CASE STUDY

SoftServe Realizes 90% Reduction in Cycle Execution Time for Accounting Processes with RPA Implementation

softserve

Company Background

SoftServe is a digital authority that advises and provides at the cutting-edge of technology. We reveal, transform, accelerate, and optimize the way enterprises and software companies do business. With expertise across healthcare, retail, energy, financial services, software, and more, we implement end-to-end solutions to deliver the innovation, quality, and speed that our clients' users expect.

SoftServe delivers open innovation—from generating compelling new ideas, to developing and implementing transformational products and services.

Our work and client experience is built on a foundation of empathetic, human-focused experience design that ensures continuity from concept to release.

We empower enterprises and software companies to (re)identify differentiation, accelerate solution development, and vigorously compete in today's digital economy. No matter where you are in your journey.

Business Challenge

SoftServe's accounting department regularly processes changed bank account data of employees. New account data is received from a partner bank, stored and then transferred to the ERP system. The amount of data grows according to general company growth.

An accountant logs into the bank access system, receives a secure message and saves an Excel attachments with new employee account data on a network share. Another accountant opens the Exel file, accesses the ERP system, searches the record of the first employee by the employee code copied from the Excel file, opens the employee record and pastes there all new account data. Then they repeat the same for all other records in the Excel file.

The process is important so that all necessary payments are performed using up-to-date information. However, automating repetitive manual activities would bring savings of employee effort, improve process velocity and capability, and increase employee satisfaction from performing less monotonous work.
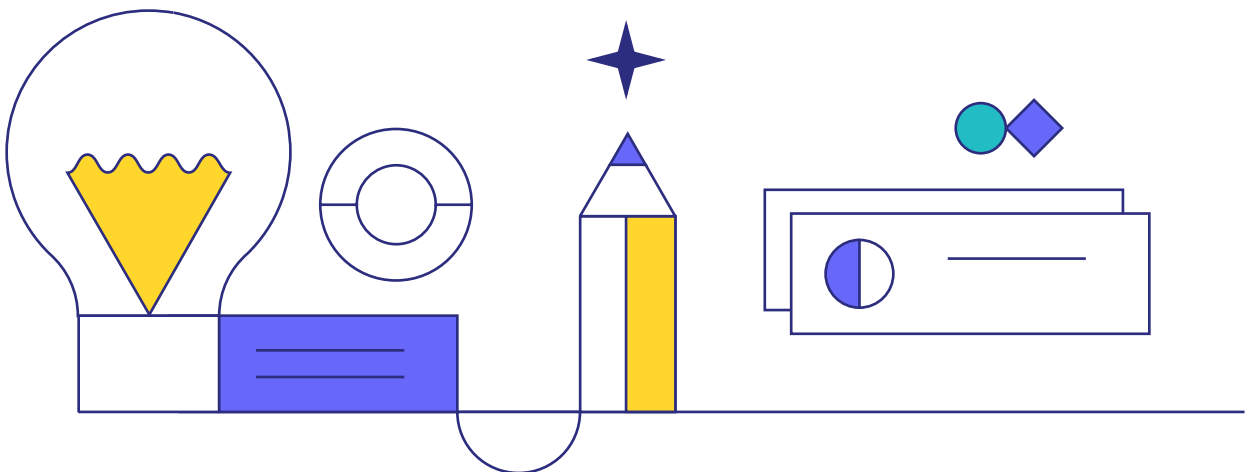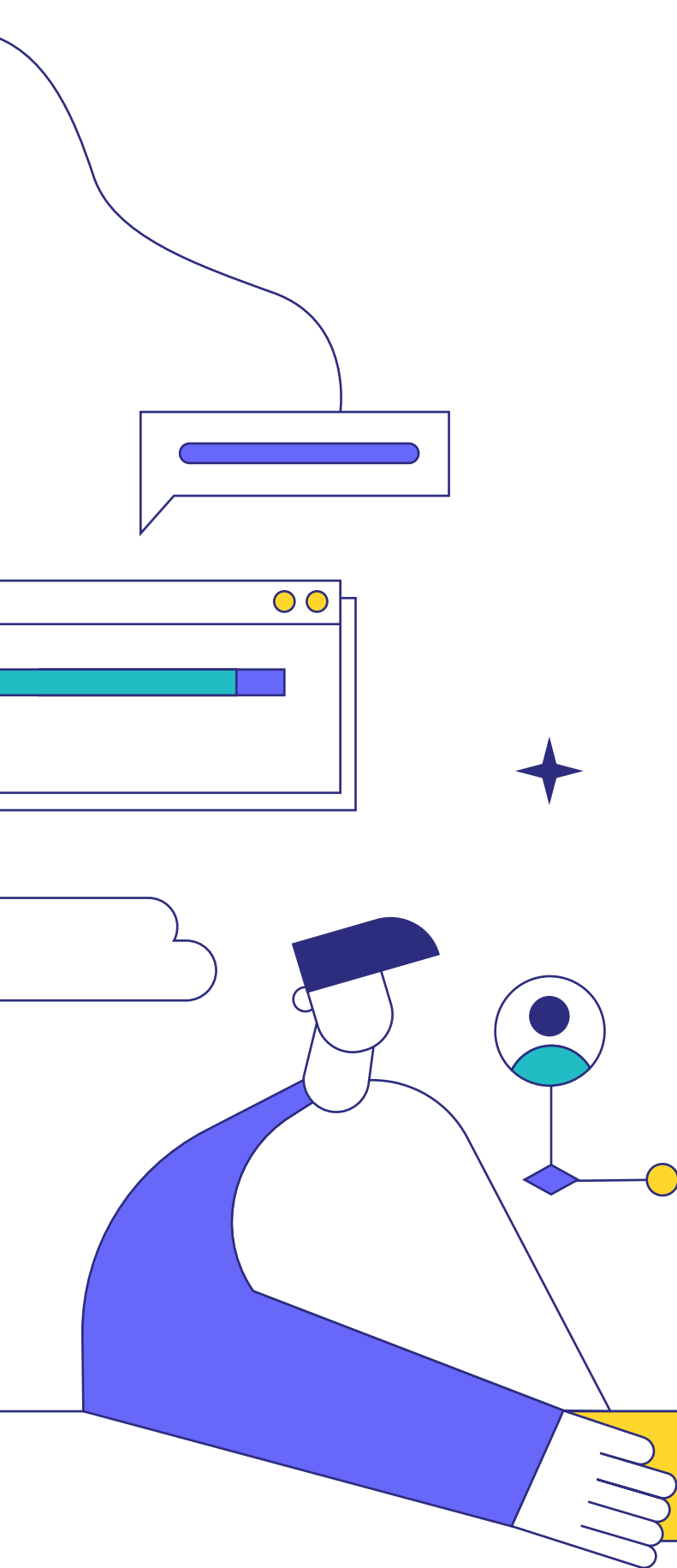
Project Description

