Automator System

AUTOMATOR

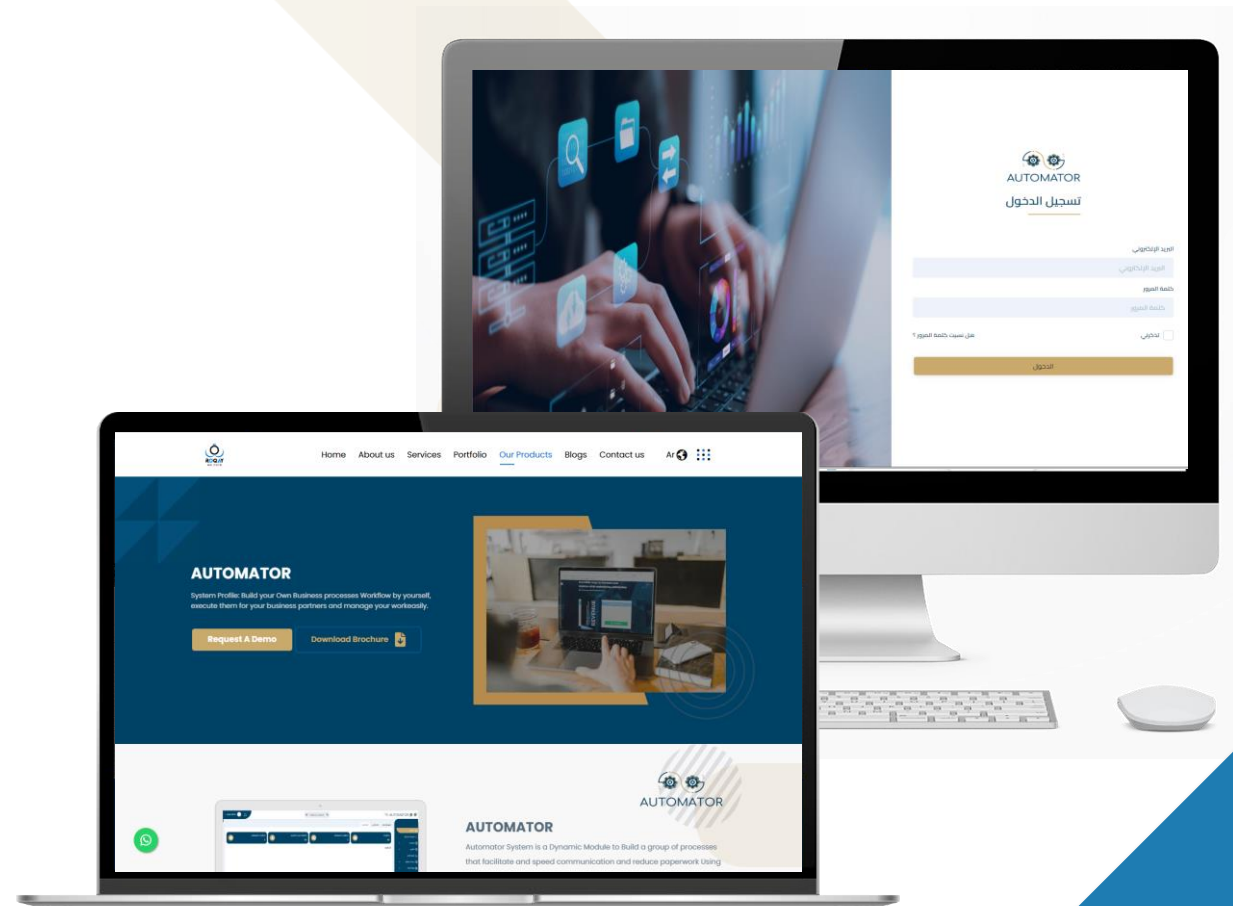ROQAY
we care

Developed By Roqay

About Automator System

Build Your Process yourself!

Automator System enables you to easily build a group of processes by facilitating communication and reducing paperwork using Dynamic Modules to produce specific Forms and Processes.

Each Process Has a Specific Workflow Cycle, Dynamic Setups Modules to ensure Fixability for Users.

The system also provides users with a Dynamic Module for Roles & Permissions which enhances the processes workflow, security and confidentiality.

Web Dashboard Homepage for System Administrator

AUTOMATOR

> ➤ ## Statistics

> ➤ Ability to Monitor processes progress, as the System Administrator can view various sets of statistics relating to the transactions made on each procedure.

> ➤ ## Departments

> ➤ Simple and Easy way to manage an organization, as the system provides fixability for the System Administrator to add, modify or delete Departments, assign Departments to employees, and fully view all Departments.

> ➤ ## Job Titles

> ➤ The System Administrator can add a new job title, view all job titles, and modify and delete any job title. The System Administrator can also link job titles to Major Tasks and assign them to employees.

> ➤ ## Tasks Module

> ➤ The System Administrator can add Major and Minor Tasks, and assign the responsibility of each Task to a certain employee based on Department and job Title.

> ➤ ## Employees

> ➤ Access to all organization employees, their departments, profiles, and job titles with one click. The system provides fixability for the System Administrator to add, edit, and delete employees.

Web Dashboard Homepage for System Administrator

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➢ Roles & Permissions

➢ Ability to design the process workflow by depending on Roles &
➢ Permissions Module. The System Administrator can define a specific
➢ role with specific permissions and assign it to an employee, who, in turn, will have access to the process workflow.

➢ System Administrators

➢ Ability to freely choose one or more persons to manage the system. From System Administrator module, you can add specific users to be system administrators.

➢ Form Builder

➢ "Fillable and Effortless Automation" is the main goal of our system. To be applied successfully, the users have to be able to design, modify and delete forms by themselves however they desire.

