



Workflow Automation & SAM



Finding your IAITAM Oasis



Topics

- What is workflow automation
- Why automate
- Successful workflow automation
- Workflow automation tools
- Example workflows
- Questions



2

May 7-9, 2024 The M Resort  Las Vegas, NV



What is workflow automation

- Automating business processes
 - ▶ Ideal for repeatable, predictable processes
 - Many steps
 - Involving different groups
- Workflows that have been automated
 - ▶ HR on-boarding and off-boarding
 - ▶ Software requests
 - ▶ Hardware reclamation
- No AI 😊?



Why automate

- Improve efficiency and reduce errors
- Compliance with business processes & regulations
- Improved communication among different groups
- Cost savings
- Enhanced visibility
- Improved customer service
- Improved data security



Why automate now

- More processes are based on digital data
- Many choices in automation tools
- Many out-of-the box templates



5

May 7-9, 2024 The M Resort  Las Vegas, NV



Successful workflow automation

- Selecting the right workflows
 - ▶ Largest impact on the organization
 - ▶ Effort required to automate workflow
 - ▶ Start small
- Selecting the right people
 - ▶ Management & contributors
- Continuously monitor and improve
 - ▶ Statistics & personal feedback



Successful workflow automation

- Starts with the data
 - ▶ Automated, accurate, up-to-date
 - ▶ For SAM this means
 - Detailed hardware
 - Detailed software and actual usage
 - Vulnerable and EOL software
- Data format
 - ▶ Can be almost any format even Excel spreadsheets 😊).
 - ▶ Should be automated, accurate and up-to-date
 - ▶ Usually in a common database format, such as SQL Server.



Steps to implement workflow automation

- Identify and define the workflows to automate
 - ▶ Ideal for repeatable, predictable processes
 - ▶ Processes with the largest business impact
 - ▶ Ease of implementation
- Design the workflow
 - ▶ Involve a dedicated team to improve the process
 - ▶ Make the workflow independent of specific people
- Test and deploy the workflow
- Monitor performance and improve the workflow
 - ▶ Continual improvement



Workflow automation tools

- Hive, Smartsheet, Monday, Jira, Zapier, Trello, Asana, Nintex,...
- Our SAM & HWAM workflow examples use Microsoft Power Automate
- Decide on a tool based on
 - ▶ Templates for the processes you wish to automate
 - ▶ Interfaces to your apps or data sources
 - SAP, Oracle, Salesforce, Stripe, etc.

