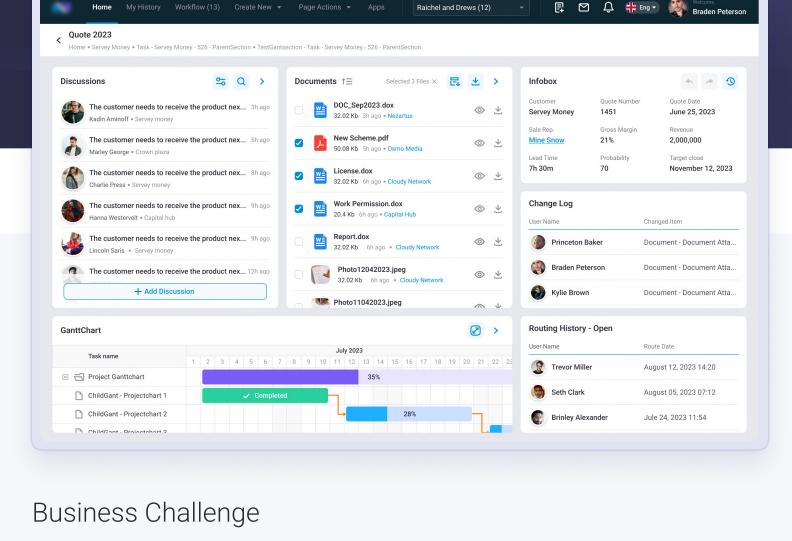


Workflow Automation Software Case study

A SaaS application developed for organizations to automate business processes. It improves process tracking, accountability, and real-time management. The application combines the features of a small SAP solution, providing the capability to effectively manage workflows, visualize the processes with Gantt chart, and improve interactions between different departments.



throughout the organization. It can be really hard to keep track of all information and quickly

manage workflows. The applied tools, like emails, files sharing systems, to-do lists, and document storages are not always effective and may decrease collaboration efficiency. Moreover, security and accessibility issues also need to be tackled. In this case, a company needs a solution to cover these needs. That is why a client asked us to develop an automated workflow software to help their business to reduce manual processes and improve document management.

Many companies are in need of a comprehensive management system that can automate

manual handling of huge amounts of data and visualize ever-changing business processes

Solution

After a deep analysis of client's needs and their business processes, we have decided to use our

experience in applying <u>cloud technologies</u> and create a **SaaS app** that allows fast access to data

the latest Amazon Web Services and followed the OWASP recommendations. Besides that, the

We have worked out a cost-effective cloud-based workflow system with an intuitive user

customer requested to create a **mobile version** of the application.

from anywhere at any time. To ensure data security and reliability, we integrated the system with

from a parent process.

ability to create their own highly customizable templates that simplify the management of a variety of company processes, including projects, resources, orders, documents, emails, tasks, appointments, reports, and more. Everything a company needs to handle is gathered in one place to make it automated. Basically, the system has a **constructor** where each task and/or created document from any selected template is displayed as a separate workflow, specifying the individual or group

<u>interface</u>. By default, it has many **pre-installed templates** organized in a tree. We've included the

progress to the next stage without meeting these requirements. Each template includes simple **fields**, which allow our client to add and store the information about a process, and complex fields that display the results of an operation performed on other fields within the process or on parent processes. Additionally, the templates contain sections that show uploaded documents, text areas, spreadsheets, document history, charts, discussions,

schedulers, etc. The starting of a process can be initiated by a user or triggered automatically

responsible for each step. Conditions can be set at each step to ensure that the document can't

We also added the **history** of changes, process **attributes**, and **user permissions** per process into the workflow automation software. Also, our web developers integrated the app with the Braintree payment system, Mailchimp mail service, and SugarCRM. The integration with Google Translate added the possibility of fast text translation into the required language. The application can also be fully localized.

In order to enhance the user experience and simplify the workflow automation system, we have

track of all the processes in the company and use different field types and sections by

integrated a variety of customizable <u>DHTMLX widgets</u> into templates. It became possible to keep

implementing our own ready-made and customizable widgets, such as grids, spreadsheets, text

For example, we have implemented DHTMLX JavaScript Gantt, which is a Gantt chart library that

helps to manage projects, tasks, documents, employees, and facilities easier and faster. The customer can adjust and schedule any assignment accurately and automatically. Its adoption

improved tasks management and provided our customer with better timesheet management for time tracking and to-do list progress points.

Admin

Quote Date

Sales Rep

Risk Factor

Revenue

Description

Lead Time

Probability

Target Close

Sales Stage

Gross Margin %

areas, Gantt charts, tables, etc.

Return Authorization

Q +

Sales Quote

Workflow Structure

Our Company

 Customer

▶ 🗁 Employee Engineering Blueprints

CapEx Request ▶ 庙 Competitor

▶ ☐ Corporate Initiative

Facility Help Ticket Information Technology Ticket

▶ 🗁 Product Group

Microsoft Dynamic Ticket

Information Technology Help Ticket - 07-07-2023 - No Re..

CapEx Reuest - Herm Ilaq - 07-03-2023 - Electric Vehicle ...

✓ Information Technology Help Ticket - 07-07-2023 - No Re...

PCN - Customer Project - Tamko - Frederick - 05-09-2023

CapEx Request - Shank - 07-06-2023 - Laptop

Workflow

Sub Page Title

Implemented Components

Our development team also included <u>DHTMLX Scheduler</u>, which is a JavaScript scheduling calendar that helps to create different events. All the events are displayed the way that our client can easily check them and change if needed. Besides that, the <u>DHTMLX Spreadsheet</u> was added into the software. This highly customizable JavaScript component allows the whole company to work with multiple sheets and drop-down lists, use predefined formulas, and more.