➢ Process Builder

➢ Draw your workflow, design your process accordingly, and automate it with ease using Automator System. Group procedures under processes, make as many steps as desired, assign responsible employee, then sit
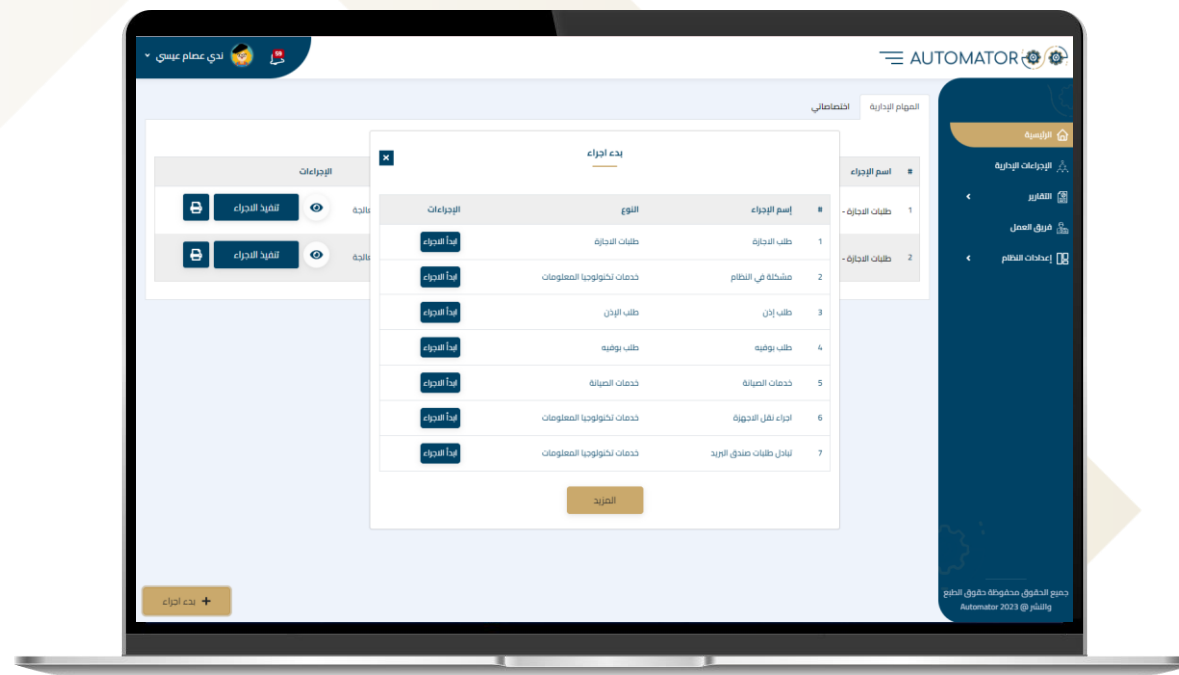➢ and watch the System do the rest for you.

Web Dashboard Homepage for an Employee

Any employee, with the right permissions, can access all the processes that he/she has been given the right to view, and each icon will direct the employee to the "Add New Request" page
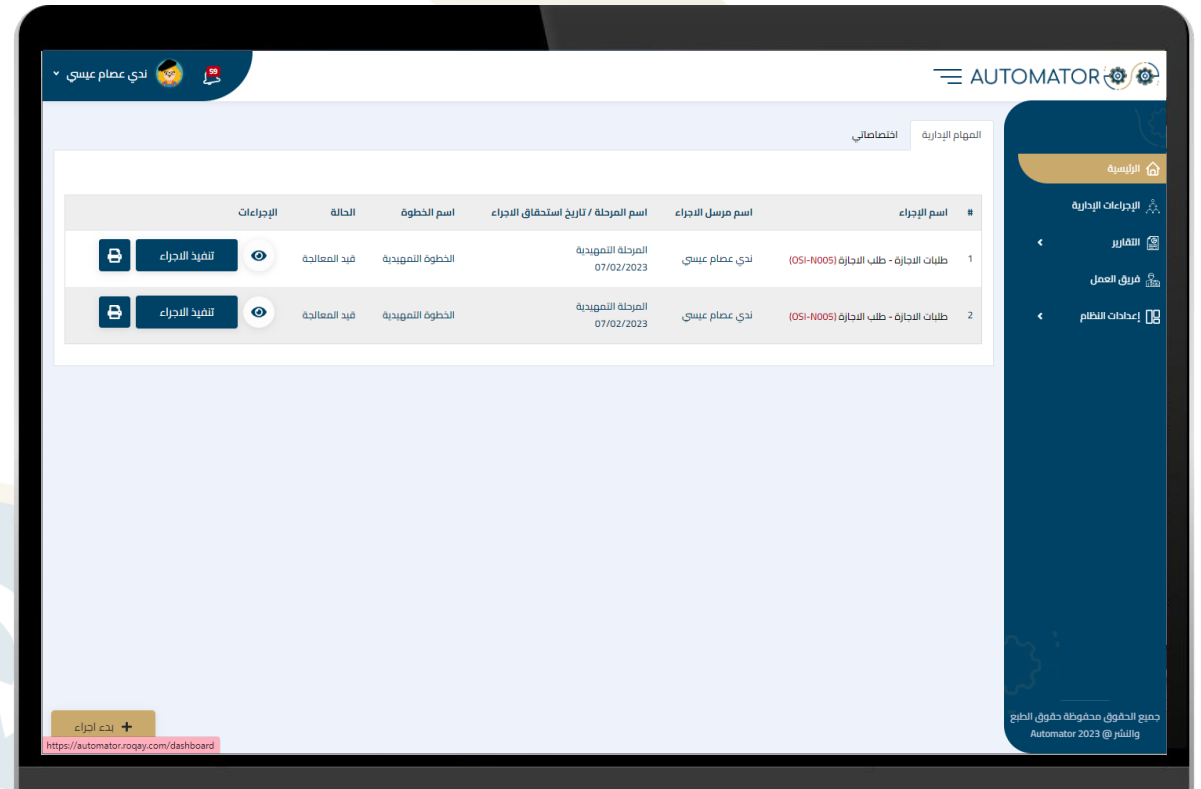
My Processes Button:

Will show the employee a list of last created requests and pending requests.

