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ORACLE AI AGENTS

for Oracle Cloud ERP

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Revolutionizing enterprise resource planning (ERP) with AI agents

In the evolving landscape of enterprise technology, AI agents are emerging as transformative digital assistants for enterprise resource planning (ERP). These agents are redefining finance and business operations by providing services tailored to the specific needs of business processes within ERP, streamlining complex tasks and workflows, increasing productivity, reducing costs, and enabling AI-driven finance by enhancing and automating financial processes, decision-making, and services.

Oracle AI agents

Oracle AI agents set a new standard for efficiency, innovation, and growth in business operations. These powerful tools assist users with generative AI–powered services that are seamlessly embedded into specific business processes and transactions. By using data found in Oracle Fusion Cloud Applications, customer-specific documentation, and various connected sources, these AI agents provide up-to-date, contextually relevant information and assistance. They excel in functions that require cognitive reasoning, such as answering complex questions, offering personalized recommendations and completing tasks on behalf of employees. The dynamic and secure use of data lets Oracle AI agents deliver accurate, timely, and relevant support, enhancing decision-making and improving operational efficiency across the organization.

Each Oracle AI agent is unique in how it interacts with its environment, producing highly relevant and contextual services for its business user. However, all Oracle AI agents operate on a common foundation to deliver services consistently across the entire organization such as:

- **Autonomous capabilities**: AI agents function as sophisticated digital assistants that automate manual or repetitive tasks and respond to changing environments, giving teams and managers time to work on more strategic activities.

- **Interactive dynamics**: AI agents mimic human interactions, making them an approachable part of daily operations. They store and learn from past interactions to significantly improve over time, and they can help manage complex, multi-agent workflows aiming to enhance organizational efficiency.

- **Transformational impact on work**: AI agents can help to significantly enhance the capabilities of employees by automating tasks, allowing their teams to provide a higher level of service without increasing headcount.

- **Specialization in roles**: AI agents can be tailored to perform specific roles within departments such as finance, HR, and procurement, enhancing their effectiveness in managing complex aspects of each department's operations.

Oracle Cloud Applications integrate AI, including agents, directly into existing systems. This seamless integration fosters rapid AI adoption across familiar platforms, reduces the need for extensive training, and enables high-quality outcomes through robust evaluation mechanisms and customization options.

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AI-driven finance

AI-driven finance refers to Oracle's strategic vision for our Cloud ERP solution. It leverages advanced technologies, such as artificial intelligence (AI), generative AI (GenAI), and machine learning (ML), to enhance and automate financial processes, decision-making, and services. The goal is to deliver a significant improvement in operational efficiency, enterprise effectiveness, control, and cost reduction. This approach is built on three main pillars: touchless operations, predictive insights, and connected actions.

- Touchless operations aim to automate business processes and workflows with minimal to no human intervention. This concept leverages AI, GenAI, ML, and other advanced technologies to handle tasks autonomously. For example, automated account reconciliation and transaction matching accelerate the financial close. Intelligent document recognition (IDR) automates invoice entry. The goal of touchless operations is to reduce manual effort, improve efficiency, minimize errors, and allow real-time decision-making.

- Predictive insights involve using data analytics and advanced machine learning to forecast future outcomes, behaviors, or trends based on historical and real-time data. Oracle Cloud ERP continuously curates financial and operational data from internal and external sources that forms the foundation for always-on visibility and agile operations. AI running against this data highlights issues and opportunities, while GenAI provides granular predictions with explanations, enabling proactive course corrections for optimal business outcomes. This capability allows organizations to make informed decisions, anticipate potential issues, and capitalize on opportunities before they happen.

- Connected actions are a set of coordinated activities or processes that are seamlessly linked across various systems, teams, and platforms, both internal and external to an organization. These actions are facilitated by advanced AI/GenAI/ML technologies and automation. For instance, Oracle Cloud ERP can help organizations find opportunities to optimize working capital by identifying suppliers and invoices with potential savings and presenting payment options such as dynamic discounting, virtual credit cards, and supply chain finance. This integration of various financial processes and external services enables more efficient and effective financial operations.

AI-driven finance integrates touchless operations, predictive insights, and connected actions to enhance financial processes. This approach improves operational efficiency, strategic decision-making, and data-driven insights. It aims to significantly improve how organizations manage financial operations and drive growth.