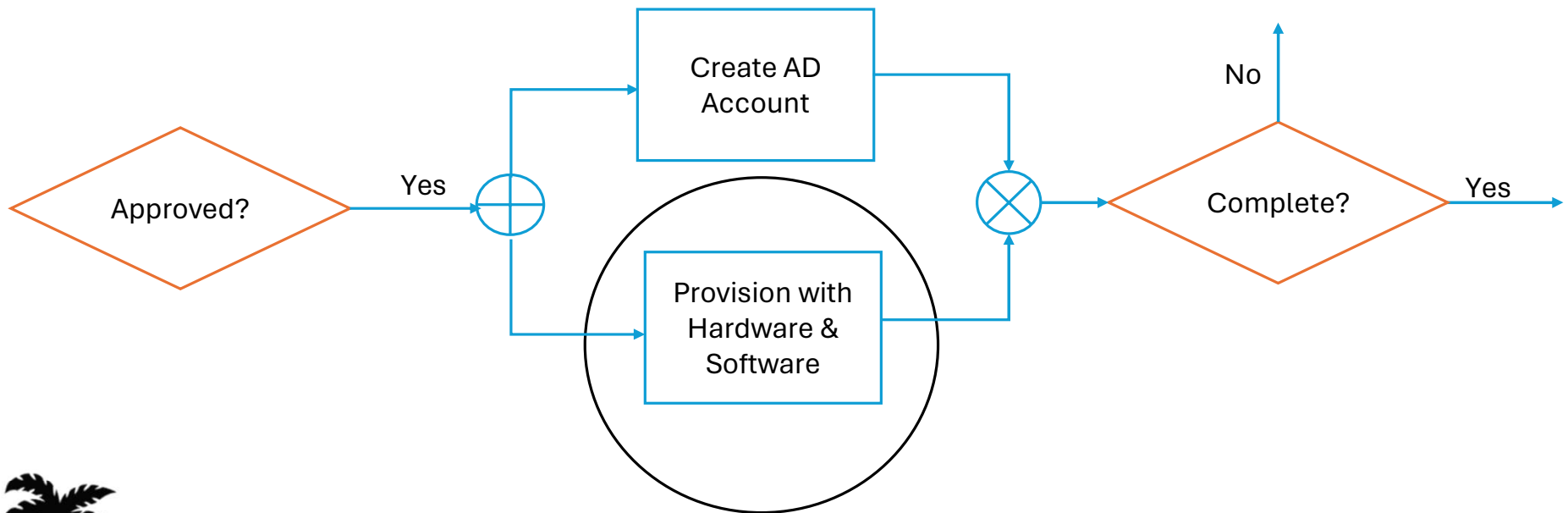


Workflow automation examples

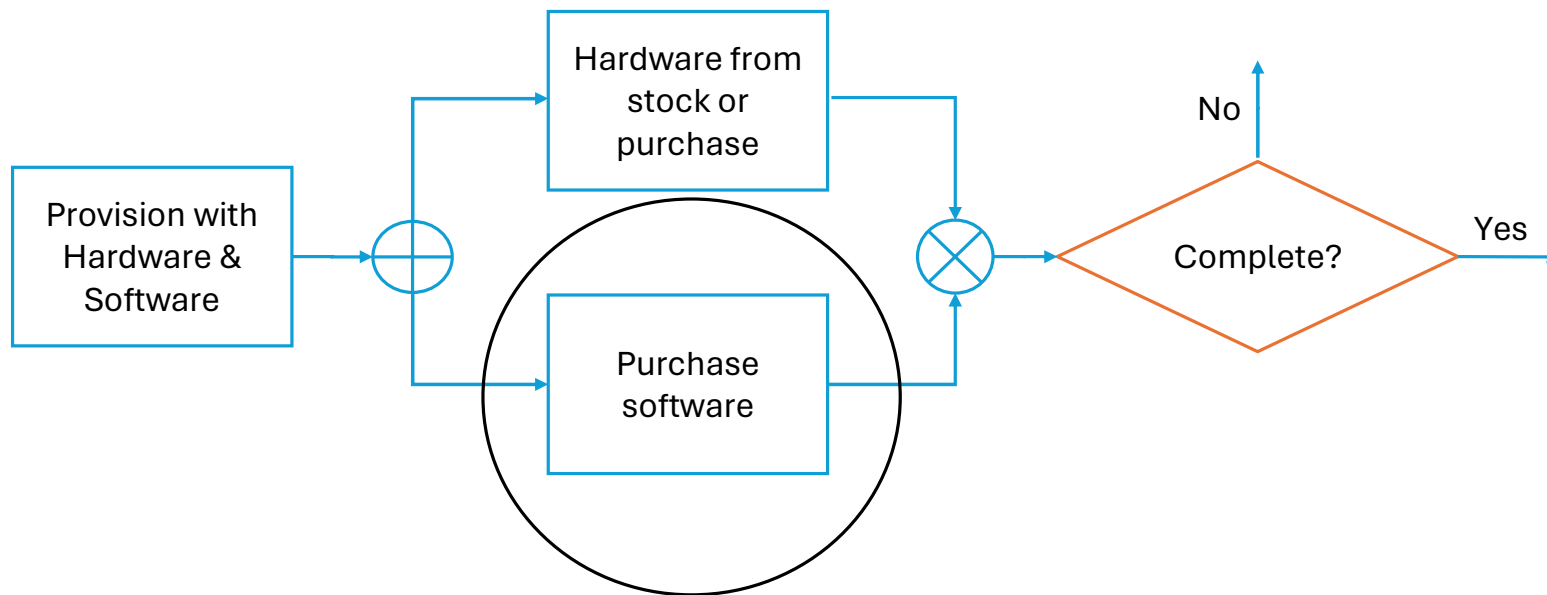
- HR on-boarding & off-boarding
- Software requests
- Hardware reclamation
- Unauthorized, vulnerable & EOL software



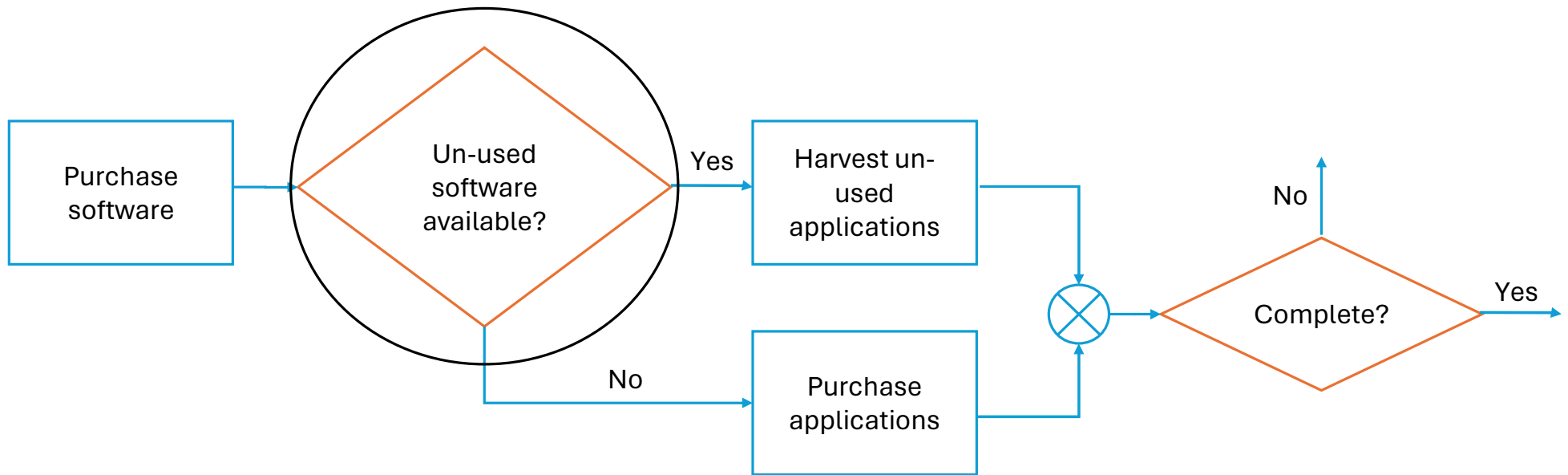
Employee On-boarding Example



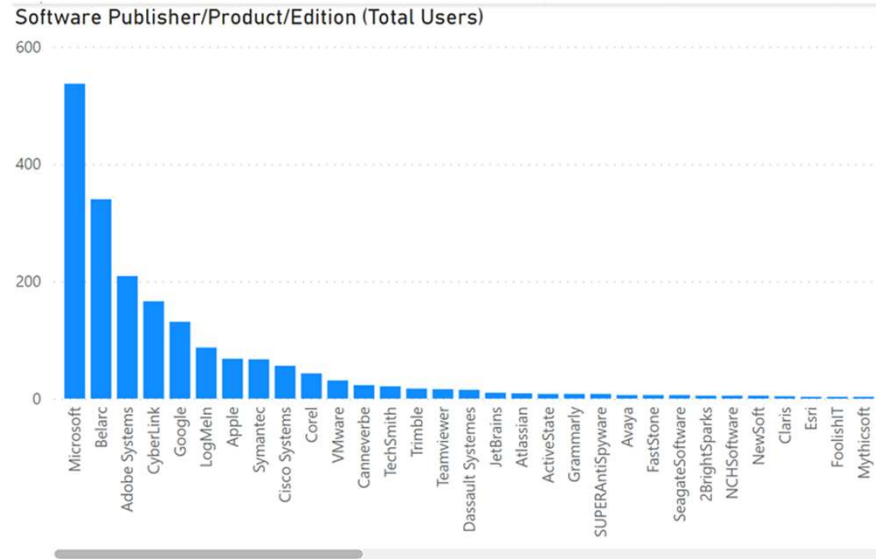
Employee On-boarding Example



Employee On-boarding Example



Software un-used for 180 days or more example



Software not used for X days

180 6916

License Required?

