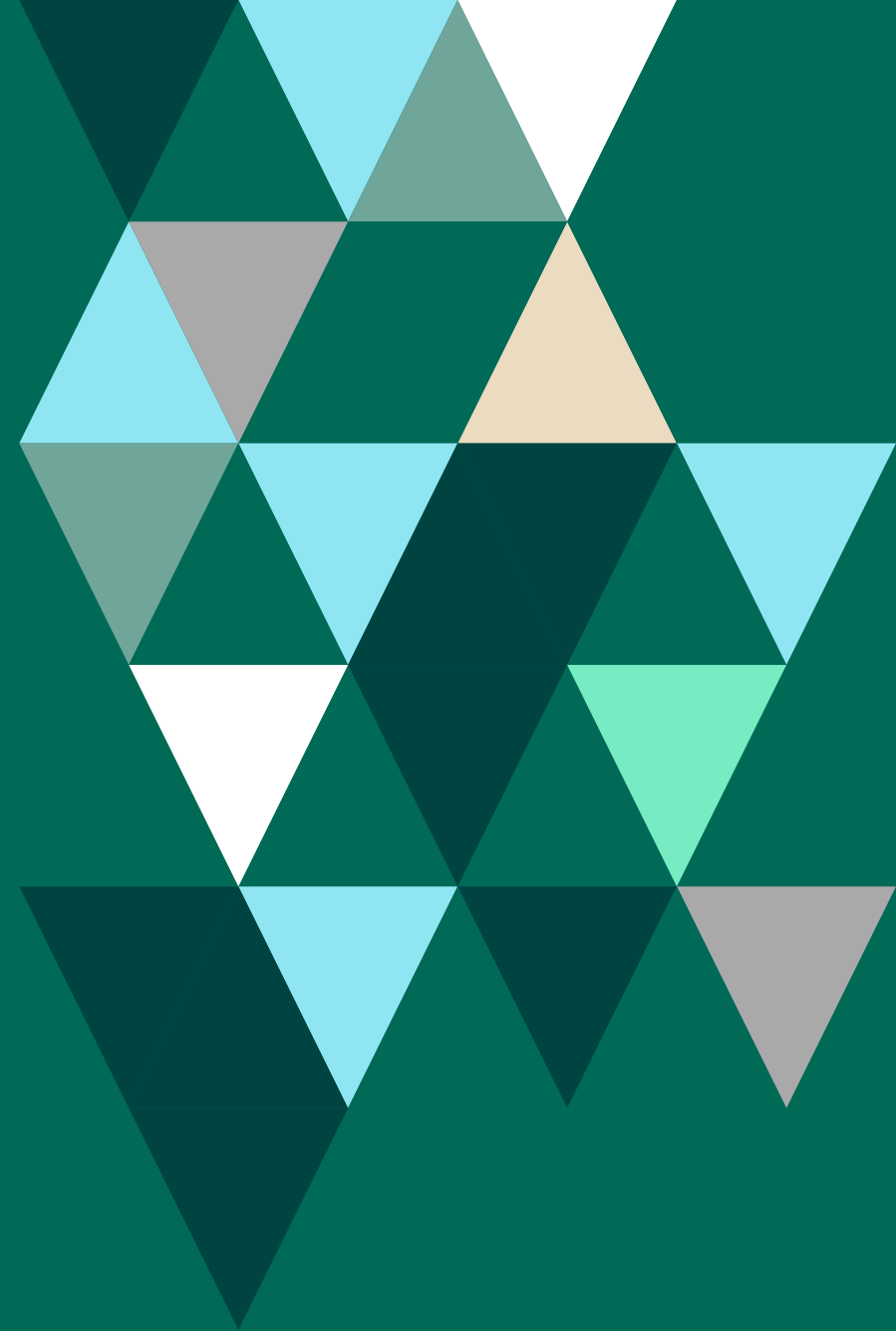


FORTRΔ

# 20 Ways Automate Solves IT and Business Problems

The Automate Use Case  
Guide





# 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 Fortra**





# Automated Processes and Categories

Robotic Process Automation	4-7
Business Process Automation	8-9
Automated Report Generation	10-12
File Transfer Automation	13
Automated Application Integration	14-17
Automated Mortgage Processing	18
Automated ERP Integration	19
Automated Inventory Management	20
Automated Data Extraction	21
Automated File Conversion	22
Web Browser Automation	23





# Robotic Process Automation

## FINANCIAL SERVICES

### 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

### 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

## TELECOMMUNICATIONS

### 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](http://www.mettel.net)



# Robotic Process Automation

## CUSTOMER SERVICE

### 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](http://www.ricoh.it)



# Business Process Automation

## CONSTRUCTION

### 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 Plus.

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 Plus'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 Plus 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**





# Business Process Automation

## PUBLISHING

### Children's Book Publisher

A children's book publisher based in the U.S. has five major imprints and many online databases that serve as eBook platforms. They publish approximately 2,000 titles per year and used to distribute the eBook formats through six resellers. They wanted to increase their distribution, but manually pulling and distributing metadata and images for those titles was taking 20-25 hours per season. This made the increase in reseller partners impossible to achieve with their current staffing level. Plus, the CFO was spending three to four hours a week pulling sales reports out of Peachtree, their accounting software.

