Let's Accelerate Digital Transformation

February 2020

Paul Blackwell

UiPath™

You Face Pressure From Many Sources

Technology and process optimization

Growth

Market saturation

Compliance and regulation

New technologies

Outsourcing

Customer expectations

Cost pressure

Yet Your Core Priorities Stay the Same

Increase revenue & lower costs

Improve customer satisfaction

Increase employee engagement

Reduce compliance risk

Previous Eras of Technological Disruption

Where would **data centers** be without

Mainframe

Where would the **business world** be without

PC

Where would **software** be without

GUI

Where would **Amazon** be without

Internet

Where would **Uber** be without

Mobile

Where would **Salesforce** be without

Cloud

Automation is the Next Disruption of Work

> “Coming over the horizon is a new wave of opportunity related to the use of robotics, machine learning, and AI. Companies that deploy automation technologies can realize substantial performance gains and take the lead in their industries, even as their efforts contribute to economy-level increases in productivity.”

McKinsey Global Institute
2017

What Can Software Robots Do?

Here are some of the tasks that can be easily handed over to the Robots

- Log in to any application
- Move files and folders
- Read and write to databases
- Scrape data from the web
- Connect to system APIs
- Extract content from documents, PDFs, emails and forms
- Open emails and attachments
- Make calculations

Look at That Robot Go!

Anything That Can Be Automated, Will Be

UiPath™

Finance

- Process-to-pay
- Order-to-cash
- Record-to-report

Supply Chain

- Inventory management
- Demand & supply
- Planning
- Invoice & contract
- management

IT

- Server & app monitoring
- Routine maintenance & monitoring

HR

- Payroll
- Onboarding & offboarding
- Benefits administration

Customer Services

- Address change
- Password reset
- Payments
- Scheduling appointments
- Order modifications

Automation Now a C-Level Priority

91% of surveyed organizations are using automation technologies

73% are 'very' or 'entirely' satisfied with the returns from automation to date

For **84%** of companies, automation is a C-level executive's responsibility

The Economist “Advance of Automation” Survey available at automationfirst.economist.com

UiPath™

Banking, Financial Services, and Insurance	pwc AON Hewitt WELLS FARGO AAA ZURICH AXA MassMutual FINANCIAL GROUP® BH HS BERKSHIRE HATHAWAY HOMESERVICES
Telecom, Media, and Entertainment	orange™ BBC CAESARS PALACE LAS VEGAS CenturyLink® vodafone NTT Communications WB
Retail and Consumer Goods	Walmart THE HOME DEPOT vf CVS pharmacy® M Unilever PEPSICO BURBERRY LONDON
Industrial and High-Tech	CISCO GE BOSCH hp vmware® Uber
Energy	ExxonMobil Chevron nrg® devon FPL Statoil
Health Care and Life Sciences	BlueCross BlueShield OPTUM® SoftScript™ Genentech MERCK AstraZeneca
Services	DHL KELLY SERVICES EQUIFAX Budget® LexisNexis®
Federal / Public Sector	NASA DEFENSE INFORMATION SYSTEMS AGENCY DEPARTMENT OF JUSTICE FEDERAL BUREAU OF PRISONS NAVAL AIR SYSTEMS COMMAND U.S. ARMY GSA UNITED STATES POSTAL SERVICE® FDA U.S. FOOD & DRUG ADMINISTRATION

World’s Largest Hybrid RPA Implementation

SMBC

Implementation time:

5 months

¥50B
Cost reduction by 2020

3M
Hours created by 2020

200+
Operations automated

5 SIs Accenture, EY, Deloitte, IBM, and PwC

Compliance/risk operations

Support branch operations

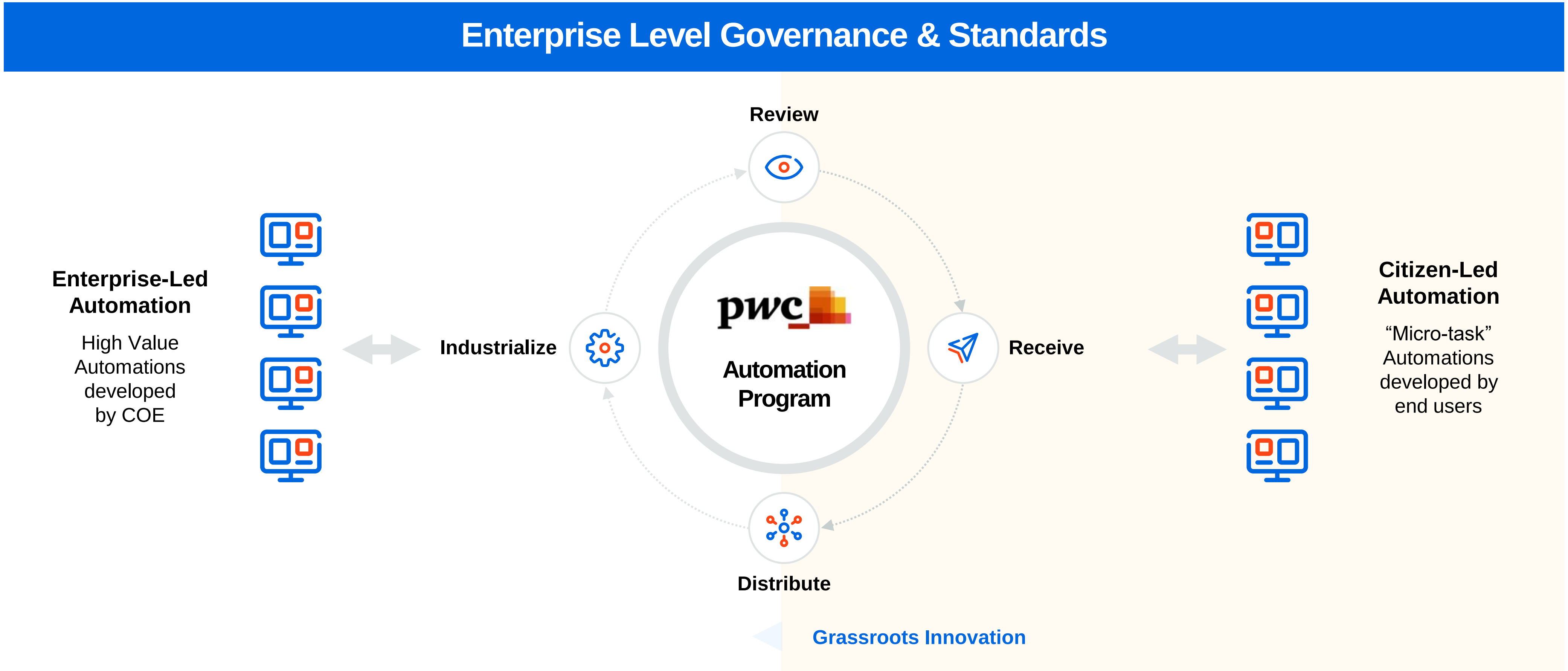
Routine operation center processes

Other high-volume routine operations within Headquarter departments

Information-gathering processes used to enhance sales & planning

PwC Rolls Out the Largest Robot Deployment in History

The program includes thousands of Robots generating new revenue streams and completely transforming PwC's services strategy



Enterprise Level Governance & Standards

Enterprise-Led Automation

High Value Automations developed by COE

Citizen-Led Automation

"Micro-task" Automations developed by end users

Review
Industrialize
Receive
Distribute
pwc
Automation Program
Grassroots Innovation

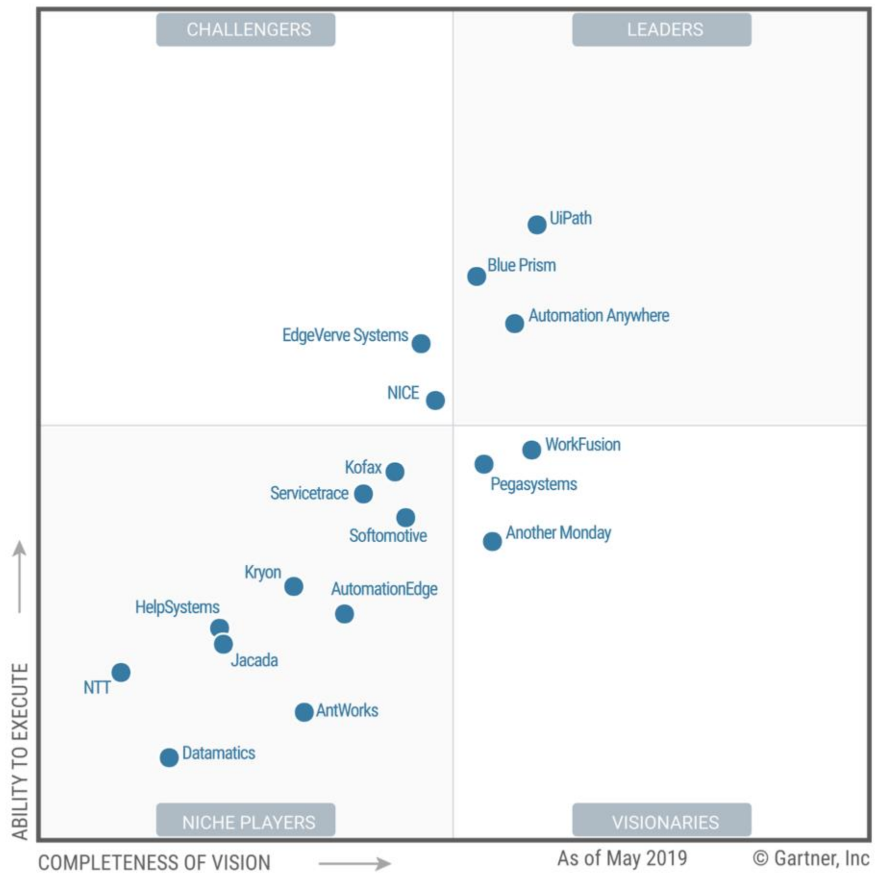
Source: PWC

A Leader in the July 2019 Gartner Magic Quadrant for Robotic Process Automation Software

UiPath achieves the **highest and furthest** overall position for its ability to execute and completeness of vision

UiPath believes this signals a tipping point for automation market growth and adoption

Figure 1. Magic Quadrant for Robotic Process Automation Software



Source: Gartner (May 2019)

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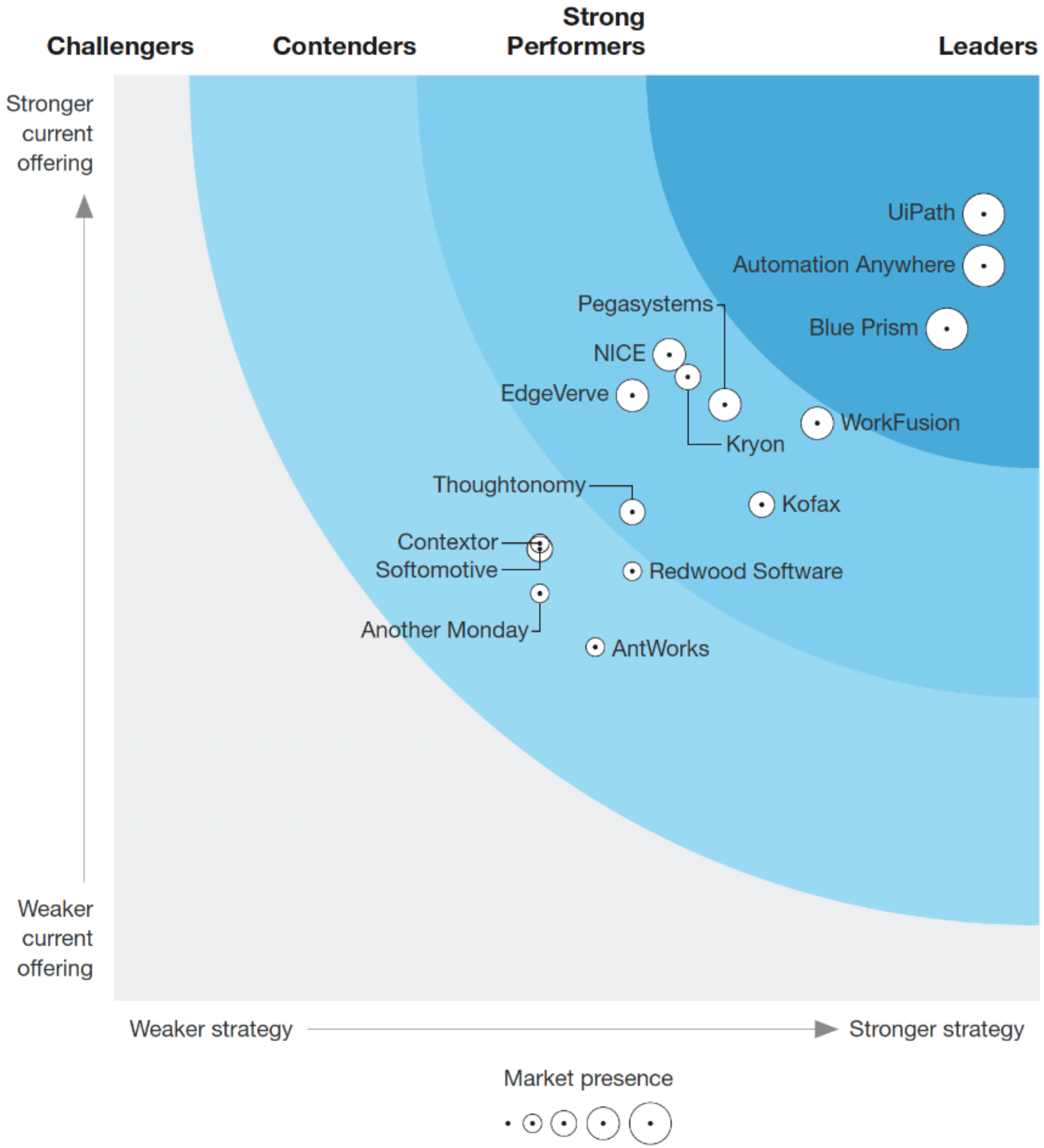
A Forrester Wave Leader

“UiPath is a Leader with shared services and ease of bot design.

The platform easily handles attended robots developed by employees as well as unattended robots that can handle large-scale processing.

Customers noted its deployment flexibility.”



Source: Forrester Research, Forrester Wave for Robotic Process Automation, June 2018

Open to Learn, Use, and Share

Open

Open to Learn

- Complimentary **training for all RPA roles** with UiPath Academy
- **Community Forum** where no questions is left unanswered

300K

Academy Trainees

43K+

Forum members

Open to Use

- **First RPA company to provide a free download** version of the product
- **Large ecosystem of deep integrations** with the technologies you already use and love

430K+

UiPath downloads

Open to Share

- Go! **marketplace** for secure and trusted RPA & AI components
- UiPath Connect open network for RPA developers, partners and you to **collaborate on your projects**

400+

Go! Components

Unattended Robots Transform Productivity

Implementation Time:

Q2, 2016 - ongoing

162

Robots deployed

$28.3M

Annualized direct benefits first year

150M+

From increased productivity

> **GE selected UiPath for software versatility and product vision. We are going to continue pushing the limit on process automation using RPA as cornerstone.**

COE dashboard allows senior leadership to see impact by geography and process type

U.S. Center of Excellence is deploying RPA globally across process areas

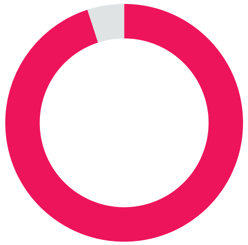
Processes Automated

- Finance
- HR
- Supply Chain
- IT
- Legal

Australia’s Largest Mutual Bank Experiences Improved Customer Engagement

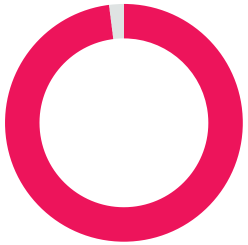
Implementation Time:

2 months



95%

of effort automated



98%

Manual effort reduction

Improved customer service, governance and compliance.

6

Months to ROI

Zero

Errors reduced to 0%

12x

Faster processing time

Processes Automated

Daily direct debit review and risk management

Global Technology Company Simplifies HR On-boarding

Implementation Time:

Within 2 months

100%

of effort automated

100%

Manual effort reduction

More detailed compliance and non-repudiation audit logs.

6

Months to ROI

1%

Errors reduced to 0%

7x

Faster processing time

Processes Automated

HR Onboarding of new hires.

Retail Bank Bolsters Its Fraud Prevention Capabilities

Implementation Time:

2 months

95%

of effort automated

50%

of Analyst review time freed for higher value work

More detailed compliance and non-repudiation audit logs.

5

Months to ROI

Zero

Errors reduced to 0%

12x

Faster processing time

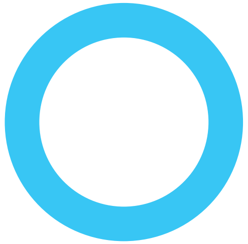
Processes Automated

Retail Fraud Prevention, a subset of the Credit Underwriting process

Nielsen Embraces RPA at Scale to Drive Digital Transformation

Implementation Time:

Within 5 months



100%

of effort automated

230K

Man/hours freed for higher value work

Improvement of SLAs and more detailed compliance.

12

Months to ROI

123

RPA projects in 40+ countries

150+

Certified RPA champions

Processes Automated

Unattended back-office functions in finance, HR, IT, and customer support

UiPath Helps AXA Save £140,000 in Six Short Months

13

Robots in 6 months

18K

Man/hours freed for higher value work

6

Months to ROI

Improved employee experience

£140K

Cost Savings

5x

Time savings

Processes Automated

Motor trade policy renewals process

Automation Ambition at a Global FMCG Company

Implementation Time:

7 months

85%

of effort automated

160K

Man/hours freed for higher value work

Higher accuracy in maintenance prediction

10

Months to ROI

Zero

Errors reduced to 0%

60%

Less cycle time

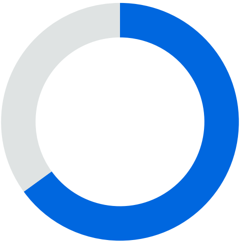
Processes Automated

Daily closing positions, a process within Portfolio Management Systems

Intelligent Assistant Supports Portfolio Management

Implementation Time:

5 months



65%

of effort automated

35%

More capacity for higher-value work

Improved governance, control.
More granular compliance log files.

11

Months to ROI

Zero

Errors reduced to 0%

54%

Faster processing time

Processes Automated

Daily closing positions, a process within Portfolio Management Systems

UiPath™

“We’ve gone from people not even having heard of RPA to it being one of the most talked-about things in our planning meetings.”

State Auto Insurance

Automate possibility

K2

K2 connects your people, processes, and data to help you succeed.

THE WORLD'S BEST KNOWN COMPANIES ARE RUNNING ON K2 TODAY

4,000+
customers

P&G
Pfizer
Magyar Posta
SPAR
Kimberly-Clark
TOYOTA

More than
4 million users

Nando's
WELLS FARGO
BAYER
NLB
Abbott
AEGON
mita
Deloitte.

30% of Fortune
100 companies

ORI
Chevron
Roche
AXA WEALTH
verizon
PEPSICO
Microsoft
Cummins

K2

Why do people buy K2 ; what problems does it solve; what are clients looking to do today for which the answer could be K2 ?