no

yes



Microsoft un-used software example

Company	Product	Edition	Version	License Model	LoginUser	LastUsedTimeByUser	ComputerName	LastUsedTimeComputer
Microsoft	Microsoft 365	Apps for enterprise	16	cloud user	mohanp	1/1/2024 12:56:00 AM	BANR90Y7DEW	1/1/2024 12:56:00 AM
Microsoft	Visual Studio	Professional	2022	cloud user	polifrs	10/23/2023 12:32:00 PM	TORPC0GA1Z0	10/23/2023 12:32:00 PM
Microsoft	Microsoft 365		16	cloud user	zhangxia	10/21/2023 7:27:00 PM	BEI6890MC5	10/21/2023 7:27:00 PM
Microsoft	Microsoft 365	Apps for enterprise	16	cloud user	ranjanr	10/21/2023 1:12:00 PM	SIN6VPW992	10/21/2023 1:12:00 PM
Microsoft	Visual Studio	Professional	2022	cloud user	gorobei	10/20/2023 9:06:00 AM	ADSKPF3FA9F1	10/20/2023 9:06:00 AM
Microsoft	Project	Professional	2016	device	ikedam	10/20/2023 6:36:00 AM	ADSKPF39ND9J	10/20/2023 6:36:00 AM
Microsoft	Visual Studio	Professional	2022	cloud user	leemi	10/19/2023 9:10:00 PM	ADSK11643613457	10/19/2023 9:10:00 PM
Microsoft	Visio	Professional	2016	device	penfolg	10/19/2023 4:51:00 PM	ADSKPF3Z0Q7K	10/19/2023 4:51:00 PM
Microsoft	Visio	Unknown	2021	device	lail	10/18/2023 8:46:00 AM	SFOPF1L7083	10/18/2023 8:46:00 AM
Microsoft	Visual Studio	Professional	2019	cloud user	bhata	10/17/2023 4:23:00 PM	SFO4VS6B42	10/17/2023 4:23:00 PM
Microsoft	Visio	Unknown	2021	device	katelao	10/17/2023 1:47:00 PM	MACPC1M2V1H	10/17/2023 1:47:00 PM
Microsoft	Project	Unknown	2021	device	vanmarm	10/17/2023 10:33:00 AM	REMPF2Q0LVH	10/17/2023 10:33:00 AM
Microsoft	Visual Studio	Professional	2019	cloud user	zhulian	10/17/2023 9:12:00 AM	MAN2VHNS22	10/17/2023 9:12:00 AM
Microsoft	Project	Professional	2016	device	siron	10/17/2023 6:41:00 AM	ADSKPC2EYK49	10/17/2023 6:41:00 AM
Microsoft	Visio	Unknown	2021	device	skidmog	10/17/2023 5:17:00 AM	ADSKPW015RGN	10/17/2023 5:17:00 AM
Microsoft	Project	Unknown	2021	device	takahay	10/16/2023 6:04:00 PM	TOKR90Y3NSA	10/16/2023 6:04:00 PM
Microsoft	Visio	Professional	2016	device	catalis	10/16/2023 8:12:00 AM	ADSKPC2DJSNB	10/16/2023 8:12:00 AM

This data is automatically sent to Power Automate and a service ticket is created.



Creating workflow with Power Automate

Data from Power BI:

- Un-used software to harvest
- Software to provision to employees
- Software to update or remove
- Users to add or remove from AD
- Hardware to provision or reclaim



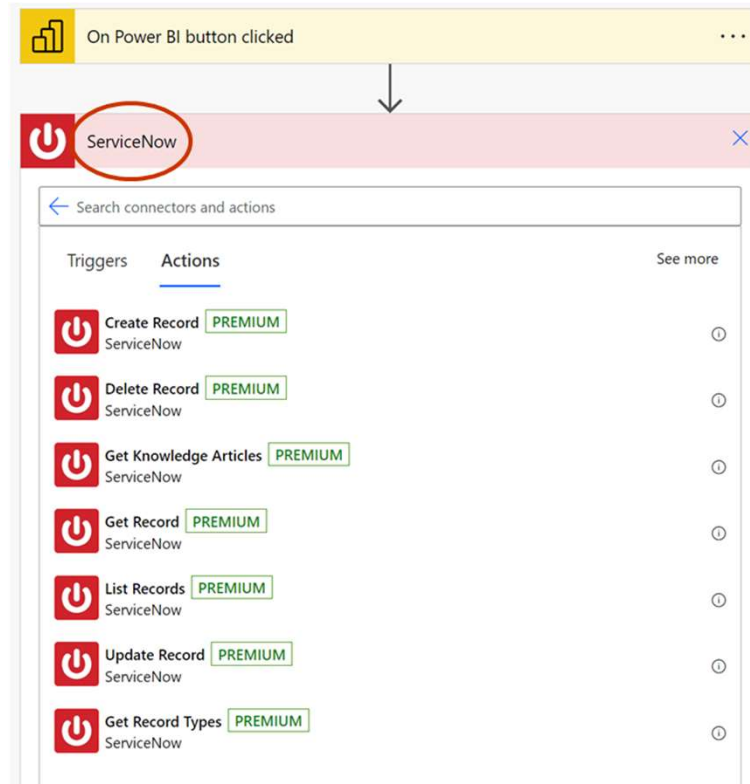
Power Automate

Create a button that triggers automated tasks without leaving Power BI. [Learn More](#)