The company found the perfect solution in Automate Plus and have now increased distribution to over 30 resellers and started distributing an additional new file type. Automate Plus software extracts data, files, and images automatically for each distributor. Now each distributor gets what they need correctly and two months faster than without automation. They've also automated sales report generation to give the CFO the reports he needs, emailed to him every week.

**Decreased content distribution time by 60 days while expanding their reseller network from 6 to 30**



*"With a tool like [Automate], it's just a matter of someone requesting help. And it's like, 'Okay, we've got this.'"*

**Jack daSilva, Senior Director of IT**

**Read More About How This Children's Book Publisher Puts Automate Plus to Work**

### COMPANY PROFILE

**Location:**

United States



# Automated Report Generation - Claims Processing

## INSURANCE

### 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.

**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](http://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](http://www.wpiinc.com)



# Automated Report Generation

INSURANCE

## Societe Generale Bank Brazil

Societe Generale Bank Brazil is one of the leading suppliers of financial services in Brazil. Employees rely on critical reports and analysis that need to be completed before they can do their work every day. The company needed a flexible RPA solution that was easy to implement, scale, and maintain. In partnership with SicoloS, they use Automate Plus and have software robots perform the mission-critical tasks overnight to automatically generate the reports and analysis the employees need to use throughout their day.

With RPA, they obtained a significant gain of time and scale, since the activities they now automate used to demand up to 6 hours of work from a single employee. This lets them put their team to work on more challenging and value-adding activities that help them better serve their clients.

**Saves up to 6 hours of daily work from a single employee**



*"RPA came to join other technological projects aiming at making our collaborators' work easier and enabling us to offer increasingly better services to our clients."*

**Mario Lopes, CIO**

**Learn More About Automated Report Generation**

### COMPANY PROFILE

**Location:**

Brazil

**Website:**

societegeneralebrasil.com



# File Transfer Automation

## HEALTHCARE

### 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](http://www.baptisthealth.net)



# Automated Application Integration

## Telecommunications Company

The tooling team at this large telecommunications company is responsible for aligning the data and instruments needed for various operations, including getting cell towers up and running. They needed a way to connect to over 50 different systems and applications to remove the manual, error-prone parts of their process

The company uses Automate Plus for RPA to connect their applications—from SAP to web clients to SQL environments. With RPA from Automate, they are able to get cell towers up and running quickly, without needing any coding experience. Their team has saved hundreds of hours since implementation and can put their focus back on more strategic work.

### TELECOMMUNICATIONS

The company estimates that they are saving **\$1,000,000 per month** with RPA



*“At the time, and still, Automate is far beyond what other tools offer when you factor in the no-code, low-code functionality and what you’re able to accomplish in a short amount of time.”*

Systems Capability Architect

**Learn More About How This Company Saved big with Automate**



# Automated Application Integration

## Ellis Medicine

When Ellis Medicine, a large healthcare system, purchased a new point of sale system, InfoGenesis, they found it could not easily integrate with their other critical systems. At first, they thought they would create custom scripts to integrate the software. They quickly realized how time-intensive and complicated custom scripts would be to develop and support, particularly because the process involved multiple systems, checks, and reformatting of data.

Ellis Medicine turned to Automate Plus to replace custom scripting with RPA bots that connect to applications through an API. They were able to get up and running quickly, using no-code automation and have automated over 65 processes across IT, accounting, HR, and revenue cycle departments. Now their team can focus on more value-adding tasks, saving hundreds of hours since implementation.

### HEALTHCARE

**750-1000 hours re-claimed in the accounting department store alone by automating journal entries**



*"I had one training session, and after that, I was building automation for our financial applications—it was very easy to use."*

**Michael DiPoffi, Sr. Web & Database Developer**

**Read More About Ellis Medicine's Use of Automate**

### COMPANY PROFILE

**Location:**

United States

**Website:**

ellismedicine.org



# Automated Application Integration

## MD Anderson Cancer Center

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.

### HEALTHCARE

**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](http://www.mdanderson.org)





# Automated Application Integration

## Celina Insurance Group

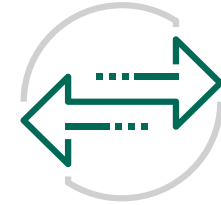
Celina Insurance Group is a property and casualty insurance company. For Celina, balancing happens nightly and includes changes to any claims or policies made that day, usually numbering in the thousands. Different nightly cycles create reports referenced in this process that when done manually, is tedious and prone to errors. Since it's extremely important to verify accurate balancing, they wanted to automate the balancing process. Since they already were using Robot Schedule from Fortra, they looked into RPA from Fortra—Automate.