Enterprise Process Platform

Process Based Business Applications
Finance, HR
Sales, Operations

Case Management

Advanced Human Workflow
Add on
O365, UiPath, SAP, D365

Let’s look at some scenarios for K2 and some real-life examples

K2 for Finance

Invoice Processing

Purchase Order Requests

Procure to Pay

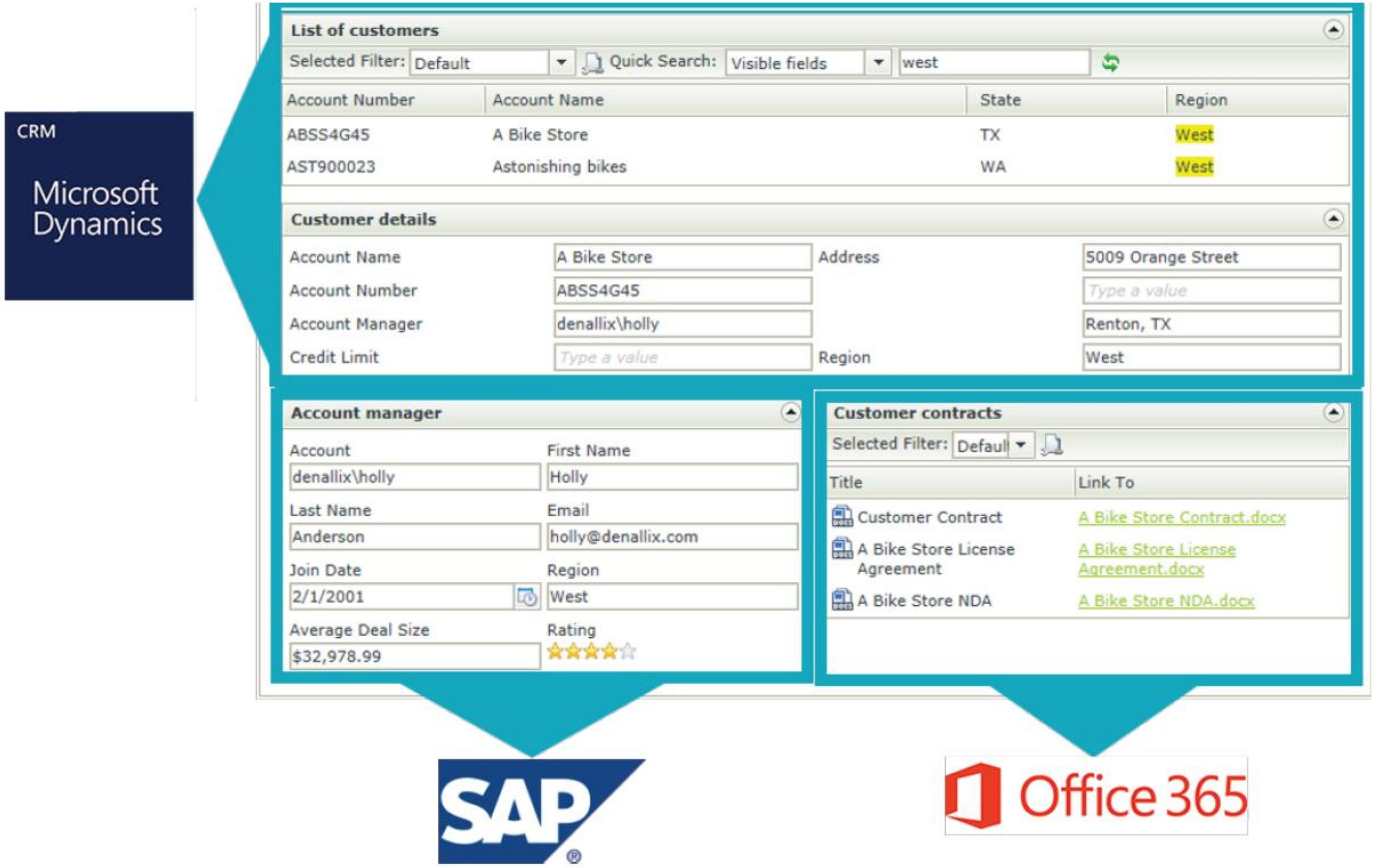
Capex Management

Payroll

Expense Claims

Master Data Management

Supplier Onboarding



List of customers

Selected Filter: Default Quick Search: Visible fields west

Account Number	Account Name	State	Region
ABSS4G45	A Bike Store	TX	West
AST900023	Astonishing bikes	WA	West

Customer details

Account Name	A Bike Store	Address	5009 Orange Street
Account Number	ABSS4G45		Type a value
Account Manager	denallix\holly		Renton, TX
Credit Limit	Type a value	Region	West

Account manager

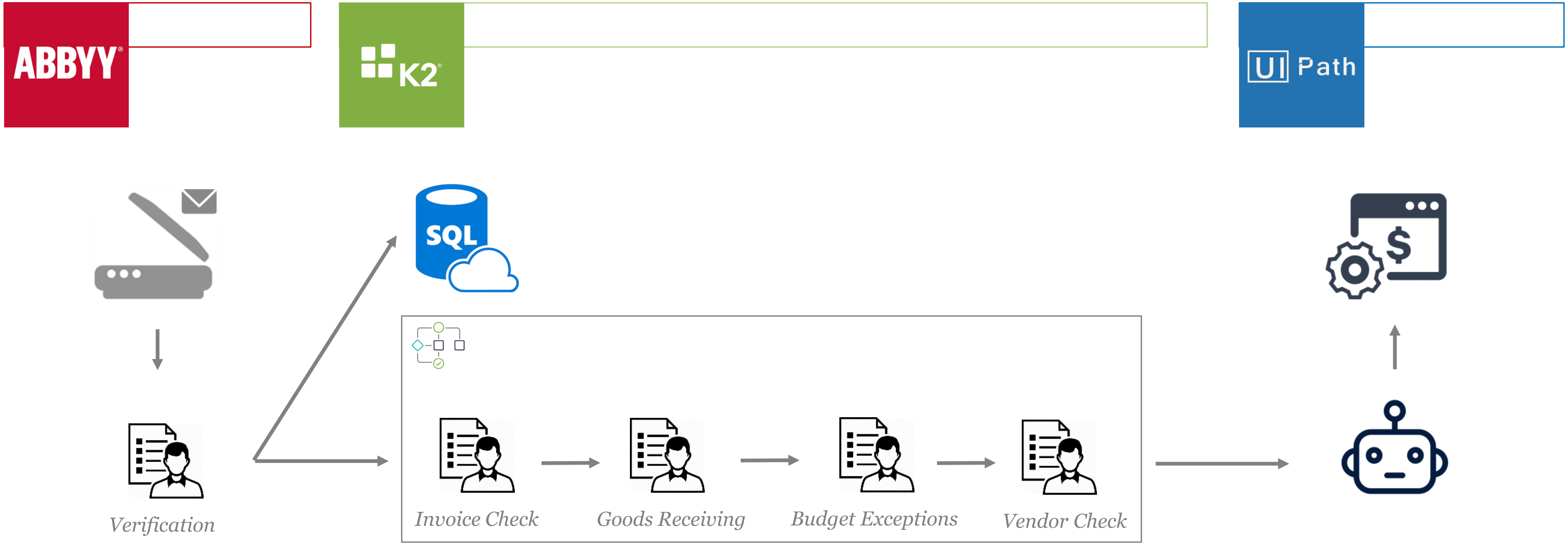
Account	First Name
denallix\holly	Holly
Last Name	Email
Anderson	holly@denallix.com
Join Date	Region
2/1/2001	West
Average Deal Size	Rating
$32,978.99	★★★★☆

Customer contracts

Selected Filter: Defaul

Title	Link To
Customer Contract	A Bike Store Contract.docx
A Bike Store License Agreement	A Bike Store License Agreement.docx
A Bike Store NDA	A Bike Store NDA.docx

K2 for Invoice Processing


ABBYY
K2
UiPath
SQL

Verification

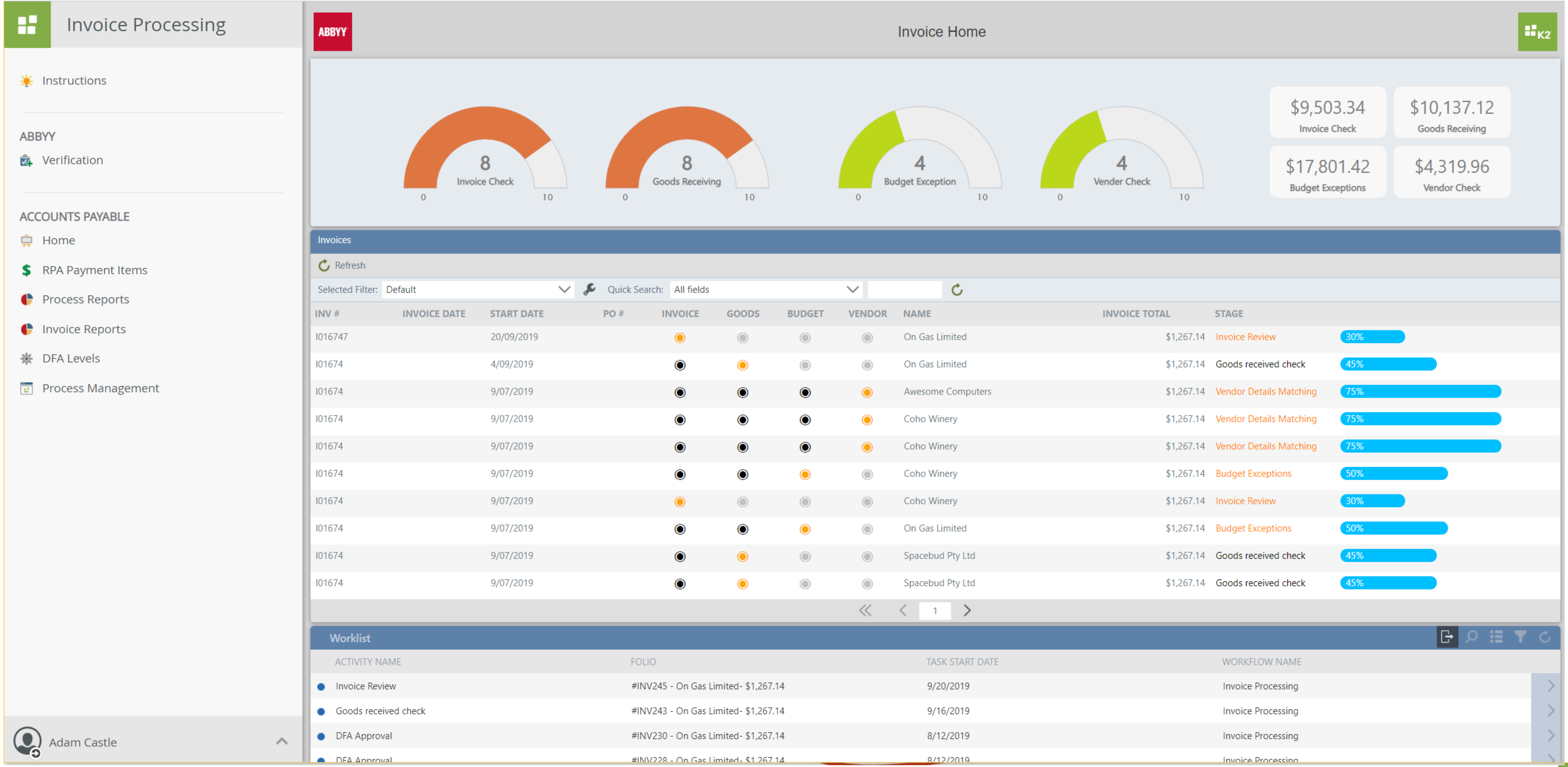
Invoice Check

Goods Receiving

Budget Exceptions

Vendor Check

K2 for Invoice Processing


Invoice Processing
Instructions
ABBYY
Verification
ACCOUNTS PAYABLE
Home
RPA Payment Items
Process Reports
Invoice Reports
DFA Levels
Process Management
Adam Castle
ABBYY
Invoice Home
K2
8
Invoice Check
0
10
8
Goods Receiving
0
10
4
Budget Exception
0
10
4
Vender Check
0
10

$9,503.34 Invoice Check	$10,137.12 Goods Receiving
$17,801.42 Budget Exceptions	$4,319.96 Vendor Check

Invoices

Refresh

Selected Filter: Default

Quick Search: All fields

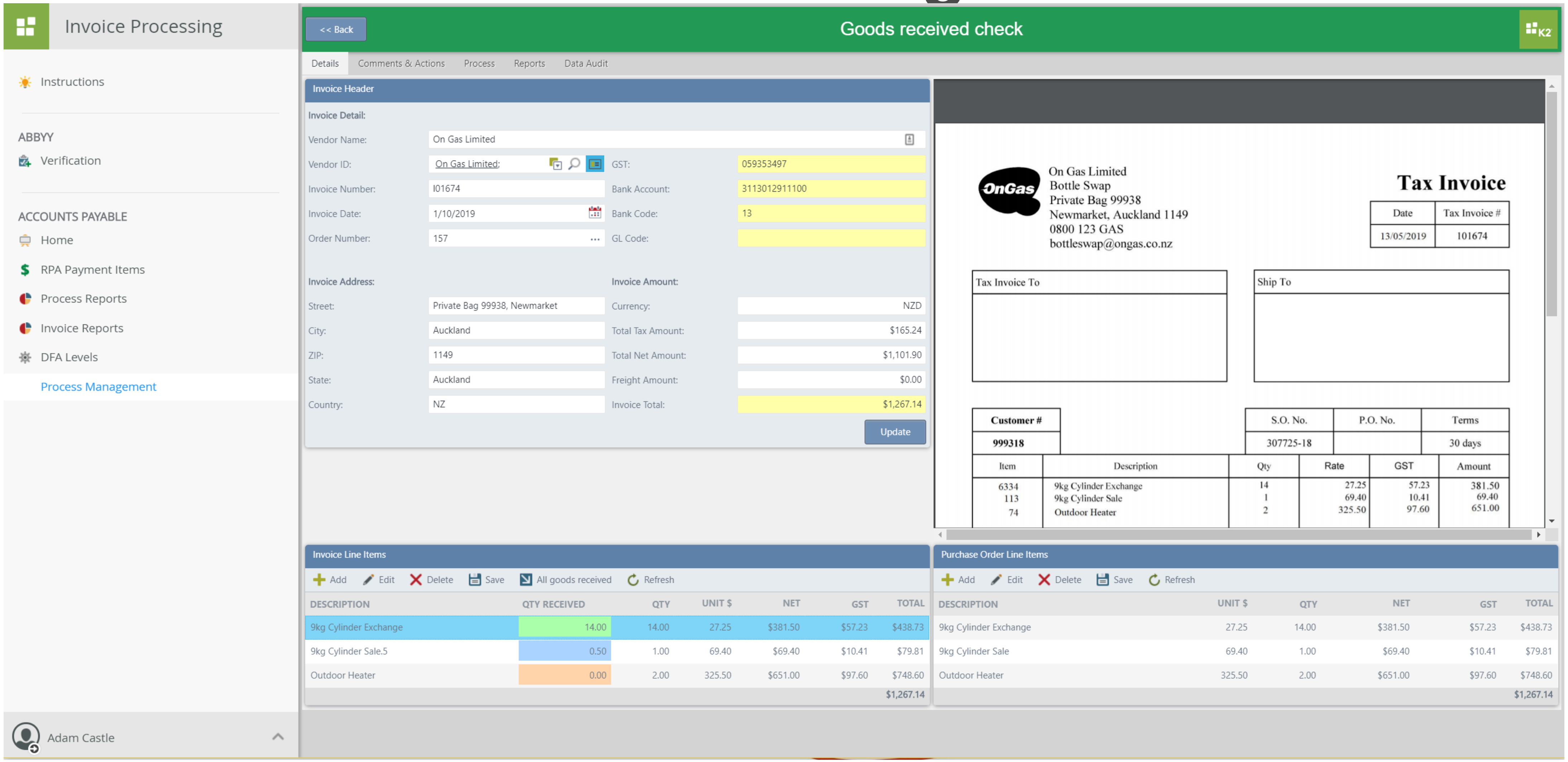
INV #	INVOICE DATE	START DATE	PO #	INVOICE	GOODS	BUDGET	VENDOR	NAME	INVOICE TOTAL	STAGE	
I016747		20/09/2019		🟠	○	○	○	On Gas Limited	$1,267.14	Invoice Review	30%
I01674		4/09/2019		●	🟠	○	○	On Gas Limited	$1,267.14	Goods received check	45%
I01674		9/07/2019		●	●	●	🟠	Awesome Computers	$1,267.14	Vendor Details Matching	75%
I01674		9/07/2019		●	●	●	🟠	Coho Winery	$1,267.14	Vendor Details Matching	75%
I01674		9/07/2019		●	●	●	🟠	Coho Winery	$1,267.14	Vendor Details Matching	75%
I01674		9/07/2019		●	●	🟠	○	Coho Winery	$1,267.14	Budget Exceptions	50%
I01674		9/07/2019		🟠	○	○	○	Coho Winery	$1,267.14	Invoice Review	30%
I01674		9/07/2019		●	●	🟠	○	On Gas Limited	$1,267.14	Budget Exceptions	50%
I01674		9/07/2019		●	🟠	○	○	Spacebud Pty Ltd	$1,267.14	Goods received check	45%
I01674		9/07/2019		●	🟠	○	○	Spacebud Pty Ltd	$1,267.14	Goods received check	45%

1

Worklist

ACTIVITY NAME	FOLIO	TASK START DATE	WORKFLOW NAME
Invoice Review	#INV245 - On Gas Limited- $1,267.14	9/20/2019	Invoice Processing
Goods received check	#INV243 - On Gas Limited- $1,267.14	9/16/2019	Invoice Processing
DFA Approval	#INV230 - On Gas Limited- $1,267.14	8/12/2019	Invoice Processing
DFA Approval	#INV228 - On Gas Limited- $1,267.14	8/12/2019	Invoice Processing

K2 for Invoice Processing


Invoice Processing
Instructions
ABBYY
Verification
ACCOUNTS PAYABLE
Home
RPA Payment Items
Process Reports
Invoice Reports
DFA Levels
Process Management
Adam Castle
<< Back
Goods received check
K2
Details
Comments & Actions
Process
Reports
Data Audit
Update
Add
Edit
Delete
Save
All goods received
Refresh

Invoice Header

Invoice Detail:

Vendor Name: On Gas Limited

Vendor ID: On Gas Limited;

Invoice Number: I01674

Invoice Date: 1/10/2019

Order Number: 157

GST: 059353497

Bank Account: 3113012911100

Bank Code: 13

GL Code:

Invoice Address:

Street: Private Bag 99938, Newmarket

City: Auckland

ZIP: 1149

State: Auckland

Country: NZ

Invoice Amount:

Currency: NZD

Total Tax Amount: $165.24

Total Net Amount: $1,101.90

Freight Amount: $0.00

Invoice Total: $1,267.14

On Gas Limited
Bottle Swap
Private Bag 99938
Newmarket, Auckland 1149
0800 123 GAS
bottleswap@ongas.co.nz

Tax Invoice

Date	Tax Invoice #
13/05/2019	101674

Tax Invoice To

Ship To

Customer #
999318

S.O. No.	P.O. No.	Terms
307725-18		30 days

Item	Description	Qty	Rate	GST	Amount
6334	9kg Cylinder Exchange	14	27.25	57.23	381.50
113	9kg Cylinder Sale	1	69.40	10.41	69.40
74	Outdoor Heater	2	325.50	97.60	651.00

