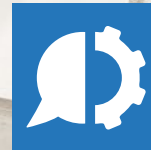# helpsystems

15 Ways Automate Solves IT and Business Problems

The 2019 Use Case Guide from HelpSystems

INTRODUCTION

Automate provides quick-to-scale and easy-to-use automation solutions for organizations of any size. Instead of spending precious time and resources on repetitive, manual tasks, let Automate go to work and streamline your IT and business processes with robotic process automation and business process automation. No matter the unique case of your organization, with Automate's drag-and-drop interface and over 600 prebuilt automation building blocks, setting up an automation strategy is easy for any user—regardless of technical expertise.

Curious how others are using Automate? According to our customers, the top processes being automated are report generation, file movement, data import and export, and scheduling batch processing. And 74% say they use Automate to run mission-critical processes. Plus, Automate has the ability to integrate with your existing business applications for a seamless automation strategy throughout your organization.

See for yourself! In this guide we'll take you on a tour of how different organizations are using Automate to improve productivity and increase efficiencies. Learn how your peers of every size and from many industries are using our powerful automation solution to solve their unique problems and meet their goals. From banks to hospitals to manufacturing suppliers, companies are discovering Automate. And your organization should be next!

**Learn More About Automate
from HelpSystems >>**

AUTOMATED PROCESSES & CATEGORIES

ROBOTIC PROCESS AUTOMATION

Carter Bank & Trust

Carter Bank & Trust offers banking and financial services to customers across 100 branches. After spending far too much time on routine, manual processes—from new employee onboarding and payroll to customer account maintenance—they established a Center of Excellence to bring an "automation first" culture to their organization. Automate streamlined these processes and migrated over 300,000 customer accounts to a new system within a 24-hour period.

Automate quickly scaled beyond its initial use and is now handling server reboots, 3rd-party SLA management, and data validation. Carter Bank & Trust has more than 75 robots running processes across the company, saving them time and money.

Achieved 3,800% ROI within five months
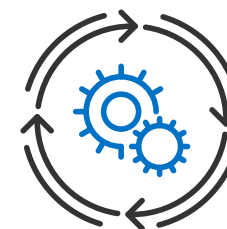
"*We could never have conducted data validation and correction of erroneous account information without Automate. I don't care if I had 100 people for a year, it never would have worked.*"

Matt Speare, CIO

Read more about Carter Bank & Trust's use of Automate >>

COMPANY PROFILE

| Location:	United States
Website:	carterbankandtrust.com

ROBOTIC PROCESS AUTOMATION

Utilities Company

This utility company manages the production and delivery of energy resources over a wide geography. Their plant needs to measure and monitor various temperatures, pressures, and other readings on the critical control systems which support the production and delivery of energy. This produces massive amounts of data that are needed in the event of disaster.

The company uses Automate to accurately sort, compress, archive, and delete massive event log files daily with robotic process automation. Now, data from each machine is reliably available in the event it's needed in an emergency. The robots also back up information that could previously only be backed up by a highly-experienced operator. The automated robotic tasks mimic what the user would do, saving precious time and giving peace of mind that all their data is safe and usable.

**Time to value (ROI):
2 days**
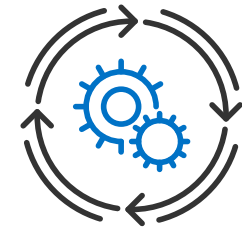
"
"Automate helped us reduce data loss by 100 percent. We haven't lost any data since implementing Automate."

Plant Engineer

**Learn more about robotic
process automation >>**

ROBOTIC PROCESS AUTOMATION

MetTel

MetTel is a large telecommunications provider with a bundled service offering that makes billing easier for customers. At first, this service made things much harder for employees, requiring 40 employees to manually log into websites to capture and consolidate customer billing information—a long and tedious process prone to human errors.

Through robotic process automation with Automate, software robots are now in place taking over these steps which greatly reduces the repetitive, manual activities and improves the quality and consistency of their work. They're even able to expand their automation strategy to include automating their network monitoring—combining monitoring with automated remediation to improve response times and eliminate repetitive work for more teams within MetTel.

Replaced 75% of their manual efforts with software robots

Learn more about robotic process automation >>

COMPANY PROFILE

| Location:	United States
Website:	www.mettel.net

ROBOTIC PROCESS AUTOMATION

Ricoh Italia

The customer service department at Ricoh Italia, a business solutions company, was receiving 1,000 customer emails a day, 400 emails were stuck in their backlog, and call center agents didn't have the proper tools to fulfill customer requests for products and parts. With workloads growing and pressure on their employees rising, Ricoh was looking to automate both the data coming in from customer emails and the information taken from call center agents during calls. The main goal was to provide customers a more seamless, digital experience.