Helpdesk Processes:

IT Services and Maintenance Services are both dynamic Moules. The System Administrator can add, edit, delete services form the Dashboard and Change their icons that Appears to Users.

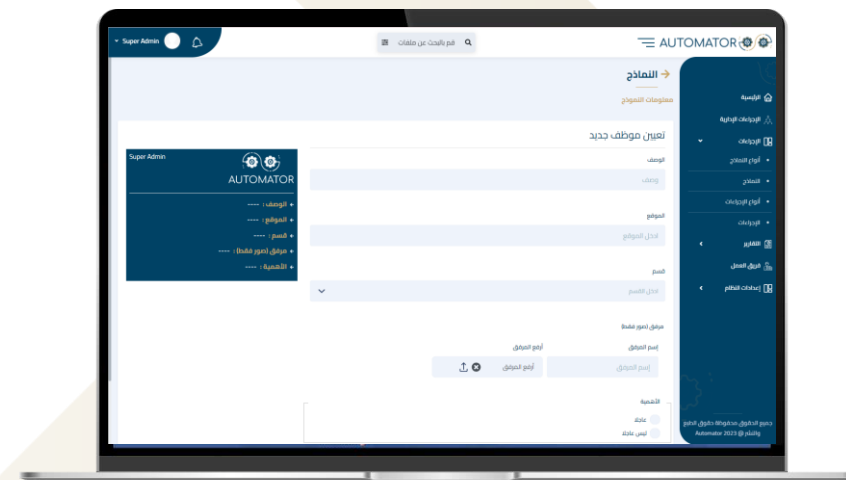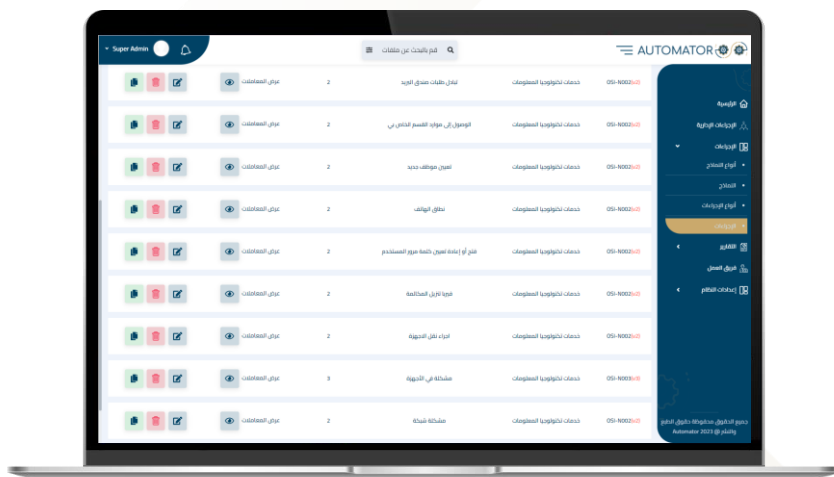# Process 1: **IT Service Requests**

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What if an Employee is facing a technical issue related to information technology field?
IT Services Request is the solution!
The employee will simply select the category of the requested service and create a New Request.

The employee can describe the issue using text, images, documents, or video clips.
When the request is Sent, it will follow the predefined workflow cycle of the selected process to be resolved.

What other functions are available to employees under IT Services?

➢ View own Requests filtered by IT Service Category.
➢ Search all Requests by IT Service Category.

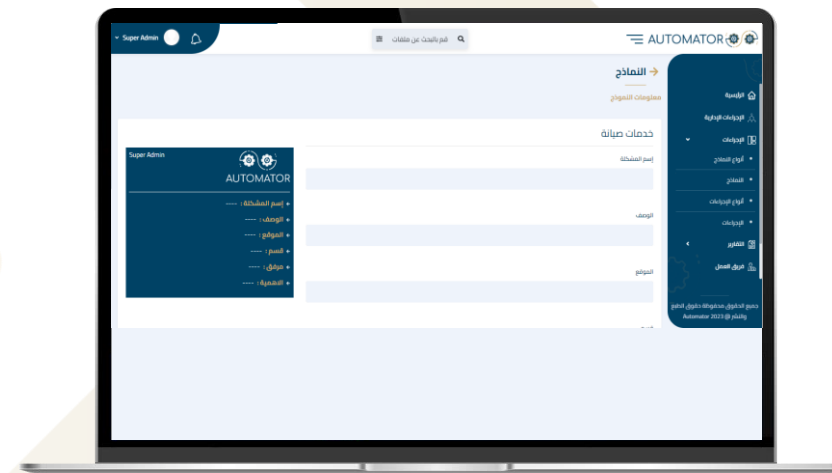# Process 2: **Maintenance Services**

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What if Employee has a technical Issue related to Maintenance field?
Maintenance Services Request is the solution!
The employee will simply select the category of requested service and create a New Request.

The employee can describe the issue using text, images, documents, or video clips.
When the request is Sent, it will follow the predefined workflow cycle of the selected process to be resolved.
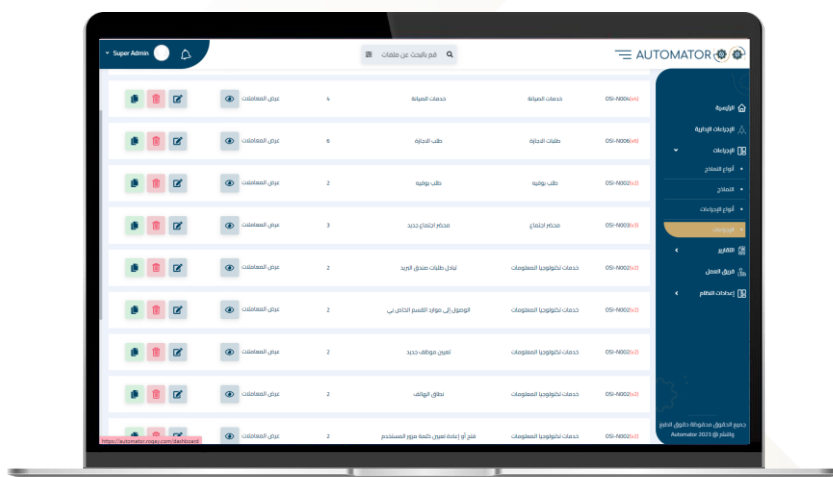
What other functions are available to employees under Maintenance Services?