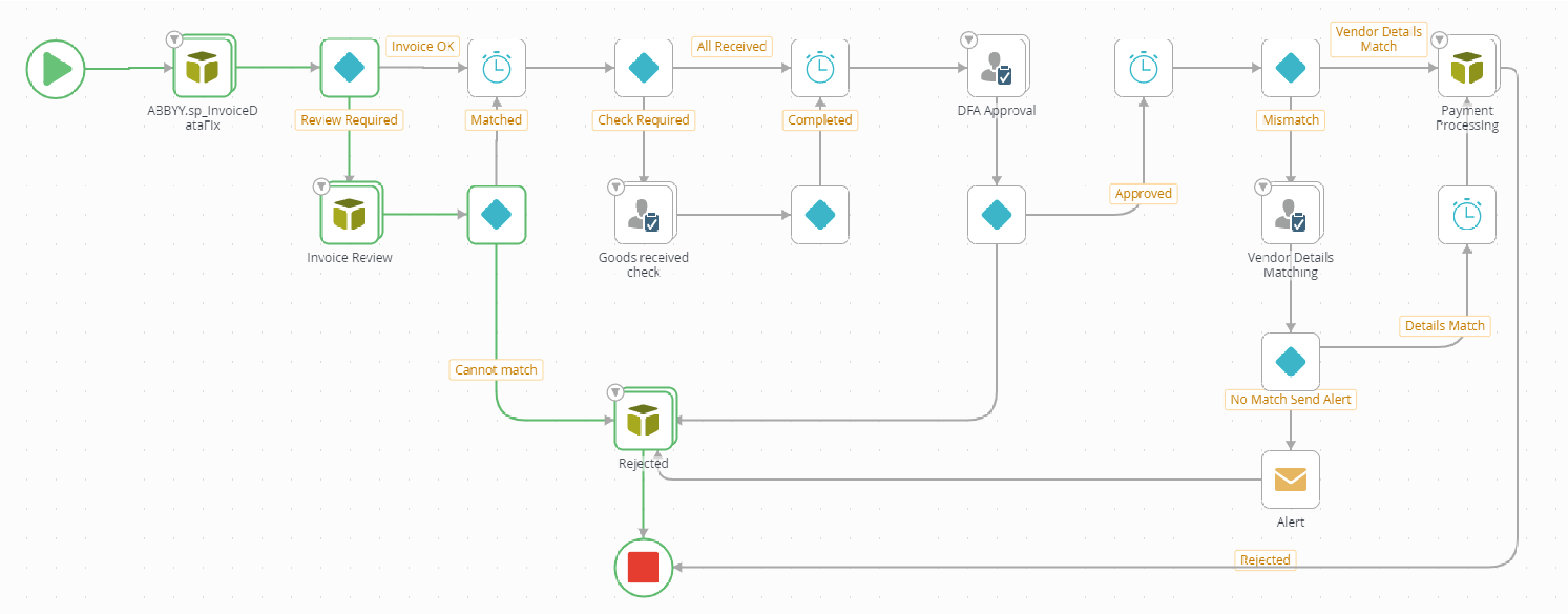
Invoice Line Items

DESCRIPTION	QTY RECEIVED	QTY	UNIT $	NET	GST	TOTAL
9kg Cylinder Exchange	14.00	14.00	27.25	$381.50	$57.23	$438.73
9kg Cylinder Sale.5	0.50	1.00	69.40	$69.40	$10.41	$79.81
Outdoor Heater	0.00	2.00	325.50	$651.00	$97.60	$748.60
						$1,267.14

Purchase Order Line Items

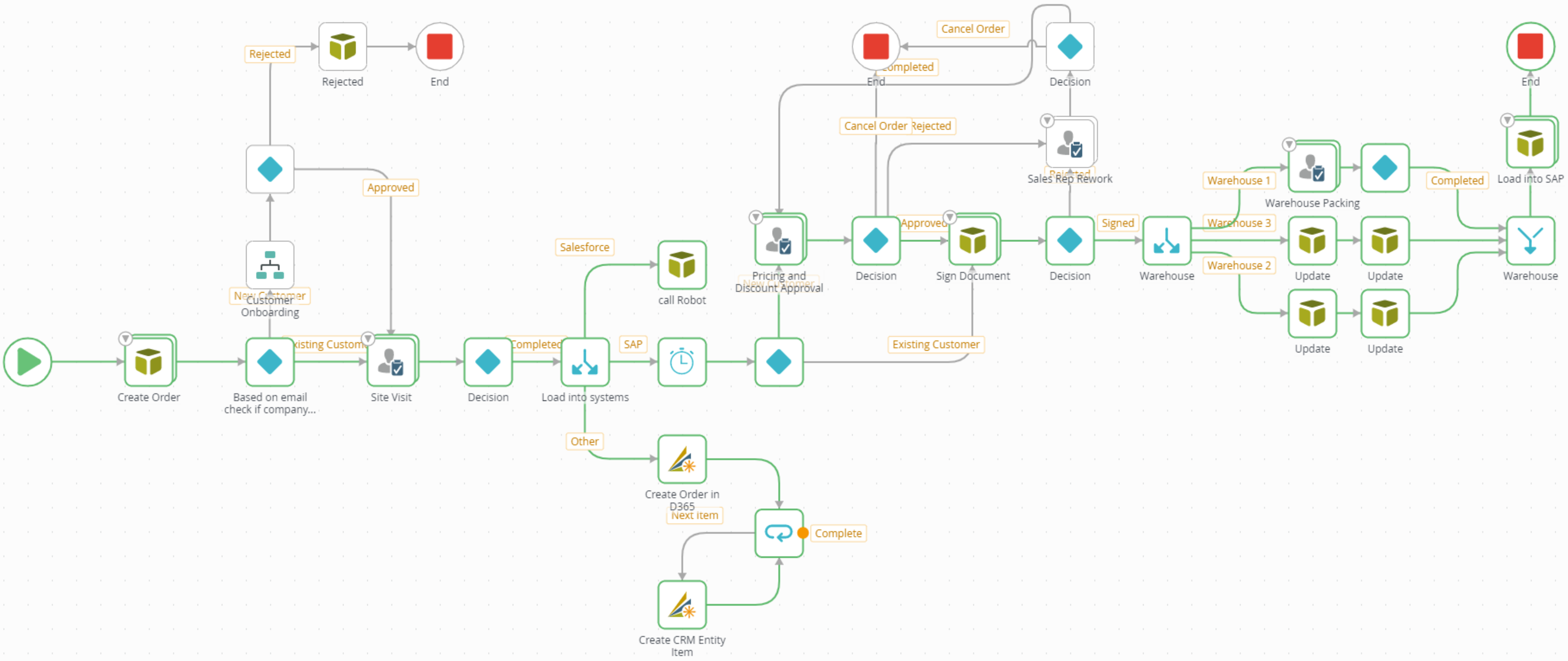
DESCRIPTION	UNIT $	QTY	NET	GST	TOTAL
9kg Cylinder Exchange	27.25	14.00	$381.50	$57.23	$438.73
9kg Cylinder Sale	69.40	1.00	$69.40	$10.41	$79.81
Outdoor Heater	325.50	2.00	$651.00	$97.60	$748.60
					$1,267.14

K2 for Invoice Processing

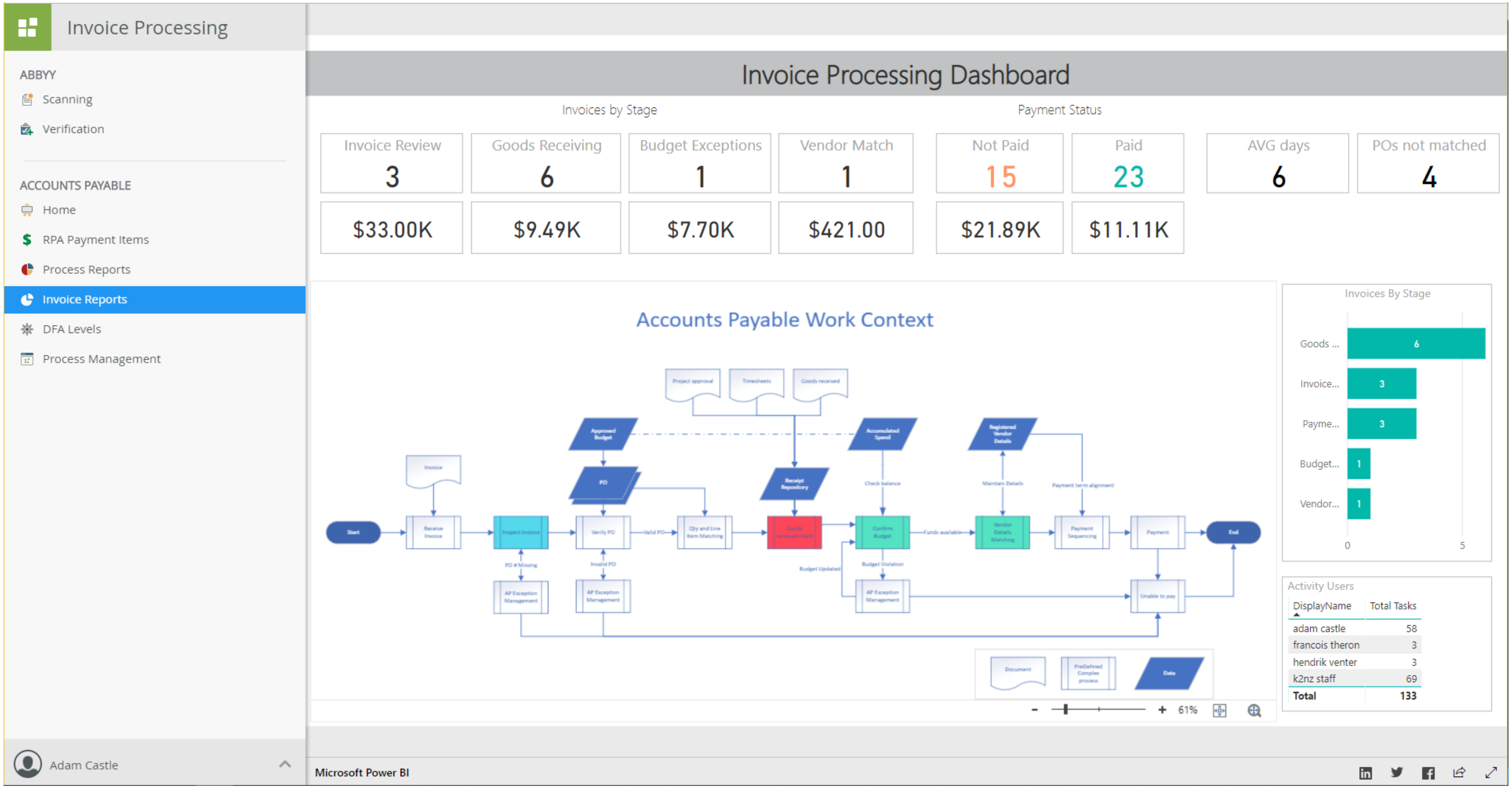

ABBYY.sp_InvoiceDataFix
Invoice OK
Review Required
Matched
All Received
Check Required
Completed
DFA Approval
Vendor Details Match
Mismatch
Payment Processing
Invoice Review
Goods received check
Approved
Vendor Details Matching
Details Match
Cannot match
No Match Send Alert
Rejected
Alert
Rejected

Sensitivity: Internal

K2 for Invoice Processing


Rejected
Rejected
End
Approved
New Customer
Customer Onboarding
Existing Customer
Create Order
Based on email check if company...
Site Visit
Decision
Completed
Load into systems
Salesforce
call Robot
SAP
Other
Create Order in D365
Next Item
Complete
Create CRM Entity Item
Pricing and Discount Approval
New Customer
Existing Customer
Decision
Approved
Sign Document
Cancel Order
Completed
End
Cancel Order
Rejected
Decision
Sales Rep Rework
Rejected
Decision
Signed
Warehouse
Warehouse 1
Warehouse 3
Warehouse 2
Warehouse Packing
Update
Update
Update
Update
Completed
Load into SAP
End
Warehouse

K2 for Invoice Processing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Invoice Reports
DFA Levels
Process Management
Adam Castle
Accounts Payable Work Context
Project approval
Timesheets
Goods received
Approved Budget
Accumulated Spend
Registered Vendor Details
Invoice
PO
Receipt Repository
Check balance
Maintain Details
Payment term alignment
Start
Receive Invoice
Inspect Invoice
Verify PO
Valid PO
Qty and Line Item Matching
Goods received check
Confirm Budget
Funds available
Vendor Details Matching
Payment Sequencing
Payment
End
PO # Missing
Invalid PO
Budget Updated
Budget Violation
AP Exception Management
AP Exception Management
AP Exception Management
Unable to pay
Document
PreDefined Complex process
Data
61%
Invoices By Stage
Goods ...
Invoice...
Payme...
Budget...
Vendor...
6
3
3
1
1
0
5
Microsoft Power BI

Invoice Processing Dashboard

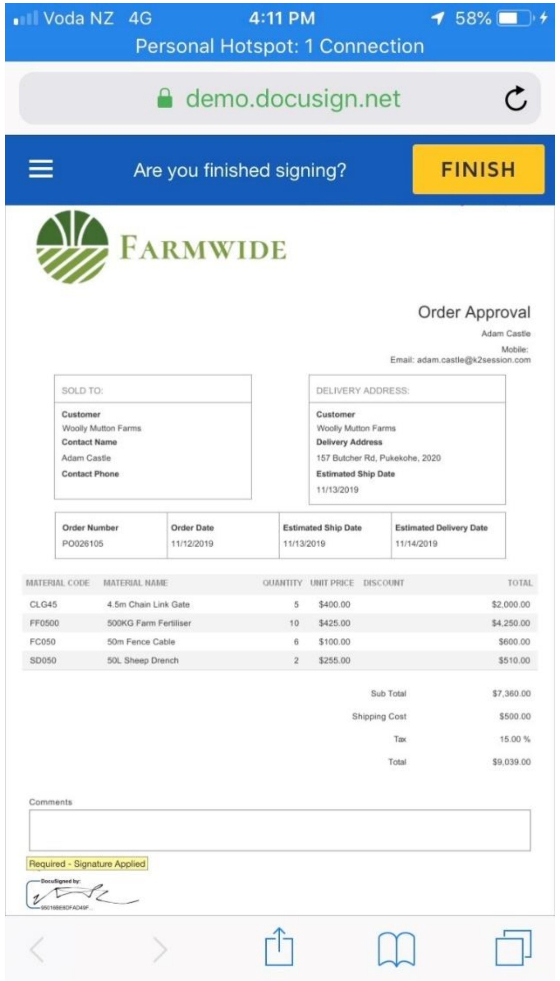
Invoices by Stage				Payment Status			
Invoice Review	Goods Receiving	Budget Exceptions	Vendor Match	Not Paid	Paid	AVG days	POs not matched
3	6	1	1	15	23	6	4
$33.00K	$9.49K	$7.70K	$421.00	$21.89K	$11.11K		

Activity Users

DisplayName	Total Tasks
adam castle	58
francois theron	3
hendrik venter	3
k2nz staff	69
Total	**133**

Sensitivity: Internal

K2 for Invoice Processing



Order Approval

Adam Castle
Mobile:
Email: adam.castle@k2session.com

SOLD TO:	DELIVERY ADDRESS:
Customer Woolly Mutton Farms **Contact Name** Adam Castle **Contact Phone**	**Customer** Woolly Mutton Farms **Delivery Address** 157 Butcher Rd, Pukekohe, 2020 **Estimated Ship Date** 11/13/2019

Order Number	Order Date	Estimated Ship Date	Estimated Delivery Date
PO026105	11/12/2019	11/13/2019	11/14/2019

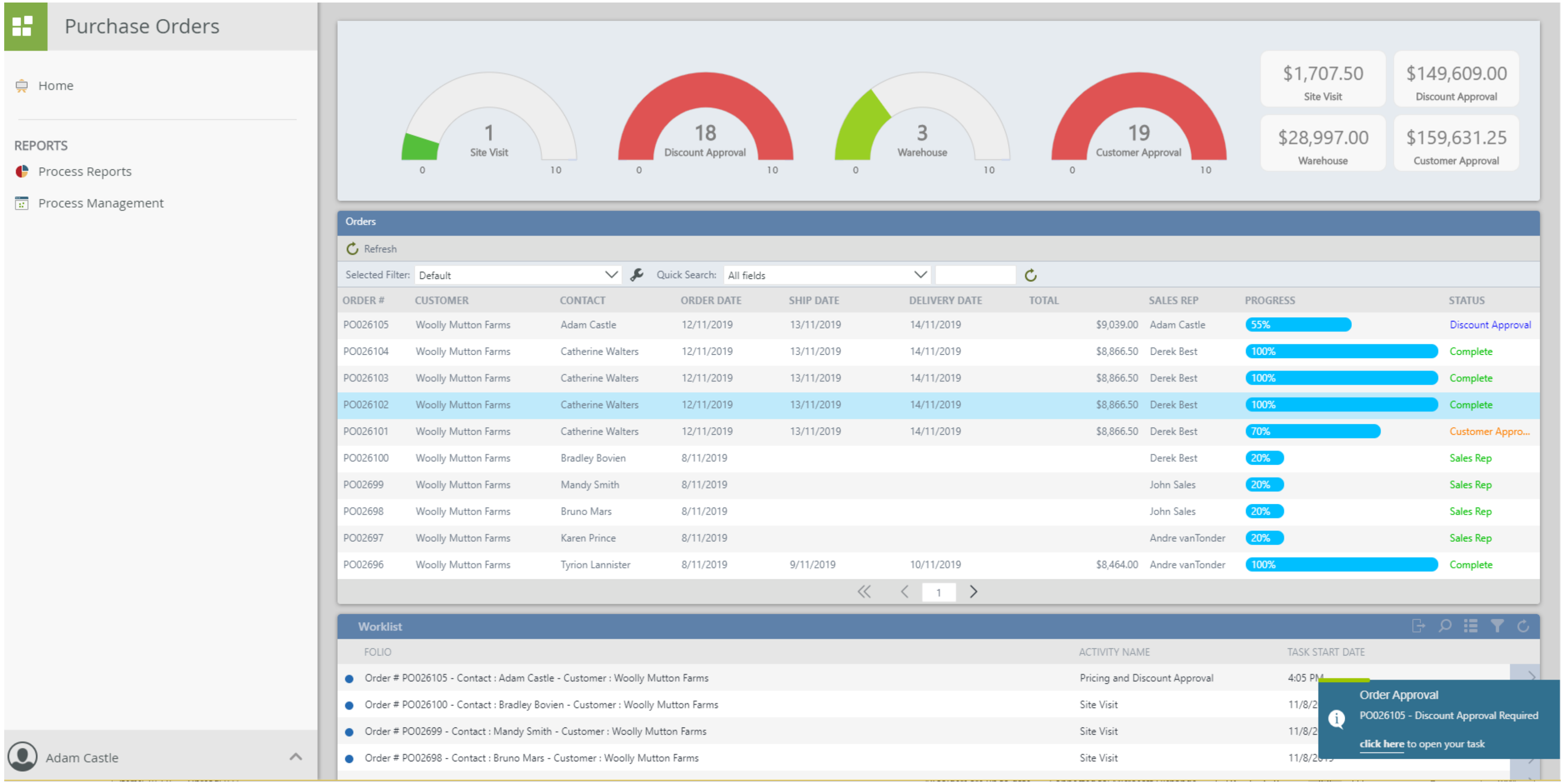
MATERIAL CODE	MATERIAL NAME	QUANTITY	UNIT PRICE	DISCOUNT	TOTAL
CLG45	4.5m Chain Link Gate	5	$400.00		$2,000.00
FF0500	500KG Farm Fertiliser	10	$425.00		$4,250.00
FC050	50m Fence Cable	6	$100.00		$600.00
SD050	50L Sheep Drench	2	$255.00		$510.00

Sub Total	$7,360.00
Shipping Cost	$500.00
Tax	15.00 %
Total	$9,039.00

Comments

Required - Signature Applied

DocuSigned by:
950168E8DFAD49F...