A business analyst and a solution architect worked with accountants to assess the process, learn constraints, and define tasks feasible for automation. Then internal IT teams were engaged to agree on the solution architecture to integrate the automation with internal systems.

The first step of the process was agreed as not to be automated because of heightened security in the bank access system and shorter duration of manual activities. The next step of the process to transfer Excel data to ERP was fully automated. The only manual activity is to read the execution report and act on failed updates, if any. Additionally, the e-mail report the process execution is fully logged for analytics and audit.

The UIPath RPA platform was used to develop the automation. It was also integrated with MuleSoft enterprise messaging bus, Outlook, and the ERP. The process involves a proprietary bank access system with heightened security restrictions and an internal ERP system with sensitive personal data.

Business Value

The process cycle execution time was reduced by 90%. Process scalability increased to accommodate for the company growth. Full logging for the audit and analytics was implemented. The project implementation took only seven weeks and involved a small team.
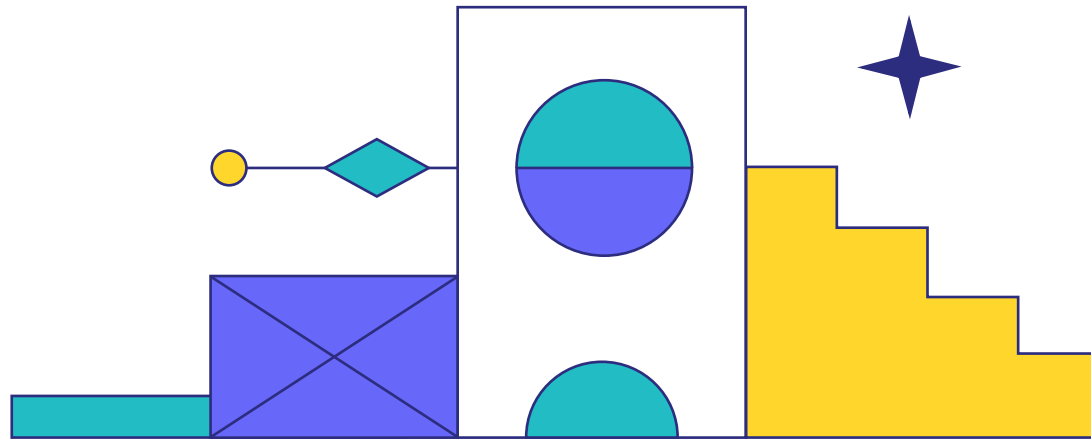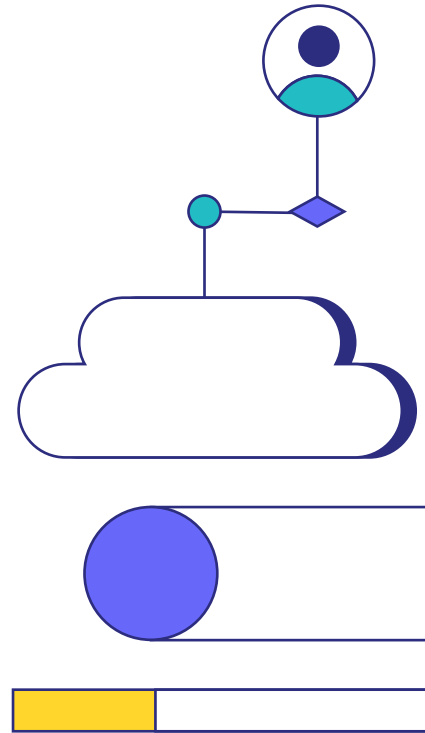
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