Ricoh Italia leverages Automate bots in a workflow that connects all the different types of communications to generate a unique funnel of entry. Thanks to Automate, Ricoh Italia's now able to free up more of their employees to spend time helping customers and improving the efficiencies of their field operations. With more time and resources, they're able to provide their customers with value added services like remote resolution of technical issues, remote management of machines in the field, and consumable service quality and cost control.

Automated almost 100% of structured customer emails
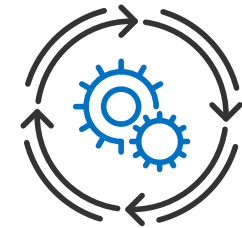
"*When the RPA engine was integrated with our tool to validate requests coming from customers, our agents could finally focus on value and provide the correct amount of supplies based on their actual usage and print volumes.*"
Andrea Gombac, Director of Customer Service

Read more about Ricoh Italia's use of Automate >>

COMPANY PROFILE

| Location:	Italy
Website:	www.ricoh.it

BUSINESS PROCESS AUTOMATION

Construction Utilities Company

The IT department of a construction utilities company— providing gas and electric transmission and distribution, telecommunications, and water and waste systems for construction sites—was manually writing code to ensure funds for accounts payable and payroll transactions are deposited into bank accounts in a timely, scheduled fashion. The process varied for each and writing code took days of tedious, manual work. Looking for a more efficient solution, the company found Automate Enterprise.

Now, Automate successfully extracts payment data from their Spectrum Forefront accounting application, creates a text file with the information, encrypts the text file, and then connects and sends the file to the bank's FTP site—all with one solution and no manual intervention. Days of writing custom code are now mere hours spent automating the payment process. And Automate Enterprise's feature for embedding existing scripts allow this organization to reuse previously created code. The centralized management of all automated processes is key, giving them one place to deploy and make changes to the processes that vary from supplier to supplier.

Up and running in production in less than a week
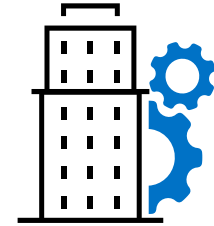
> *"I think Automate Enterprise is truly a great product and a huge time saver. I would definitely recommend it to other organizations."*
> Applications Development Manager

Learn more about robotic process automation >>

AUTOMATED REPORT GENERATION – CLAIMS PROCESSING

Medmarc Insurance Group

Medmarc Insurance Group offers liability protection to life sciences technology companies. What was once a long, manual process to close out each month's claims—with IT staff working well into the morning hours to finish the eight hours of work—is now fast and efficient with Automate. An automated process starts immediately upon the close of business on the last day of the month and runs unattended throughout the night before notifying the appropriate IT staff by email in the event of an application malfunction.

Medmarc gets faster and more accurate report creation and delivery to key executives and there's no more late nights for the IT staff to generate reports. Automate is also helping Medmarc comply with a myriad of agency and governmental rules and regulations by automating the reporting process for extensive reports demanded by regulators, often without prior notice. Automate integrates Medmarc's existing applications— like Crystal Reports, the Infinity system, and Medmarc's Microsoft Great Plains financial system—to maintain up-to-date data and provide regulators with the information that pertains to their demands.

INSURANCE

Saves multiple employees days of work per month

" *"Automate has all the features required for automating any process, as well as a comprehensive toolset for monitoring and notifying staff about the status of processes and applications. After considering all the alternatives, it really was an easy decision for me to choose Automate."*

Chris Prime, Developer

Learn more about Automate in the insurance industry >>

COMPANY PROFILE

Location:	United States
Website:	www.medmarc.com

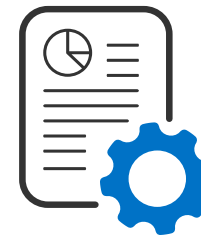# AUTOMATED REPORT GENERATION— DAILY PROCESSING

World Precision Instruments

World Precision Instruments (WPI) manufactures lab instruments used by biomedical researchers worldwide. The IT team is responsible for producing 25 different accounting, production, and manufacturing resource planning reports at the close of the business day, plus more than 75 reports at the end of the month. Instead of requiring employees to manually trigger and generate reports on a nightly basis, the company wanted to automate the entire process without investing in custom programming.

Automate saves the day—and night—with a drag-and-drop interface that saves tens of thousands of dollars in coding and makes their daily processing a breeze. Automate works directly with their SYSPRO ERP and kicks off the first set of nightly reports every evening. As each set of reports is completed, Automate moves on to the next. And if any of the processes fail for any reason, WPI automatically receives an email alert.

