</b>                |          |       |       |       |                                     |
| 26%                                       | 2m 4s    | 10    | 6     | 83    | <input checked="" type="checkbox"/> |
| <b>New corporate Customer</b>             |          |       |       |       |                                     |
| 24%                                       | 1m 43s   | 14    | 5     | 79    | <input type="checkbox"/>            |
| <b>Existing Retail Customer</b>           |          |       |       |       |                                     |
| 17%                                       | 1m 52s   | 13    | 6     | 73    | <input type="checkbox"/>            |
| <b>Existing Corporate Customer</b>        |          |       |       |       |                                     |
| 10%                                       | 2m 50s   | 24    | 5     | 79    | <input type="checkbox"/>            |
| <b>Enhanced Due diligence - Retail</b>    |          |       |       |       |                                     |
| 10%                                       | 2m 49s   | 14    | 6     | 73    | <input type="checkbox"/>            |
| <b>Enhanced Due diligence - Corporate</b> |          |       |       |       |                                     |
| 3%                                        | 2m 16s   | 22    | 3     | 68    | <input type="checkbox"/>            |
| <b>High Risk Individuals</b>              |          |       |       |       |                                     |
| 3%                                        | 1m 47s   | 7     | 3     | 52    | <input type="checkbox"/>            |
| <b>High Risk Corporates</b>               |          |       |       |       |                                     |
| 2%                                        | 2m 20s   | 18    | 2     | 64    | <input type="checkbox"/>            |

New Retail customer

26% 2m 4s 10 6 83



Step Properties

PROPERTIES

EXCLUDE



APPLICATION NAME

FreshDesk

SCREEN NAME

SAP Easy Access

URL

-

FIELD NAME

Tree Node - 0000000332

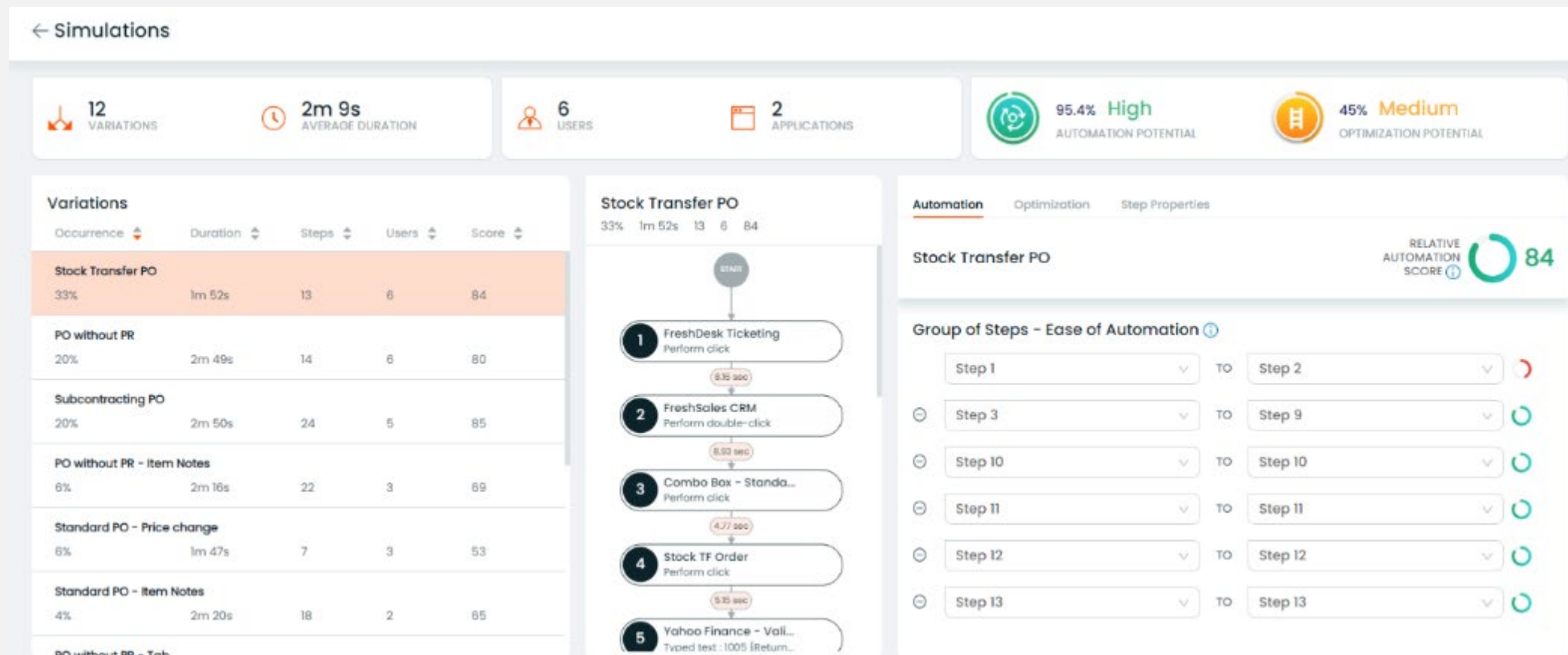
FIELD ID

Tree Node - 0000000332 | Tree Node

ACTION

# Simulation – What-if analysis

## Simulation Output



# Insights to optimize and automate the right processes

Identify automation opportunities

## Automation Blueprint

| TASK METRICS         |                        |                   |                   |                             |
|----------------------|------------------------|-------------------|-------------------|-----------------------------|
| Number of Variations | Total Steps            | Unique Steps      | Repeating Steps   | Task Duration               |
| 9                    | 558                    | 54                | 504               | 5m 22s                      |
| Time between Steps   | Number of Applications | Number of Screens | Number of Toggles | Number of Copy-Paste Events |
| 5s                   | 22                     | 49                | 492               | 9                           |