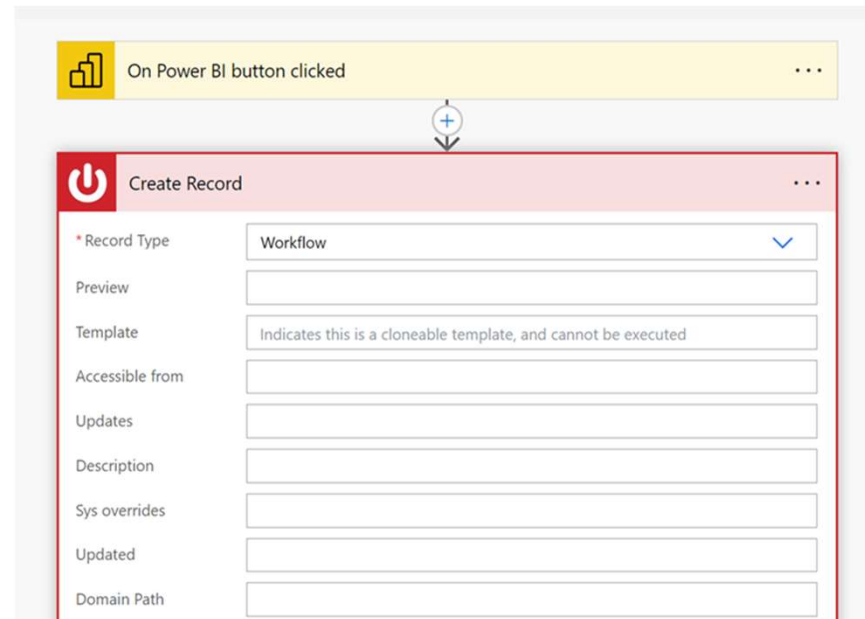
- 1 Add data**
Drag the fields needed for your flow (automated task) into the field well.
- 2 Set up your flow**
Select Edit in the More options (...) menu of this visual, and follow the instructions to create a flow.
- 3 Apply and share**
Select Apply to connect the flow to your button. Make sure you share the flow with the report readers who need access to use it.
- 4 Format your button**
Resize and format your Power Automate button.



Creating workflow with Power Automate



Creating workflow with Power Automate

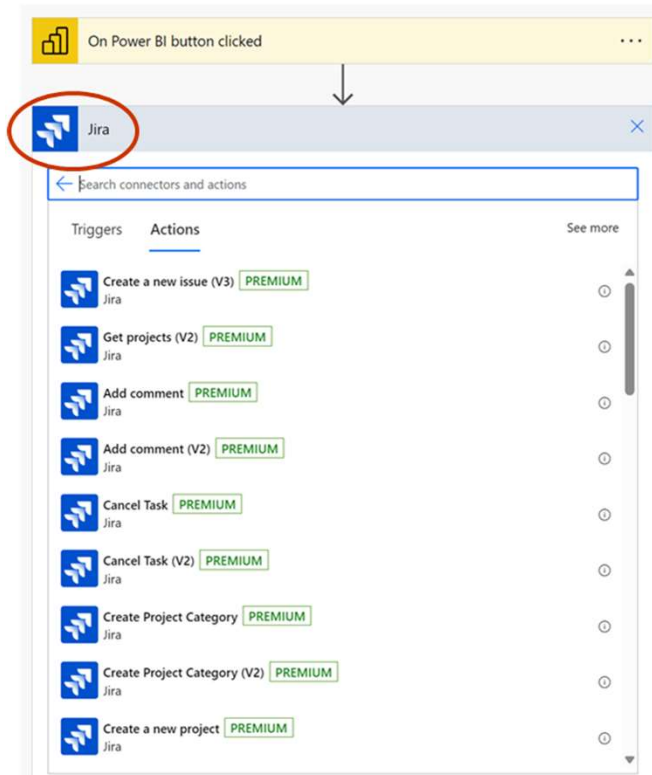


The screenshot shows a Power Automate interface. At the top, a yellow bar contains a bar chart icon and the text "On Power BI button clicked". Below this is a red bar with a power icon and the text "Create Record". The main form area contains several fields:

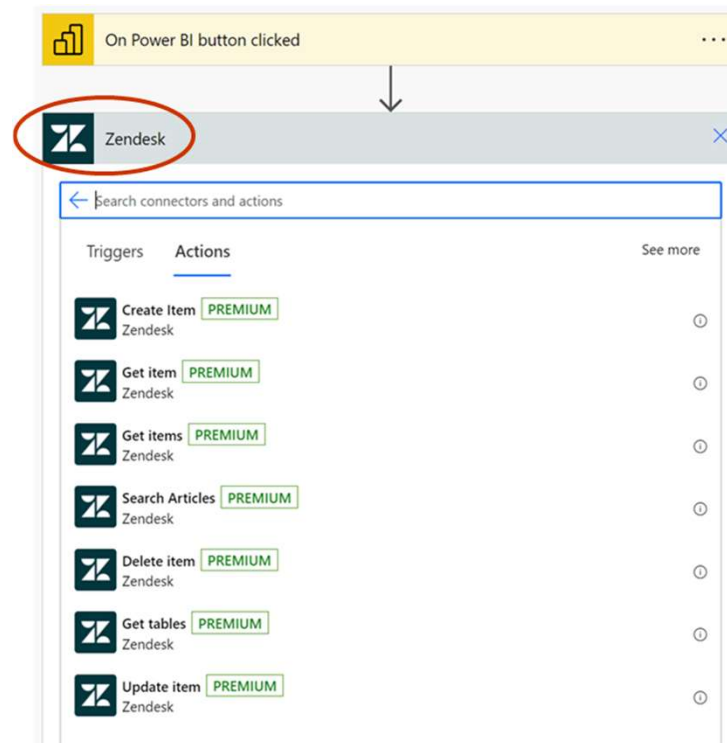
- * Record Type: Workflow (dropdown menu)
- Preview: (empty text box)
- Template: Indicates this is a cloneable template, and cannot be executed (text box)
- Accessible from: (empty text box)
- Updates: (empty text box)
- Description: (empty text box)
- Sys overrides: (empty text box)
- Updated: (empty text box)
- Domain Path: (empty text box)