LAB PRODUCT MANUFACTURING

Saves five hours, per night, in report generation

> "I'm not a programmer, but with Automate I don't need to be. I taught myself to use the program, and there is almost no learning curve."
>
> Jackie L. Messmer, IT Support Specialist

Learn more about automated report generation >>

COMPANY PROFILE

Location:	United States
Website:	www.wpiinc.com

AUTOMATED USER PROVISIONING

Technology Company

As this mid-size technology company saw rapid growth, the HR department felt the growing pains. The onboarding process for each new employee took up much of the HR manager's precious time. Between Active Directory set up, filling out new forms, and equipment setup, a lot of manual and repetitive work must be done to get each new employee up and running on a variety of applications. Needing help, the HR team turned to Automate.

Automate streamlines the user provisioning process so it can be done in no time. Business process automation software automatically creates a support ticket, correctly provisions the new user on Active Directory, VMWare, and other applications, notifies the employee's new manager, and closes the ticket without any manual intervention. Now the HR team can get back to working directly with people—what they do best—and not have to spend their days entering data into a variety of systems.

Learn more about automating user provisioning >>
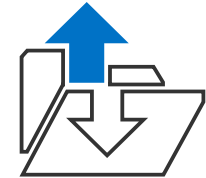
FILE TRANSFER AUTOMATION

Single Source

Single Source is a large-volume provider of dry, refrigerated, and frozen goods, as well as paper and chemical products for institutional commissaries. They process and ship 250 million pounds of food nationwide each year. With a high volume of orders to process and ship, they can't afford to have their limited staff tied up doing mundane repetitive tasks like manually faxing customer order files to their warehouse.

With Automate, Single Source transfers customer order files automatically to their warehouse with an automated file transfer. And they use Automate to run a variety of other essential processes like monitoring supply levels and making SQL updates to their database. All these tasks are completed reliably without anyone on staff needing to intervene or monitor the processes, allowing Single Source to scale and provide a trusted way to make sure files get where they need to go on time.

SUPPLY CHAIN AND FOOD DISTRIBUTION

Automate dependably runs critical processes in the background without any staff intervention

> "*Automate reliably completes these tasks without anyone on staff needing to intervene or monitor the process.*"
>
> Robert Newhart, Vice President & CIO

Learn more about file transfer automation with Automate >>

COMPANY PROFILE

|	
Location:	United States
Website:	www.singlesource.com

FILE TRANSFER AUTOMATION

Baptist Health

Baptist Health is a large not-for-profit health care organization, with seven major medical facilities and several outpatient centers. Together, the medical facilities generate 837 patient claim files, but their claims management system—ePREMIS from NDC Health—will only accept one claim file each day. They needed a way to join an array of 837 claim files into one file so they could import all the data into the system at once.

With Automate, they automate the daily transfers of the individual claims files to an FTP server which triggers an Automate task that joins all the files together and transfers them to their system. They also use Automate to audit the files and ensure no claims are overlooked. This results in greater centralized control over the thousands of file transfers that occur each day, and greater consistency with data and timeliness.

Automate saves Baptist Health 40 hours a month in manual tasks
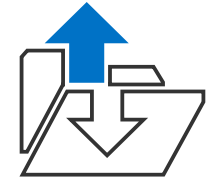
> *"Automate is a huge time saver. The clients on the other end of our 837 processes have stated it is saving them approximately 10 hours a week in manual work. And, I am saving around 5 to 10 hours a week."*
> Jason Stoyles, Automation Team Supervisor

Read more about Baptist Health's use of Automate >>

COMPANY PROFILE

|	
Location:	United States
Website:	www.baptisthealth.net

AUTOMATED APPLICATION INTEGRATION

Frankenmuth Insurance

Frankenmuth Insurance provides personal, commercial, and life insurance to people in 15 states. The network analyst at Frankenmuth was proud of how easy their systems were for agents to complete the insurance claims process. But he noticed a lack of integration between the products they used and felt there had to be a way to further streamline their processes—and with a less tedious and code-heavy way to set up workflows.

Through robotic process automation (RPA), Frankenmuth uses Automate to combine the steps in their process from different applications and get them working in sync. One example is in the check printing process. An Automate workflow automates this process by working directly and seamlessly with multiple applications to create greater efficiency and fewer errors. And with Automate's REST API, updating and creating workflows is faster and easier.

Created 450 workflows across their applications in only 4 hours
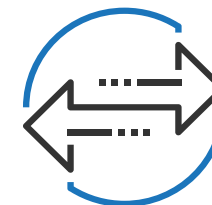
"*The REST API from Automate was a huge addition for us. We have 2,500 workflows and when we have to make changes to the workflows, prior to the API, we would have to go in and update them all in each application individually.*"

David Seibel, Network Analyst

COMPANY PROFILE

| Location:	United States
Website:	www.fmins.com

AUTOMATED APPLICATION INTEGRATION
MD Anderson Cancer Center

HEALTHCARE

The University of Texas MD Anderson Cancer Center has the challenge to staff and manage thousands of nurses while delivering top-notch patient care. They rely on three main applications: an HR system by PeopleSoft, a time and attendance system by Kronos, and a staffing system by Per-Se's ANSOS One-Staff. Their applications always need to be up-to-date and in-sync for the Cancer Center to staff at appropriate levels, operate efficiently, and provide quality care. But juggling between the applications to ensure they had accurate data was taking time away from their patients and mission.

