

Automating your workflows

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Automating you workflows

- Workflow Automation – what is it and what are the benefits?
- Applications of workflow automation
- Case study – Leave management system

Workflow Automation – what is it and what are the benefits?

- “an approach to making the flow of tasks, documents and information across work-related activities perform independently in accordance with defined business rules.”

Workflow Automation – what is it and what are the benefits?

- Benefits of workflow automation:
 - increase productivity through efficiencies allowing more time on other tasks
 - reduce labour intensive tasks
 - reduces the risk of human error

Application of workflow automation

- Developed capabilities and products for internal use and also used as building blocks to provide similar capabilities for clients.
- Examples of building blocks:
 - Web forms
 - Smartphone integration – leveraging capabilities on smartphones
 - Robotic Process Automation (RPA)
 - Data extraction
 - PDF or Microsoft Excel file manipulation
 - Email Automation

Application of workflow automation

- Web forms
 - Used to present data to users and collect data from them, can be designed to work well with phone browsers.
- Robotic Process Automation (RPA)
 - Navigating browser based products, entering data and reading data as required to automate processes.

Case Study – Leave management system

- We have successfully built a leave management system for a large independent College in Adelaide
- The College utilises **Synergetic** for its accounting system and **TimeTabler** for its time tabling system

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Case Study – Leave management system

- Benjamin James - presentation

Automating your workflows

- Application Success stories
 - RPA to automate reporting process for our financial planning clients
 - Daily investor statements downloaded and emailed to clients
 - RPA to download bank statements to automate daily bank reconciliation process (saving 2 days of an employees' time)
 - Audit reporting where we extract data from our Caseware (Audit workpapers) to build our management letters

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Summary

- Open sourced product enabling any combination of these building blocks to be used together
- Advantages:
 - Run the product on your existing IT infrastructure
 - No ongoing licencing costs
 - It is scalable (no limits on the number of robots that can be deployed)
- Able to this as we have invested in developing our own software based on open source software.



Thank you for attending