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AutoMate case studies



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Financial Group Improves Loan Origination Process with Automation

Aldergrove Financial Group, with 20,000 members throughout Frazier Valley, British Columbia, chose AutoMate to solve one problem within its loan origination process. The company soon found out, however, that AutoMate could be used for much, much more.

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An Independent Publisher Uses AutoMate BPA Server to Help Preserve Ancient Texts

Gorgias Press, an independent, academic publisher, turned to AutoMate BPA Server for a more efficient way to convert texts into electronic files. AutoMate was able to streamline the whole process, from scanning the first page to sending the completed file to the printers. The Press went from publishing a few dozen books to a few hundred books a year.

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NYC Health Care Provider Uses Audit System to Cure Overworked IT Department

Health Plus, covering more than 300,000 New Yorkers, upgraded from AutoMate to BPA Server after AutoMate's audit service found more than 200 processes that could be automated within the company. By expanding AutoMate to five servers, Health Plus' IT Department saves well over 15 hours a week, which allows them to focus on more strategic activities.

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BPA Server Eliminates Custom Visual Basic Code for InfraSource

Prior to discovering AutoMate BPA Server, they wrote custom code in Visual Basic to extract positive payment data from their Spectrum Forefront accounting application, create a text file with the information, encrypt the text file, and then connect and send the file to the bank's FTP site. Steve Mayor, Senior Network Engineer, and John Latherow, Applications Development Manager, decided they needed to look for a more efficient and time saving solution to replace their current process.

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AutoMate Brings Automated Data Collection and Dissemination to University Enrollment Office

The onerous task of compiling data from thousands of student applications and even more from visiting prospective students each month was shifting the departments focus from its main objective - enrollment. AutoMate provided the solution.

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Fortune 500 Subsidiary Leaps Legacy Reporting Hurdles with AutoMate

SSCI, a distribution division for a Fortune 500 company, needed a better way to disseminate sales reports. They were wasting tens of thousands of dollars per year in paper, postage, and human resources. In using AutoMate, they were able to digitize their reports resulting in savings of time, costs, and paper.

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Preferred Health Professionals Cures File Transfer and Encryption Woes with AutoMate

Preferred Health Professionals, a Kansas City-based PPO network, uses AutoMate to trigger and execute more than 175 tasks ranging from retrieving and decrypting claims to sending those claims to the firm's EDI translator, encrypting and forwarding EDI files to the appropriate parties, and generating and emailing SQL reports. Building each new automation routine typically requires only a few hours of dragging and dropping pre-programmed commands into the proper sequence, eliminating hours of expensive programming and code maintenance while also saving at least 10 hours of IT busywork daily.

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Mindbeam

Mindbeam Technologies Streamlines Telecom Departments by Automating Service Order Updates

Founded in 2000, Mindbeam Technologies is a contract IT services company that writes custom software, develops web interfaces, and provides automated solutions for everyday business tasks. They are based in Birmingham, Alabama and provide effective solutions for repetitive order systems.

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Credit Union Banks on AutoMate for Hands-Off Handling of 27 IT Tasks

At First **Credit** Union in British Columbia, a small software investment aimed at automating a single task has turned into a multi-purpose automation workhorse that is saving well over 15 hours of weekly busywork. Today, First CU uses AutoMate to handle 27 tasks ranging from downloading clearing files to streamlining month-end processing - yielding major efficiency dividends with virtually none of the coding typically required to create automation routines.

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Automating Crystal Reports with AutoMate Saves 20 Hours per Week for Appliance Distributor

For wholesale appliance distributor Echelon Home Products, generating and distributing reports for four different business divisions used to require at least 20 hours of weekly Crystal Reports work as well as wreak havoc among employees every Monday because of an all-day report-related network slowdown. That changed in 2008 when Echelon plugged into AutoMate Professional.

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Fit to Print Faster: AutoMate Saves Vestcom 200 Hours per Week with GUI Automation

At Vestcom International, raw product data sent by major retailers and brand manufacturers must be scrubbed, organized, converted, and sorted. In the past, six or seven employees worked nearly full-time manually launching and directing these processes according to hundreds of business rules. Then Vestcom put the entire series of tasks on auto-pilot with AutoMate Professional. This massive reduction in manual intervention led to major efficiency gains, and a 97 percent reduction in error rates.

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AutoMate Helps Medical Discount Plan Provider Share Salesforce Data without Pain

Every morning before opening time, an IT staffer had to spend one to two hours manually manipulating new or changed membership data from the day before to fit the disparate formatting requirements of Prime Liberty Benefit's wholesale partners. Then the company took the AutoMate Professional cure, using Network Automation's no-code business process automation platform to custom-format, encrypt and transmit data updates without user intervention.

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Financial Services Firm Credits AutoMate with Saving 400 Hours/Month in IT Tasks

Providing back-end financial services to hundreds of **credit** unions is an IT-intensive job. For Florida-based PSCU Financial Services, it requires hours of repetitive tasks ranging from monitoring client websites for availability assurance to migrating files from a variety of sources to a central location for client retrieval.

Since 2002, managers in several PCSU departments have turned to Network Automation's AutoMate BPA Server to automate these kinds of processes without the time and expense of coding.

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Concrete Producer Keeps Trucks Rolling by AutoMate-ing Event Log Monitoring

With more than 400 ready-mix concrete trucks on the street at any given time, St. Marys Canada Building Materials (CBM) relies heavily on real-time data transmitted from those vehicles to its fleet management software to meet customers' construction schedules. Any prolonged disruption in the data stream can force a switch to manual vehicle tracking that is both less efficient and less accurate. In 2007, the company began using AutoMate Professional business process automation platform to help maintain the data flow.

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30 Minutes of Automating Cuts Infor ERP VISUAL Work by an Hour a Day

In the quest for IT efficiency, one way to save time is to automate the daily grind of launching and monitoring ERP system utilities. Washington-based job shop Magic Metals, Inc., sought to do just that when it implemented Infor ERP VISUAL, but the company's busy IT manager did not have time to write custom scripts to enable VISUAL utilities to self-execute. Instead, he turned to the pre-programmed automation capabilities of AutoMate Professional. The software allowed Magic Metals to automate nine essential operations in just thirty minutes of building automation routines in a plain-English, drag-and-drop development environment. The strategy saved Magic Metals four to six weeks of coding work as well as slicing an hour a day off of ERP maintenance—all for less than the cost of a

modest vacation.

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'AutoMate-ing' Nightly Processing Pays Off for Florida's CNLBank

At Florida's multi-bank holding company CNLBancshares, Inc., nightly processing routines used to require as much as three hours of IT staff time. The staff member on duty on any given evening had to perform nearly 50 consecutive tasks to update bank databases for the next business day, manually launching, monitoring and waiting for each task to complete before moving on to the next. Instead of investing in expensive programming or a costly automation package from its core processing vendor to trigger and execute many of these routines, the bank used Network Automation's AutoMate software to implement an in-house solution to automate the majority of its nightly processes. The payoff: a two-hour reduction in daily IT overhead, automated error handling of routines, and additional efficiencies gained without any additional software investment by using AutoMate to power other manual processes.

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Home & Car Care Products Maker Puts ERP/EDI Reporting & More on Cruise Control with AutoMate

For home and car care products manufacturer Mallory Industries, the road to low-cost automation of everyday business processes began with the deployment of a new ERP system at the company's two plants in the U.S. and Canada. Twenty-four daily ERP reports needed to be produced from the two locations and merged into a custom-built reporting application, requiring four hours of hands-on IT work every day. IT supervisors liberated staff members from that assignment by turning the job over to AutoMate Professional, a drag-and-drop business process

automation solution from Network Automation. Since then, the company has 'AutoMate'd a total of 44 different functions - ranging from EDI data dissemination to variance reporting, database monitoring and beyond - without expensive custom programming. Putting AutoMate in the driver's seat is saving Mallory more than 25 hours of paperwork per week and in at least one instance averted a server crash by alerting the IT team to data overload.

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Hospital's Diet Data Duties Get Trimmed 20 Hours a Week with AutoMate BPA Server

For any hospital, feeding hundreds of patients three times a day involves substantial paperwork. At California's Saddleback Memorial Medical Center, completing these tasks consumed roughly 20 hours per week until 2007. That year, the facility turned to Network Automation's AutoMate BPA Server, a drag-and-drop client/server business process automation platform that eliminates many repetitive manual IT tasks without the need for costly custom scripting. With AutoMate, Saddleback has reclaimed the time previously spent monitoring the daily flow and operation of its nutrition care and foodservice production facilities. Now other departments are going on the AutoMate 'diet' to trim unnecessary manual processes from their daily workload.

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AutoMate Eliminates SYSPRO Night Duty for Lab Products Manufacturer

The IT team at World Precision Instruments (WPI) wanted to take back the night on behalf of employees responsible for running reports from the company's SYSPRO ERP system. Instead of requiring employees to manually trigger and generate reports from home at specific hours in a specific sequence on a nightly

basis, the company wanted to automate the entire process without investing in custom programming. AutoMate Professional software saved the day—and the night—with a drag-and-drop automation strategy that also saved tens of thousands of dollars in coding.

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Manufacturer Cuts 2 1/2 Hours of Daily ERP Work with AutoMate

For years, an IT staffer at ITW Construction Products had to come to work early every morning to prepare the company's ERP system for the new day. At first, the process of incorporating the previous day's business activities into the ERP database took thirty minutes. As the company grew, the job ballooned to 2 1/2 hours. Rather than continuing to waste valuable time repeating the same tasks day after day, ITW brought AutoMate Professional on board. In just a few hours, IT managers used the software's automation wizards to trigger, run, and error-check ERP updates on a hands-free basis—slashing over 12 hours off the IT workload every week.

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Stryker Finds Rx for Multi-Office Reporting with AutoMate

Every night for several years, the five Latin America offices of Michigan-based medical technology products manufacturer Stryker Corporation were forced to burn the midnight oil to turn their daily financials into a single consolidated report. Each office has its own independent ERP system, so the process required three hours to compile the data for each territory plus another 90 minutes for a financial analyst at division headquarters to merge the five spreadsheets into one document. The upshot: nearly 18 hours of late-night labor that sometimes lasted past 11 pm. In 2004, IT managers at Stryker Latin America eliminated the

drudgery by using AutoMate Professional to put each step of the process on automatic pilot - without writing a line of code.

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BJ's Restaurants Serves Up Automation

The way the business now views the IT group at BJ's Restaurants is working to everyone's advantage. In most restaurants, IT is generally viewed as a function of finance, where the prevailing ethos is keeping costs down. But at BJ's, which has been growing 20 to 25 percent over the last five years, IT is viewed as a function of operations. That makes all the difference when it comes to accelerating business process automation and optimization.

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Vanderburgh County Highway Department Automates AVL Data Collection

The Vanderburgh County Highway Department encompasses the Highway, Local Roads, and Street and Cumulative Bridge departments within the Vanderburgh County Government. About 55 employees within these departments handle public works and general maintenance for 560 lane miles of Vanderburgh County roads, including general road repairs and resurfacing, right-of-way mowing, roadway ditch maintenance, tree maintenance and emergency response to weather conditions such as storm damage and snow removal. The Vanderburgh County Highway Department operates under the authority of the Vanderburgh County Commission and is funded by the Vanderburgh County Council.

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International Publisher Frees up Resources for Strategic Planning using AutoMate

The Globe Pequot Press has established an international reputation for publication of outstanding regional guides to a myriad of travel destinations in the U.S. and around the world, and is among the top three sources for travel books in the United States. Globe employs a full time staff in excess of 130 personnel who publish market, promote, and distribute a list of approximately 600 new books each year. In addition to publishing its own imprint, it offers marketing and fulfillment services to client publishers whose combined annual output currently exceeds 200 new titles.