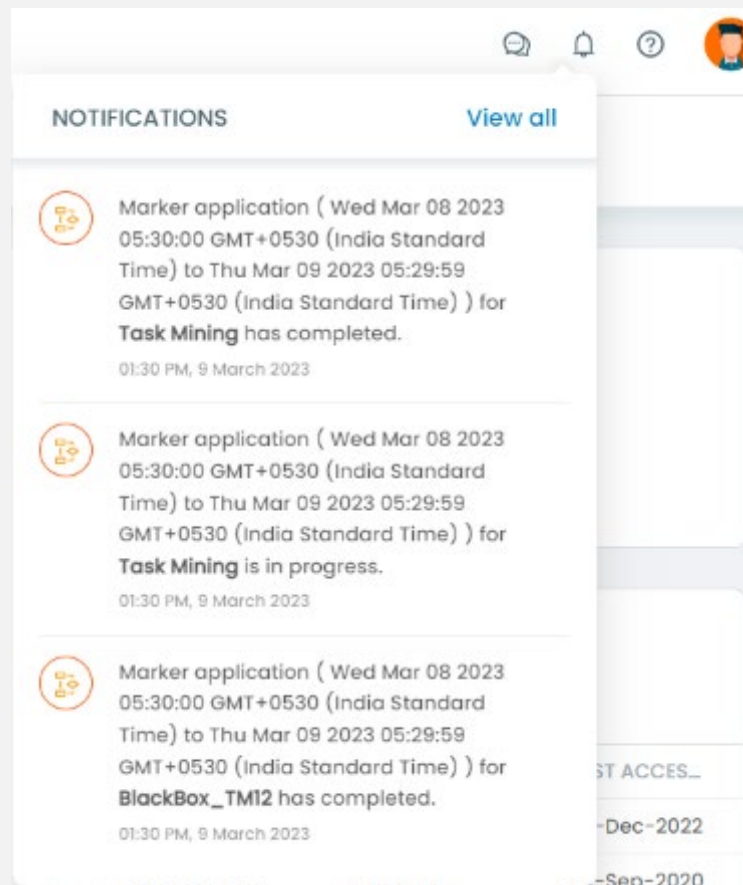
## Automation Blueprint

Prioritize automation opportunities with prioritization matrix and funnel



# Monitor task mining with in-app notifications

## In-App notifications



# AssistEdge Discover

Work Insights  
Dashboard Snapshots



# Setup and manage team roster and work shifts

Managers can define and assign rosters and shifts across users, and can track the details from the dashboard

**Shift Configuration**

Download + Add Shift

| Shift Name          | Duration (HHMM) | Start Time | End Time |
|---------------------|-----------------|------------|----------|
| Holiday             | 00:05           | 00:00      | 00:05    |
| New Afternoon Shift | 07:00           | 13:15      | 20:15    |
| GeneralShift        | 24:00           | 00:00      | 23:59    |
| Leave               | 00:05           | 00:00      | 00:05    |
| Temp2               | 08:00           | 08:00      | 16:00    |
| Normal Shift        | 09:00           | 09:00      | 18:00    |
| Night Shift         | 09:00           | 22:00      | 07:00    |
| Afternoon Shift     | 07:00           | 15:00      | 22:00    |

**Manage Roster**

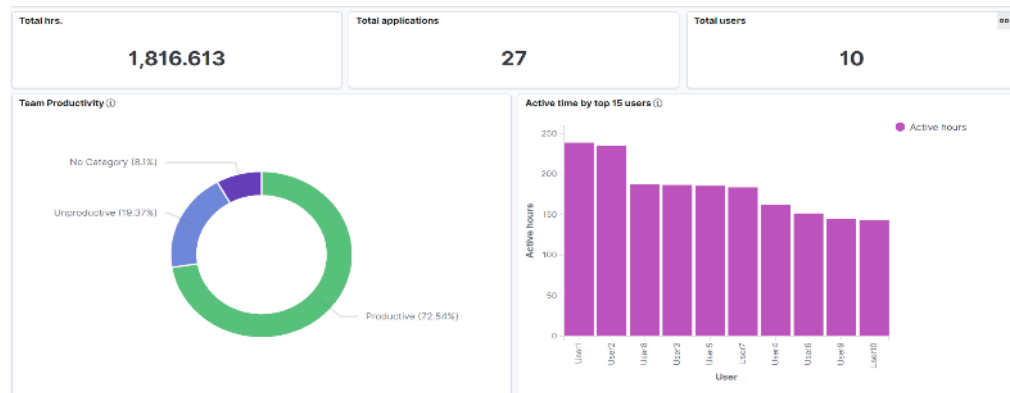
USER GROUP: Application\_analysis WEEK: Week 36 (Sep 04 - Sep 10) Go

Shifts Details

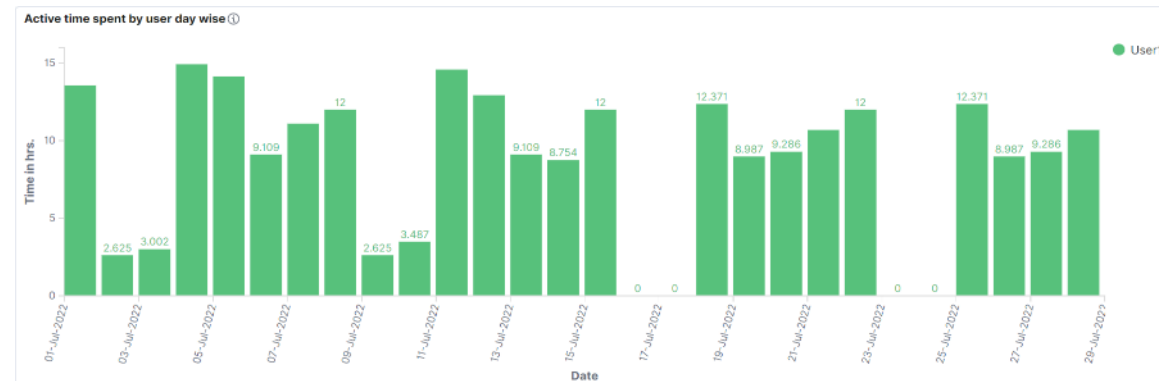
| USER NAME           | MONDAY 4      | TUESDAY 5    | WEDNESDAY 6  | THURSDAY 7    | FRIDAY 8     | SATURDAY 9    | SUNDAY 10    |
|---------------------|---------------|--------------|--------------|---------------|--------------|---------------|--------------|
| Abhishek Nudurupati | Morning S...  | Normal Sh... | New After... | Afternoon ... | Night Shift  | Select Shift  | Select Shift |
| Bipin               | Afternoon ... | Night Shift  | Holiday      | Morning S...  | Normal Sh... | Afternoon ... | Select Shift |
| Digumurthy Neeraja  | Normal Sh...  | Morning S... | New After... | GeneralSh...  | Night Shift  | Select Shift  | Normal Sh... |