➢ View own Requests filtered by Maintenance Service Category.

➢ Search all Requests by Maintenance Service Category.

Process 3: **Business Card Request**

Employee can use this Process to Order new Business Cards or to amend old ones, by Default the employee will find an image of a Business Card design showing the employee's information.

This Process workflow will end when the employee confirms receiving the requested Business Card by Feedback.
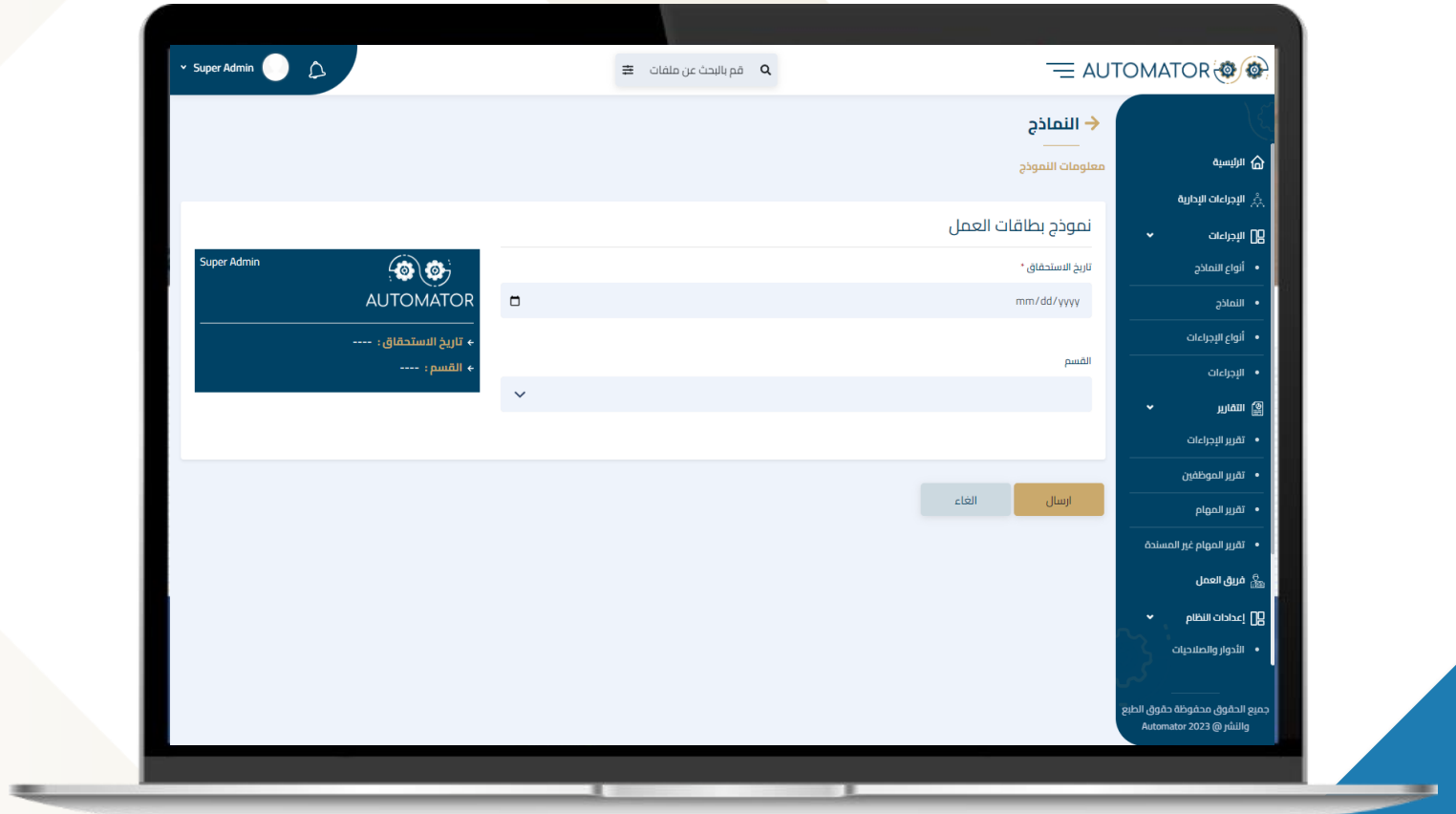
Process 4: **Meeting Room Booking**

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Manage Your Organization Meetings Easily!

Arranging a meeting with your team has never been easier by using the Meeting Room Booking Request.

All you have to do is to select a meeting room, the attendees, the purpose of the meeting, define any requirements, and hit the Send Request button.