$1,707.50	Site Visit
$149,609.00	Discount Approval
$28,997.00	Warehouse
$159,631.25	Customer Approval

Orders

Refresh

Selected Filter: Default

Quick Search: All fields

ORDER #	CUSTOMER	CONTACT	ORDER DATE	SHIP DATE	DELIVERY DATE	TOTAL	SALES REP	PROGRESS	STATUS
PO026105	Woolly Mutton Farms	Adam Castle	12/11/2019	13/11/2019	14/11/2019	$9,039.00	Adam Castle	55%	Discount Approval
PO026104	Woolly Mutton Farms	Catherine Walters	12/11/2019	13/11/2019	14/11/2019	$8,866.50	Derek Best	100%	Complete
PO026103	Woolly Mutton Farms	Catherine Walters	12/11/2019	13/11/2019	14/11/2019	$8,866.50	Derek Best	100%	Complete
PO026102	Woolly Mutton Farms	Catherine Walters	12/11/2019	13/11/2019	14/11/2019	$8,866.50	Derek Best	100%	Complete
PO026101	Woolly Mutton Farms	Catherine Walters	12/11/2019	13/11/2019	14/11/2019	$8,866.50	Derek Best	70%	Customer Appro...
PO026100	Woolly Mutton Farms	Bradley Bovien	8/11/2019				Derek Best	20%	Sales Rep
PO02699	Woolly Mutton Farms	Mandy Smith	8/11/2019				John Sales	20%	Sales Rep
PO02698	Woolly Mutton Farms	Bruno Mars	8/11/2019				John Sales	20%	Sales Rep
PO02697	Woolly Mutton Farms	Karen Prince	8/11/2019				Andre vanTonder	20%	Sales Rep
PO02696	Woolly Mutton Farms	Tyrion Lannister	8/11/2019	9/11/2019	10/11/2019	$8,464.00	Andre vanTonder	100%	Complete

Worklist

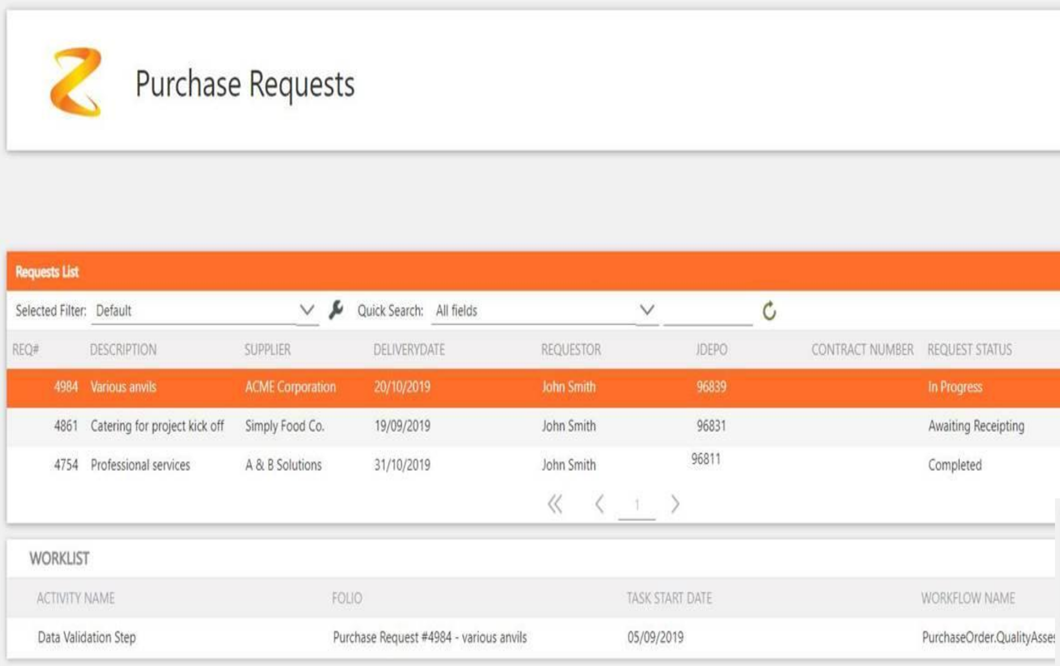
FOLIO	ACTIVITY NAME	TASK START DATE
Order # PO026105 - Contact : Adam Castle - Customer : Woolly Mutton Farms	Pricing and Discount Approval	4:05 PM
Order # PO026100 - Contact : Bradley Bovien - Customer : Woolly Mutton Farms	Site Visit	11/8/2
Order # PO02699 - Contact : Mandy Smith - Customer : Woolly Mutton Farms	Site Visit	11/8/2
Order # PO02698 - Contact : Bruno Mars - Customer : Woolly Mutton Farms	Site Visit	11/8/2

Order Approval

PO026105 - Discount Approval Required

click here to open your task

A K2 process for an Energy customer with an integration into JD Edwards (JDE) via Mulesoft



Purchase Requests

New Purchase Request

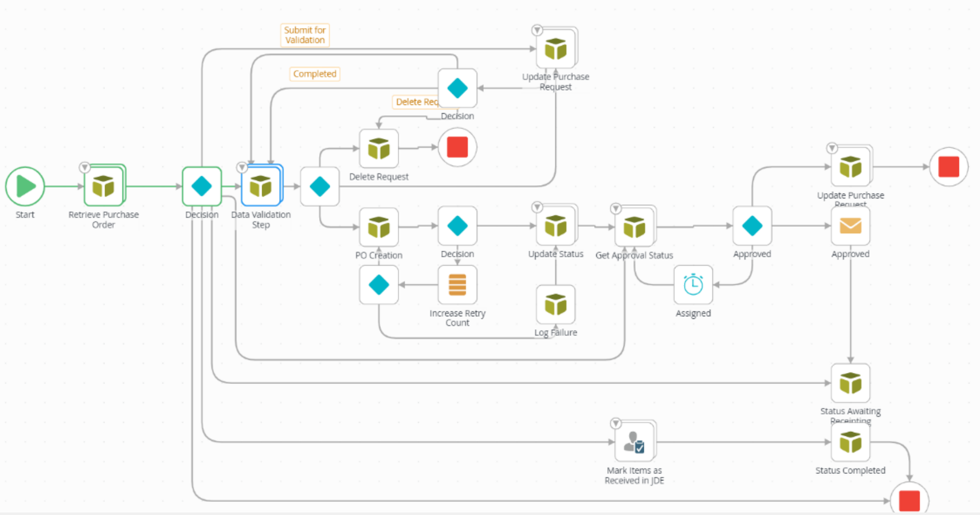
Requests List

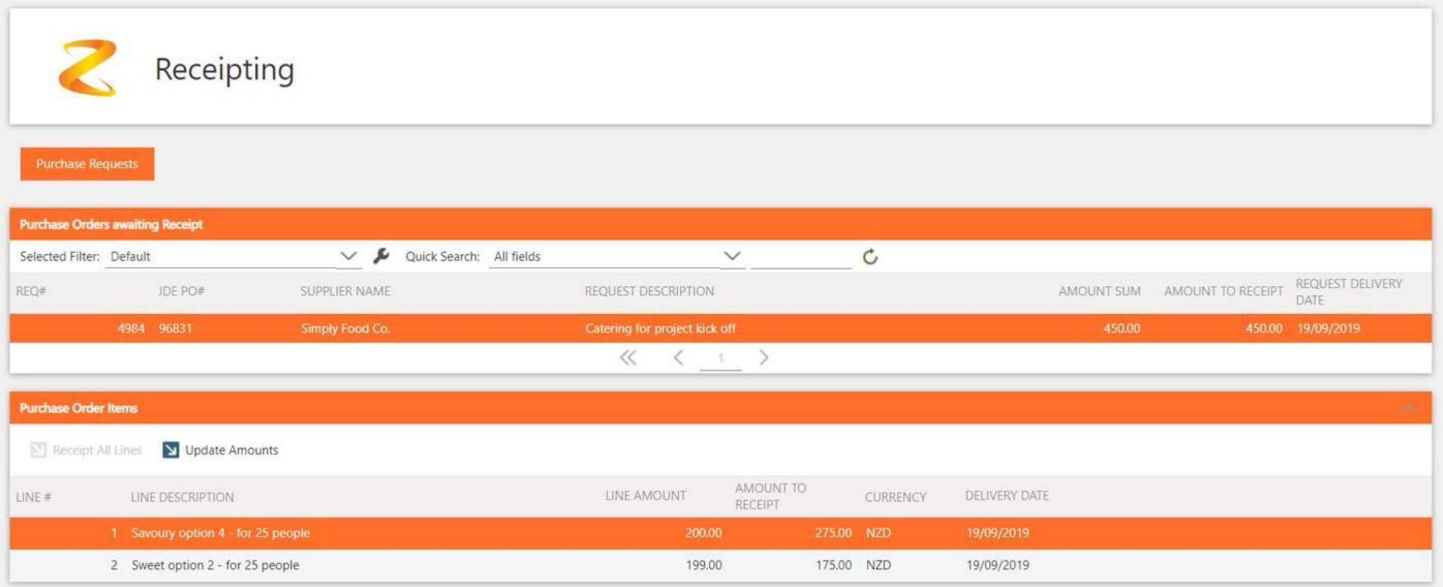
Selected Filter: Default Quick Search: All fields

REQ#	DESCRIPTION	SUPPLIER	DELIVERYDATE	REQUESTOR	JDEPO	CONTRACT NUMBER	REQUEST STATUS	TOTAL	CURRENCY
4984	Various anvils	ACME Corporation	20/10/2019	John Smith	96839		In Progress	3395.00	NZD
4861	Catering for project kick off	Simply Food Co.	19/09/2019	John Smith	96831		Awaiting Receipting	450.00	NZD
4754	Professional services	A & B Solutions	31/10/2019	John Smith	96811		Completed	14500.00	NZD

WORKLIST

ACTIVITY NAME	FOLIO	TASK START DATE	WORKFLOW NAME
Data Validation Step	Purchase Request #4984 - various anvils	05/09/2019	PurchaseOrder.QualityAsse


Submit for Validation
Completed
Delete Req
Update Purchase Request
Decision
Delete Request
Start
Retrieve Purchase Order
Decision
Data Validation Step
PO Creation
Decision
Update Status
Get Approval Status
Approved
Approved
Update Purchase Request
Increase Retry Count
Log Failure
Assigned
Status Awaiting Receipting
Mark Items as Received in JDE
Status Completed



Receipting

Purchase Requests

Purchase Orders awaiting Receipt

Selected Filter: Default Quick Search: All fields

REQ#	JDE PO#	SUPPLIER NAME	REQUEST DESCRIPTION	AMOUNT SUM	AMOUNT TO RECEIPT	REQUEST DELIVERY DATE
4984	96831	Simply Food Co.	Catering for project kick off	450.00	450.00	19/09/2019

Purchase Order Items

Receipt All Lines Update Amounts

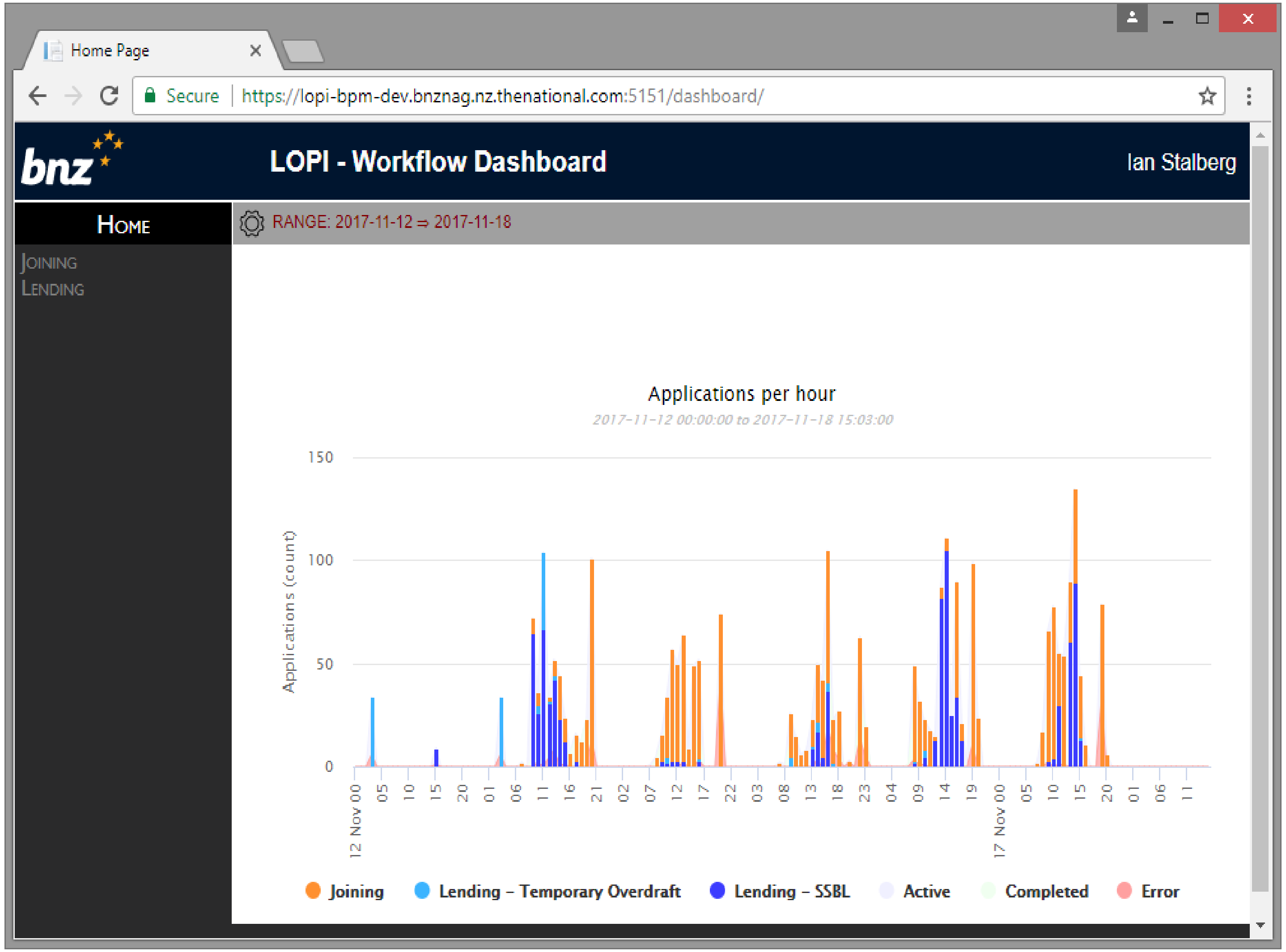
LINE #	LINE DESCRIPTION	LINE AMOUNT	AMOUNT TO RECEIPT	CURRENCY	DELIVERY DATE
1	Savoury option 4 - for 25 people	200.00	275.00	NZD	19/09/2019
2	Sweet option 2 - for 25 people	199.00	175.00	NZD	19/09/2019

K2 for Banking

Process orchestration and visibility across disparate backend systems

Workforce Management

Tactical applications


Home Page
Secure
HOME
JOINING
LENDING
150
100
50
0
Applications (count)
12 Nov 00
05
10
15
20
01
06
11
16
21
02
07
12
17
22
03
08
13
18
23
04
09
14
19
17 Nov 00
05
10
15
20
01
06
11
● Joining
● Lending – Temporary Overdraft
● Lending – SSBL
● Active
● Completed
● Error

https://lopi-bpm-dev.bnznag.nz.thenational.com:5151/dashboard/

bnz

LOPI - Workflow Dashboard

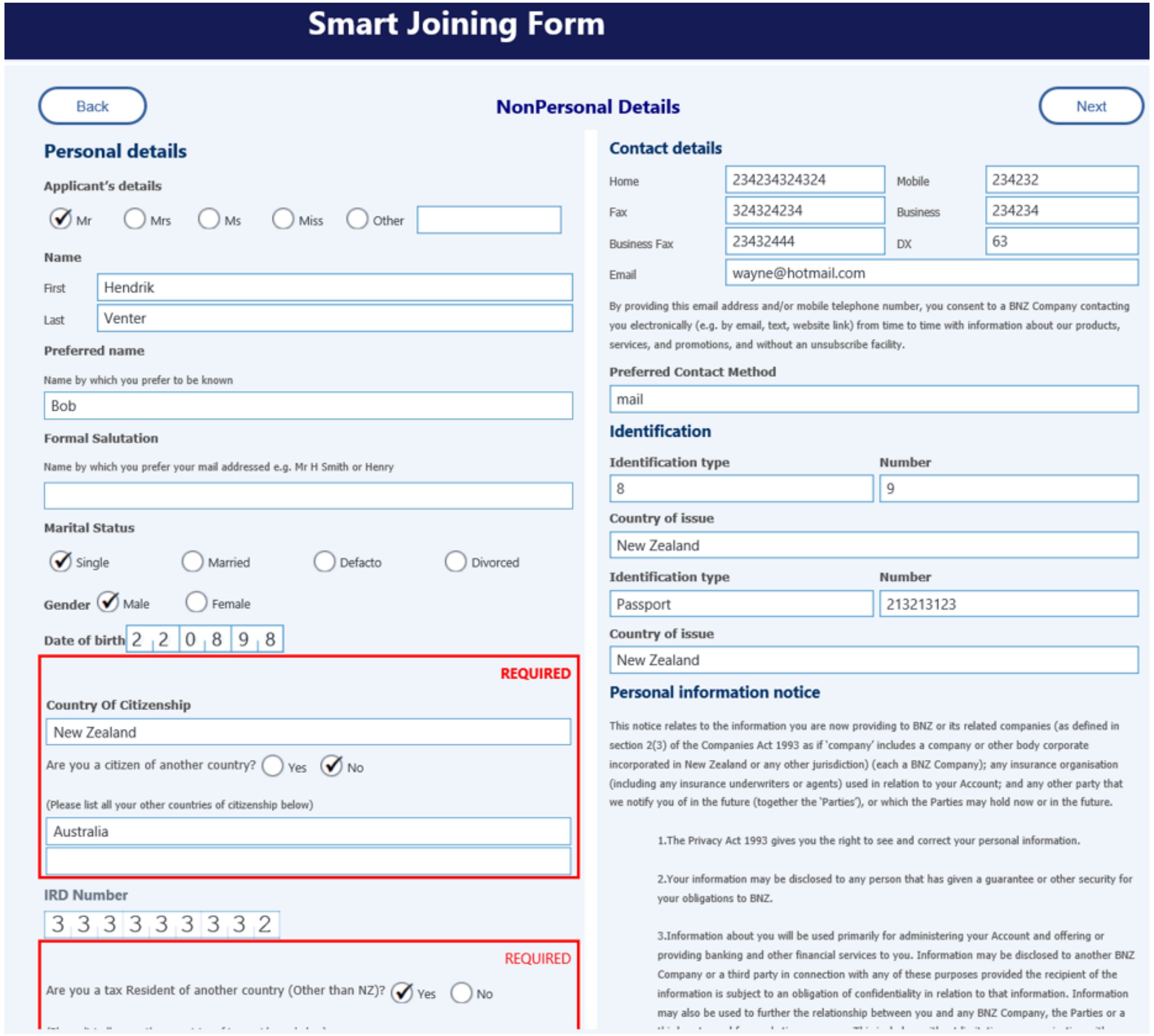
Ian Stalberg

RANGE: 2017-11-12 ⇒ 2017-11-18

Applications per hour

2017-11-12 00:00:00 to 2017-11-18 15:03:00

K2 for Banking E-Forms



Smart Joining Form

Back | **NonPersonal Details** | Next

Personal details

Applicant's details

☑ Mr ○ Mrs ○ Ms ○ Miss ○ Other

Name

First: Hendrik

Last: Venter

Preferred name

Name by which you prefer to be known

Bob

Formal Salutation

Name by which you prefer your mail addressed e.g. Mr H Smith or Henry

Marital Status

☑ Single ○ Married ○ Defacto ○ Divorced

Gender ☑ Male ○ Female

Date of birth 2 2 0 8 9 8

REQUIRED

Country Of Citizenship

New Zealand

Are you a citizen of another country? ○ Yes ☑ No

(Please list all your other countries of citizenship below)

Australia

IRD Number

3 3 3 3 3 3 3 3 2

REQUIRED

Are you a tax Resident of another country (Other than NZ)? ☑ Yes ○ No

Contact details

Home: 234234324324

Mobile: 234232

Fax: 324324234

Business: 234234

Business Fax: 23432444

DX: 63

Email: wayne@hotmail.com

By providing this email address and/or mobile telephone number, you consent to a BNZ Company contacting you electronically (e.g. by email, text, website link) from time to time with information about our products, services, and promotions, and without an unsubscribe facility.

