

# BPA TO THE RESCUE!

## 5 Areas Where Business Process Automation Can Make a Substantial Difference



*Business Process Automation (BPA) is a hot topic these days because it can make such a difference in how smoothly a business operates and, consequently, how profitable it is. With many new tools now available that make automation much easier, such as our NITRO Studio, there are more and more reasons to jump on the BPA bandwagon and start streamlining your organization!*

**Let's look at five areas where BPA can have a significant impact.**

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### 1. INCIDENT MANAGEMENT

Something is broken, not working, causing an issue, delaying processes, etc. This is likely causing a work stoppage or slow-down for one or more people and it needs immediate attention.

In this case, a BPA solution needs to provide Omni-channel access so that the user can reach the service desk from anywhere on any device. Alerts and notifications are critical. SLAs with guaranteed response times are often implemented.

Workflows need to automatically direct the ticket to the right group for resolution. The ticket form needs to have action buttons for easy escalation and reassignment. Techs need to be able to communicate quickly and effectively with the user, and they need tools to update and close tickets easily, from any device.

A self-service portal and bots can be implemented. Users can interact with the portal or bot to access immediate answers from a knowledge base or FAQs.

**Cost Savings and Benefits:**

Speedy resolution of incidents gets people back to work and systems back to operational status faster. Less down time equals more productivity.

**Related Applications:**

[NITRO Help Desk](#)



[Work Orders](#)

## 2. CHANGE MANAGEMENT

A set of incidents could indicate an underlying problem, which could be due to software, hardware, an outdated procedure, or improper personnel training. A Root Cause Analysis takes place to identify the problem. Once the root cause is determined, a process is implemented to fix it.

A BPA solution needs to collect the data necessary to accurately detail the problem, track the root cause investigation, and describe the proposed fix. The solution needs to record related items, such the incidents that indicated an issue, the tasks needed to fix the underlying problem, and any associated documents. There needs to be information about the cost, timing, effort, and impact of the proposed change. Rollback and contingency plans are critical. An approval workflow along with alerts and notifications are required. A detailed description of the change should be retained so that any future problems can be correlated with this fix.

Change Management requires a more thought-out approach compared to the immediacy of Incident Management.

**Cost Savings and Benefits:**

Identifying and fixing root causes reduces incidents and improves quality of service, resulting in more productive, and generally happier, employees.

**Related Applications:**

[NITRO Help Desk](#)



[Work Orders Professional](#)

### 3. REQUEST MANAGEMENT

Every organization has many request processes to manage, whether from employees (purchasing, leave, new equipment, access to systems, benefit updates, and many others) or from customers and clients (information inquiries, complaints, returns, etc.).

Request Management differs from Incident Management and Change Management in that the request needs to follow a proscribed process from initiation to fulfillment. This frequently maps out to:

**Request > Review > Approval > Fulfillment**

A solution needs to successfully handle each stage.

With the large and varied number of requests, a BPA solution needs a powerful Forms Designer. The forms must gather the right amount of information. Fields on the form should have auto-fill capabilities. The forms should be dynamic, asking for information that is only related to the type of request. They need to be available from any device.

The solution also needs a Workflow and Action Manager so that automation is easy to set up and modify. The workflows need to route the request accurately and facilitate moving it along to fulfillment. There often is a need to interact with outside systems, whether HR, CRMs, ERPs, or other databases.

*Take a Leave Request system. The user needs to fill out a form with the start and end dates of the request time off and indicate the type of leave. Once submitted, the request goes to the manager, who may need to check the time-off calendar before approval. Once approved, HR may need to be notified and data entered into the HR system. Other types of requests, such as a purchase request, may require checking budget or inventory levels prior to approval, and connect to a financial system once approved.*

#### **Cost Savings and Benefits:**

Efficient tracking and fulfillment of requests enables an organization to rapidly meet employee and customer needs. Streamlined request systems reduce friction, saving time and reducing costs.

#### **Related Applications:**



Request  
Manager



Purchase  
Requests



HR Requests

## 4. TRACKING ASSETS, EQUIPMENT, AND MORE

Both physical devices (hardware, equipment) and virtual entities (software) need to be tracked. The people responsible have to know where the assets are located, if they are installed and operational, who is using them, what is the usage history, what maintenance or upgrades are required, what are the warranties and support provided, when does it need replacement, what is in inventory or on order, and more.

BPA comes in to play by providing an accurate, easily updated listing of assets and their relation to each other. The BPA solution runs workflows that take action when maintenance or replacement is needed, when new items should be ordered, when an asset used by a user or at job needs to be returned, etc. The solution may need to interact with a ticketing system to track incidents related to the assets and it may need to synchronize with network discovery tools or other databases. For some types of assets or equipment, it is important to track parts used for repair and the time and costs involved.

### **Cost Savings and Benefits:**

Knowing what assets are available, where and how they are being used, and how well they are operating allows their efficient allocation throughout the company. By not tracking and maintaining assets and equipment, a company suffers from non-optimal performance, lost assets, and unnecessary downtime.

### **Related Applications:**



Asset Management



Equipment Tracking

## 5. DOCUMENT MANAGEMENT

With the flood of documents at any organization, managing the creation, updating, revision, and distribution of documents is critical. A BPA solution tracks meta-properties of documents and runs workflows based on this data. Workflows can be used at any step of the document lifecycle. For contracts that need renewal, or have milestones, alerts and notifications can be established. For example, the contract “owner” can receive an alert 30 days before renewal so that the contract does not either auto-renewal or expire without anyone knowing.

Also, when a document such as a procedure or policy is established or updated, “attestation” can be implemented to make sure everyone who needs to has read and acknowledged the new document.

### **Cost Savings and Benefits:**

Mismanaged documents, outdated procedures, and poor documentation result in inefficiencies and lost productivity. Contracts, licenses, and subscriptions that are renewed without proper authorization and review waste money. Efficient, pro-active document management saves substantial time, money, and effort.

### **Related Applications:**



Contract Management

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## **Powering up your organization with NITRO Studio**

The list above is by no means comprehensive. BPA can be put to work in many other areas, such as Project Management and Task Management. The advantage of Crow Canyon’s NITRO Studio is that it can improve just about any business process in any department in the organization.

NITRO Studio extends the base functionality of Microsoft 365, Teams, and SharePoint so that these platforms can provide enhanced automation power. The forms, workflows, actions, portals, bots, reports, and other tools in NITRO Studio work together to provide modern, comprehensive solutions that streamline operations, reduce costs, and increase profitability.

Business Process Automation, or what some call “Digital Transformation”, can make a substantial difference in reducing costs, streamlining operations, increasing productivity – and, ultimately, in better profitability along with happier customers and employees.

**Check out Crow Canyon Software’s NITRO Studio, which runs in Microsoft 365, Teams, and SharePoint on-premises. NITRO Studio includes a Forms & Workflow “build-your-own” platform and over a dozen pre-built applications. It’s time to accelerate your Business Process Automation!**

**CONTACT US TODAY!**

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