Save

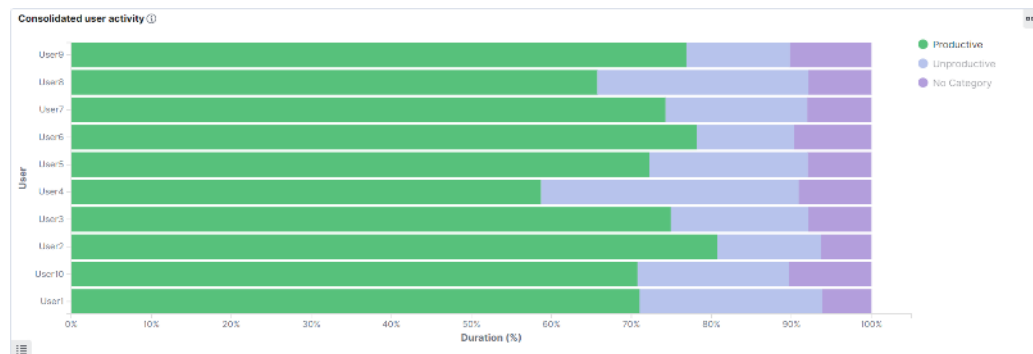
# Drill-down reports and insights-driven dashboard



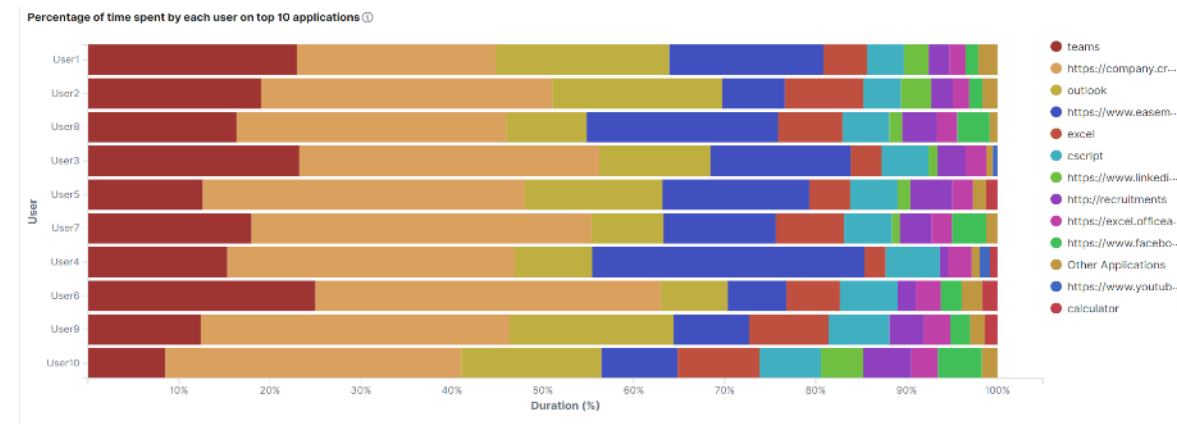
Consolidated team productivity chart, based on the active time spent on core business applications