The Request will go through the process' workflow, and will be successfully completed if all obligatory attendees have approved attending the meeting.
You can also reschedule the meeting based on attendees' availability.
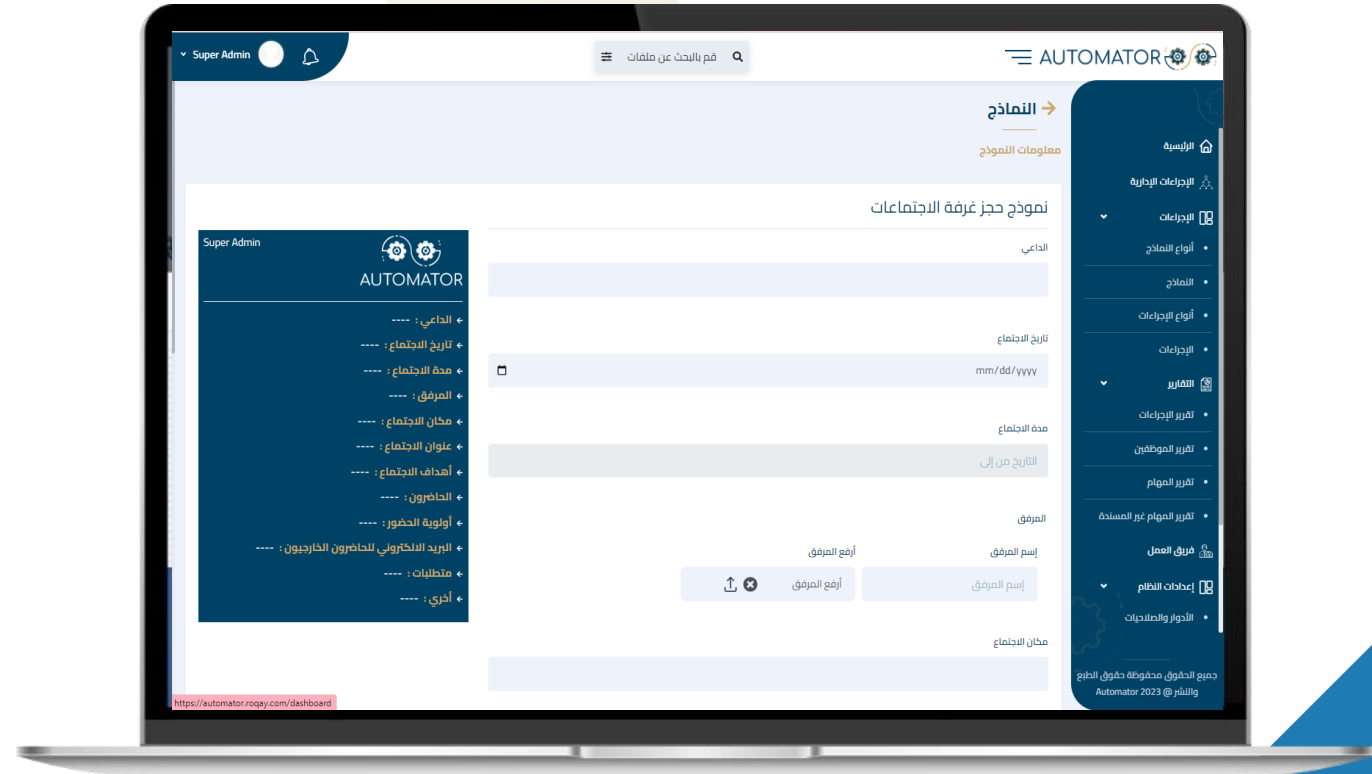
Process 5: **Minutes of Meeting**

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At the end of any meeting, the meeting output needs to be shared and confirmed with all attendees.

Minutes of Meeting Process facilitates this process by linking new MOM to a specific Successful Meeting, where you can add Points, Outputs, and Meeting Resolution.

This process will follow the workflow and will be closed successfully when all attendees approve the MOM.
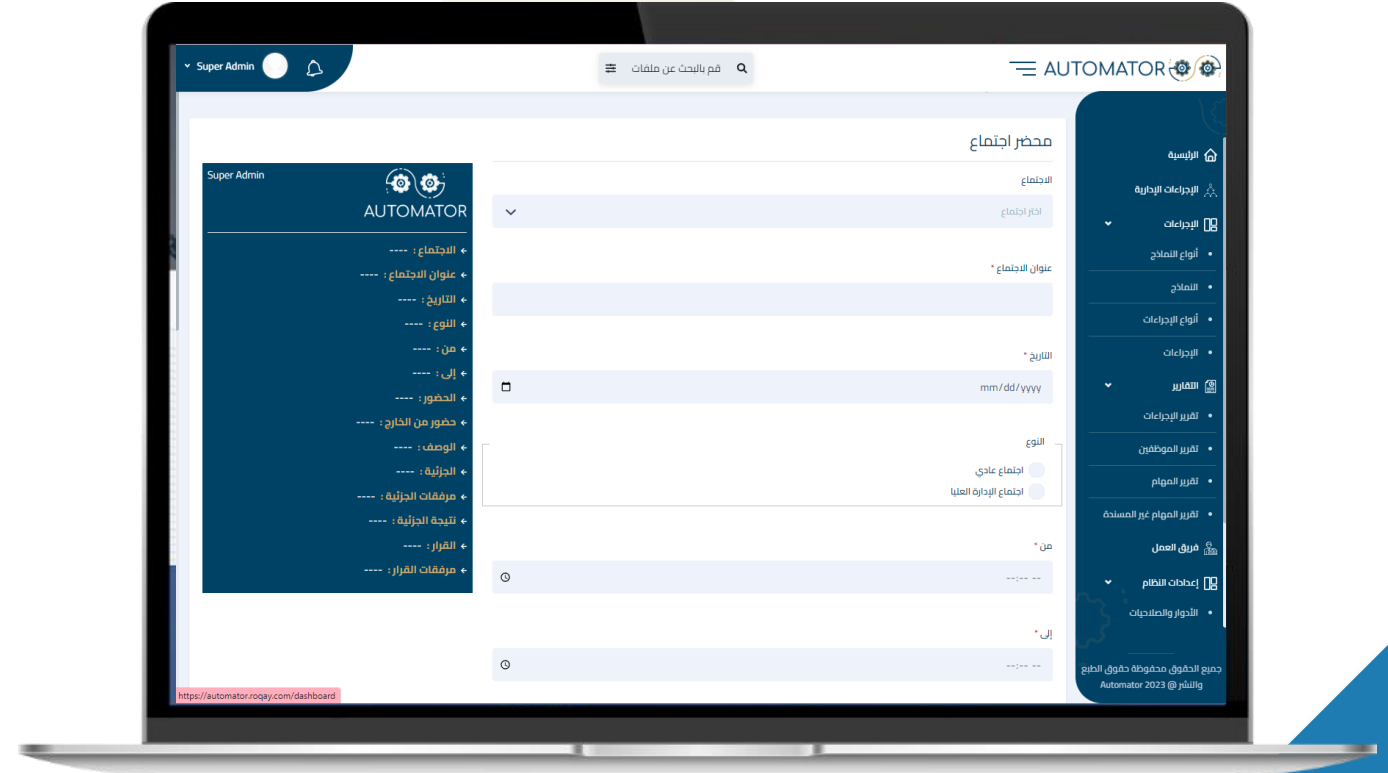
Process 6: **Internal Memo**

An Internal Memo is used as an official way of communication between different Departments within the Organization.

