



PRINT INDUSTRY TOP PLAYER AUTOMATES BO REPORT GENERATION PROCESS WITH XTGLOBAL



About Client

The client is one of the largest and the most trusted US-based providers of premium printing, mailing, and marketing services. They have consistently led the way in innovative marketing solutions for businesses worldwide. Their mission is to develop and customize advanced print and digital solutions, enabling their customers to concentrate on their core operations.



Client Challenge

The client faced significant operational inefficiencies due to the manual processes involved in generating, updating, and distributing essential reports and data files. Each day, the team used SQL Database to download and update reports, manage the database, and send emails. Specifically, they had to download BO reports for each plant, email files with crew data, target files for each plant. They also had to copy database files from the server to the bot, update these files, and email them to plant contact lists. This involved running around two reports per plant, repeating the process daily for multiple plants, which was time-consuming and repetitive.

For instance, the process included generating five BO press reports, five BO bind reports, and five plant target files, merging crew data, updating five databases, and reviewing data to identify crews' eligibility for incentives. In total, this meant managing 10 BO reports, five target files, and maintaining a database of incentives by period.

To streamline operations and reduce the manual workload, the client sought to automate these processes using UiPath Robotic Process Automation (RPA), aiming for increased efficiency and accuracy in their day-to-day operations.

Client Challenge

-  Daily Management
-  Processing of Five Plant Data Items per Day

Tech Stack



XTGlobal Business Solution

Our team of UiPath-certified RPA professionals effectively addressed the client's challenge by designing a comprehensive automation solution to overcome the existing operational inefficiencies. The solution designed is now capable of streamlining and optimizing the process, ensuring accuracy and faster actions. Here's how:



Process Design Document Creation:

Created a detailed Process Design Document, which described both the current and optimized process workflows. This document highlighted the steps that could be minimized and identified potential exceptions, laying the foundation for a more efficient automated process.



Development of Unattended BOT:

Developed an unattended BOT capable of triggering automatically at a set frequency. This BOT can execute the entire process within an hour, handling tasks such as downloading BO reports, merging crew data, updating databases, and sending emails, thus eliminating the need for manual intervention.



Automated Confirmation Emails:

To ensure accurate database update completion, the BOT was programmed to send automated confirmation emails to each customer's business user. This verification step added an extra layer of reliability to the automated process.



Thorough Testing:

Conducted extensive testing to ensure the BOT could handle all business process scenarios. This rigorous testing phase was essential to guarantee that the automated process can be operated smoothly and accurately under various conditions.



Deployment into Orchestrator:

Deployed the BOT into UiPath Orchestrator for enhanced monitoring and maintenance. This allowed centralized management and oversight of the automated processes, making controlling and maintaining the BOT easier.

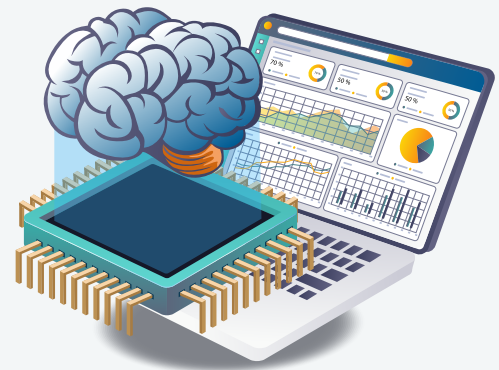


Scheduled Monitoring:

After deployment, the BOT is monitored during its scheduled runs to ensure that each process is completed successfully. Continuous monitoring allows for promptly identifying and addressing any issues, maintaining the automation's efficiency and reliability.

Business Benefits

- Automated processes reduced human error by 95%, ensuring consistent and reliable outcomes
- With better workforce utilization, the client reclaimed 5 FTE's part-time hours for more critical tasks, boosting overall productivity
- Achieved USD 100,000 annual savings through automation efficiency



📍 2701 Dallas Parkway,
Suite 300, Plano, TX 75093

🌐 www.xtglobal.com,

✉ info@xtglobal.com,

☎ 866.446.2910

Follow Us On:

