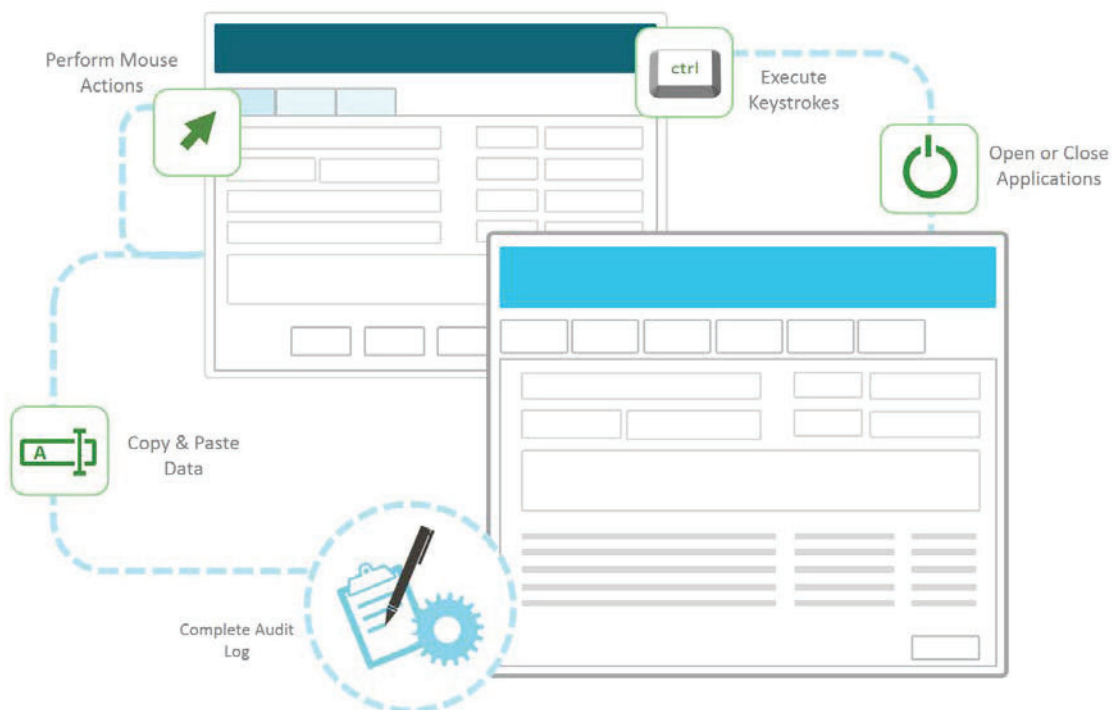# Task Automator

Summary

OnBase Task Automator accelerates digital processes by automating manual and repetitive tasks, freeing knowledge workers to spend time on activities most valuable to the organization. By creating a digital workforce, Task Automator performs clicks and keystrokes faster and more accurately than humanly possible. Integration between business systems is simplified, eliminating screen switching and duplicate data entry. Configuration is low to no-code for a quick implementation and easy maintenance.

Benefits

- **Automates the interaction between business applications when integration is a challenge**, reducing the need for employees to navigate multiple systems.
- **Eliminates the need for workers to execute manual tasks** by simulating human activities, clicks and keystrokes.
- **Performs work more accurately,** improving automation and ensuring that everything is complete.
- **Improves visibility** over manual tasks by creating an audit trail for every move made during the process.
- **Visually configured** for faster implementation and less maintenance of the solution over time.

Design

Task Automator facilitates the interaction between systems, utilizing "digital users" to perform actions like copying and pasting data between screens, executing keystrokes, performing mouse actions, and starting or closing applications and dialogs. Every action is monitored and recorded in an audit log.

One platform
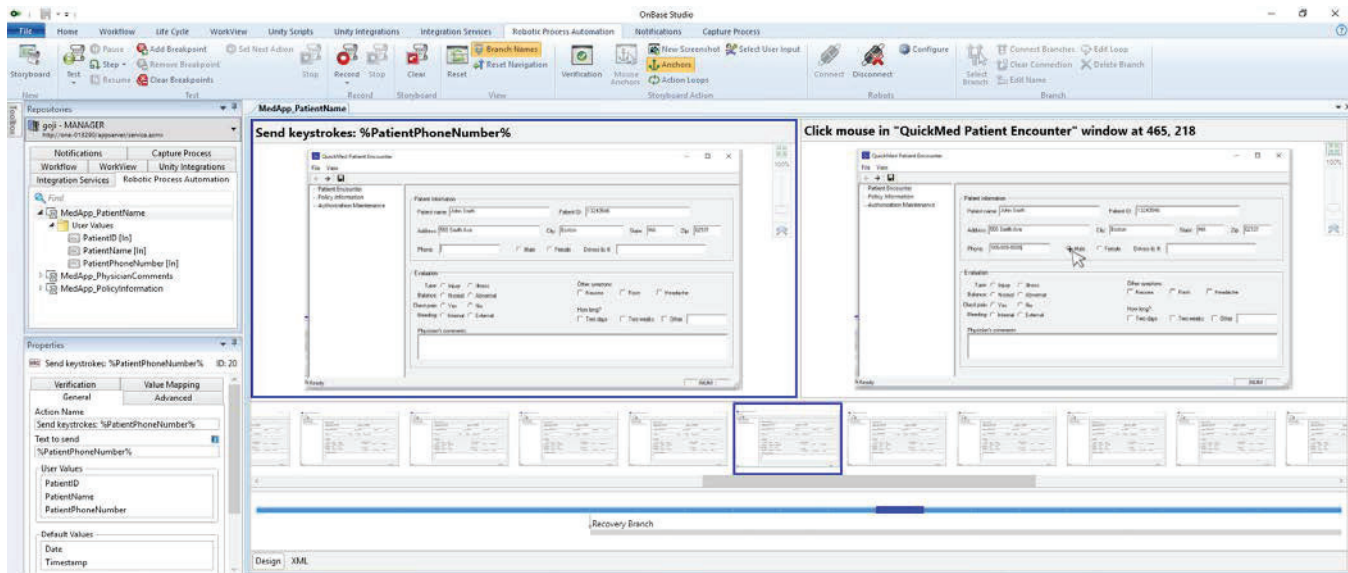**Unlimited potential**

OnBase
by Hyland

Applications

- **Replicate data entry between systems when integration is a challenge:** When a business application is not easily accessible through an API or web service, the data entry is often manual . Task Automator can supply the values to the business application without the errors that would occur if performed by human users.

- **Automate feature execution in multiple systems:** Interactions like application button selection, performing keystrokes, and copying and pasting data have traditionally required a human user to execute. Instead, Task Automator can leverage a digital user to perform the same actions—even starting the application if needed, and closing application dialogs after the process is complete. Utilizing a digital user for these actions means that the process will move forward more quickly and the employee is not burdened by repetitive work.

- **Accounts Payable (AP) integration:** When purchase orders and invoices are imported into OnBase they are processed by Workflow to validate data and manage exceptions. In many cases, amounts on an invoice are at odds with the amount on the purchase order. Once the appropriate approvals have been made in Workflow, Task Automator can update the ERP with corrected data from the approved invoice.

- **Report Capture, Healthcare**: When a Release of Information request is received, information often needs to be collated from multiple systems, including the EMR. With Task Automator, staff do not have to search in multiple applications to gather the information—using the patient visit account number, Task Automator will import content into OnBase using the Report Capture virtual printer.

Key Features

- **Records and repeats the movements** of human users performing actions like mouse clicks, keystrokes, shortcuts, and function keys.
- **Initiate Task Automator** from Workflow, the Command Line, a shortcut, or healthcare-specific modules Report Capture or Revenue Cycle Management.
- **Audit logs** save the movements of the digital users as an audit trail.
- **Visually configured in OnBase Studio,** allowing interactions to be automated without custom coding:
  - **Data mapping** allows the storyboard to execute actions on values from recorded areas.
  - **Testing provides a mechanism to troubleshoot** storyboards and ensure process quality.

Interface

Task Automator uses a concept called Storyboards to visually configure tasks and interactions between applications.