Active time log for specified period report

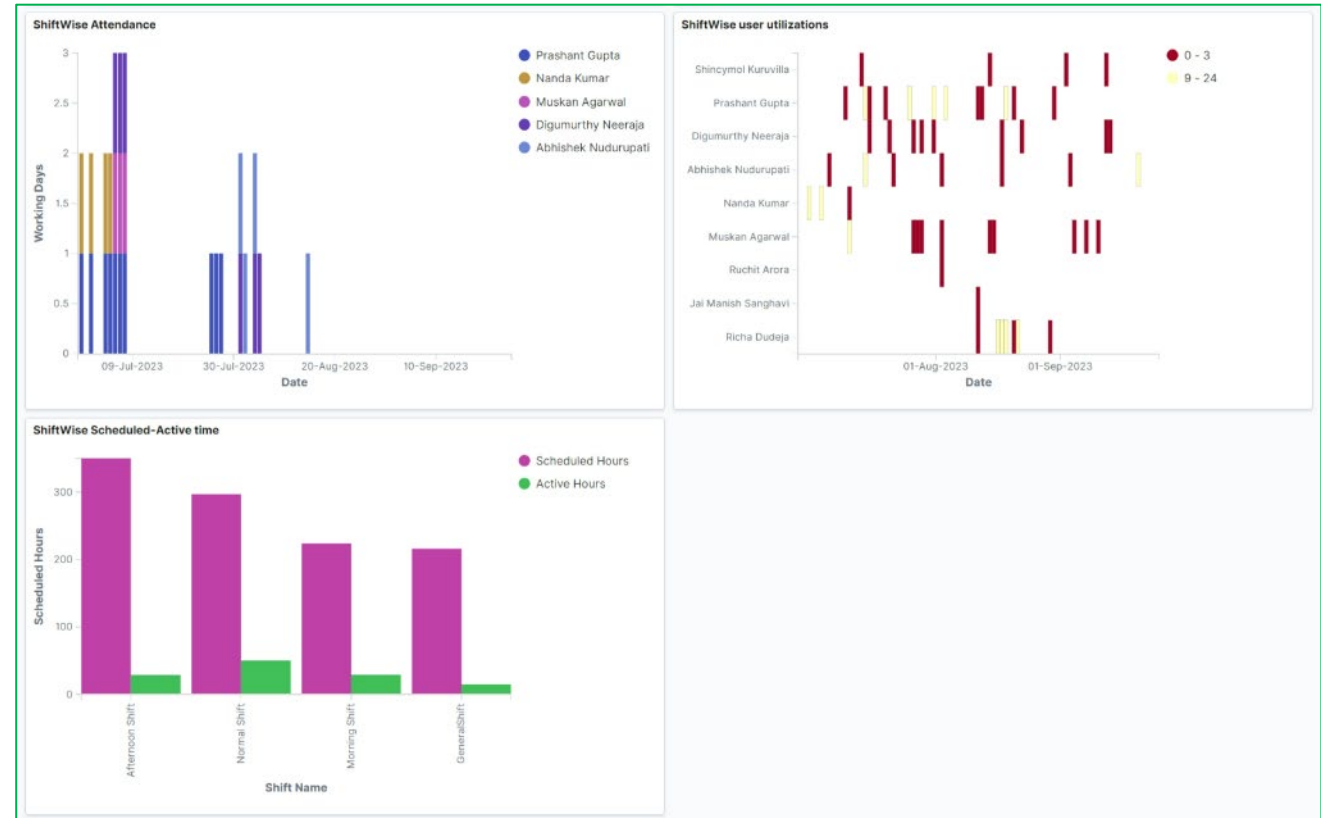
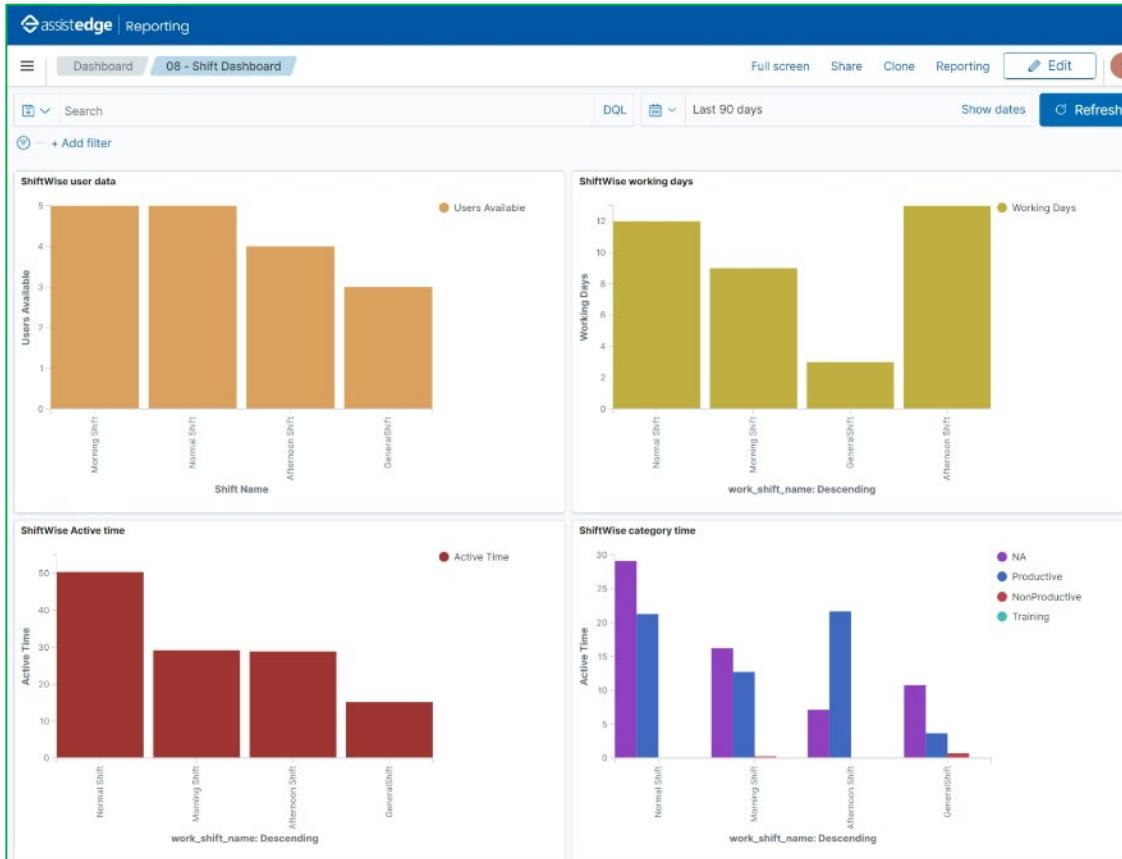


User time spent on core vs. non-core business applications

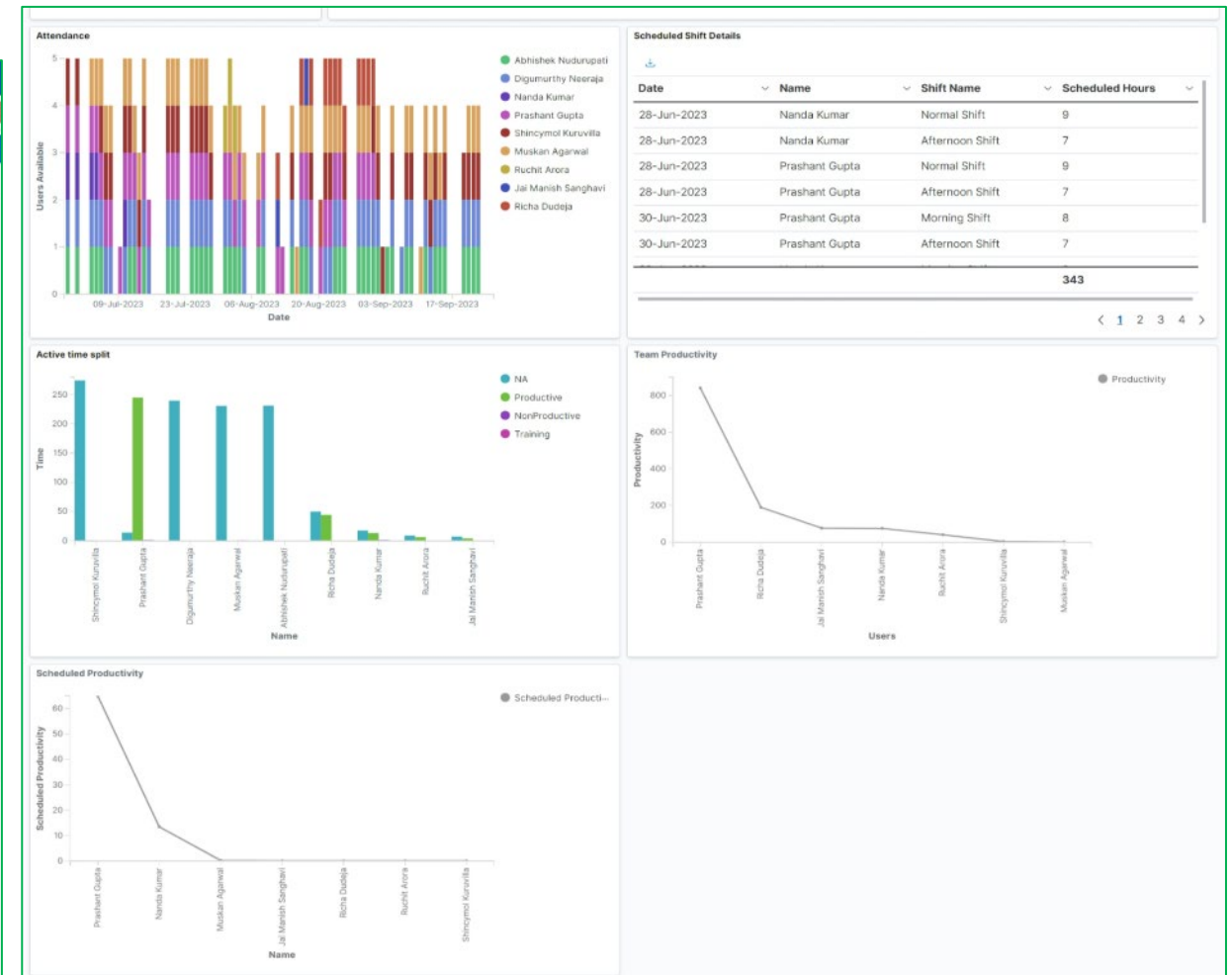
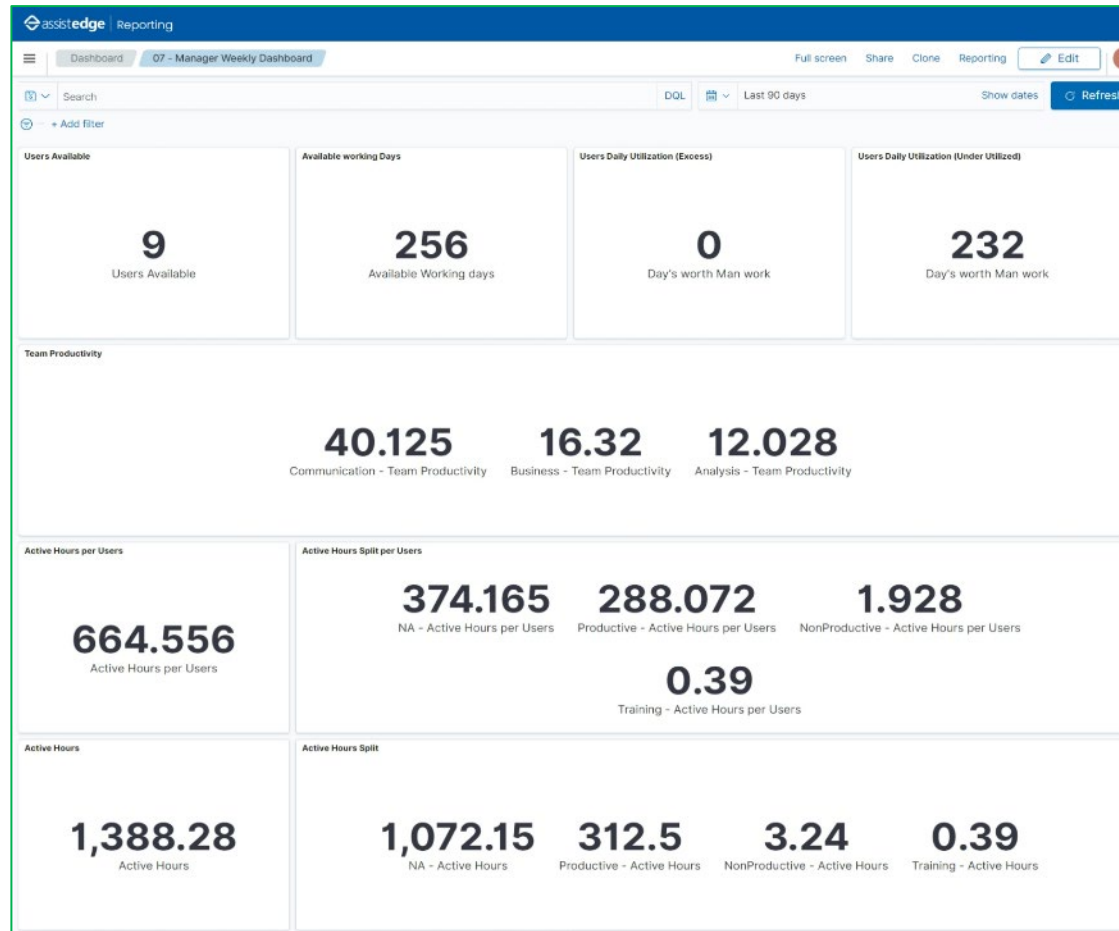