Now, Automate acts as a "traffic cop" with the main duty to automate the thousands of data transfers between these applications. Instead of having to worry about staffing levels and not having the most accurate and up-to-date data, they can keep the focus on their patients and providing them with the highest levels of care.

Savings of $150,000 with an ROI of 650%
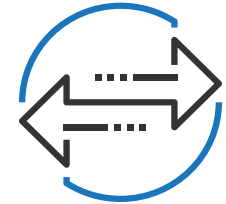
"*Automate offers the ability to 'script' any kind of solution, even when you don't know anything about scripting. Automate is powerful, too. If you do pride your scripting prowess, you can really take your talents to the next level with Automate.*"

Juan Garcia, Systems Analyst

Learn more about Automate in the healthcare industry >>

COMPANY PROFILE

Location:	United States
Website:	www.mdanderson.org

AUTOMATED ERP INTEGRATION
Construction Products Company

A construction products company sells fastening products ranging from self-drilling screws and toggles to power nailers and staplers. For years, an IT staffer had to come to work early every morning to prepare the company's Syspro ERP system for the new day. Rather than continuing to waste valuable time repeating the same tasks day after day, the company brought Automate on board. In just a few hours, IT managers began using Automate to trigger, run, and error-check ERP updates on a hands-free basis—slashing over 12 hours off the IT workload every week.

The ERP updates now run without any IT involvement whatsoever and running updates overnight has virtually eliminated ERP system downtime—giving them complete access to their valuable customer information. The company also uses Automate for processes ranging from sales updates to backorder release reviews. The resulting 99.9 percent uptime keeps all of their departments running smoothly.

2 ½ hours of IT time saved daily and achieved 99.9% uptime for their Syspro ERP

ERP

"*Custom scripting would have cost tens of thousands of dollars and resulted in a patchwork of different batch processes that would be difficult to troubleshoot and maintain. Utilizing Automate allowed us to automate all processes within a single framework quickly and easily.*"

IS Manager

AUTOMATED INVENTORY MANAGEMENT AND REPORT GENERATION

Home Appliance Distributor

A luxury home appliance distributor maintains data in four separate SAP Business One databases that are shared with sales and management personnel via dozens of weekly and monthly reports. When the manual reporting was causing sluggish network performance during the work day, they knew it was time for automation.

The company uses Automate for hundreds of tasks simply by using simple commands like "Open Excel" and "Run" from a menu and dragging and dropping them into a window in the proper sequence. Having Automate on duty is saving 20 hours per week of repetitive report generation and allows them to avoid the expense of custom coding so there is more time to dedicate to streamlining other IT activities. Weekly reports are now delivered on a firm schedule and inventory reports no longer slow the network down because they don't have to run during working hours.

Saves 20 hours per week of repetitive report generation

"*The budgeting job used to monopolize four or five people for two or three days straight. I automated it and created the files we needed in less than 90 minutes.*"

Systems Analyst

Learn more about automated report generation >>

AUTOMATED DATA EXTRACTION – ROBOTIC PROCESS AUTOMATION

Deloitte

A public sector agency working with Deloitte needed to get key information from PDFs into a Microsoft Excel template. They would spend a significant amount of time manually extracting and transcribing the relevant data into Excel. Faced with budget and workforce constraints, this manual process was eating into their precious time needed to meet the demand for their services.

With Automate, they leverage Optical Character Recognition (OCR) to read and extract the necessary information from the PDFs and put it directly into Excel. The user-friendly interface is an intuitive way to instruct the bot to schedule tasks and take action. With Automate, the agency recaptures valuable time and resources needed to drive their mission-critical work.

PUBLIC SECTOR

Achieved 99.9% accuracy in executing data refresh

Learn more about automated data extraction >>

Listen to the Webinar >>

COMPANY PROFILE

Location:	United States
Website:	www.deloitte.com

ABOUT AUTOMATE

Automate is a robotic process automation solution that streamlines IT and business processes. It is flexible enough to automate almost any process. Quickly build tasks without code in a drag-and-drop automation environment using its pre-built automation building blocks. By eliminating time-consuming, repetitive tasks, Automate enables you to focus on strategic activities where human interaction and thought add the most value.

Try Automate free for 30 days:
www.helpsystems.com/automate-trial

About HelpSystems

Organizations around the world rely on HelpSystems to make IT lives easier and keep business running smoothly. Our software and services monitor and automate processes, encrypt and secure data, and provide easy access to the information people need.