In the Robot Schedule process when it's time to balance, Automate bots step in to balance and then trigger another process in Robot Schedule. Automate looks through thousands of policies for anomalies, sends an email every night indicating whether everything is balanced, and attaches a spreadsheet containing all the applicable numbers. If it's balanced, then the Automate bot uses a stored procedure on IBM i and kicks off a Robot job. If it's not balanced, then the team knows they have a problem to fix. Automating these processes has eliminated the need for the hard-to-fill second shift position and the IT team can operate knowing that balancing, file transfer, and backup processes will be completed.

[Read More About How Celina Insurance Group Uses Automate](#)

### INSURANCE

Automated entire balancing process through integration with Robot Schedule



*Everything just worked as it was presented, and I wasn't sold something that wasn't going to work.*  
Greg Young, Systems Administrator

### COMPANY PROFILE

Location:

United States

Website:

celinainsurance.com



# Automated Mortgage Processing

## Mortgage Company

A large mortgage company had hundreds of applications coming in every day requiring manual, error-prone processing. Applications needed to first be downloaded from the Blend website, and then that data had to be entered into their Mortgage Cadence application. They needed a solution that could automate the data extraction and data entry tasks and integrate both critical business applications to streamline their process.

With Automate, they found an effective automation solution that was quick to stand up—and saw fast ROI. The full project was implemented in just two weeks and they are now able to process hundreds of applications per day—error free. Since implementing Automate, they've saved thousands of hours monthly and have started looking at other opportunities throughout their company where they could expand their automation footprint.

### FINANCIAL SERVICES

Reached positive ROI within 45 days.



**See How Easy it is to Automate Blend and Mortgage Cadence with RPA**



# Automated ERP Integration

## MANUFACTURING

### 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**



*"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.

### WAREHOUSE MANAGEMENT

**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.

[Learn More About Automated Report Generation](#)

[Listen to the Webinar](#)

### PUBLIC SECTOR

**Achieved 99.9% accuracy  
in executing data refresh**



### COMPANY PROFILE

Location:

United States

Website:

[www.deloitte.com](http://www.deloitte.com)



# Automated File Conversion

## EDUCATION

### Oregon School Boards Association

Oregon School Boards Association's policy department had thousands of policy documents in WordPerfect that needed to be converted to Microsoft Word. The conversion of each individual document followed a two-step process: convert the WordPerfect file to .RFT, and then convert it to Word. At first, OSBA thought they could speed up the process by hiring a temp, but the backlog continued to pile up and efficiency was lacking.

With Automate, OSBA was able to quickly create an RPA workflow to automatically and accurately manage the tedious conversions. OSBA was up and running in less than a week thanks to Automate's quick implementation time. Every single policy document for a given school district can be converted in just 20 minutes instead of the 40 hours it had previously taken. They were able to clear their backlog in only a month and a half. Plus, OSBA can let RPA run overnight and convert the policy documents for 10 to 20 districts. And with Automate's easily reusable workflows, they are able to quickly expand their RPA footprint into other departments.

**Decreased conversion time from 40 hours to 20 minutes**



*"I picked Automate up from not having known anything about it and learned it in about a week. It's a really user-friendly product with drag-and-drop features and it couldn't be any easier than that."*

**Andrew Norval, IT Analyst**

**Learn More About How OSBA Uses Automate for Fast File Conversion**

### COMPANY PROFILE

**Location:**

United States

**Website:**

OSBA.org



# Web Browser Automation

## FINANCIAL SERVICES

### PSCU Financial Services

Florida-based PSCU Financial Services provides backend financial and IT services to hundreds of credit unions. One of their services involves continually checking credit unions' online applications to ensure they're up and running. At first, they were doing manual checks every 30 minutes. It wasn't efficient and they needed to find a way to continue providing the service without having to take support people away from the phones.

PSCU found an alternative to manual website monitoring using RPA. With Automate, they can assemble automation sequences simply by dragging and dropping their choice of hundreds of pre-programmed web browser automation actions ranging from "Send Keystroke" to "Open Webpage" to "FTP Logon" into a visual task-building window. It took only 20 minutes to automate the website monitoring duties. After specifying the keystrokes required to log onto each site, Automate software can execute the job by following the keystrokes in the proper order to simulate user input and validate the availability of client-facing web applications and check for server outages.

**Saved over 400 hours of monthly IT work**



*"Every minute we save in these kinds of tasks translates into time we can spend on developing new reports, maintaining our data warehouse, doing other IT work that will benefit our clients, or keeping customer service representatives on the phones. This is a huge business advantage."*

**Danielle Derby, Enterprise Information Manager**

**Discover 4 More Real-World Uses for Web Browser Automation**

### COMPANY PROFILE

**Location:**

United States

**Website:**

PSCU.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**





# FORTRA

## **About Fortra**

Fortra is a cybersecurity company like no other. We're creating a simpler, stronger future for our customers. Our trusted experts and portfolio of integrated, scalable solutions bring balance and control to organizations around the world. We're the positive changemakers and your relentless ally to provide peace of mind through every step of your cybersecurity journey. Learn more at [fortra.com](https://fortra.com).