Oracle AI agents across finance

At the heart of Oracle Cloud ERP lies our vision for AI-driven finance, brought to life through seamlessly integrated AI agents. These intelligent assistants are embedded throughout the entire suite, including Financials, Procurement, Project Management, and Enterprise Performance Management. These AI agents enable touchless operations, provide predictive insights, and facilitate connected actions across the organization. By leveraging AI agents, organizations can significantly improve their financial operations, decision-making processes, and overall business performance.

These comprehensive, embedded capabilities ensure that the power of AI is available wherever and whenever it's needed most in your ERP workflows. More than 50 role-based AI agents within Oracle Cloud Applications suite have been announced, with additional functionality coming in each quarterly release. This document focuses on three key AI agents in Oracle Cloud ERP: document IO, ledger, and advanced prediction.

Document IO agent

The document IO agent helps organizations automate and simplify onboarding of complex integrations for third parties such as suppliers, customers, banks, government authorities, and logistics providers to increase efficiency and improve the capture and generation of documents across all transactions, electronic channels, document standards, formats, and languages.

For example, the agent can process images; formatted documents, such as PDFs; or electronic documents in different languages. It can also standardize and map all attributes and convert these documents into requisitions, invoices, or payment instructions ready for human review and approval.

The document IO agent can speed up financial operations by automating document handling across end-to-end financial processes, such as procure-to-pay. It can help process supplier invoices and payments, create purchase requisitions, ingest bank statements, generate customer invoices, and handle expense receipts—transforming how organizations manage their documents, transactions, and workflows.
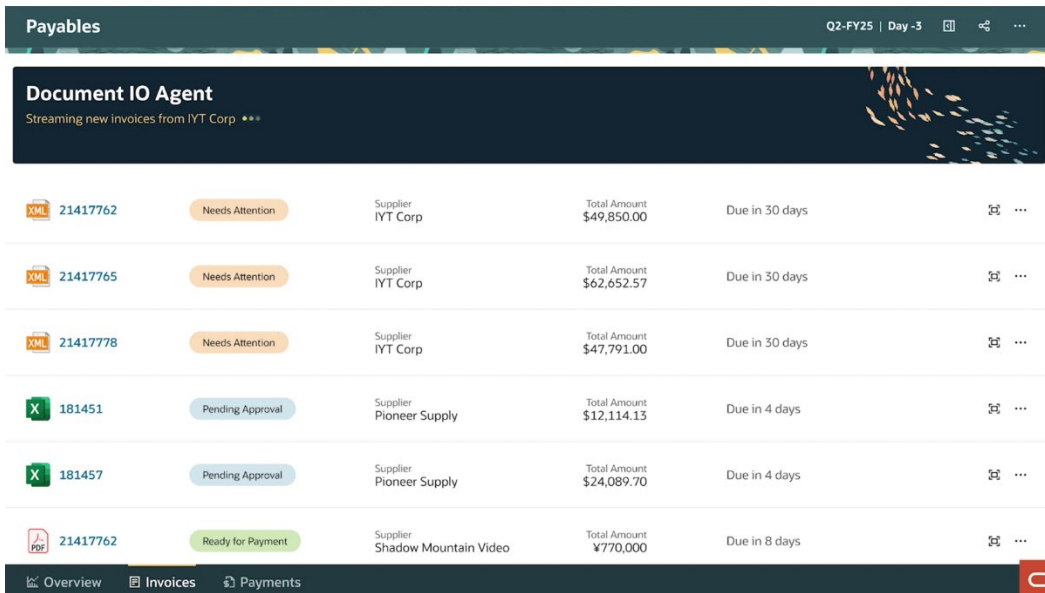
Document IO agent automatically processes invoices in a variety of file and document formats.

Ledger agent

The ledger agent helps organizations eliminate manual effort by identifying exceptions and anomalies in transaction data. This AI assistant efficiently monitors and analyzes account balances, exceptions, and anomalies and provides supporting details from subledgers with prompt-based natural language account analysis.

