

XtractEdge 4.0

Launching XE 4.0 Gen AI powered document
processing platform



A Connected Enterprise is built on contextual insights that power real-time data driven decisions

DIGITIZE

Processes and documents

CONNECT

Parties and customer journeys

EXCHANGE

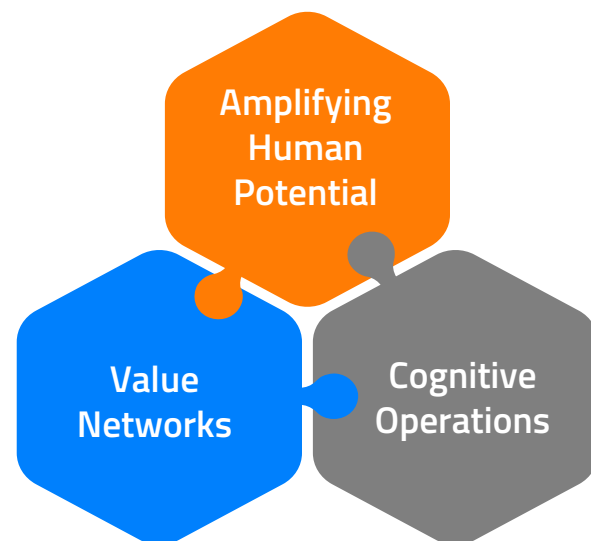
Data and information

AUTOMATE

Processes and systems

AUGMENT

Human decision making



Amplifying Human Potential

Unlocking data-driven and insights-based decision making

Cognitive Operations

Efficient and seamless operations leading to improved productivity and higher customer satisfaction

Value Networks

Creating a network of information for both intra and inter-enterprise use cases

A holistic Intelligent Document Processing platform is central to orchestrating a Connected Enterprise



01

A platform that drives agility

- Enables business users to configure models in an intuitive manner for pre-defined extraction
- Facilitates cognitive search and generates contextual information from documents on the fly

02

A platform that can scale

- Caters to multiple functional and industry use cases to solve specific challenges
- Handles document variety and complexity with ease

03

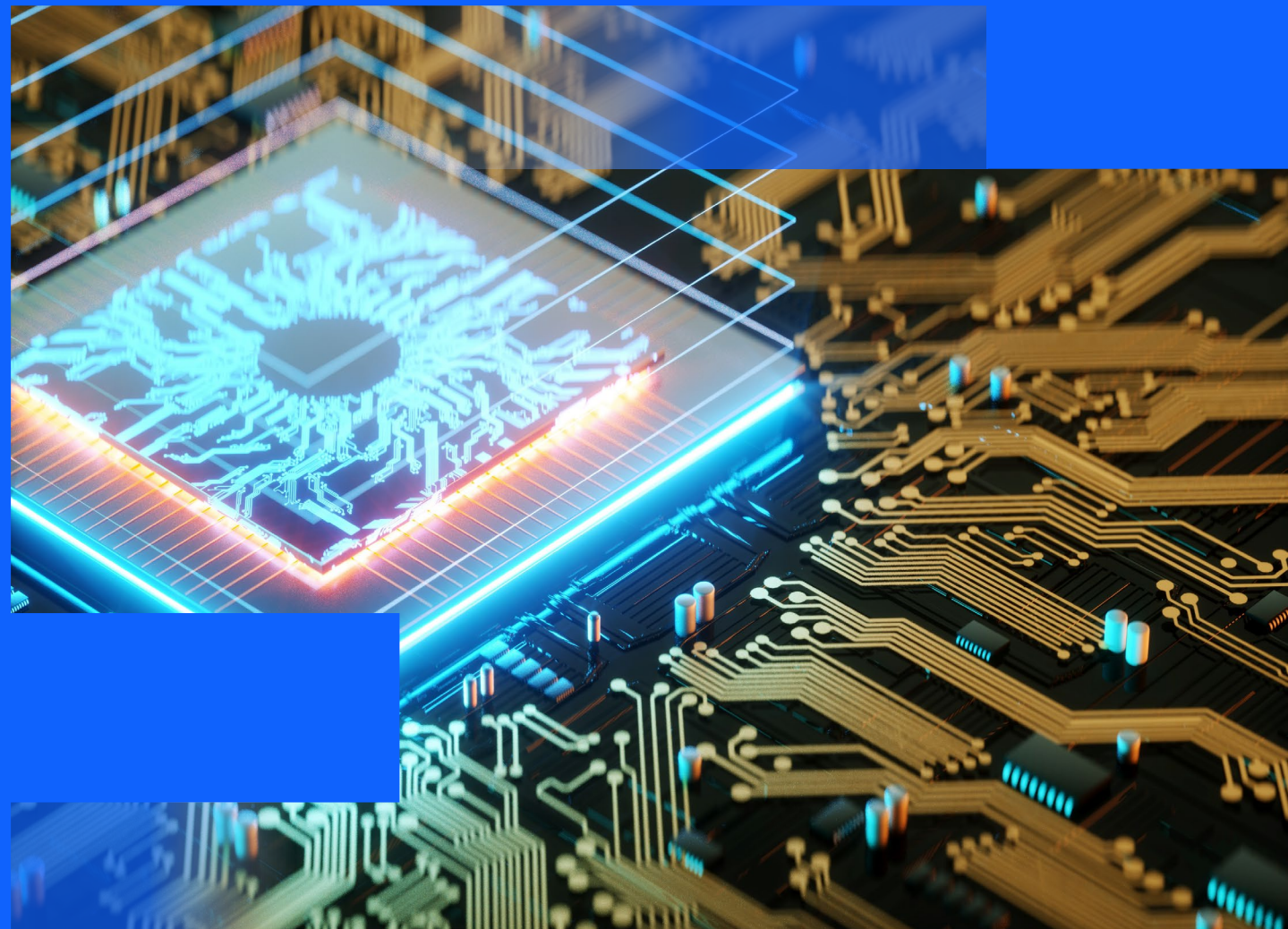
A platform that delivers more than data extraction

