RPA SUCCESS STORY

Oregon School Boards Association

OREGON SCHOOL BOARDS ASSOCIATION USES RPA TO CONVERT CRITICAL POLICY DOCUMENTS

BACKGROUND

The policy department of the Oregon School Boards Association (OSBA) is responsible for writing and maintaining policies for over 200 school districts. Each individual district has hundreds of policies, and the number of documents can add up in the thousands. OSBA originally had these policies written in WordPerfect, but needed to convert them to Microsoft Word to better fit organizational standards and collaboration across all districts. They needed a way to quickly and accurately convert these documents, so they turned to Automate, a powerful RPA solution from Fortra.

20
minutes to convert one school district's policies, down from 40 hours

< 1 week
to get up and running with Automate

20
school districts' policies can be converted overnight

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CHALLENGES

- OSBA's policy department had **thousands of policy documents** in WordPerfect that needed to be converted to Microsoft Word
- The conversion of each individual document followed a **two-step process:** convert the WordPerfect file to .RFT, and then convert it to Word
- At first, OSBA thought they could speed up the process by hiring a temp, but the **backlog continued to pile up** and efficiency was lacking

SOLUTION

- With **Automate from HelpSystems**, OSBA was able to quickly create an RPA workflow to automatically and accurately manage the tedious conversions
- OSBA was up and running in less than a week thanks to Automate's **quick implementation time**
- Automate's Workflow & Task Library, further helped OSBA get up to speed on the product by offering a **library of sample tasks** to highlight and demonstrate specific features of Automate

RESULTS

- With RPA, OSBA was able to clear their backlog in about a **month and a half**
- Every single policy document for a given school district can be converted in just **20 minutes** instead of the 40 hours it had previously taken
- OSBA can let RPA run overnight and **convert the policy documents for 10 to 20 districts**
- Easily able to expand their RPA footprint into other departments thanks to **Automate's reusable workflows**

Company Profile

The Oregon School Boards Association is a non-profit member services agency for more than 200 locally elected boards serving school districts, education service districts, and community colleges.

Location:	Oregon
Website:	http://osba.org/

"I picked Automate up from not having known anything about it and learned it in about a week. It's a really user-friendly product with drag-and-drop features and it couldn't be any easier than that."

–Andrew Norval, IT Analyst