Preferred Contact Method

mail

Identification

Identification type: 8

Number: 9

Country of issue: New Zealand

Identification type: Passport

Number: 213213123

Country of issue: New Zealand

Personal information notice

This notice relates to the information you are now providing to BNZ or its related companies (as defined in section 2(3) of the Companies Act 1993 as if 'company' includes a company or other body corporate incorporated in New Zealand or any other jurisdiction) (each a BNZ Company); any insurance organisation (including any insurance underwriters or agents) used in relation to your Account; and any other party that we notify you of in the future (together the 'Parties'), or which the Parties may hold now or in the future.

1.The Privacy Act 1993 gives you the right to see and correct your personal information.

2.Your information may be disclosed to any person that has given a guarantee or other security for your obligations to BNZ.

3.Information about you will be used primarily for administering your Account and offering or providing banking and other financial services to you. Information may be disclosed to another BNZ Company or a third party in connection with any of these purposes provided the recipient of the information is subject to an obligation of confidentiality in relation to that information. Information may also be used to further the relationship between you and any BNZ Company, the Parties or a

K2 for Industrial Services & Construction

Procure to Pay
Sales & Finance
Debt Recovery Case management
Job Management – Fibre rollout
Asset Inspections, Health & Safety
Timesheets and Mobile Inspection forms
Risk Management
Contract Management
Supply Chain Management
Incident Management
Compliance Management

Manage Paper/email based approvals

Visibility across the value chain

Increase throughput

Consistent process across departments

Examples of K2 for Ports / Logistics

PD Ports – UK

Streamlined invoicing process, eliminated the need to employ new staff: annual cost saving of £25,000 with its very first K2 solution.

K2 integrates warehouse management system & automates order entry process, making it easier for staff to check stock, select batches, and allocate products to customers all within one app

K2 Vehicle Safety Check SmartForm on mobile devices: issues requiring maintenance are automatically sent directly to the maintenance team

BidVest SACD – South Africa

100+ K2-driven workflows and business systems, ranging from human resources and financial processes to systems for inventory and operations management.

Reduced its use of paper by 60% in just one year

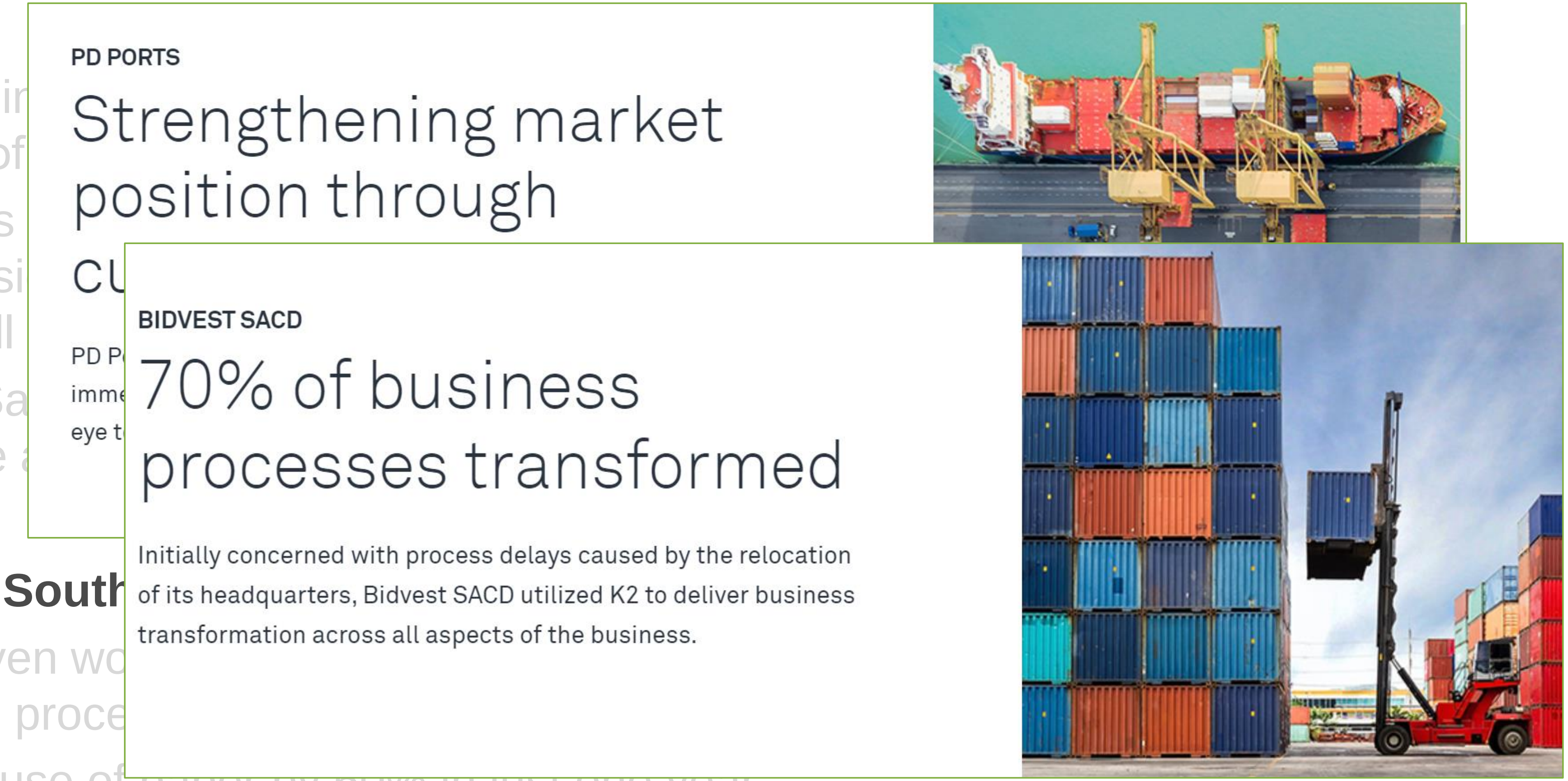
Examples of K2 for Ports / Logistics

PD Ports – UK

- Streamlined i
cost saving of
- K2 integrates
making it easi
customers all
- K2 Vehicle Sa
maintenance a

BidVest SACD – South

- 100+ K2-driven wo
and financial proce
- Reduced its use of paper by 60% in just one year



PD PORTS

Strengthening market position through cu

PD P
imme
eye t

BIDVEST SACD

70% of business processes transformed

Initially concerned with process delays caused by the relocation of its headquarters, Bidvest SACD utilized K2 to deliver business transformation across all aspects of the business.

Project Introduction

15.46 M
Awaiting To-Do Tasks in Total

1.39 M
Workflow instances in Total

0.9 M
Awaiting To-Do Tasks
(per Month)

80,000
Workflow instance
(per Month)

This is the **China Eastern Airlines B2E Workflow Platform** based on the K2 workflow platform**.**

In April 2019, the peak record of pending tasks per day was **50,019**. There are currently **522** Workflows (not including 67 sub-Workflows). These include **284** announcement-related workflows, **108** administrative workflows, and **130** purely business workflows.

Structure

Joint Portals

b2e.ceair.com

CEAH Employees

Platform

Announcement-Related Workflows

- 🟦 Government Announcement Release
- 🟦 Government Internal Announcement Release
- 🟦 Government Notifications
- 🟦 T2 Department Notification
- 🟦 Government Meeting Notification
- 🟦 T2 Department Internal Meeting Invitation
- 🟦 T2 Department Bottom-Up Approval
- 🟦 T2 Department Internal Bottom-Up Approval
- 🟦 Announcement Acceptance
- 🟦 T2 Department Announcement Acceptance
- 🟦 Branch Meeting Invitation
- 🟦 Branch Notifications
- 🟦 Branch Announcement Acceptance
- 🟦 T2 Department Announcement Release
- 🟦 T2 Department Internal Announcement Release
- 🟦 T2 Department Brief Announcement Release
- 🟦 Government Internal Notification
- 🟦 Branch Bottom-Up Approval
- 🟦 T2 Department Meeting Invitation
- 🟦 Government Bottom-Up Approval
- 🟦 Branch Announcement Release
- 🟦 Stock-Related Bottom-Up Approval
- 🟦 T3 Department Announcement Release
- 🟦 T3 Department Notification
- 🟦 T3 Department Meeting Invitation
- 🟨 Stock-Related Announcement Release

Business Workflows

- 🟦 Paper-Free Workflow
- 🟦 Legal Authorization
- 🟦 Car Application
- 🟦 Service-Center Authorization
- 🟦 Gold and Silver Card Special Approval
- 🟦 Luggage Claim
- 🟦 IT Purchasing Application
- 🟦 Asset Discard
- 🟦 Third-Grade Asset Transfer
- 🟦 Fixed Expense Workflow
- 🟥 Branch Class Upgrade Policies
- 🟨 B2T Deposit Refund
- 🟥 Luggage Claim Authorization
- 🟦 Class and Luggage Limit Upgrade
- 🟦 Budget Approval
- 🟦 Canteen Card Application
- 🟦 Service-Center ID Application
- 🟦 Membership Management
- 🟦 Unusual Flights
- 🟦 IT Update
- 🟦 Second-Grade Asset Transfer
- 🟦 Fixed Asset Purchasing Application
- 🟦 Variable Expense Workflow
- 🟨 New Air Routes
- 🟨 B2T Price Update
- 🟥 Gold and Silver Card Distribution
- 🟦 External Affairs Approval
- 🟦 Fixed-Asset Approval
- 🟦 Property Management
- 🟦 Mktg Department ID Application
- 🟦 Derivative Workflow
- 🟦 IT Services
- 🟦 Company Asset Application
- 🟦 Asset State Update
- 🟦 Contract Approval
- 🟦 Expenditure Workflow
- 🟥 Passport Application Fee Claim
- 🟥 Unusual Flight Authorization
- 🟥 Budget Application

Administrative Workflows

- 🟦 Meeting Funding Application
- 🟦 Meeting Management
- 🟦 IT Department Leave Application
- 🟦 IT Department OT Application
- 🟦 IT Operation Payment Application
- 🟦 Part-time Worker Management
- 🟦 Training Management
- 🟦 Transportation Services Management
- 🟦 Document Management
- 🟦 Recommendation Letter Management
- 🟥 Sales Department Leave Application
- 🟨 Group Leader Leave Application
- 🟥 Stamp/Seal Management
- 🟦 Recommendation Letter Application
- 🟦 Security Department Meeting Minutes
- 🟦 Office Supply Application
- 🟦 Printed Matter Application
- 🟦 IT Payment Application
- 🟦 Name Card Application
- 🟦 Car Management
- 🟦 Manager Business Trip Report
- 🟦 Dorm. Management
- 🟨 Infrastructure Department Meeting Minutes
- 🟨 Meeting Notes
- 🟥 Dismission Management
- 🟥 Political Examination Management

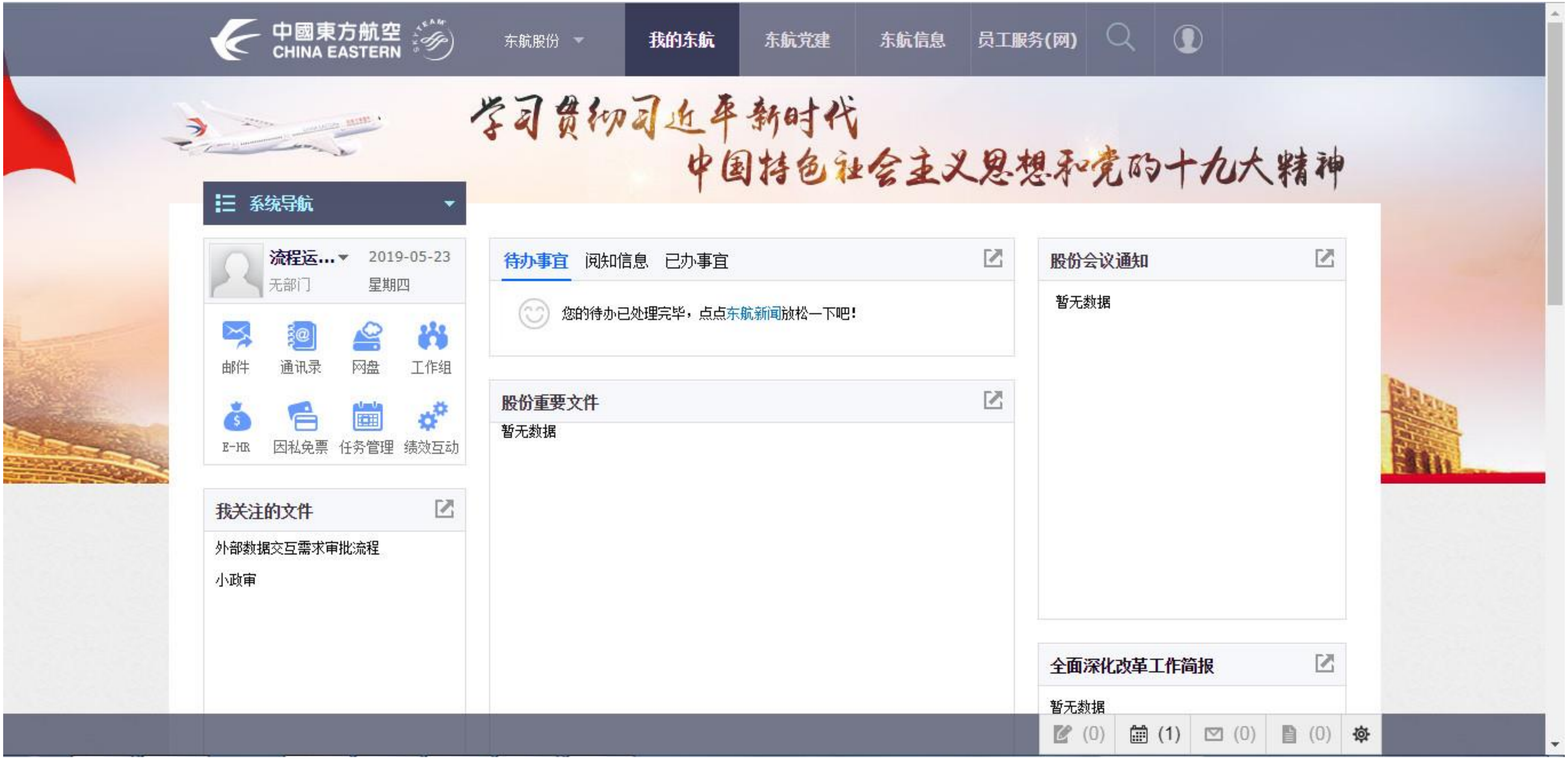
Public Workflows

- 🟨 Form Parsing Engine
- 🟨 Third-Party Port
- 🟨 Workflow Engine
- 🟨 Workflow Upgrade Authorization
- 🟦 Database Viewing Tool
- 🟦 Workflow Exchange
- 🟦 Cache Management
- 🟦 Message Queue Monitoring
- 🟨 Customized Report
- 🟨 Operation and Maintenance Tool
- 🟦 Regular Database Archive
- 🟦 Platform Extension
- 🟨 Log Management
- 🟦 Distribution Tools

Pending Tasks

External Business System

🟥 New 🟨 Upgraded 🟦 In Use


东航股份
我的东航
东航党建
东航信息
员工服务(网)
学习贯彻习近平新时代
中国特色社会主义思想和党的十九大精神
系统导航
邮件
通讯录
网盘
工作组
E-HR
因私免票
任务管理
绩效互动
(0)
(1)
(0)
(0)