For example, the agent can monitor and detect if revenue for a specific line of business is off forecast before the quarter-end; facilitate prompt-based natural language inquiry for factors influencing revenue, such as order delays; and then automate supporting true-up accrual journal entries.
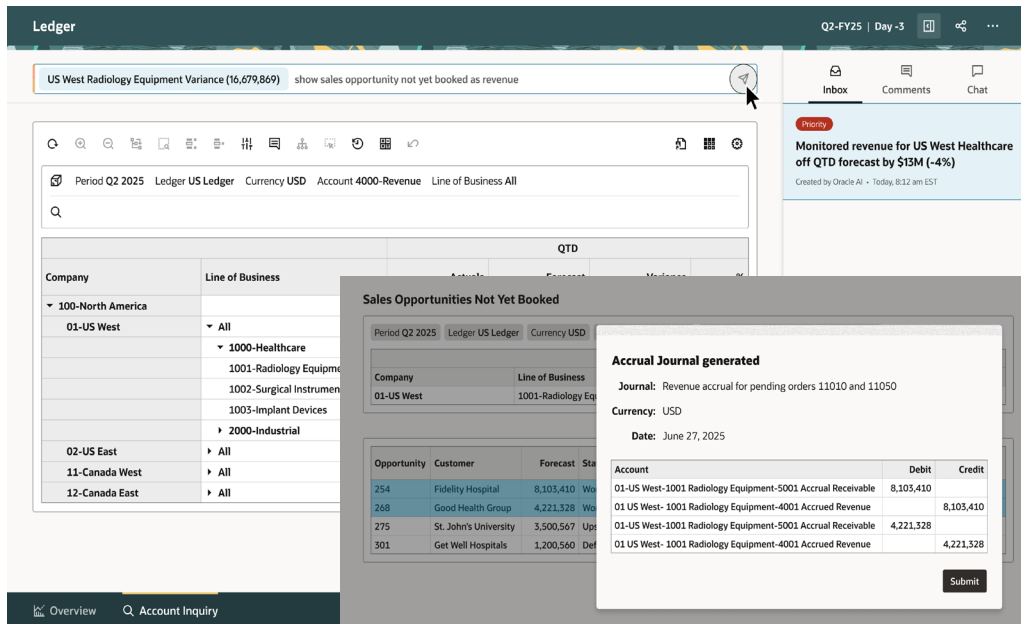
The ledger agent pinpoints the source of a revenue forecast variance using natural language search and automatically generates the true-up journal entry to fine-tune the forecast.

Advanced prediction agent

The advanced prediction agent leverages AI to provide more accurate and comprehensive forecasting and analysis. It helps organizations support multivariate AI prediction models, leveraging financial, operational, and external factors in predictive forecasting.

For example, the agent can create data-driven revenue forecasts by leveraging internal and macro-economic data factors to uncover hidden patterns or trends, resulting in more timely and accurate cash forecasts.
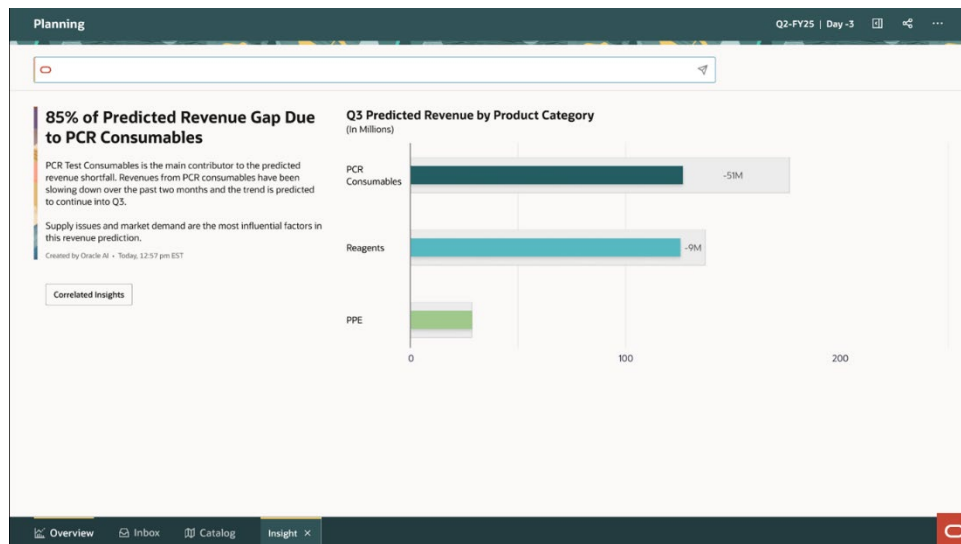
Advanced prediction agent predicts a revenue shortfall in PCR consumables and calls out the likely drivers for the shortfall.

Conclusion

AI agents are redefining enterprise resource planning by infusing digital intelligence into every facet of financial and business management. They empower businesses to achieve significantly higher levels of efficiency, scalability, and consistency, leading to a more effective and streamlined ERP function. By leveraging AI agents, organizations can transform their financial operations to better meet the challenges of a dynamic business environment.

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Learn more about Oracle Cloud ERP

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