The Process is very simple, the initiating employee will create the Memo, select the receiver or receivers, and then submit the Request.

The Memo main participants (creator and receivers) have access to Print, Download, and Write Comments.
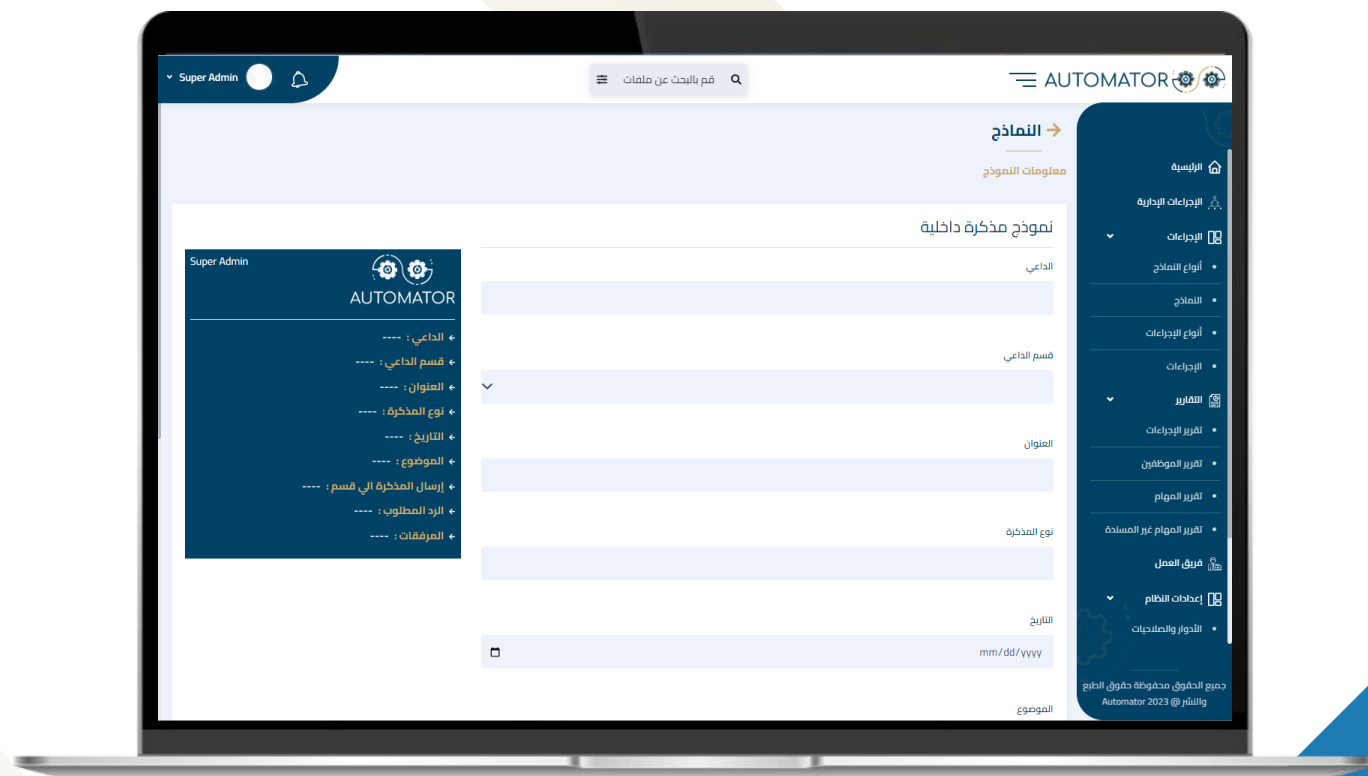
Process 7: **System Access Requests**

For security and confidentiality, if an employee wants access to a specific system, he/she needs to submit a request explaining the access reason, Duration, and type.