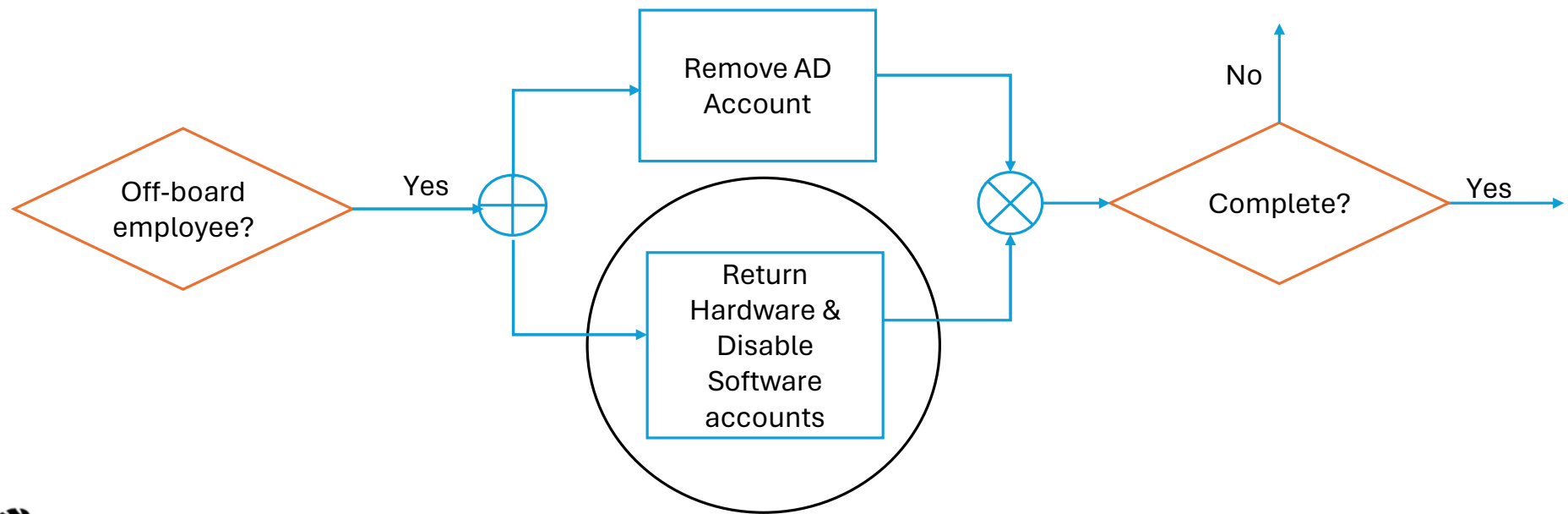
Creating workflow with Power Automate



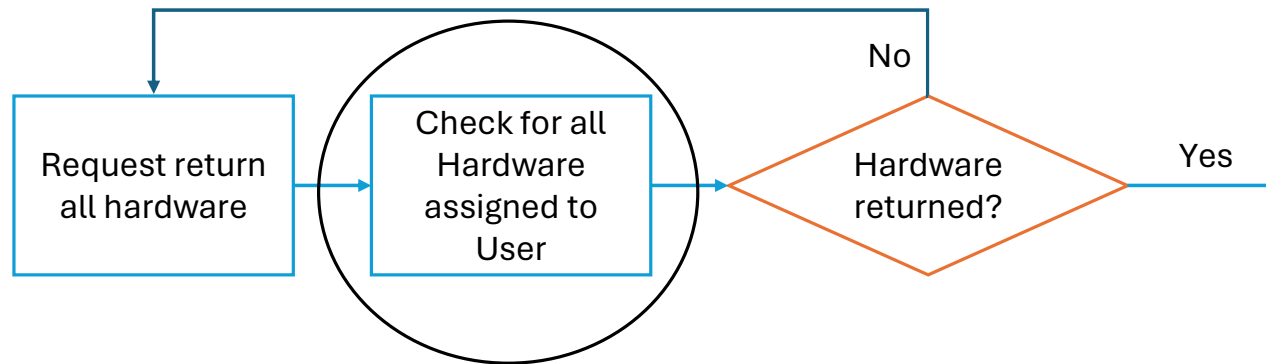
Creating workflow in Power Automate



Employee Off-boarding Example



Employee Off-boarding Example



Hardware from Discovery database

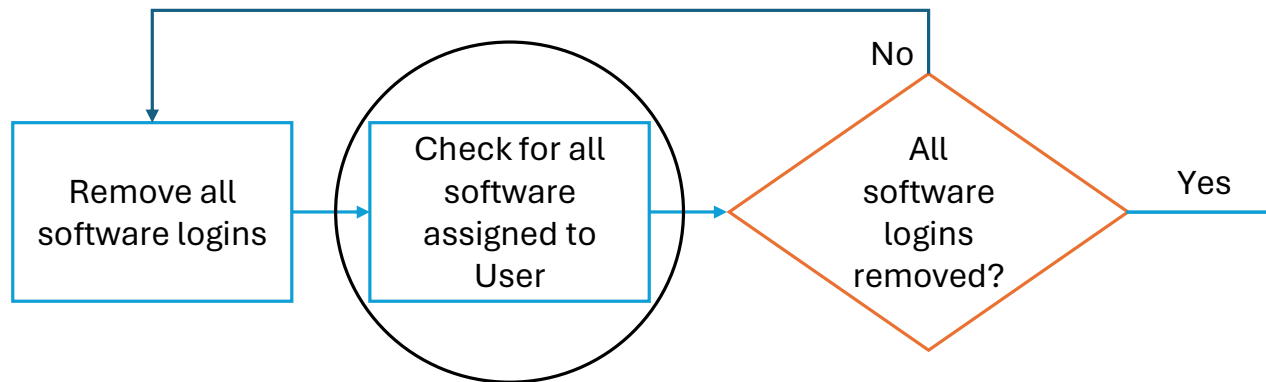
Systems List

Computer	Login User	System Make	System Model	MachineClass	MachineType	OS Name	OS Version	OS Edition	PrimarySerialNumber
desk_2503	1011	ASUS	All Series	Workstation	P	Windows	10	Professional (x64)	131220223004790
desk_1314	1011	Dell	OptiPlex 3020	Workstation	P	Windows	10	Professional (x64)	7SC3382
desk_2506	1011	Dell	Vostro 470	Workstation	P	Windows	10	Professional (x64)	342TNW1

This data is automatically sent to Power Automate and a service ticket is created.



Employee Off-boarding Example



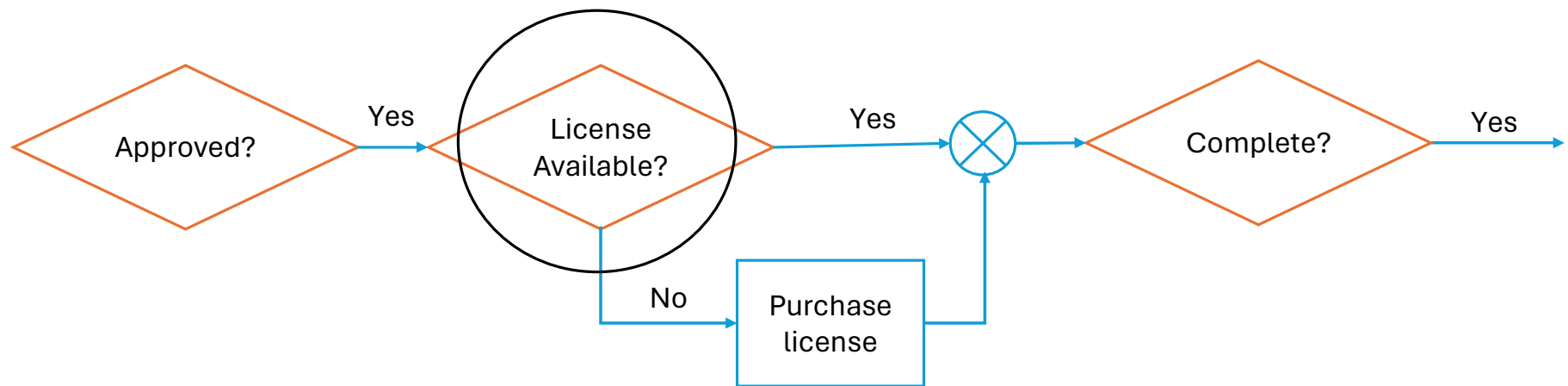
Software from Discovery database

Software List									
Company	Product	Edition	Version	License Model	License Required	Subscription Assigned	ProductKey	LoginUser	LastUsedTimeByUser