- Provides accurate insights from traditional and new data sources
- Gives a contextualized review experience for holistic decision-making

Introducing XtractEdge 4.0

The next-generation platform for intelligent document processing.

Powered by generative AI technology, XtractEdge 4.0 takes document processing to a whole new level of speed, accuracy, and efficiency. With its advanced capabilities, XtractEdge 4.0 streamlines document-intensive operations at scale delivering contextual insights that enable data-driven decisions.



The platform democratizes document digitization giving business and technology users the power to transform any document into data.

XtractEdge 4.0 processes structured, unstructured and semi-structured data, from all kinds of documents and data sources converting it to usable information. Its generative AI capabilities enable conversational search and provide contextual information.

With a combined ability to pre-define extraction criteria and search information on the fly, XtractEdge 4.0 provides relevant, timely and precise insights enabling smarter business decisions.



Complex

600-page complex documents with legal and regulatory nuances

The most complex corporate bond offer document processing

Leading post-trade financial services company in the US



Massive

40 mn KYC documents being processed at scale

A massive program spanning processing millions of KYC documents

A leading global bank



Transformational

Being expanded to 83 products across 7 Lines of Business

Re-imagining submissions and pipeline management

Global provider of insurance solutions



Process efficiency

Cycle time	Throughput	Error Rate
✓	✓	✓

> Faster and efficient delivery enhancing customer satisfaction

Workforce productivity

On-time delivery	Work-in-progress inventory	Contextualized and spontaneous Insights
✓	✓	✓