Similar to other Processes, The Request will go through the workflow until the employee in-charge grants access to the requesting employee.
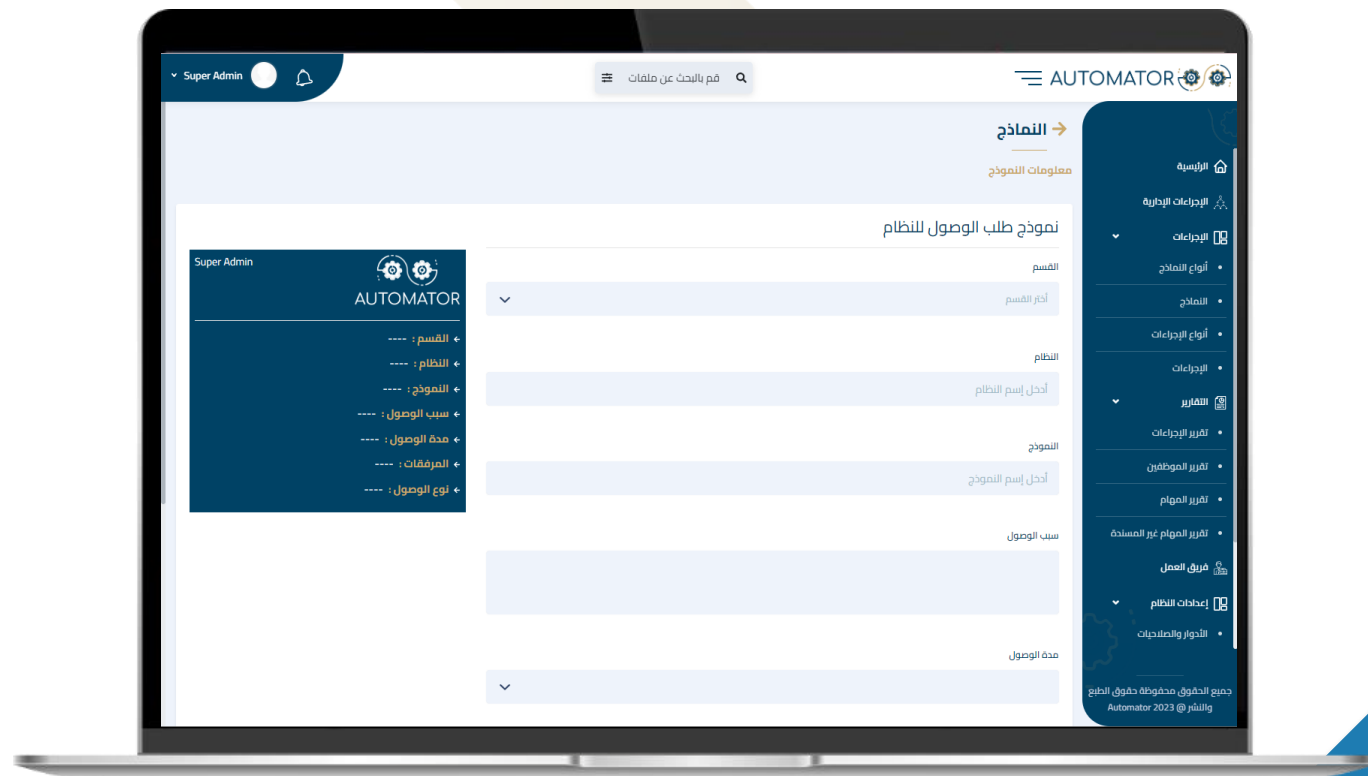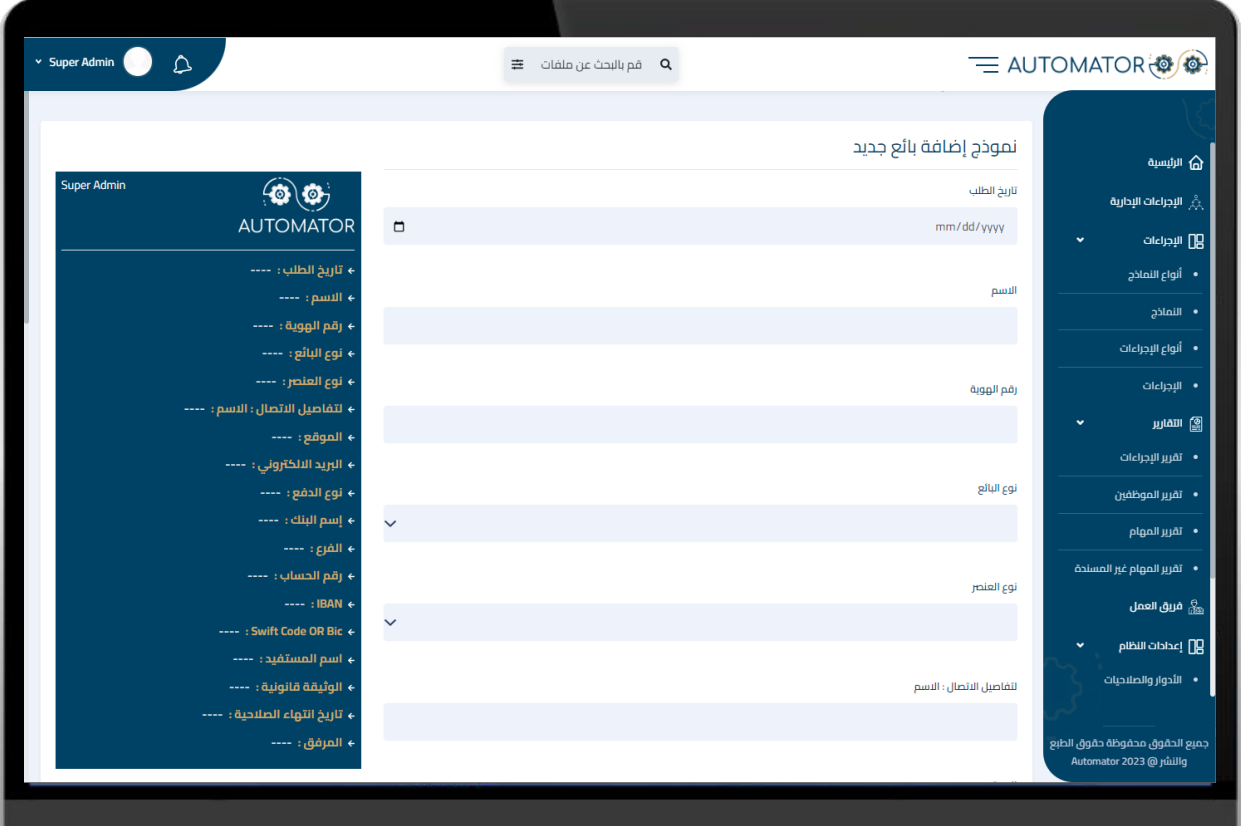
Process 8: **Material Request**