Microsoft	Windows	Professional	10	device	yes	no		1011	5/6/2020 6:38:00 AM
Microsoft	Windows	Professional	10	device	yes	no		1011	5/6/2020 6:38:00 AM
Microsoft	Windows	Professional	10	device	yes	no		1011	5/6/2020 6:38:00 AM
Belarc	BelMonitorClient	None	8	device	yes	no	3d7a172f	1011	5/6/2020 5:39:00 AM
Google	GoogleEarth Pro	None	7	device	yes	no		1011	3/19/2019 5:00:00 AM
Microsoft	Office	Standard	2019	device	yes	no		1011	3/8/2019 7:30:00 PM
Adobe Systems	Photoshop	None	CS2	user	yes	no	1045-1412-5685-1654-6343-1431	1011	4/18/2016 6:44:00 PM
Adobe Systems	Lifecycle Designer	None	9002	user	yes	no		1011	
Autodesk	z??? AutodeskSketchBookDesign r2013	None	2013	user	yes	no	393-39499945	1011	
Cisco Systems	Webex Meetings	None	10032	user	yes	no		1011	
CyberLink	PowerDirector	None	12	device	yes	no	MES150728-02	1011	
CyberLink	PowerDVD	None	9	device	yes	no	DVD101202-02	1011	
Microsoft	Project	Standard	2010	device	yes	no	6Q7Y8-J8XX8-CP4DP-9PXD-	1011	

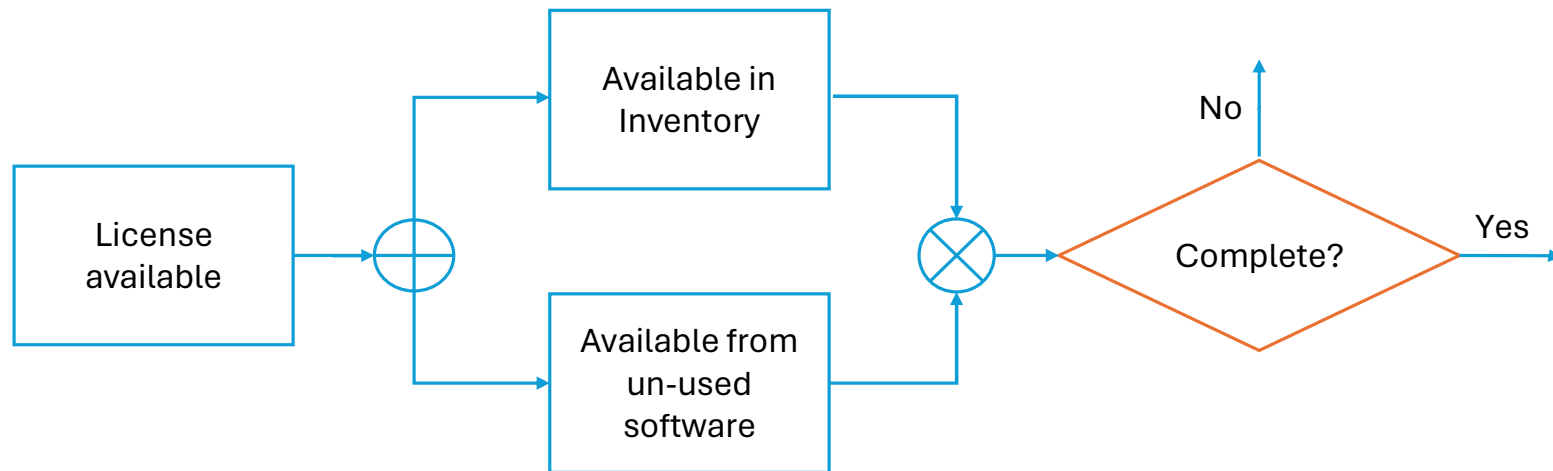
This data is automatically sent to Power Automate and a service ticket is created.