> Efficient workforce amplifying its potential

Compliance & Monitoring

Timeliness of reporting	Compliance-related costs	Incident reporting rate
✓	✓	✓

> A regulated and compliant enterprise

XtractEdge 4.0 : Built for scale and scope



Design Studio

Configure data extraction models with ease

Document Processor

Processing documents at scale while closely monitoring performance

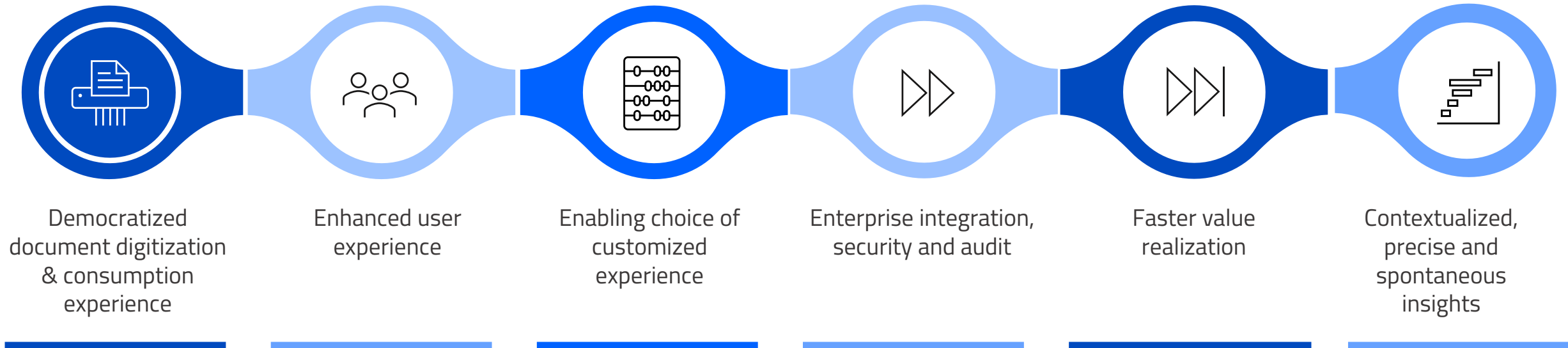
Operations Studio

Solving business problems with data-driven decisions

Generative AI engine supporting contextual insights

- Unified access workbench
- Annotation-based training
- Open AI API Integration
- Secured Open AI API access via MS Azure
- Testing and validation of AI model
- Pre-processing for improved extraction
- Post-processing for validation
- Integrate business rules
- Scale and parallelize
- Performance monitoring
- Case management
- Third-party data integrations
- Single-pane view of data
- Rule-based decisioning

Re-imagining document processing with XtractEdge 4.0



Continuous innovation for best results

Feature	Version 2.9.5	Version 4.0
Modularisation	✗	✓
Third-party data integrations	✗	✓
Single pane view of document, third-party and internal data	✗	✓
Case Management	✗	✓
Low-code enabled customized interfaces	✗	✓
Superior Human-in-the-loop (HITL) capability	✗	✓
Unified workbench for model configuration	✗	✓
Auto-discovery for data annotation	✗	✓
Gen AI powered Q&A	✗	✓
Enhanced Monitoring Dashboard	✗	✓
Bulk Onboarding	✓	✓
Custom workflows	✓	✓
Flexible custom post-processing	✓	✓
Built-in connectors	✓	✓

Why Edgeverve?



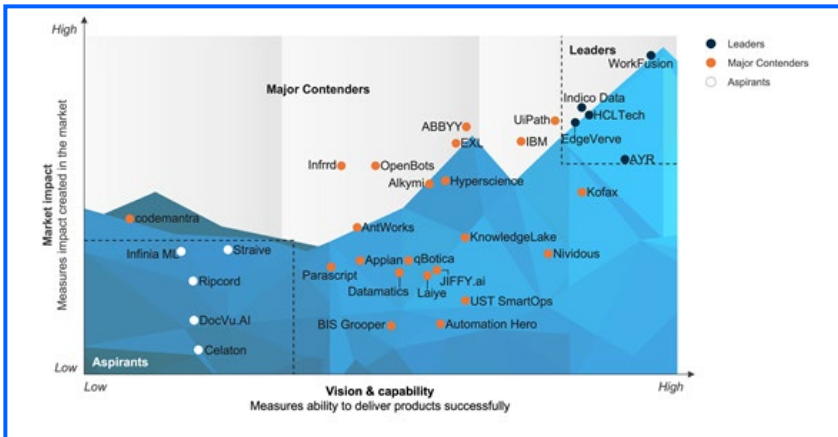
Best in breed platform

Industry leading products in Intelligent Document Processing (IDP)



Leader

Everest, Unstructured Document Processing (IDP) Products
PEAK Matrix Assessment 2023