Employees can now easily order what they need from the organization's stock, track their orders and confirm their orders delivery.
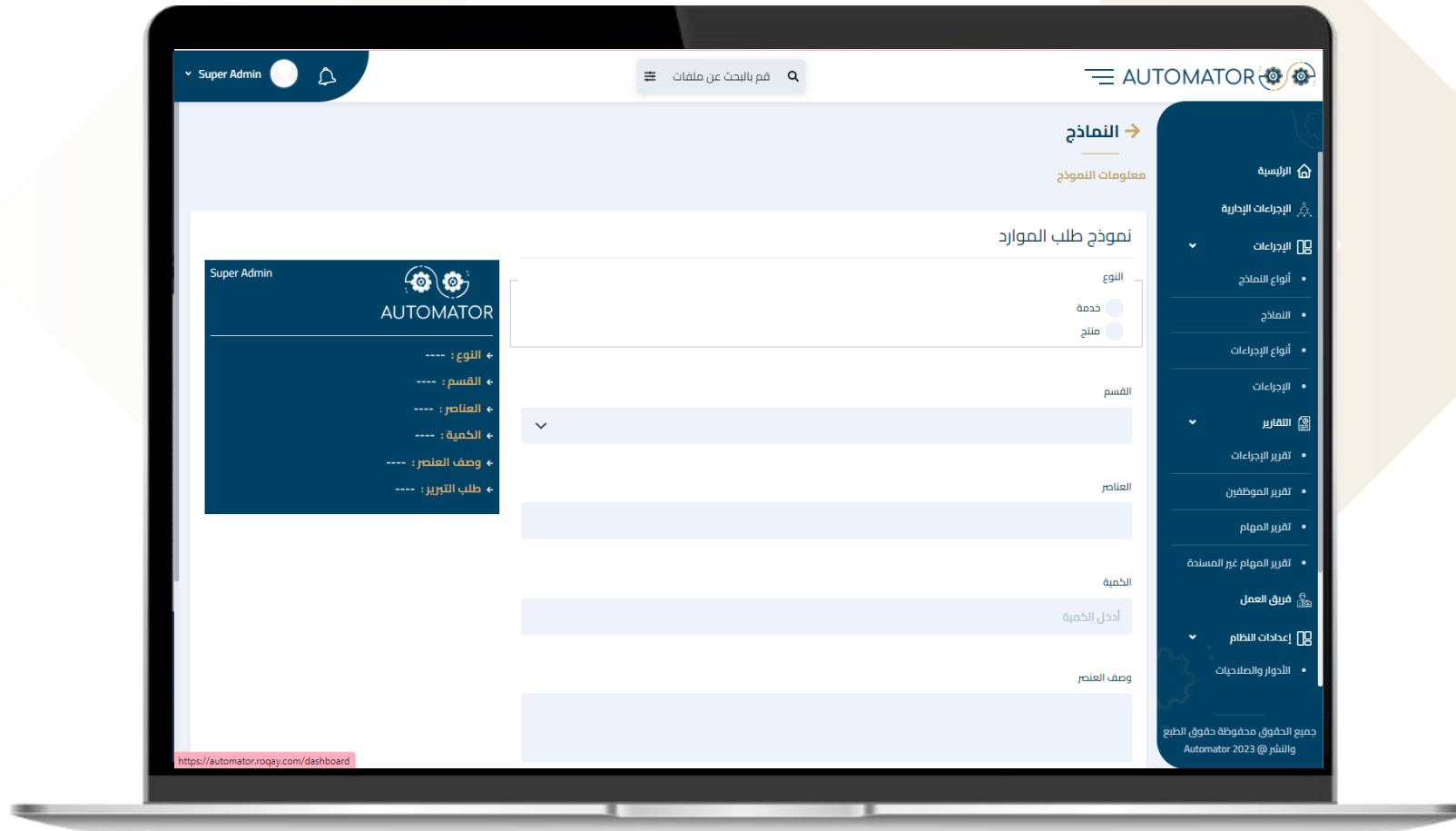
Process 9: **Adding Vendors**

To order any materials or services through the system, you must first have your list of preferred Vendors added to the system.

Adding Vendors Process has a complete workflow cycle which includes adding, reviewing and evaluating vendors who organization deal with.

Process 10: **RFQ Process**

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What if an Employee wants to buy something, and the organization doesn't have the specified Quotation to Start a Purchase Order?

Request For Quotation (RFQ) process facilitates acquiring various
quotations for one or more items from the organization's Preferred Vendors List.

The employee will simply open a New RFQ, write the item name, quantity and description, select desired vendors from the list, and hit the send button.

Process 11: **Purchase Order**

What if an Employee sends Material Request for something that doesn't exist in Stock? or what if he/she needs to buy a service?

Purchase Order Request process facilitates for the organization the process of purchasing materials and services being existing or new.

The responsible employee will create a New Purchase Order Request, select vendor, upload price quotation, insert payment terms, and submit the request.

Based on the submitted Purchase Order Request, the intended vendor will start their delivery process.

Process 12: **Payment Requests**

Control Your Payment!

To Start any Payment, you must initiate a Payment Request Process, once the request is approved, the payment order will start.
The system provides you with many types of Payment Requests and related Orders.

1. HR Payment Request

Which includes payments related to employees' benefits and compensation.

The authorized HR employee will add the HR Payment Request for a certain employee.

Process 12: **Payment Requests**

2. Beneficiary Payment Request

a. A list of Beneficiaries must be added to the system at first before starting this process.

b. Any Employee, with the right permissions, can submit this payment request to pay a specific Beneficiary from the list of beneficiaries on the system with a justifiable reason.

3. Petty Cash Request

a. An Authorized employee will add invoices related to the organization's purchases using his/her assigned fund.

b. When the fund's balance reaches Zero, the authorized employee must start Petty Cash Refund Request to reimburse the fund amount.

Process 13: **Payment Orders**

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1. HR Payment Order

To start this Process, the initiated HR Payment Request must be approved and completed its workflow cycle.

3. Petty Cash Payment Order

To start this Process, the initiated Petty Cash Payment Request must have been approved and completed its workflow cycle.

2. Beneficiary Payment Order

To start this Process, the initiated Beneficiary Payment Request must be approved and completed its workflow cycle.

4. Vendor Payment Order

a. To start this Process, the initiated Purchase Order Request must be updated with the last invoice sent by the Vendor, approved, and completed its workflow cycle.
b. Each Invoice will require a separate Payment Order.

Process 14: **Budget**

Each Department in the Organization has its own budget plan, which in turn is divided into several budget categories and each category is specified by an amount.

Some of the previously mentioned Processes will directly affect these budget plans, the system will clearly show these transactions in a detailed report for each budget category under each budget plan.

By using this system feature, all organization employees, with the right permissions, will be able to view each Department's policies and procedures.

Also, every Department will be able to submit a request to add, edit or remove a policy or a procedure, with an updated summary tracking these changes.

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