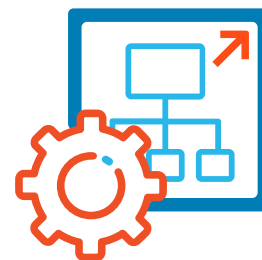# Capturing institutional knowledge:
Turn human expertise into automated workflows

Your people have spent years developing and refining business processes to make them perfect. Except for perhaps one thing – if they're doing them manually. Automate these processes to create resiliency in your organization and increase the productivity of the personnel responsible for them.

The journey from manual process to automated workflow — how to go from input to output

This is a tried and true process our automation experts use to approach process automation, and how we teach our clients to approach it as well. Regardless of the level of complexity of the output, everything can be broken down into actionable steps that can be put into workflows in OpCon, our automation platform.

1 DETERMINE WHAT ACTION IS REQUIRED FOR EVERY STEP (JOB) IN THE PROCESS

- ☐ Run a program with specific arguments
- ☐ Call a web service
- ☐ Query a database
- ☐ Import a file
- ☐ Send an email
- ☐ Etc.

2 DEFINE THE DEPENDENCIES AND CONSTRAINTS OF EACH STEP

- ☐ What are the success criteria?
- ☐ Does an event trigger this workflow?
- ☐ Does it require another step to be completed first?
- ☐ Does it need to be completed at a specific time?
- ☐ Can the next step run if this step has not been completed?
- ☐ Does anyone need notifications?

3 DECIDE IF YOU NEED AN API CALL OR SCRIPT TO PERFORM EACH STEP

- ☐ If an API integration exists, OpCon can run it
- ☐ Do you have an existing script? OpCon can run it (PowerShell, Python, SQL, shell script, and many executables run on OpCon)
- ☐ Can your in-house talent write new scripts as required?
- ☐ Our automation experts can assist you with scripts — they already have quite a few common ones ready to go
- ☐ SMA's **Innovation Lab** is a growing workspace for sharing and downloading scripts for common automation challenges

4 BUILD YOUR AUTOMATION WORKFLOWS

- ☐ Embed the appropriate script within the OpCon database
- ☐ Configure the OpCon job to call the script or API
- ☐ Set the frequency or conditions that determine when the workflow executes
- ☐ Link workflows together as necessary or desired
- ☐ Monitor and optimize
- ☐ Keep automating new processes

These are just the first steps, and we can help you push forward with your automation initiatives. Reach out to an SMA rep about automating your institutional knowledge to achieve resiliency and scalability. We'd love to help.

TALK WITH AN EXPERT
smatechnologies.com/request-a-demo

SMAtechnologies.com

contact@SMAtechnologies.com