Software Request Example



Software request example



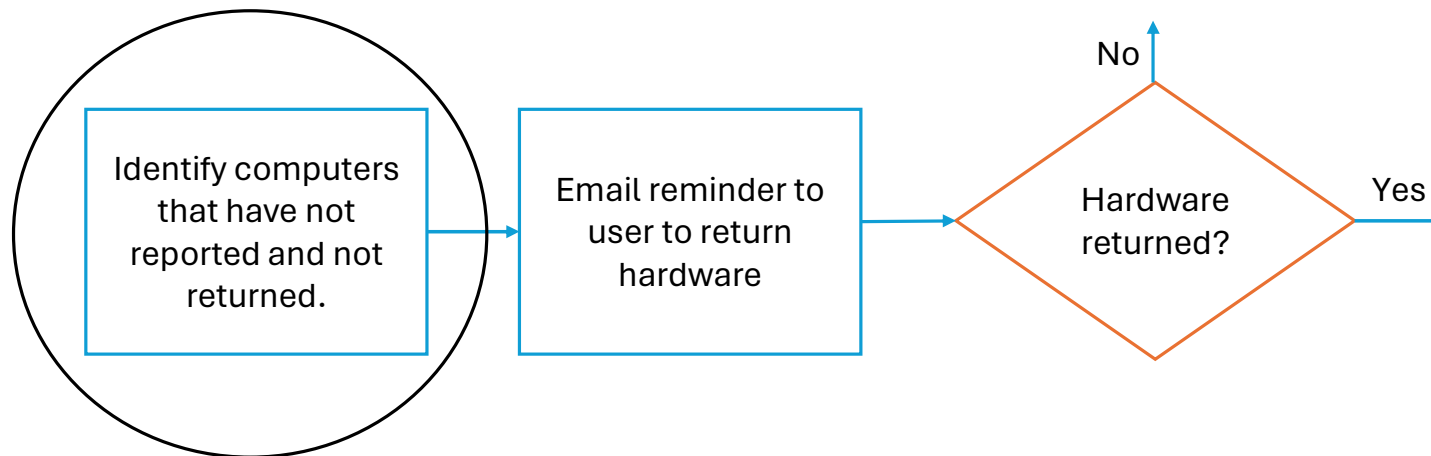
Adobe un-used software

Computer	User	Email	Product	Edition	Version	License Type	Last Used Date (By Computer)	Last Used Days Ago (By Computer)	Last Used Date (By User)	Last Used Days Ago (By User)
desk_1004	11401	bdpym.fmpchj@...	Illustrator	None	CS6	cloud user	5/23/2021	500	5/23/2021	500
desk_1146	11401	bdpym.fmpchj@...	Illustrator	None	2015	cloud user	10/10/2021	360	10/10/2021	360
nb_985	23913	yewadx.vlkxlnh...	Acrobat	Pro DC T	2018	cloud user	10/13/2021	357	10/13/2021	357
nb_985	23913	yewadx.vlkxlnh...	InDesign	None	CS6	cloud user	11/17/2021	322	11/17/2021	322
nb_985	23913	yewadx.vlkxlnh...	Photoshop	None	CS6	cloud user	11/23/2021	316	11/23/2021	316
desk_2290	142990	dhjwzo.qjjetq@...	Photoshop	None	CS3	cloud user	12/21/2021	288	12/21/2021	288
nb_449	23248	wavagd.svbgwlv...	Captivate	None	11	cloud user	1/13/2022	265	1/13/2022	265
nb_449	23248	wavagd.svbgwlv...	Creative Cloud All Apps Pro	Enterprise	2020	cloud user	2/26/2022	221	2/26/2022	221
desk_387	25217	vaar.afhh@ucw...	Acrobat	Pro DC T	2020	cloud user	4/19/2022	169	4/19/2022	169
desk_387	25217	vaar.afhh@ucw...	Creative Cloud All Apps Pro	Enterprise	2020	cloud user	4/27/2022	161	4/27/2022	161

This data is automatically sent to Power Automate and a service ticket is created.