Solution Manager 1 Q + Solutions Library **Document Template - Sales Quote Dropdown Configuration** Template Name Template Type Field Type Sales Quote Serial Dropdown Customer Corp Customer Template Sections Inbox Fields Route Back Reasons Naming Rules Process Descriptions Localization Wizard Customer Location Probability Customer Contact Field Name Editable Configurated ▶ ✓ 庙 Customer Project ▶ ✓ 🗁 Meeting Minutes Parts Costing Text Û Quote Number Yes None Phone Report

Date Field

② User

Text

Text

Text

Text

Dropdown

Date Field

Dropdown

Number

Raichel and Drews (37)

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Çg+ ∰ Eng ▼

A Administrator

目

Û

Û

Û

Û

Û

Û

ů

1

Û

Dropdown values have not been added ve-

+ Add Value

None

None

None

None

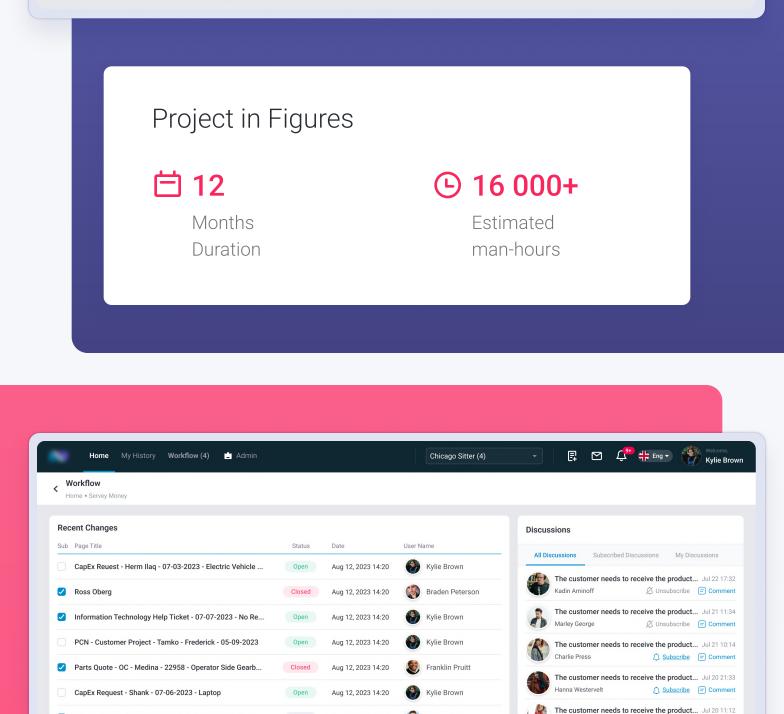
None

None

No

None

Yes



(g) Hasan Gibb

Kylie Brown Kylie Brown

Kylie Brown

Kylie Brown

User Name

Lincoln Saris

Albert Flores

Contact Us \rightarrow

The customer needs to receive the product... Jul 20 08:32

The customer needs to receive the product... Jul 19 17:32

The customer needs to receive the product... Jul 19 17:32

The customer needs to receive the product... Jul 19 17:32

The customer needs to receive the product... Jul 19 17:32

Draft

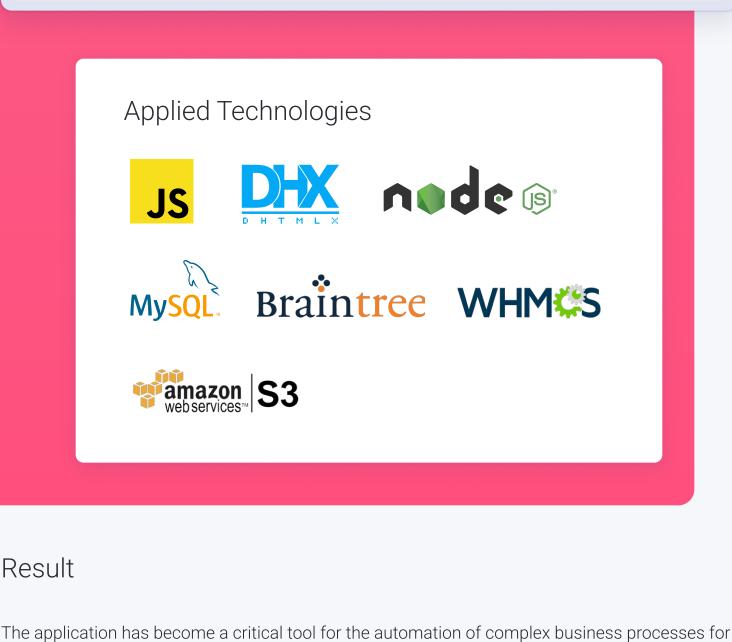
Status

Open

Open

Open

Aug 12, 2023 14:20



simplicity and achievement of digital transformation. This cloud workflow software helps our

Enhance the efficiency of workflows;

Increase service quality and delivery;

- Gain time; And reduce costs.

Visit

client's company to:

As a result, the customer really liked the application and decided to start providing workflow services with its help. Considering that it became possible to customize the application for each company due to the components that we used, it became our client's one of the best decisions.

©XB Software - Software Development Company. All rights reserved