Business application usage

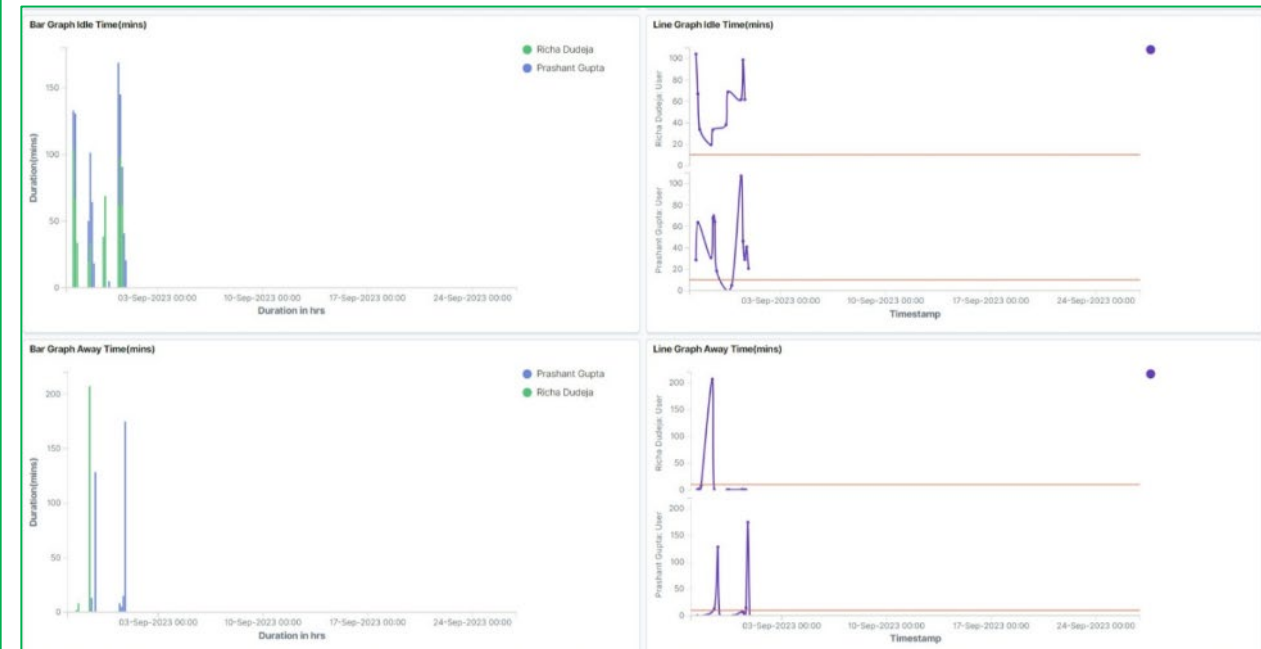
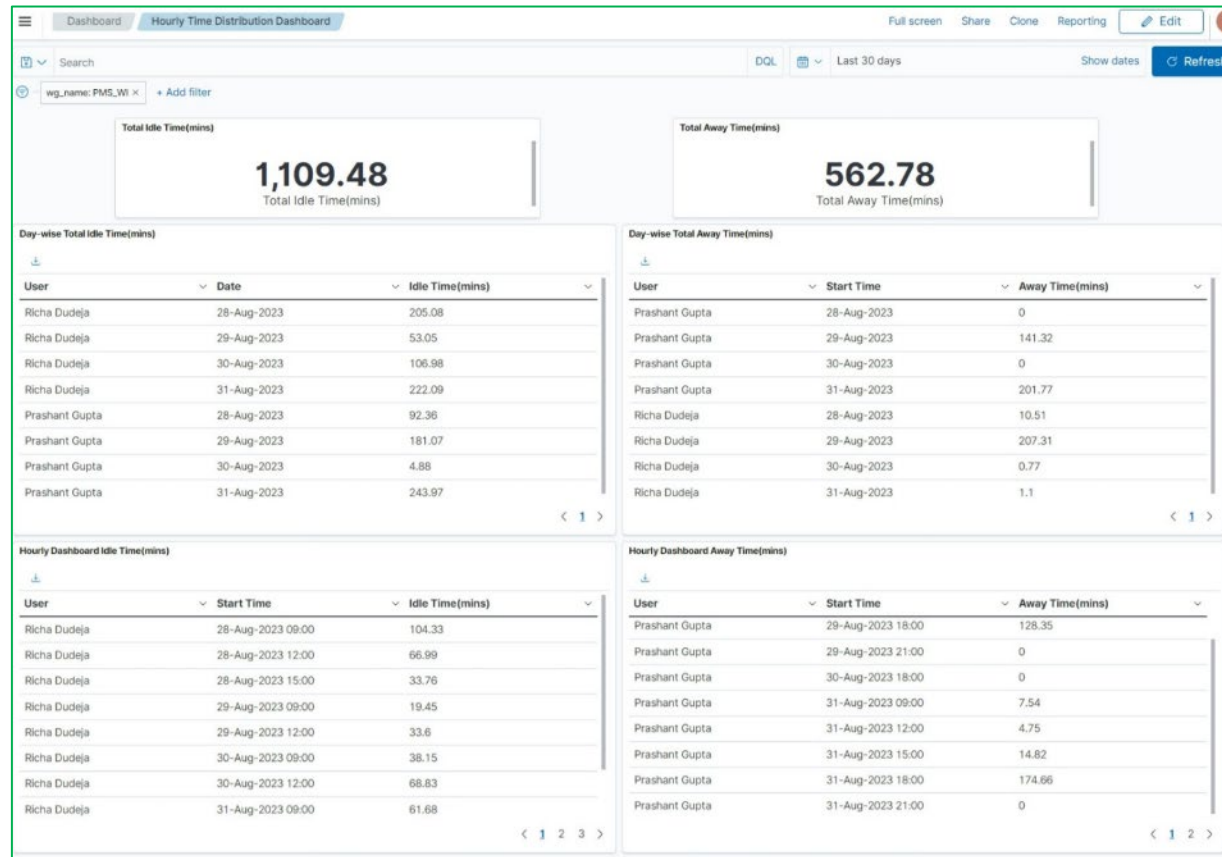
# Shift dashboard to manage team shifts & schedules



# Manager weekly dashboard for team & users' productivity



# Hourly time distribution dashboard



# AssistEdge Discover

## Case Studies



# A large Australian bank discovers processes 80% faster and scales its automation program

## Client

- One of the largest multinational banks in Australia, providing financial services in Australia, New Zealand, India, and the UK.

## Need

- The client wanted to streamline the approach to identify and prioritize the right processes for automation.
- They needed robust security and on-premise deployment support, that aligns with the Banks' strict security and architecture requirements.

## Solution

- AssistEdge Discover's process intelligence delivered granular process insights to create powerful automation blueprints.
- Generated process design documents to help client teams understand compliance gaps, analyze process variations and train new workforce on standard operating procedures.
- Best-in-class and intuitive UI/UX protected user privacy with role-based user management, non-intrusive active screenshot capture and masking of any sensitive data.