Hardware reclamation example



Hardware reclamation example

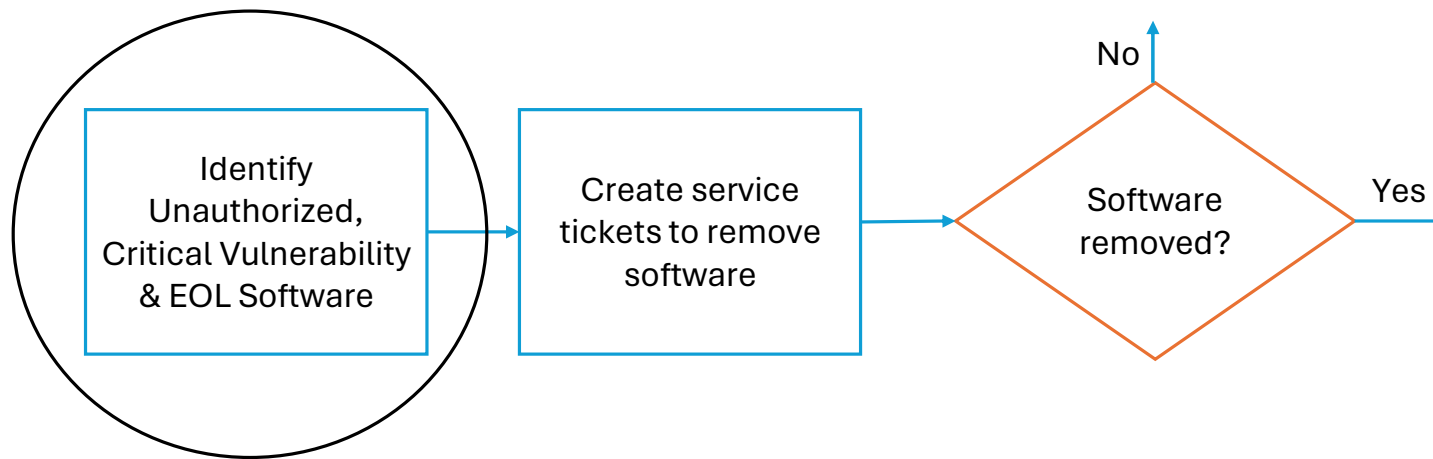
ComputerName	LoginUser	Email	SystemManufacturer	SystemModel	EnclosureType	SystemSerialNumber	ChassisAssetTag	Computer UUID
Steve's MacBook Pro	stevemarshall		Apple	MacBookPro17,1		FVFFT4RDQ05F		02399C2A-FE29-5A9F-
Aaron's MacBook Pro	aaronsevern		Apple	MacBookPro16,1	Laptop	C02CJ1J3MD6T		A4A91831-2AC5-5DC-
ACS's MacBook Pro	andrianagutierrez		Apple	MacBookPro15,2	Laptop	C02CF31RLVDL		33D61916-91A6-5752-
ACS's MacBook Pro	dwyerj		Apple	MacBookPro16,1	Laptop	C02D70MYMD6T		5F7F767A-5DA1-5355-
ACS's MacBook Pro	eckenhj		Apple	MacBookPro16,2	Laptop	C02D56NHML85		5608E600-4CCB-5308-
Aditya's MacBook Pro	sanghia		Apple	MacBookPro16,1	Laptop	C02FF3QDMD6N		E53E1495-0433-5E8C-
admin's MacBook Pro	admin		Apple	MacBookPro11,3	Notebook	C02NR4W1G3QD		79D0583D-6385-557B-
admin's MacBook Pro	admin		Apple	MacBookPro16,1	Laptop	C02FC4XDMD6T		BF7F4794-0AE2-523A-
admin's MacBook Pro	ramalim		Apple	MacBookPro14,3	Laptop	C02WV263HTDF		BC8026A6-0025-5E31-
administrator's MacBook Pro	aditi		Apple	MacBookPro16,1	Laptop	C02ZR6WQMD6N		A3842644-87DC-5268-

Not reported in 30 days and not returned computers.

This data is automatically sent to Power Automate and a service ticket is created.



Unauthorized, Vulnerable & EOL Software example



Unauthorized, Vulnerable & EOL Software example

Hotfixes Needed

Computer	Name	BulletinId	Severity	Vendor	Version	Description
desk_391	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.20.6 32-bit	Oracle Critical Patch Update Advisory - April 2020
desk_962	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.20.6 32-bit	Oracle Critical Patch Update Advisory - April 2020
nb_190	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.210.7 32-bit	Oracle Critical Patch Update Advisory - April 2020
srv_1844	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.210.7 64-bit	Oracle Critical Patch Update Advisory - April 2020
desk_1633	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.220.4 32-bit	Oracle Critical Patch Update Advisory - April 2020
desk_1741	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.240.7 64-bit	Oracle Critical Patch Update Advisory - April 2020
srv_2146	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.250.4 32-bit	Oracle Critical Patch Update Advisory - April 2020
srv_2467	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.250.4 32-bit	Oracle Critical Patch Update Advisory - April 2020
desk_949	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.270.7 32-bit	Oracle Critical Patch Update Advisory - April 2020
desk_1456	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.330.3 32-bit	Oracle Critical Patch Update Advisory - April 2020
desk_1336	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.430.1 32-bit	Oracle Critical Patch Update Advisory - April 2020
nb_647	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.430.1 32-bit	Oracle Critical Patch Update Advisory - April 2020
nb_648	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.430.1 32-bit	Oracle Critical Patch Update Advisory - April 2020
desk_1084	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.450.6 64-bit	Oracle Critical Patch Update Advisory - April 2020
srv_1370	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.450.6 64-bit	Oracle Critical Patch Update Advisory - April 2020
srv_961	CpuApr2020	CpuApr2020	EOL	Oracle	Java 6.0.450.6 64-bit	Oracle Critical Patch Update Advisory - April 2020

This data is automatically sent to Power Automate and a service ticket is created.



Summary

- Workflow automation offers major benefits to organizations of all sizes
 - ▶ Better customer service
 - ▶ Better results and reduced errors
 - ▶ Compliance with regulations
 - ▶ Cost savings
 - ▶ Improved visibility
 - ▶ Better data security
- SAM can be an integral part of workflow automation
 - ▶ Its all about the data and making it available
 - ▶ Automated, accurate, up-to-date



Belarc

- Over 1,800 customers worldwide
 - ▶ Autodesk, Environmental Protection Agency, Federal Aviation Administration, NASA, Patent & Trademark Office, Department of State, Travelers Insurance, US Air Force
 - ▶ Many long term >10 years
 - ