



Automation Toolset - Improve, Manage and Automate your Business Processes

The SynergySoft Automation Toolset is designed to help you improve your Business Processes by automating routines and distributing information in a more timely and efficient manner.

The Toolset contains five components which can be purchased individually or can be obtained as a bundle. The five features are:

- Workflow, the most comprehensive option within the Toolset, is a tool to optimise the efficiency of processes by delivering 'the right work to the right officer at the right time'. It involves automating business processes through the electronic receipt, processing and management of work.
- Email Notifications, which inform someone within the organisation of a particular event.
- Report Scheduling, which allows User Reports to be scheduled to run at predetermined times.
- Excel Automation, which enables Excel spreadsheets to be updated at predefined times with up to date information derived from SynergySoft, and
- User Report Emailing allows information to be emailed to multiple people internally or externally as a bi-product of generating a report.

Workflow

Electronic Workflow is a proven methodology to improve productivity, increase accountability, help with support for compliancy, increase staff productivity and above all reduce costs.

SynergySoft Workflow is a tool that allows you to automate routines, quickly and efficiently, that may be single process or complex operations that involve several individuals or departments

SynergySoft Workflow will help to:

- Increase Productivity
- Increase Visibility
- Reduce costs and time
- Provide better reporting, measuring, and analysing
- Improve staff accountability
- Maintain excellent integration within SynergySoft
- Adapt process changes as your business changes
- Provide greater predictability and therefore consistency of service quality
- Standardise results and process times
- Adhere to compliance regulations
- Improve customer satisfaction.

SynergySoft Workflow provides the User with task lists, alerts when events have occurred, process history, and exception reports. Officers are guided as to the importance of each work item and taken through processes to complete the work by being offered one or more outcomes for each.

Measurements are freely available to provide KPIs identifying how many and how long each process takes (for example, how many Building Applications have been processed within a month / year, how long did each take to process, which steps in the process take the longest time to process, which steps take longer than are expected to process, which officers take longer or shorter to handle steps in the process).

Email Notifications

The Email Notification functionality enables you to set up processes whereby Officers automatically receive an email when specific conditions occur, or do not occur.

An example may be to notify the Rates department when a new swimming pool has passed its final inspection by

the Building inspectors, so that a pool inspection service charge can be raised.

The condition and the contents and wording of the email can be easily created by council staff.

Report Scheduling

Report scheduling, allows user reports to be scheduled to run at predetermined times, with the resultant documents being stored centrally and an email being sent notifying the relevant person of its location. For example, it could be triggered to run the balancing reports, showing the balances on subsidiary ledgers against the General Ledger control accounts, every day at 11pm for delivery to the accountant.

- User reports which are generated on a regular basis can be run without user intervention.
- Run time parameters can be provided as fixed values, and dates can be set using pre-defined options. For example, produce a report of all purchase orders place in the last seven days that are allocated to accounts that have exceeded their budget.
- Officers do not need to remember to run such reports and will be reminded by the report automatically arriving in their Inbox.
- Reports are generated by a MS Windows service which runs centrally serving all reports and officers.

Excel Automation

Excel automation allows spreadsheets to be updated at predefined times with information derived from SynergySoft, which can be used for publishing to the intranet / internet {for example, publishing Management Reports on an internal Intranet}.

Existing excel integration spreadsheets can be refreshed with current values on a regular basis without manual intervention from an officer.

User Report Emailing

User Report Emailing allows information to be emailed to multiple people internally or externally as a bi-product of generating a report.

An example of its use is the emailing of Payslips to employees. It enables any file in the system which contains an email address to be used to send information to internal or external email addresses. It saves time in distributing documents internally, and saves postage and administration time for distribution to external parties

How to obtain SynergySoft Automation Toolset products

Each of the solutions above may be purchased as individual components. Alternatively, there are two kits available that enable the components to be purchased at discounted prices:

- The Automation Toolset Enterprise Version includes all five of the components.
- The Automation Toolset Workgroup Version excludes Workflow, but includes the other four components.

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