Contender

The Forrester Wave: Document-Oriented Text
Analytics Platforms, Q2 2022



Gold at 2022 Stevie awards for
innovation in technology
management



2022 Most Innovative
company of the year in AI



EdgeVerve is among the **top**
document AI software/
technologies in use**



AEGIS
GRAHAM BELL
AWARDS

Finalist at the prestigious
Aegis Graham Bell Awards
2023



XtractEdge's key proposition is its ability to handle massive amount of document variations at scale with no upfront training and learning requirement.*



Gartner

*Competitive Landscape: Intelligent Document Processing Platform Providers, November 2021 - ID G00756438

** According to IDC survey respondents, What Is the Landscape of the Emerging Document Artificial Intelligence Market?, Doc # US47701421, July 2021

Comprehensive services and support ecosystem

Program design	Collaboration	Implementation	Training	Support
▪ Bringing together partner and ecosystem capabilities with platform capabilities ▪ Governance mechanism and deployment strategies	▪ SME support at different stages of the engagement ▪ Requirement gathering and PoC	▪ Three modular components ▪ End-to-end in-house implementation services ▪ Agile delivery for rapid and adaptable design	▪ Hands-on navigation with sandbox environment ▪ Experience portal with multiple use cases ▪ Training support from EV academy	▪ 24 x 7 support ▪ Trained and certified dedicated FTE support



Domain expertise for industry focused use cases