流程运... 2019-05-23
无部门 星期四

待办事宜 阅知信息 已办事宜

您的待办已处理完毕，点点东航新闻放松一下吧！

股份会议通知

暂无数据

股份重要文件

暂无数据

我关注的文件

外部数据交互需求审批流程

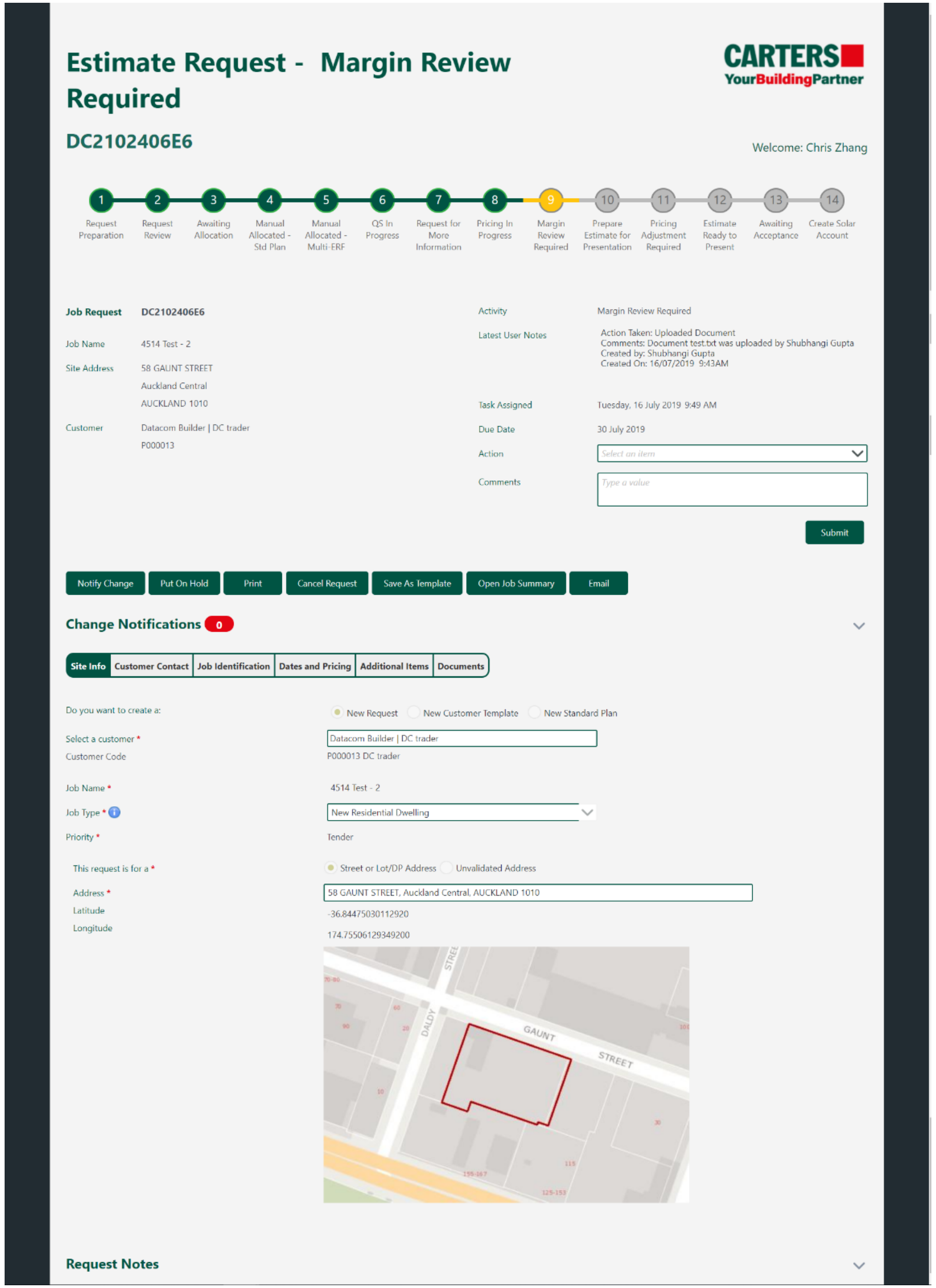
小政审

全面深化改革工作简报

暂无数据

K2 for a Building Services Company

- Forms accessed on iPad
- Integration with DCRM and CoreLogic address search
- Documentation saved to SharePoint Online & Azur Blob storage
- Push data to backend ERP (JDE)



Estimate Request - Margin Review Required

DC2102406E6

CARTERS YourBuildingPartner

Welcome: Chris Zhang

1 Request Preparation
2 Request Review
3 Awaiting Allocation
4 Manual Allocated - Std Plan
5 Manual Allocated - Multi-ERF
6 QS In Progress
7 Request for More Information
8 Pricing In Progress
9 Margin Review Required
10 Prepare Estimate for Presentation
11 Pricing Adjustment Required
12 Estimate Ready to Present
13 Awaiting Acceptance
14 Create Solar Account

Job Request DC2102406E6

Job Name: 4514 Test - 2

Site Address: 58 GAUNT STREET
Auckland Central
AUCKLAND 1010

Customer: Datacom Builder | DC trader
P000013

Activity: Margin Review Required

Latest User Notes: Action Taken: Uploaded Document
Comments: Document test.txt was uploaded by Shubhangi Gupta
Created by: Shubhangi Gupta
Created On: 16/07/2019 9:43AM

Task Assigned: Tuesday, 16 July 2019 9:49 AM

Due Date: 30 July 2019

Action: Select an item

Comments: Type a value

Submit
Notify Change
Put On Hold
Print
Cancel Request
Save As Template
Open Job Summary
Email

Change Notifications 0

Site Info
Customer Contact
Job Identification
Dates and Pricing
Additional Items
Documents

Do you want to create a: ● New Request ○ New Customer Template ○ New Standard Plan

Select a customer *: Datacom Builder | DC trader

Customer Code: P000013 DC trader

Job Name *: 4514 Test - 2

Job Type *: New Residential Dwelling

Priority *: Tender

This request is for a *: ● Street or Lot/DP Address ○ Unvalidated Address

Address *: 58 GAUNT STREET, Auckland Central, AUCKLAND 1010

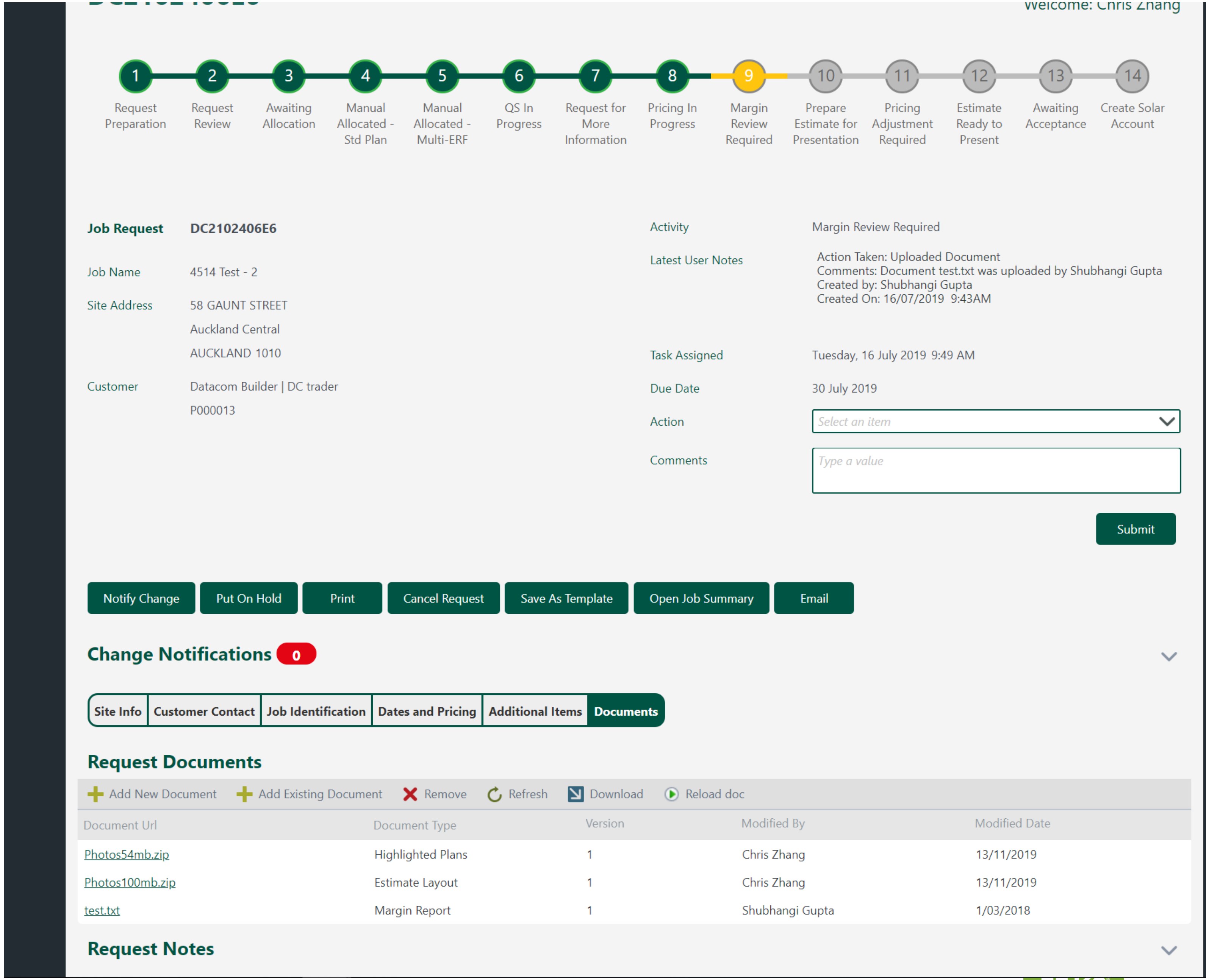
Latitude: -36.84475030112920

Longitude: 174.75506129349200

STREET
DALDY
GAUNT
STREET

Request Notes

K2 for Carters


Welcome: Chris Zhang
1 Request Preparation
2 Request Review
3 Awaiting Allocation
4 Manual Allocated - Std Plan
5 Manual Allocated - Multi-ERF
6 QS In Progress
7 Request for More Information
8 Pricing In Progress
9 Margin Review Required
10 Prepare Estimate for Presentation
11 Pricing Adjustment Required
12 Estimate Ready to Present
13 Awaiting Acceptance
14 Create Solar Account

Job Request **DC2102406E6**

Job Name 4514 Test - 2

Site Address 58 GAUNT STREET
Auckland Central
AUCKLAND 1010

Customer Datacom Builder | DC trader
P000013

Activity Margin Review Required

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Comments: Document test.txt was uploaded by Shubhangi Gupta
Created by: Shubhangi Gupta
Created On: 16/07/2019 9:43AM

Task Assigned Tuesday, 16 July 2019 9:49 AM

Due Date 30 July 2019

Action *Select an item*

Comments *Type a value*

Submit
Notify Change
Put On Hold
Print
Cancel Request
Save As Template
Open Job Summary
Email

Change Notifications 0

Site Info
Customer Contact
Job Identification
Dates and Pricing
Additional Items
Documents

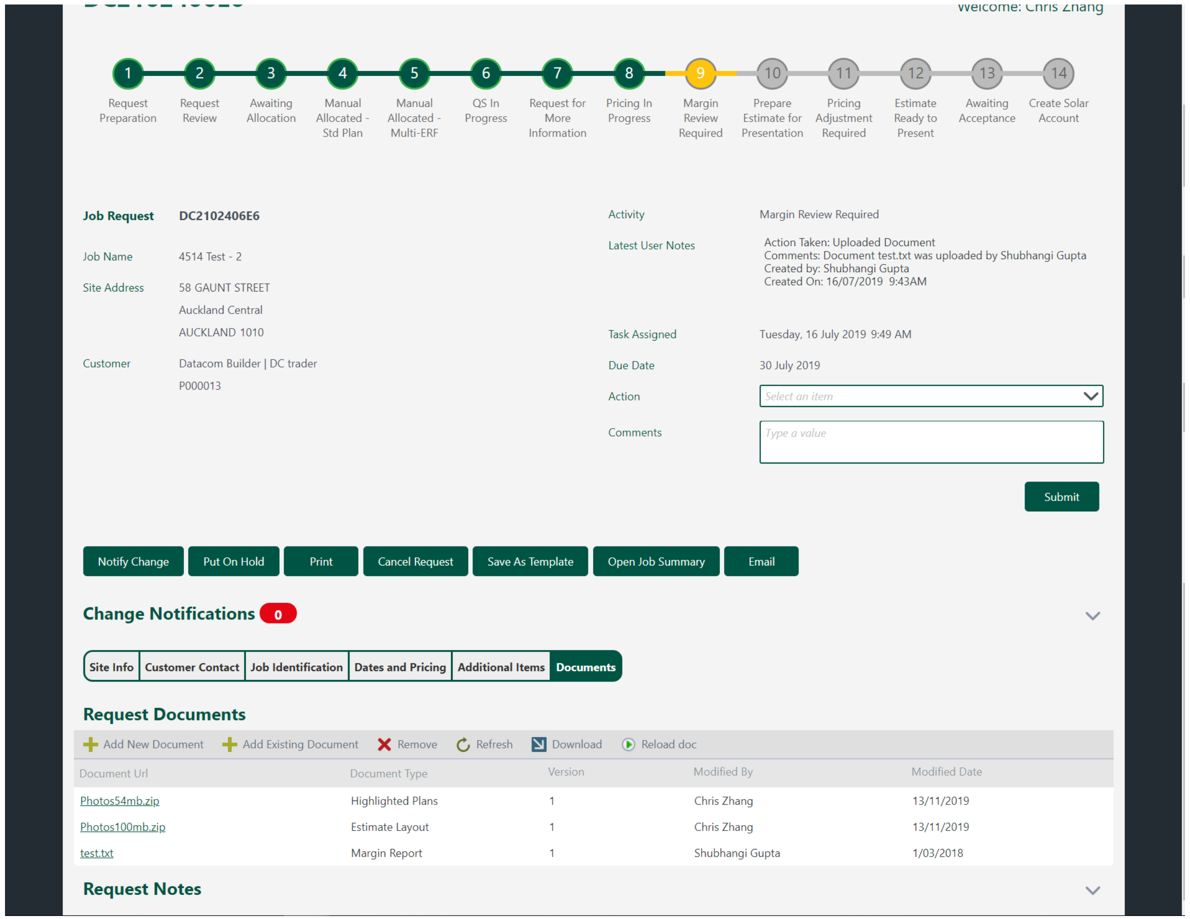
Request Documents

Add New Document
Add Existing Document
Remove
Refresh
Download
Reload doc

Document Url	Document Type	Version	Modified By	Modified Date
Photos54mb.zip	Highlighted Plans	1	Chris Zhang	13/11/2019
Photos100mb.zip	Estimate Layout	1	Chris Zhang	13/11/2019
test.txt	Margin Report	1	Shubhangi Gupta	1/03/2018

Request Notes

Their workflow is quite complex!



Welcome: Chris Zhang

1. Request Preparation
2. Request Review
3. Awaiting Allocation
4. Manual Allocated - Std Plan
5. Manual Allocated - Multi-ERF
6. QS In Progress
7. Request for More Information
8. Pricing In Progress
9. Margin Review Required
10. Prepare Estimate for Presentation
11. Pricing Adjustment Required
12. Estimate Ready to Present
13. Awaiting Acceptance
14. Create Solar Account

Job Request DC2102406E6

Job Name 4514 Test - 2

Site Address 58 GAUNT STREET
Auckland Central
AUCKLAND 1010

Customer Datacom Builder | DC trader
P000013

Activity Margin Review Required

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Created On: 16/07/2019 9:43AM

Task Assigned Tuesday, 16 July 2019 9:49 AM

Due Date 30 July 2019

Action Select an item

Comments Type a value

Submit
Notify Change
Put On Hold
Print
Cancel Request
Save As Template
Open Job Summary
Email

Change Notifications 0

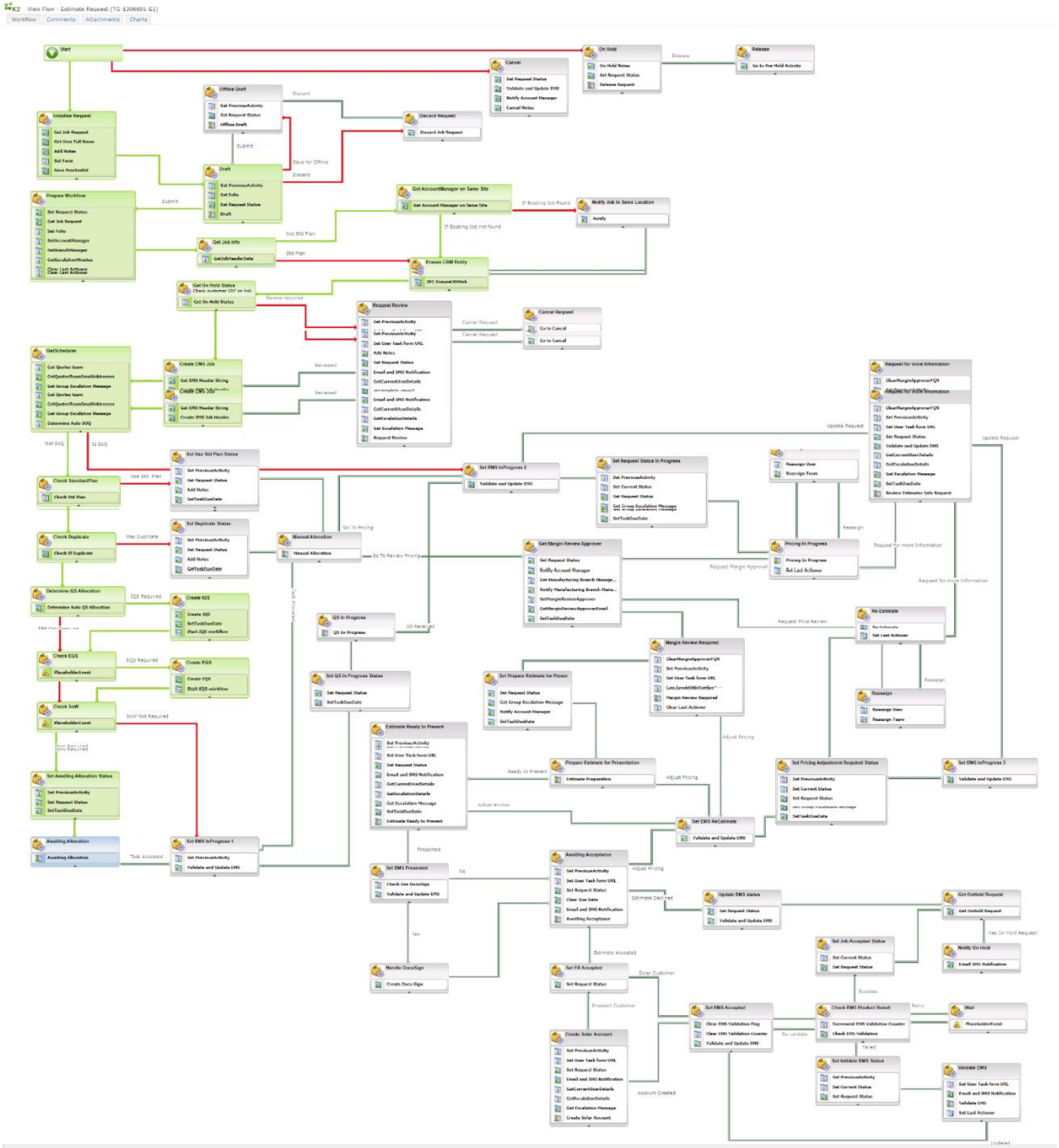
Site Info
Customer Contact
Job Identification
Dates and Pricing
Additional Items
Documents