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Accudata Technologies Automates their File Processing Without Writing Code Using AutoMate

Accudata Technologies, provides flexible access to data validation through innovative technology and cutting-edge data transmission. Accudata serves as an access hub for validating information associated with telephone numbers, cellular numbers and IP locations while also providing line information database storage of phone numbers and corresponding information. Accudata services the majority of the working lines in North America maintaining customers' telephone services providers and collect call preferences. Accudata's calling name database provides Caller Name information, which helps carriers provide Caller ID service. In addition, e-retailers require sales lead validation and lead verification through Accudata for optimum profitability.

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Norton Healthcare Automates Reporting and Print Management in Cumbersome Legacy Applications



For more than a century Norton Healthcare's faith heritage has guided its mission to provide quality health care to all those served. Today, Norton Healthcare is the Louisville area's leading hospital and health care system (45 percent market share) and second largest private employer. The not-for-profit system - the largest in Kentucky and rated one of the top 100 integrated health care delivery systems in the country - includes four large hospitals in Louisville, 10 Norton Immediate Care Centers, 9,700 employees, 280 employed medical providers at some 50 locations, and nearly 2,000 total physicians on its medical staff. Norton Healthcare serves the Greater Louisville metro area, including Southern Indiana, and patients throughout Kentucky.

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Community Bank and Trust of Florida Selects AutoMate to Streamline Core Bank Processing

Community Bank & Trust of Florida (CBTF) is a regional financial services institution powerhouse dedicated to personalized customer service. As with all other banks, CBTF must run an array of nightly processes to prepare its core processing system for the next business day. Much of the work is comprised of reconciling accounts and updating transactions conducted at branch locations and ATMs during banking hours. The work performed is considered mission critical, and it is essential to keep accounts 100% accurate and up-to-date.

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Pacific Toxicology Laboratories Saves Time with AutoMate

Pacific Toxicology Laboratories (PacTox), located in Chatsworth, California, is a privately owned company that performs five distinct lab functions under one roof —drug testing, biological monitoring, medical surveillance, therapeutic drug monitoring, and forensic toxicology. PacTox's competitive advantage is its unique

ability to provide integrated biological testing services. Clients include corporations, medical and occupational health clinics, academic and government researchers, district and defense attorneys, and physicians and other health professionals. In today's heavily regulated health care environment, many organizations are required to satisfy the security mandates outlined in the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and the Sarbanes-Oxley Act. To that end, laboratories like PacTox are investing in enhanced automation software to slash costs, streamline information flow, and provide better testing and faster results for their patients.

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Six400 Creates a New Financial Product with AutoMate That Streamlines Bank Operations

Six400 Financial Services LLC (Six400) is a technology company which provides automated solutions to complex back office processes for banks and **credit** unions. Recognizing the need to automate manual overdraft processing at banks and **credit** unions, Six400 introduced a revolutionary product called Overdraft Advantage[™] which has been successfully deployed nationwide.

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Baylor Medical Center at Frisco Streamlines Materials Management with AutoMate

Baylor Medical Center at Frisco (BMCF), outside of Dallas, Texas, is one of approximately 100 hospital facilities run by United Surgical Partners International (USPI). In this large system, BMCF is known as the most profitable medical facility in the entire USPI system. BMCF utilizes Meditech's health information system to manage the bulk of its activities including ordering and controlling the inventory required to sustain operations.

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Baptist Health South Florida Streamlines Claims Processing with AutoMate

Baptist Health is South Florida's largest not-for-profit health care organization, encompassing six major medical facilities and a number of outpatient centers. They utilize a health information system provided by Siemens called INVISION, and a claims management system from NDC Health called ePREMIS.

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Indiana University Deploys AutoMate Software

The Auxiliary IT Operation center at the Indiana University has a lot of responsibility on its plate. It is in charge of the majority of for-profit activities the university is engaged in, namely the halls of residence, parking, dining facilities, campus transportation and much more. Additionally, this unit supports many critical IT processes including the secure distribution of student photos for identification cards.

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Cutting Edge Receivables Management Company Turbo-charges Collections with AutoMate

A leading provider of account receivables management services for the healthcare industry uses its deep experience and a specialization in the Emergency Medicine market to provide unparalleled service to hospitals throughout the Southeastern United States.