Customisation to address specific needs



Comprehensive user training



Strong SLA compliance

Our differentiators

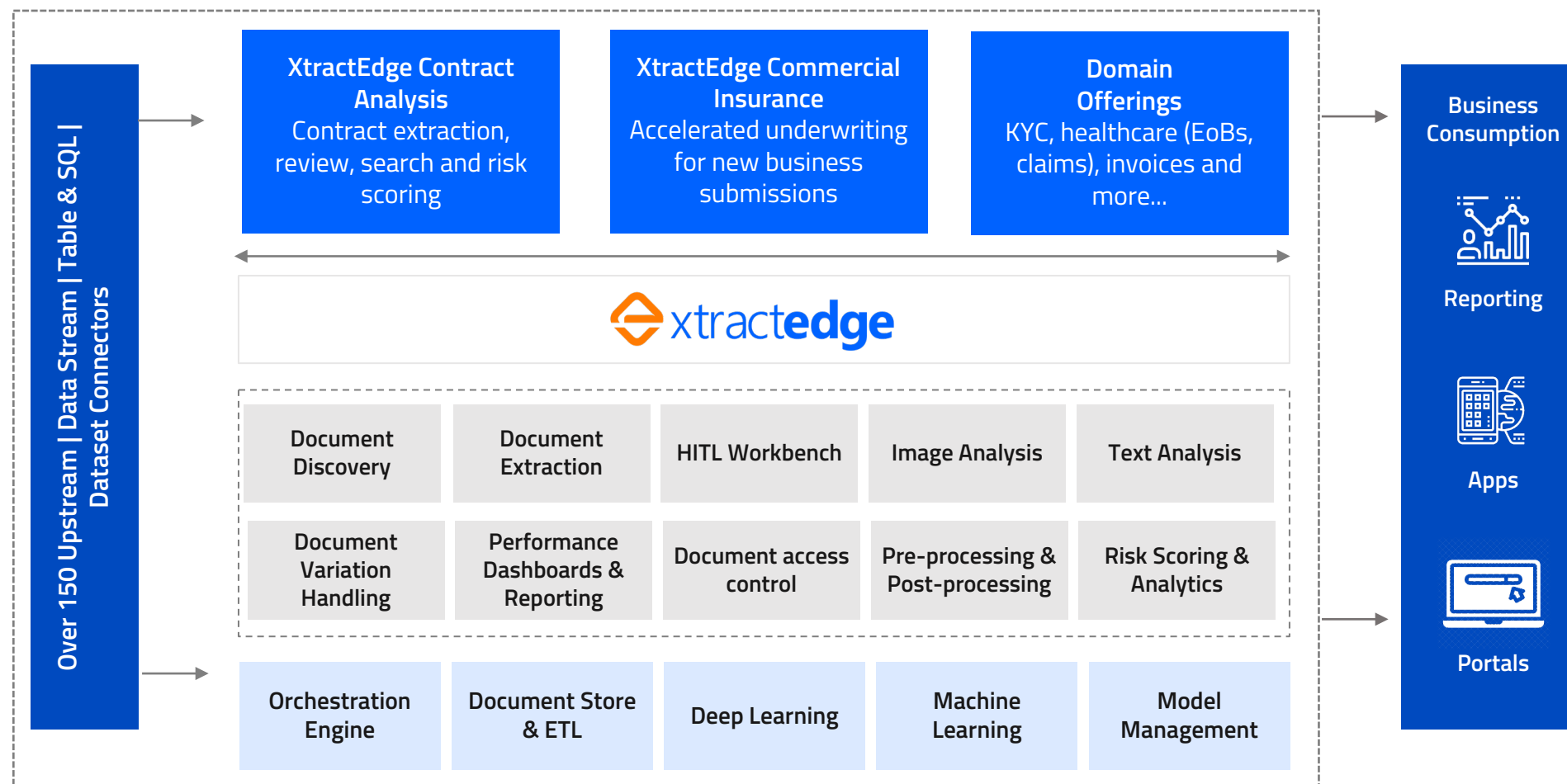
Platform differentiators	Flexible commercial models	Industry solutions	Deep connect with G2000	Deep connect with technology partners	Unique delivery model
▪ Complex document processing capability ▪ Generative AI powered contextualized insights ▪ Contextualized experience for business operations ▪ Document processing at scale across use cases	▪ Innovative per-page, per-seat and per-case pricing model ▪ Value-centric, focused, flexible pricing models ▪ Flexibility of duration, unit of charge, deployment, pay-per-use, and scope	▪ Uniquely positioned due to Infosys partnership to build vertical and horizontal solutions, at speed ▪ Extensive domain and consulting expertise to discover and prioritize industry problems that can be solved with AI and automation	▪ Our extensive experience and deep connection with G2K companies ▪ Profound understanding of client challenges enable us to deliver solutions unique to their needs	▪ Strategic Partnerships with Microsoft, Intel and Abbyy ▪ Cloud Partners MS Azure and AWS ▪ OCR partners Abbyy FineReader, Google OCR, Azure READ, AWS Textract ▪ Process Mining partner Minit	▪ Deep engagements with clients help drive large automation programs seamlessly ▪ Implementation know-how and expertise ▪ Automation Factory Model for continuous delivery

Thank you

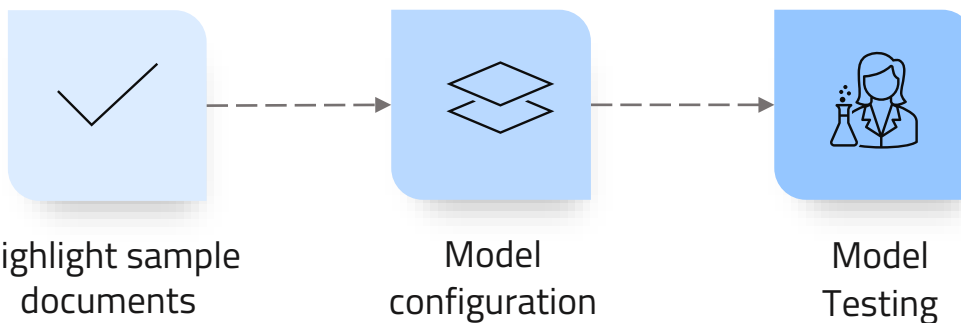


XtractEdge platform and products

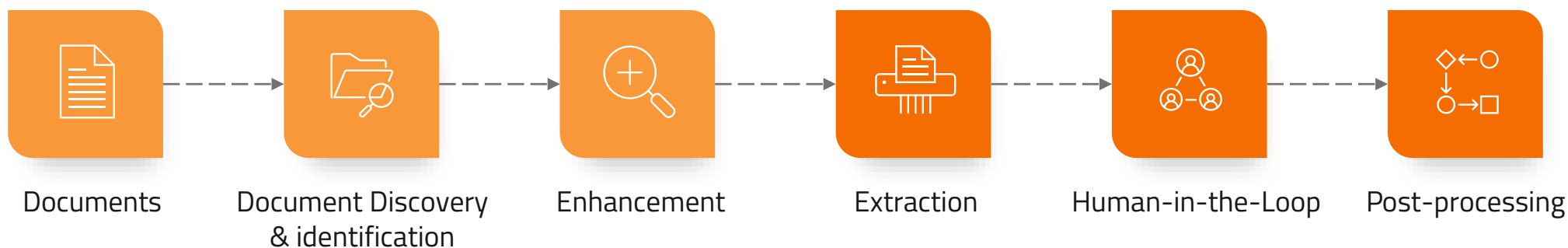
#BuiltOnAI - focused on business



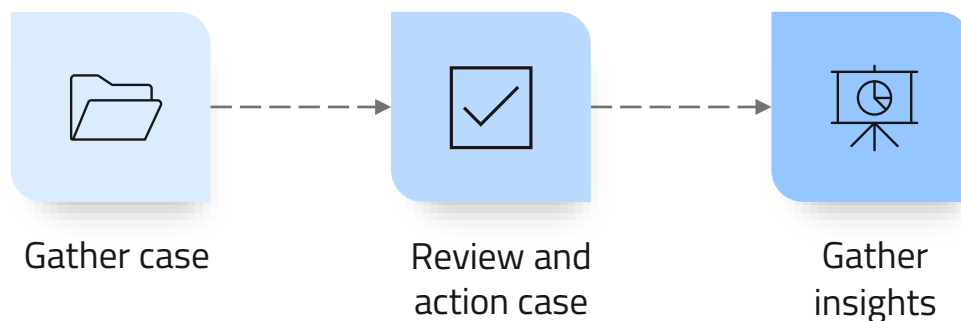
Document Design Studio



Document Processor



Document Operations Studio



Securities Prospectus digitization to speed up the underwriting process for an American post-trade financial services company



Need

- The client is a trade settlement agency providing transaction settlement services for trading parties. They perform **risk analysis** to underwrite new securities instruments which are traded on their platform by reviewing their **corporate bond offer documents**
- The underwriting process involved scrutinizing descriptive offer documents spanning **400-600 pages** with **complex** financial, legal, and regulatory **aspects**. The documents spanned domestic US market and international issuers adding to the complexity.
- **The information** to be extracted (66 fields) was not available directly but was **implied** and had to be deduced. Additionally, the **language** varied from issuer to issuer and added to the challenge.
- The underwriting team was accustomed to reviewing information in a **particular format**, and required the output to continue to be in a similar format

Solution

- We implemented XtractEdge, our Intelligent Document Processing platform. The platform helped create an AI model to extract metadata elements involved in determining underwriting eligibility from the offering documents, streamlining our client's entire eligibility review process.
- Training models on sample offering documents with varying structures and formats, using convolutional neural network (CNN) for intent or paragraph-related content and SpaCy for entity or datapoint-related points.
- Creating reusable models for subsequent issues under corporate debt, including municipal bonds, asset-back securities, and collateralized mortgage obligation
- Continuously refining the model by accelerating document analysis using an accuracy tool

Benefits

- Streamlined the underwriting eligibility review workflows that significantly improved operational efficiency and reduced manual effort
- Enabled the underwriting team to determine eligibility within a specific timeframe before the closing date
- Empowered the client to convert highly unstructured data from disparate sources into meaningful structured information that drives greater insights and efficiencies.
- Reduction of time involved in developing and enhancing AI models to review and determine eligibility

One platform and multiple solutions for industries and use cases



Logistics documents



Vendor invoices



Policy documents



Application forms



Medical document



Product artwork



Government issued IDs



Legal documents



Claims document



Property documents



Bank statements



Org charts

For any document problem
Expanding universe of documents and data types



Handwritten text



Charts



Barcode



Signatures



Financial services



Insurance



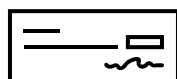
Manufacturing



Retail



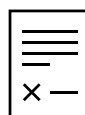
Hi-Tech



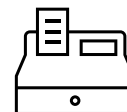
Finance & Accounting



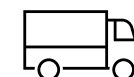
Sourcing



Legal



Sales



Logistics