



Streamlined Weekly Work-in-Progress Reporting with Power Automate

WHO WE ARE

“UB Technology Innovations is a Microsoft Power Platform delivery partner offering no/low-code solutions, virtual bots, RPA, and data insights. We help clients on their digitalization journey by automating tasks, optimizing workflows, and providing a competitive edge through quick app deployment”

WHAT WE DO

- Automate Process using Microsoft Power Automate (RPA)
- Eliminate Manual Process
- Automate email distribution
- Timely Reports



THE CLIENT

Our client is a leading Construction company based in the US with over two decades of experience in the industry.



CHALLENGES

Our client operates within the Construction industry, adhering to a weekly employee payroll cycle. As part of this payroll process, they are required to generate a 'Work in Progress' (WIP) Report on a weekly basis. This report plays a critical role in extracting data, performing various data manipulations and calculations, and refining the report. The accuracy and timeliness of this report directly impacts employee salary disbursements. Initially, generating this WIP Report is entirely manual, which can be time-consuming, error-prone, and resource-intensive

The manual process of creating the WIP Report presents several challenges. It is inherently time-consuming, requiring substantial effort each week to gather, process, and refine the necessary data. Additionally, manual data manipulation and calculations can introduce errors, potentially leading to inaccuracies in employee salary payments. The reliance on manual processes also makes the workflow less agile and less responsive to changes in data sources or reporting requirements.



www.ubtiinc.com



info@ubtiinc.com



+1 (714) 912-1600





SOLUTION

We propose implementing an automation solution using Power Automate to overcome the challenges posed by the manual WIP Report preparation process. The automation workflow involves the following steps:

- **Data Extraction:** Automatically retrieve data from "QTools" based on date filters for the current week
- **Data Manipulation:** Export the extracted data into Excel workbook. Within Excel, automate data cleaning by removing duplicates and filtering out jobs based on specified criteria.
- **WIP Calculation:** Access essential reports ("Job Cost Category Totals" and "WIP Hours-Operations Weekly-2") with the "ComputerEase" connector. Extract specific job data and organize it in Excel. Save these reports for reference.
- **Report Refinement:** Employ Power Automate's "Excel" connector to format and organize the Excel report. Apply headings, insert lines, calculate totals, and highlight key data points.
- **Automated Distribution:** Leverage connectors like Outlook to automate email distribution. Forward the previous week's WIP email, embed WIP data, and send it without the signature block.



SOLUTION BENEFITS

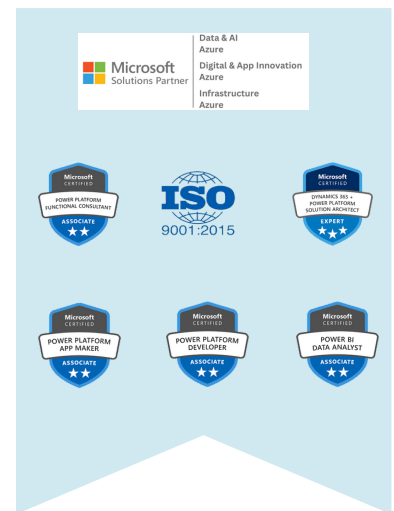
This simplified automation approach makes the WIP Report process faster, error-free, and consistent. Automation ensures reports are well-structured and delivered promptly to stakeholders. It also enhances data accuracy and facilitates seamless integration, saving time and improving decision-making based on reliable WIP data.

- **Error Minimization:** Automated processes reduce the risk of errors and inconsistencies.
- **Timely Reports:** Automation ensures prompt availability of accurate WIP reports.
- **Resource Optimization:** Human resources can focus on strategic tasks instead of manual work.
- **Direct/Indirect Cost saving:** The Power Automate solution reduces direct costs by freeing up human resources for strategic tasks and minimizing errors, resulting in a 55% reduction. It also generates significant indirect cost savings through improved decision-making, enhanced compliance, and increased productivity.



ABOUT US

UB Technology Innovations, Inc. (UBTI) is a leading global technology solution provider with more than 3 decades of experience across all industries, specializing in Capital Markets (Asset Management), Logistics and Healthcare. We are the preferred Microsoft Gold Certified partner backed by a world-class team of Microsoft Certified experts with rich experience in Azure Cloud Platform and Data Analytics.



UB Technology Innovations, Inc.
2401 E Katella Ave, Suite 450
Anaheim, CA 92806



www.ubtiinc.com



[company/ubti](https://www.linkedin.com/company/ubti)



info@ubtiinc.com



+1 (714) 912-1600



Connect us