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AutoMate Streamlines Lottery Operations and Reporting in Louisiana

A big challenge for the Louisiana Lottery Corporation is to extract and import the data collected by their retail location GTECH lottery machines and off-site terminals and backend systems that identify winning tickets. From here reports must generated and ticket sales must be reconciled with bank deposits. A process of this magnitude would take an army of workers if it were manual.

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Ricoh Canada Uses AutoMateTM Software for Document and Printing Automation

Ricoh runs a network of 'just-in-time', print-on-demand production facilities, distributed across the globe. These facilities produce and disseminate all sorts of documents (e.g., real-estate sales sheets, courseware for educational institutions, invoices, and account statements) for large corporate customers.

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Regional Healthcare Provider Uses AutoMateTM Software for Complex Data Processing & Transmission

In order to deliver quality patient care, Health First must exchange information with a large number of partners, customers, and vendors on a timely basis. Complicating this enormous task is the fact that Health First has over 15 business units using a variety of mission-critical applications. Additionally, since much of the data transferred contains sensitive patient information, security is paramount.

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Children's Museum Creates One-of-a-Kind Interactive Exhibit Using AutoMate Software

The Children's Museum of Science and Technology in Troy, New York was founded in 1954 and is located in the Rensselaer Technology Park. Its mission is to be the premier science center in the New York Capital Region where kids and parents can explore, discover, and imagine the world of science together.

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Winner of the November, 2005 iPod Contest for Best Customer Success Story Using AutoMate

TransAlta manages the production and delivery of energy resources over a wide geographical expanse. This requires a sophisticated mesh of control systems for thousands of pumps, valves, gas turbines, high voltage breakers, and more. In one plant alone where Marco Martinez works in Ontario, there are over 1,500 measurements monitored in real-time and around the clock. These measurements include various temperatures, pressures, and other readings on the critical control systems which support the production and delivery of energy.

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Major Medical Center Uses AutoMate to Streamline Meditech's Data Repository

Memorial Medical Center of West Michigan utilizes Meditech Client/Server as its healthcare information system. Important information is also pulled from Meditech's Data Repository, stored in a Microsoft SQL Server database, using reports generated via Crystal Reports.

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AutoMate Powers ERP Processes for a High Technology Manufacturer

In the past, IST's technical staff ran these processes manually. A user would interact with the Fourth Shift application interface and initiate the batch processes by navigating through a series of screens. Moreover, the processes normally take many hours to complete, and this required an operator to babysit the application during execution.

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Industry Leading Real Estate Information Provider Creates New Products Using AutoMate Software

The challenge of creating a robust errors database, the core of iCheck, is that information must be pulled from a multitude of disparate sources. Sometimes, the data source is a database with its unique schema and field names that must be mapped to the iCheck database. Other times, the data source is a text file which must be accessed via FTP, parsed, and loaded into iCheck. And other times, the data is in RETS (Real Estate Transaction Standard) format, a real estate data format similar to XML, which is accessed via HTTP.

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AutoMate Integrates Critical Applications for a Major Medical Center

The University of Texas MD Anderson Cancer Center has the challenge of staffing and managing thousands of nurses busy delivering top-notch patient care. To manage this complexity, MD Anderson relies on three critical applications - a Human Resource system by PeopleSoft, a Time and Attendance system by Kronos, and a Staffing system by Per-Se's ANSOS One-Staff.

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AutoMate Speeds Report Generation and Distribution for a Major Insurer

Medmarc has a monthly close process whereby underwriters write policies up until the close of business for the month. Once all underwriting is completed, the IT staff have to run a series of applications that close out all insurance claims for the month and create historical entries for the claims and policies in the corporate data warehouse.

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Healthcare Company Enhanced Revenue Cycle Management with AutoMate

Perhaps one of the most critical touchpoints between HMS and its clients lies in the transmission and interchange of sensitive patient and financial data. These data exchange processes must be extremely secure, HIPPA-compliant, foolproof, and accurate. There is absolutely no room for error.

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AutoMate Facilitates Data Management at a Major Hospital

Mercy Hospital was experiencing many time-consuming and error-prone manual business processes because the Meditech system did not have an open architecture database, making it extremely difficult to get information out and put information in.

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