~ 80%

Estimated improvement  
in speed of process  
discovery



~ 60%

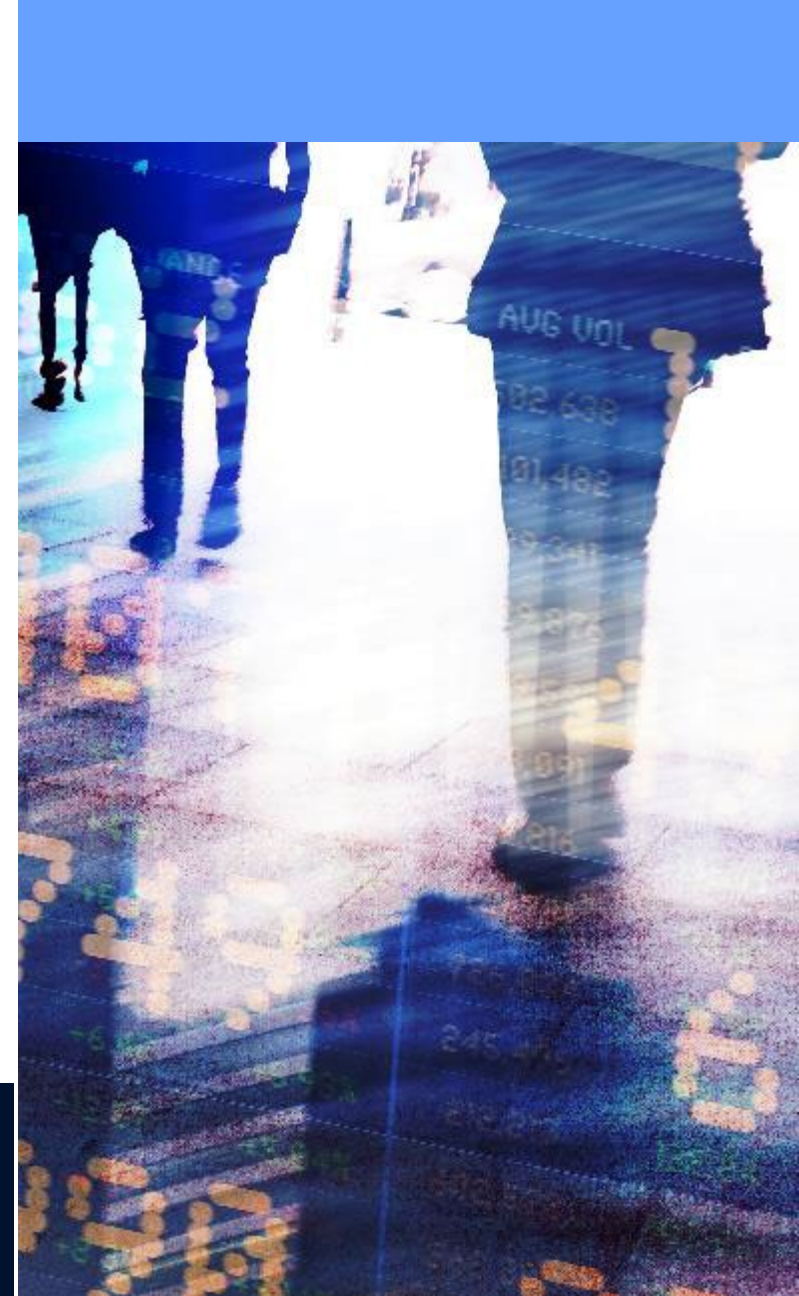
Increase in the  
accuracy of process  
understanding



Unmatched **ease of  
configuration and  
use**, delivering  
speed and scale



On-premise solution with  
**strict data redaction**,  
information security and  
**GDPR compliance**



# Process discovery helps a global beverage company save US\$1 Mn and 65000 manhours

## Client

- A global beverage company with multiple brands, 25K+ employees & over 600 Mn+ consumers across 20+ countries.

## Need

- Assess maturity of cash collection and route settlement & billing process across 10 countries and 50 users. Identify standardization and automation opportunities

## Approach

- AE Discover took 2 weeks to –
  - Capture agent data
  - Analyze data for process maturity
  - Identify standardization & automation opportunities
- Provided visibility into as-is processes and highlighted inter-country differences.



**74**

Process identified for improvement & optimization



**\$ 1 Mn**

Annual savings from process optimization



**65K**

Annual manhours savings



**16**

Processes identified for automation



# Large US telecom company improves customer experience by augmenting agent productivity by 20%

## Client

- One of the world's largest telecom companies and one of the largest providers of mobile telephone services in the U.S for fixed-line, wireless, Wi-Fi, high speed Internet, voice and cloud-based services.

## Need

- Analyze agent interactions to identify opportunities to educate and train them on the best process flows.
- Assess process maturity and highlight opportunities for process standardization and automation.
- Establish opportunities to accurately forecast agent productivity and resource planning.

## Approach

- AssistEdge Discover captured process, application, and task-level interactions on 20,000 user machines.
- Analyzed and generated activity reports for key information such as active login time, work patterns, daily productivity, core business application usage, asset utilization, and more.
- Provided secure, authenticated, role-based, customized reports with anonymized data on visually rich, intuitive dashboards.



**20%**  
Improvement in overall  
agent productivity



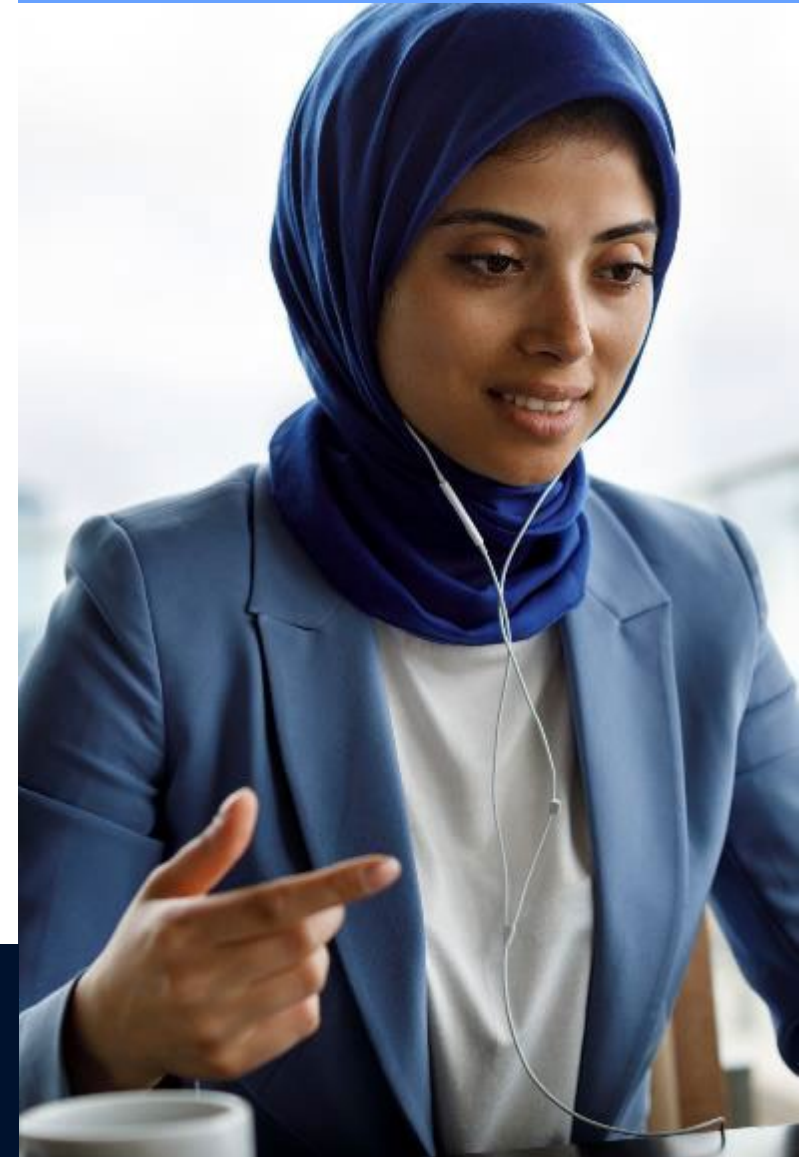
**Process insights**  
and granular task maps  
generated from data  
collected