Request Documents

Add New Document
Add Existing Document
Remove
Refresh
Download
Reload doc

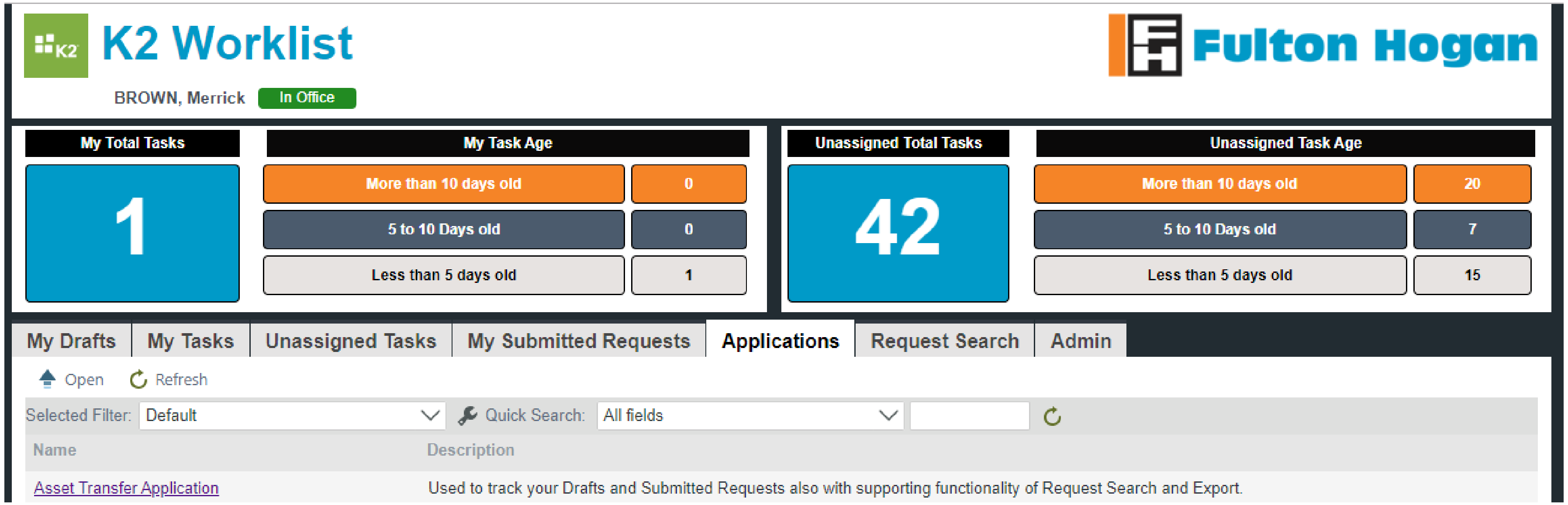
Document Url	Document Type	Version	Modified By	Modified Date
Photos54mb.zip	Highlighted Plans	1	Chris Zhang	13/11/2019
Photos100mb.zip	Estimate Layout	1	Chris Zhang	13/11/2019
test.txt	Margin Report	1	Shubhangi Gupta	1/03/2018

Request Notes



09:00 09:45 11:00 14:45 16:00 16:45

Another building infrastructure company and the specific way they wanted their forms to look



K2 Worklist

Fulton Hogan

BROWN, Merrick In Office

My Total Tasks	My Task Age	
1	More than 10 days old	0
	5 to 10 Days old	0
	Less than 5 days old	1

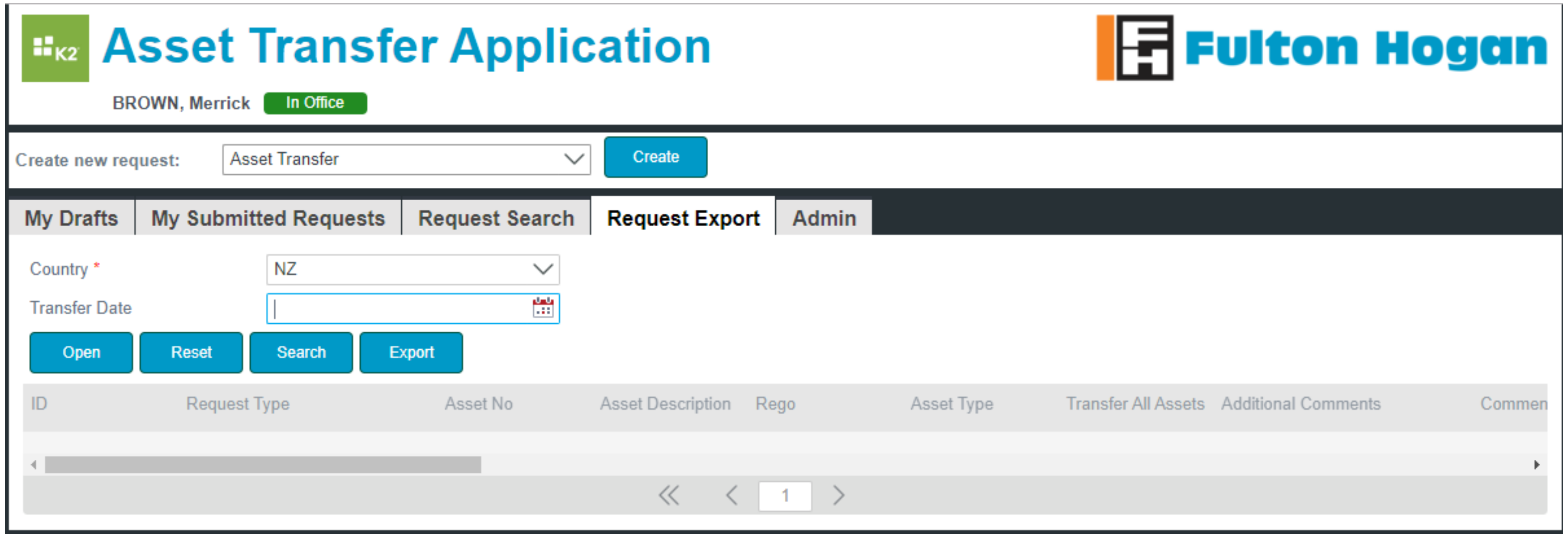
Unassigned Total Tasks	Unassigned Task Age	
42	More than 10 days old	20
	5 to 10 Days old	7
	Less than 5 days old	15

My Drafts
My Tasks
Unassigned Tasks
My Submitted Requests
Applications
Request Search
Admin
Open
Refresh

Selected Filter: Default

Quick Search: All fields

Name	Description
Asset Transfer Application	Used to track your Drafts and Submitted Requests also with supporting functionality of Request Search and Export.



Asset Transfer Application

Fulton Hogan

BROWN, Merrick In Office

Create new request: Asset Transfer

Create
My Drafts
My Submitted Requests
Request Search
Request Export
Admin

Country * NZ

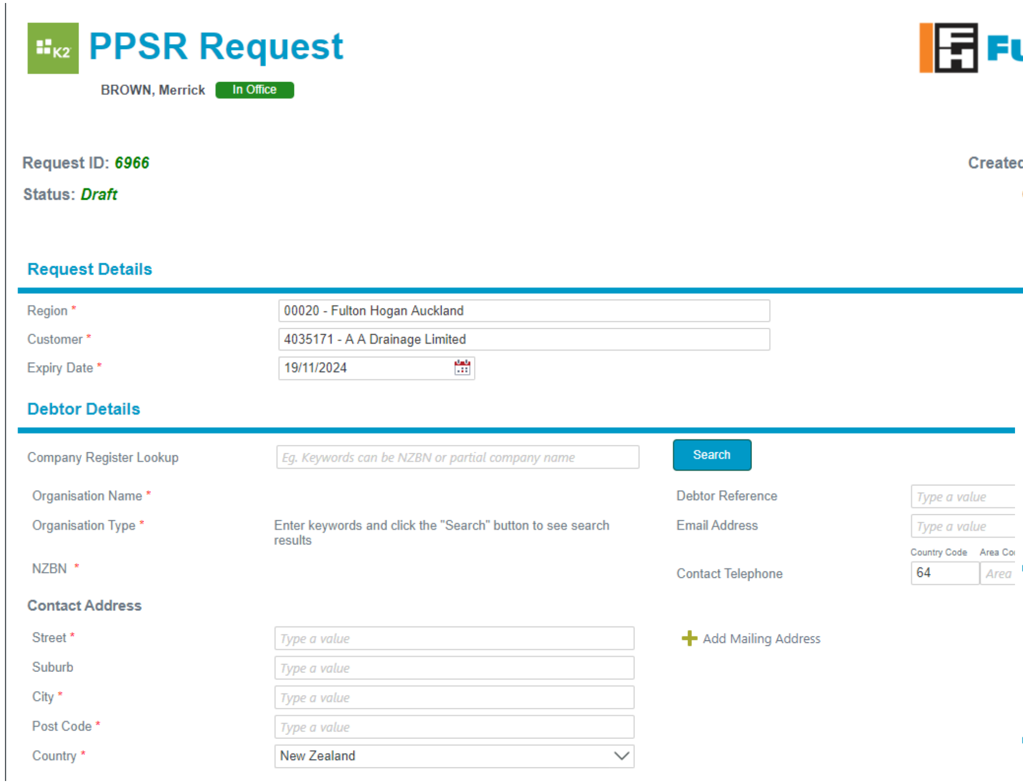
Transfer Date

Open
Reset
Search
Export

ID	Request Type	Asset No	Asset Description	Rego	Asset Type	Transfer All Assets	Additional Comments	Commen

1

Tailor Forms to the customer’s exact specifications



PPSR Request

Fulton Hogan

BROWN, Merrick In Office

Request ID: *6966*

Status: *Draft*

Created Date: *19/11/2019 (Tue) 04:13 PM*

Current Owner: *BROWN, Merrick*

Request Details

Region *	00020 - Fulton Hogan Auckland
Customer *	4035171 - A A Drainage Limited
Expiry Date *	19/11/2024

Debtor Details

Company Register Lookup: *Eg. Keywords can be NZBN or partial company name*

Organisation Name *

Organisation Type *

Enter keywords and click the "Search" button to see search results

NZBN *

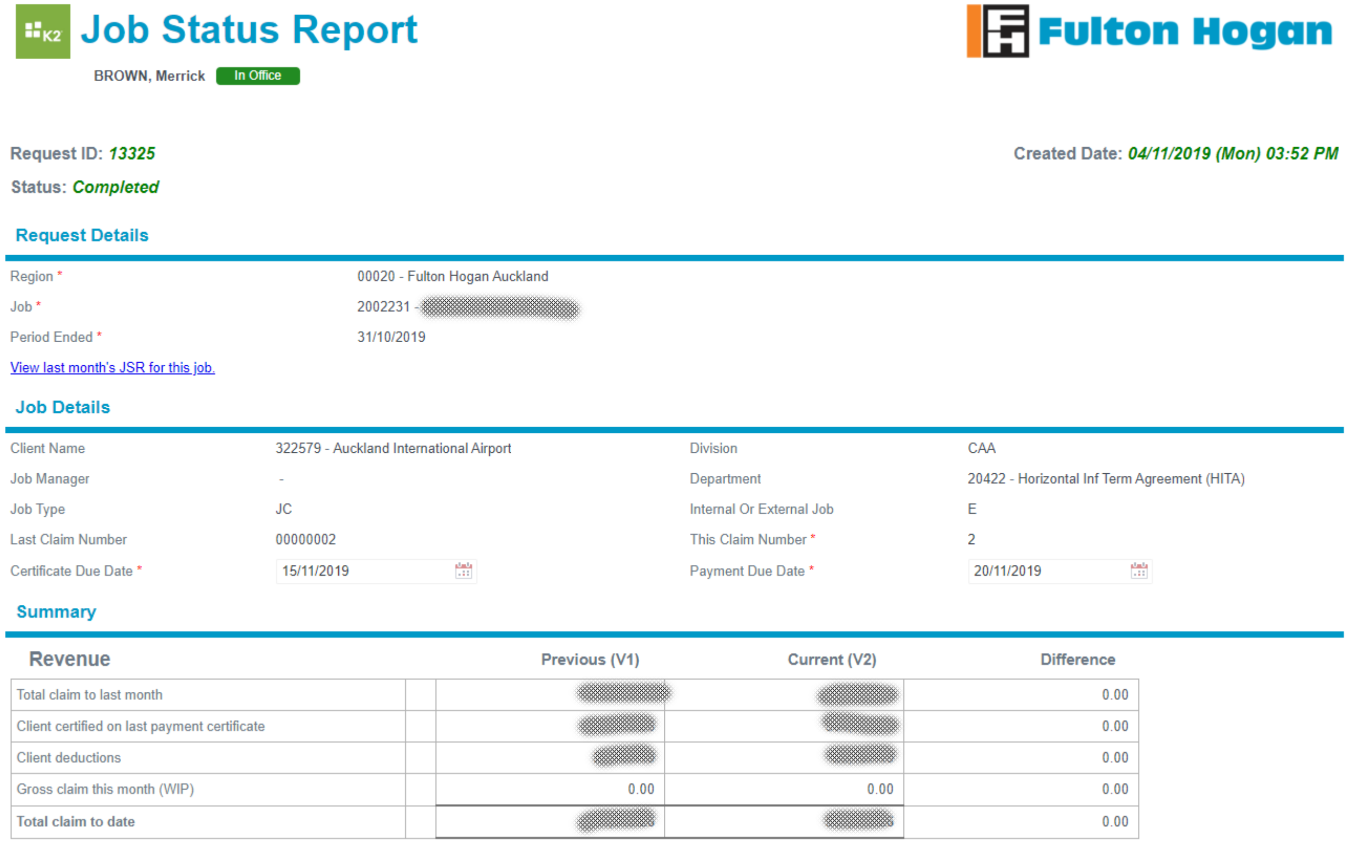
Debtor Reference: *Type a value*

Email Address: *Type a value*

Contact Telephone: Country Code 64, Area Co *Area*

Contact Address

Street *	*Type a value*
Suburb	*Type a value*
City *	*Type a value*
Post Code *	*Type a value*
Country *	New Zealand



Job Status Report

Fulton Hogan

BROWN, Merrick In Office

Request ID: *13325*

Status: *Completed*

Created Date: *04/11/2019 (Mon) 03:52 PM*

Request Details

Region *	00020 - Fulton Hogan Auckland
Job *	2002231 - [redacted]
Period Ended *	31/10/2019

View last month's JSR for this job.

Job Details

Client Name	322579 - Auckland International Airport	Division	CAA
Job Manager	-	Department	20422 - Horizontal Inf Term Agreement (HITA)
Job Type	JC	Internal Or External Job	E
Last Claim Number	00000002	This Claim Number *	2
Certificate Due Date *	15/11/2019	Payment Due Date *	20/11/2019

Summary

Revenue		Previous (V1)	Current (V2)	Difference
Total claim to last month		[redacted]	[redacted]	0.00
Client certified on last payment certificate		[redacted]	[redacted]	0.00
Client deductions		[redacted]	[redacted]	0.00
Gross claim this month (WIP)		0.00	0.00	0.00
Total claim to date		[redacted]	[redacted]	0.00

K2 for Government – Almost 1000 customers worldwide. Here is just the UK alone …

Food Standards Agency
food.gov.uk

Ofsted

THE ROYAL BRITISH LEGION

LEICESTERSHIRE
FIRE and RESCUE SERVICE

Sheffield City Council

CHP

ROYAL COLLEGE OF OBSTETRICIANS AND GYNAECOLOGISTS

Havant
BOROUGH COUNCIL

west sussex county council

Transport for London

Department for Education

hs2 engine for growth

Guy's and St Thomas' NHS
NHS Foundation Trust

Leicester College
learning for success

Waverley
BOROUGH COUNCIL

Royal Horticultural Society

PEABODY

MINISTRY OF DEFENCE

Supported by the Broads Authority
Sustainable Development Fund

Great Ormond Street Hospital Charity

BANK OF ENGLAND

arb
Architects Registration Board

Edinburgh Napier
UNIVERSITY

North Yorkshire County Council

Scottish Court Service

HSC
Belfast Health and Social Care Trust

Asiant Cefnffyrdd Gogledd a Chanolbarth Cymru
North & Mid Wales Trunk Road Agent

NHS
Business Services Authority
Supporting the NHS, supplying the NHS, protecting the NHS

Teesside University

VELINDRE
NHS TRUST

northumbria
UNIVERSITY

THE UNITED KINGDOM HYDROGRAPHIC OFFICE

Southend University Hospital NHS
NHS Foundation Trust

Hull City Council

SOUTH LANARKSHIRE COUNCIL

Tai Wales & West Housing

St Mary's University College Twickenham London

NetworkRail

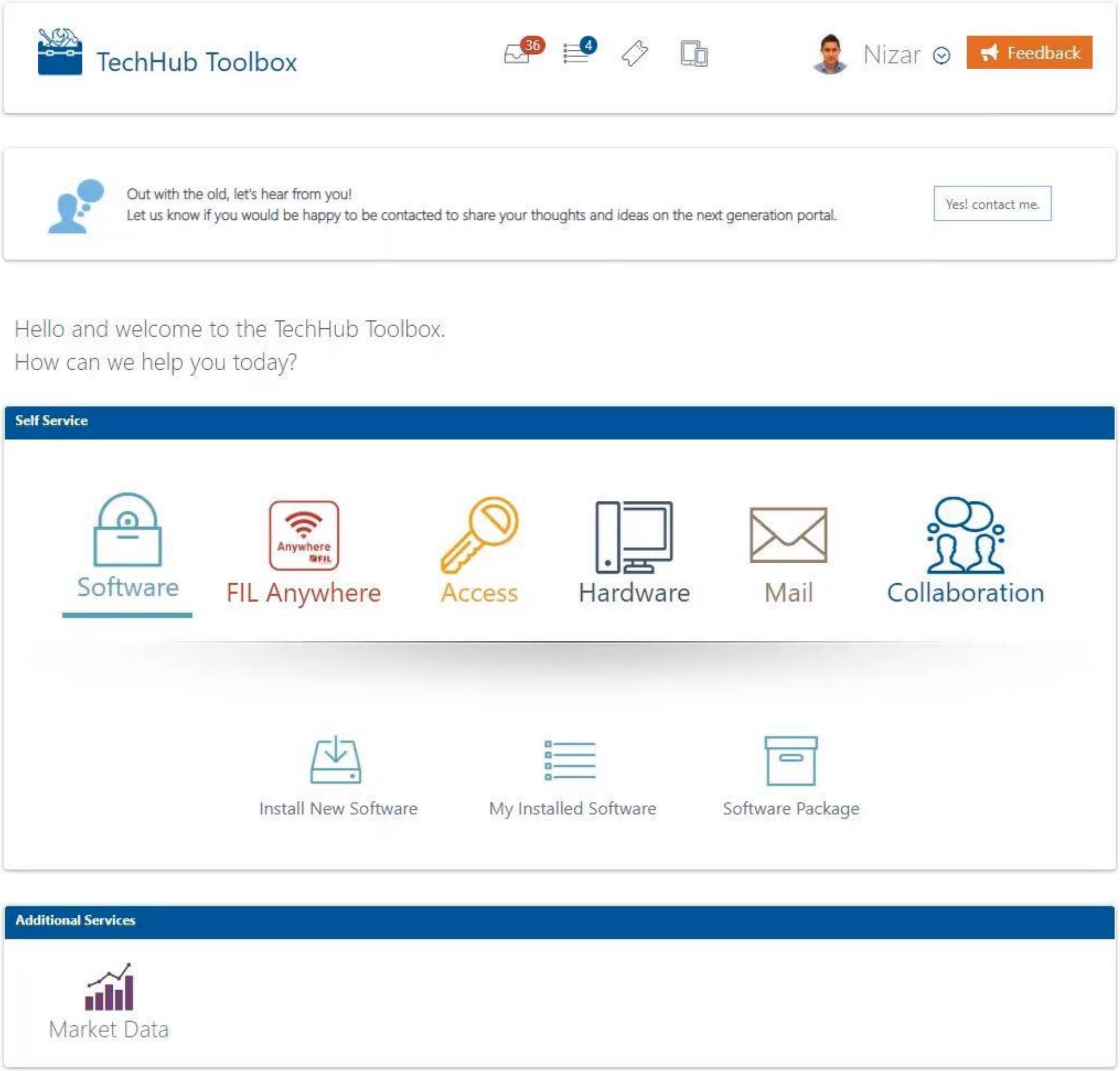
K2

K2 for Education – Colleges and Universities worldwide

University of Canberra
University of Sydney
Victoria University of Technology
Bangkok University
James Cook University Singapore
Nanyang Technological University
Singapore Management University
Enterprises University of Pretoria
King Abdulaziz University (UAE)
King Saud University
Edinburgh Napier University

Teeside University
University of Northumbria
University of Winchester
The University of Trinidad & Tobago
Louisiana State University
Northeastern University
The Penn State University
University of Alabama
University of Houston
Indiana University
Whitworth University

K2 for Operations – Employee Self Service


TechHub Toolbox
36
4
Nizar
Feedback
Yes! contact me.
Self Service
Software
FIL Anywhere
Anywhere FIL
Access
Hardware
Mail
Collaboration
Install New Software
My Installed Software
Software Package
Additional Services
Market Data

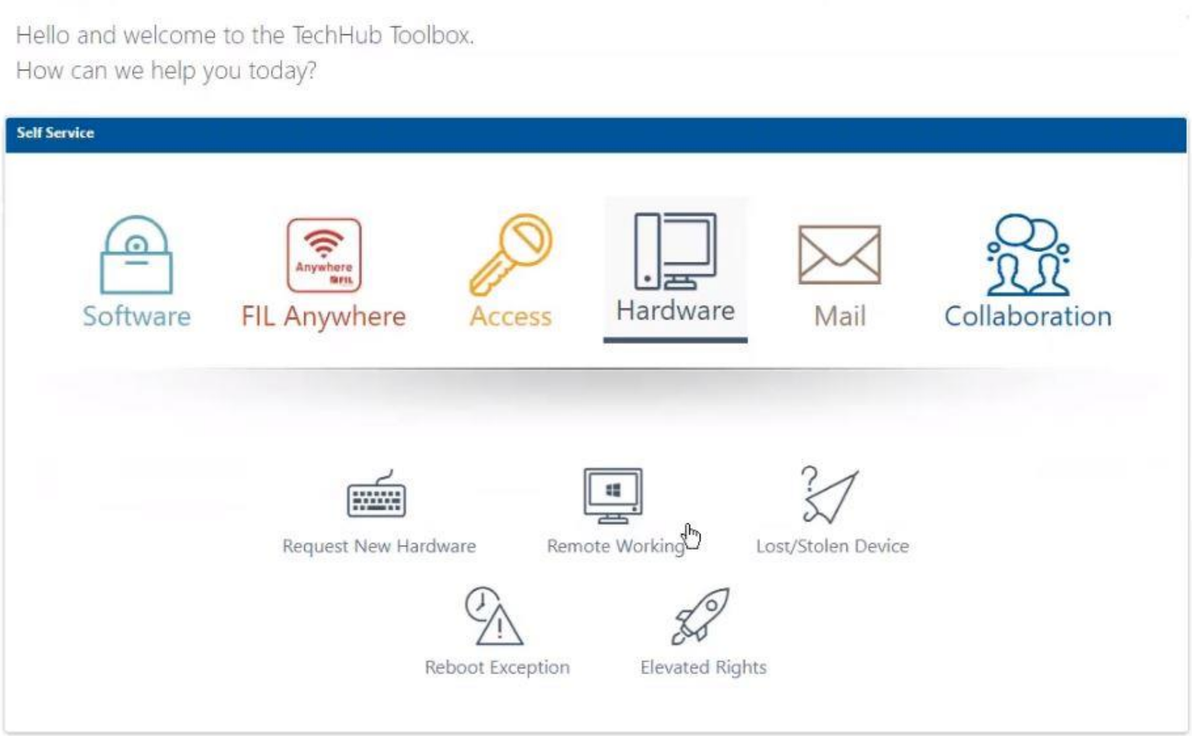
Out with the old, let's hear from you!
Let us know if you would be happy to be contacted to share your thoughts and ideas on the next generation portal.

Hello and welcome to the TechHub Toolbox.
How can we help you today?

Give Business Users a clean simple way to interact with IT across multiple service channels

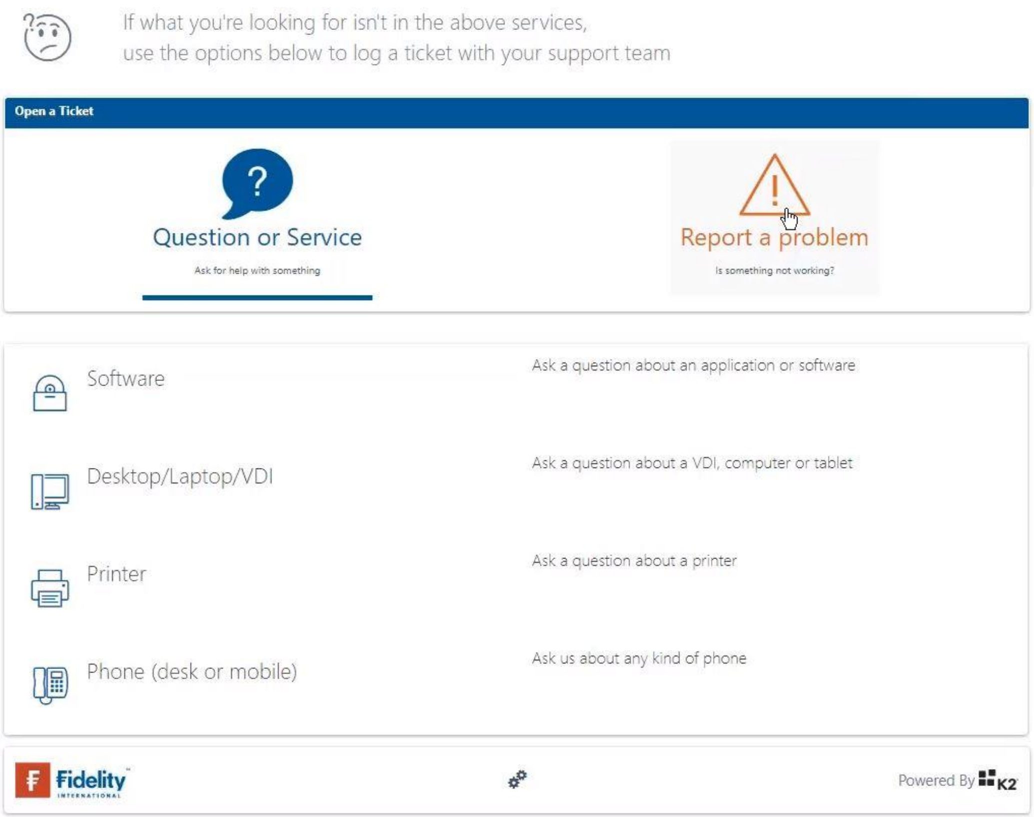
- **Integrate with ServiceNow**
- **New Software / Apps Requests**
- **Password / Account Resets**
- **Hardware Requests**
- **Schedule Online meetings**
- **Request MS Team channel**
- **Request SharePoint site**

K2 for Operations – Employee Self Service



Hello and welcome to the TechHub Toolbox.
How can we help you today?

Self Service
Software
Anywhere FIL
FIL Anywhere
Access
Hardware
Mail
Collaboration
Request New Hardware
Remote Working
Lost/Stolen Device
Reboot Exception
Elevated Rights



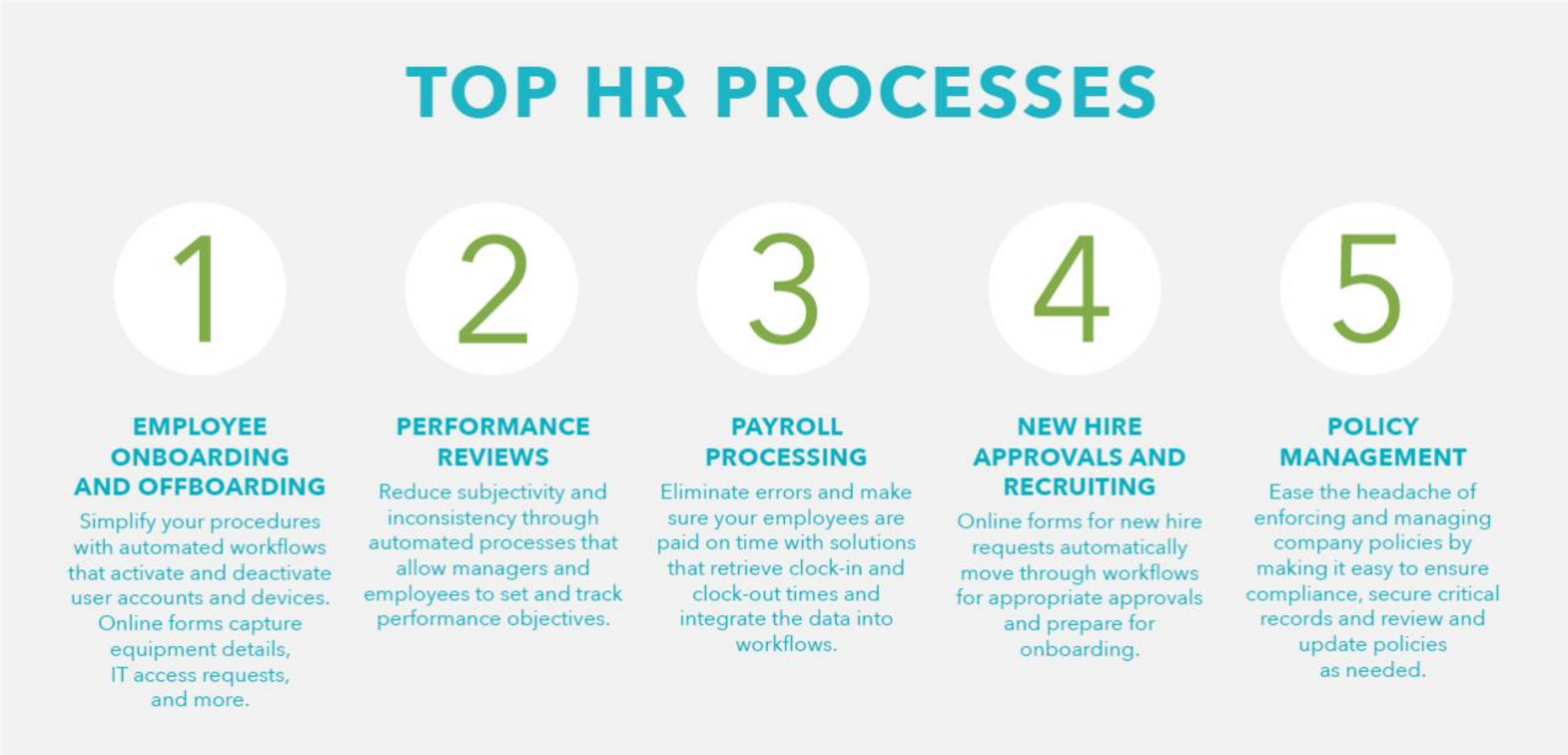
If what you're looking for isn't in the above services,
use the options below to log a ticket with your support team

Open a Ticket
?
Question or Service
Ask for help with something
Report a problem
Is something not working?

Software	Ask a question about an application or software
Desktop/Laptop/VDI	Ask a question about a VDI, computer or tablet
Printer	Ask a question about a printer
Phone (desk or mobile)	Ask us about any kind of phone

Fidelity INTERNATIONAL
Powered By K2

K2 for HR



TOP HR PROCESSES

1

EMPLOYEE ONBOARDING AND OFFBOARDING

Simplify your procedures with automated workflows that activate and deactivate user accounts and devices. Online forms capture equipment details, IT access requests, and more.

2

PERFORMANCE REVIEWS

Reduce subjectivity and inconsistency through automated processes that allow managers and employees to set and track performance objectives.

3

PAYROLL PROCESSING

Eliminate errors and make sure your employees are paid on time with solutions that retrieve clock-in and clock-out times and integrate the data into workflows.

4

NEW HIRE APPROVALS AND RECRUITING

Online forms for new hire requests automatically move through workflows for appropriate approvals and prepare for onboarding.

5

POLICY MANAGEMENT

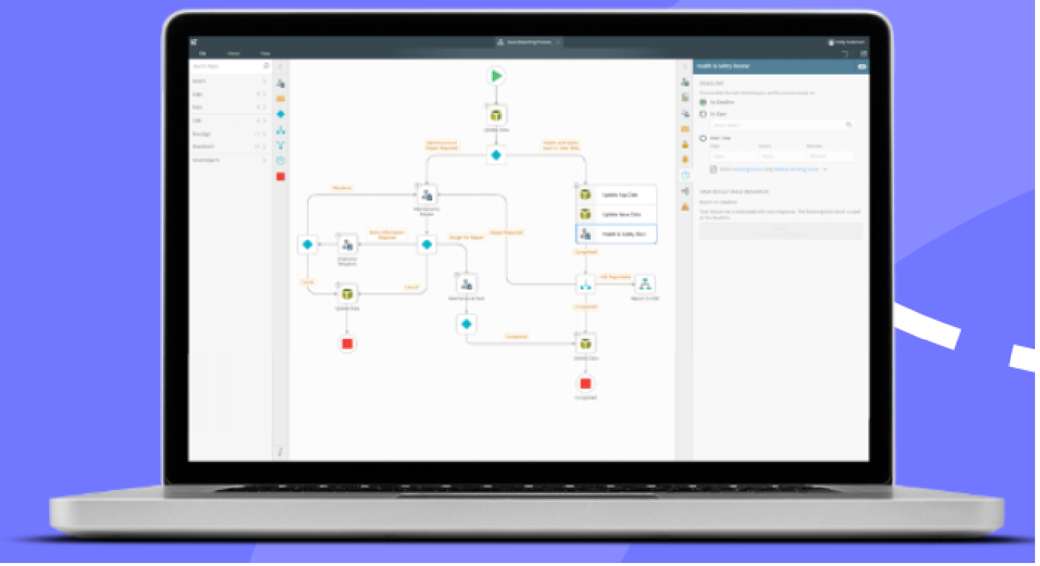
Ease the headache of enforcing and managing company policies by making it easy to ensure compliance, secure critical records and review and update policies as needed.

K2 Smart Starters		
Ad Hoc Task Management	Employee Off-Boarding	Job Posting
Change Management Request	Employee Self Service	Meeting Room Booking
Charitable Giving Assessment	FAQ Review	New Distribution List
Corporate Media Library	HR Enquiry	New Idea Submission
Defect Tracking	IT Asset Request	Publish KB Article
Distribution List	IT Issue Report	Social Media Post Review
Document Review	IT Service Request	Sales Opportunity
System Access Request	Time Management	Training Request
Travel Request		

K2 Solution Showcase

Discover pre-built apps to help customers accelerate time-to-market and reduce the cost to launch their process automation initiatives.

Join the Showcase



SOLUTION SHOWCASE

Workflow solution for Dropbox with K2

Simplify enterprise workflows with K2 and Dropbox for content management.

Dropbox

SOLUTION SHOWCASE

Streamline vendor payments

An intuitive and easy-to-use tool to help finance departments make payments to vendors.

K2

SOLUTION SHOWCASE

Customer engagement and intelligent work management

Utilize RPA, AI, and machine learning to manage your customer communications.

nimbe

SOLUTION SHOWCASE

eVision OFFICEPoint electronic office operations

Centralize and manage your electronic office operations.

eVision

SOLUTION SHOWCASE

Managing change orders to contracts

Submit change order requests and make amendments and addendum's to original contracts.

K2

SOLUTION SHOWCASE

Prevent incidents and minimize risk

Get a holistic view of all incidents that take place in the workspace.

K2

SOLUTION SHOWCASE

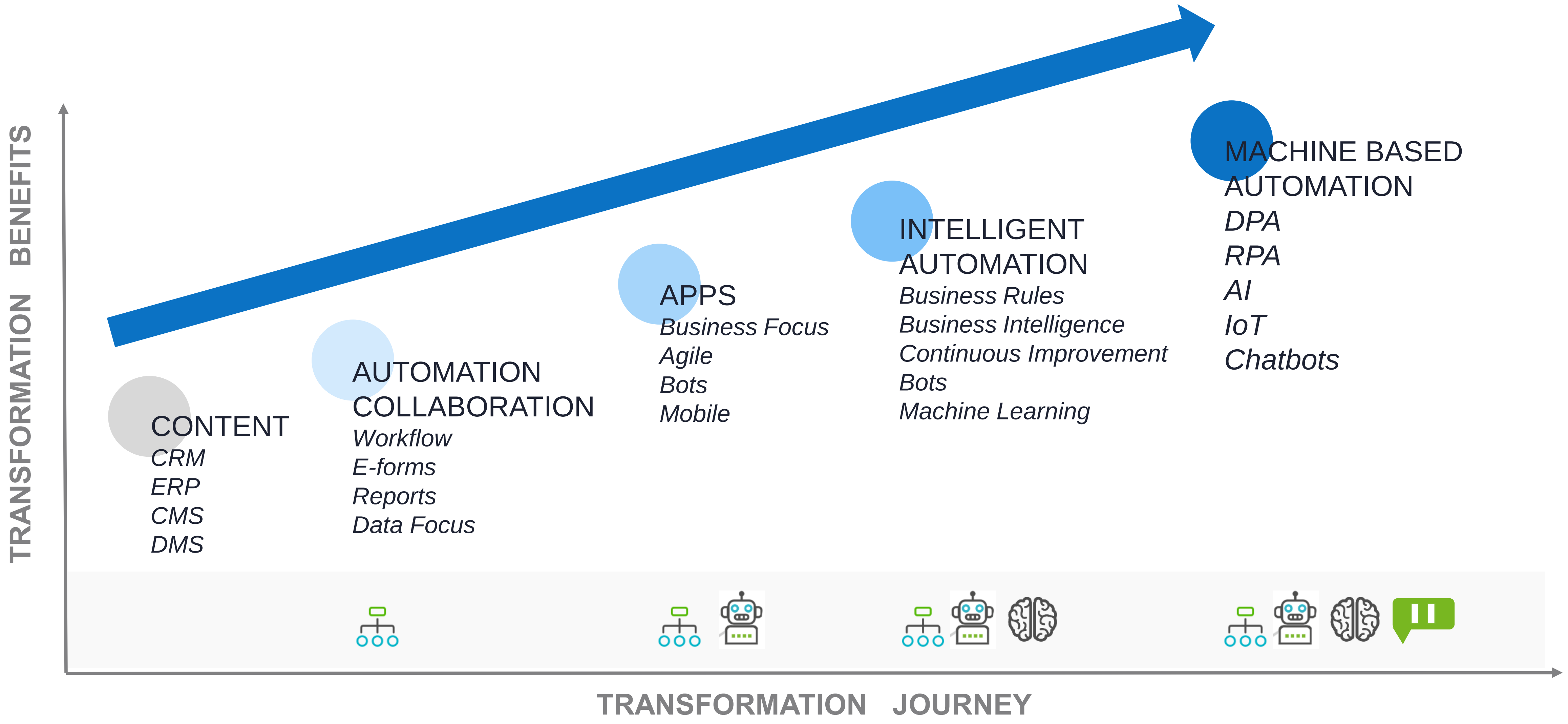
eVision's strategic decision-making process

Manage your proposals, meetings, sessions, and tasks from one central location.

eVision

K2

SMART DIGITAL TRANSFORMATION ADOPTION CURVE



TRANSFORMATION BENEFITS

CONTENT
CRM
ERP
CMS
DMS

AUTOMATION COLLABORATION
Workflow
E-forms
Reports
Data Focus

APPS
Business Focus
Agile
Bots
Mobile

INTELLIGENT AUTOMATION
Business Rules
Business Intelligence
Continuous Improvement
Bots
Machine Learning

MACHINE BASED AUTOMATION
DPA
RPA
AI
IoT
Chatbots

TRANSFORMATION JOURNEY

TECHNOLGIES

BPA

RPA

COGNITIVE SERVICES

CHATBOTS

Q&A