Significant  
improvement  
in operational efficiency  
& productivity



Provided insights and  
opportunities for  
educating and training  
agents



# A large claims management firm boosted their workforce productivity by over 20%

## Client

- One of the world's largest independent claims management companies with a presence in 70 countries faced operational issues during the pandemic

## Need

- When one of their contact center rapidly scaled up from 600 to 800 employees due to increased business need, they wanted to measure the performance of their remote teams and evaluate the time spent on business processes before further increasing the employee strength.

## Approach

- AssistEdge Discover was deployed to collect data and track employee productivity, help improve team efficiency, identify workload imbalances, and check for employee burnout among other workforce related insights.  
Discover Work Insights provided comparative data on the effort of multiple teams. Generated drill-down reports on user-level business application usage patterns



**20%**

improvement in workforce productivity



**\$10M**

Projected productivity impact



**90%**

Of the time spent by agents confirmed as productive work



# A U.S telecom major significantly improved its workforce efficiency and productivity

## Client

- The U.S based telecommunications major offers communications, network services, security, cloud solutions, voice, and managed services.

## Need

- Wanted to empower its people, build workplace transparency, and optimize processes. Enable leaders to better manage their remote teams understand how work gets done, the applications that are used.

## Approach

- AE Discover was deployed capture user and team level data, analyze and measure the overall productivity. The data captured helped streamline processes, take informed decisions and reduce information security risks. It also helped gain greater return on assets and helped defer capital investment to reduce costs and increase profitability.



**\$4M**

Projected increase in  
overall workforce  
productivity



Data-driven insights for  
improved decision making



# American transportation MNC used task mining to transform their A/C operations with AE Discover

## Client

- Identification of improvement and automation opportunities through end-to-end process assessment in AED for Straight-through processing (STP) process.

## Need

- Assess the invoicing and payment process across various enterprise applications used including Oracle Cloud, MS Excel, MS Outlook, Chrome, Explorer, Firefox, WinWord, Oracle Login self-service, and applicationframehost

## Approach

- AE Discover was installed in invoicing and payment processing user machines for data capture.
- Key findings were documented by comparing transaction Vs. variations to indicate the user efficiency with a lower ratio and identify how processes can be improved through training and standardization



**101**

Process variations & its impact on AHT identified



**87%**

Process automation opportunities identified



**90%**

Time and effort reduction in process documentation



**44%**

Process improvement opportunities discovered



# A European banking corporation transformed its administrative operations and improve productivity

## Client

- A leading bank headquartered in Amsterdam and offers financial services including savings, credit and debit cards, loans, insurance, investments, and mortgages

## Need

- A task mining platform to identify bottlenecks in their NCTO and KYC processes, enable data driven decision-making, audit-ready data & discover automation & innovation opportunities.

## Approach

- AssistEdge Discover uncovered 12 key paths taken for NCTO alone which required optimization (eliminate, standardize, simplify and automate) of process
- AE Discover provided valuable insights on knowledge-intensive processes and quantification for improvement including automation opportunities
- Task mining within the digitization value chain enabled quick and scaled follow-up on the identified opportunities



**83k-\$1M**

Incremental savings identified through automation



**5%**

Estimated increase in CSAT which directly impacts customer satisfaction



**50%**

Reduction in AHT



**60%**

Variations were ready for automation suggesting increase in automation rate



# Leading U.S. insurance major leveraged AssistEdge Discover to drive continuous process improvement

## Client

- American managed health care company that sells traditional and consumer directed health care insurance and related services

## Need

- Identify opportunities for automation, find areas for process standardization, and maximize the ROI potential of automation by choosing the right processes to automate

## Approach

- AE Discover analyzed business data to identify results-based process prioritization
- Helped measure the pre/post impact of implemented RPA workflows
- 65% variations were unearthed due to specific situations like specific steps of claim processing, adhoc approvals on mail and others



200

User transactions recorded  
over 4 tasks



80+

Variations found  
across tasks mined



150+

Approximated savings in  
FTEs in 3 months



Granular process insights  
uncovered



# A Finnish telecom major saves 3500 hours per annum

## Client

- A multinational telecom leader across mobile, fixed and cloud networks, information technology, and consumer electronics company.

## Need

- Analyze how tasks are executed across end-to-end processes to identify opportunities for process optimization, improving customer interactions and overall customer experience Scope covered 7 users, 2 sub-processes containing 3 tasks

## Approach

- AE Discover collected data of 3 selected tasks over 7-10 business days and identified variations.
- Business insights were created from the captured task-level data and an automation blueprint recommendation was generated. Task maps generated through AE Discover provided detailed process insights.



**3500**

Hours of potential annual savings



**Task variations**

Identified among the selected tasks



**Process Insights**

Identified from the captured task-level data



# A U.S. financial services major streamlined its operations with AssistEdge Discover

## Client

- A multinational corporation offering financial and card payment services

## Need

- Assess enterprise operations and opportunities for process automation. Validate the hypothesis that the travel booking process (air, hotel and car) is ready for automation. Find different methods adopted by customer executives to execute tasks

## Approach

- AE Discover identified presence of 70 disparate execution paths being taken by customer executive with execution time ranging from 10min to 140min
- Data insights highlighted disparate application usages, diversion from SOP paths and bottlenecks caused by IT issues

## Identified process nuances for its U.S operations



**184K**

Potential annual savings identified through process improvements



**5%**

Estimated increase in CSAT which directly impacts customer satisfaction



Identified specific areas for employee training



Identified broken air booking process with several variations



Thank  
you

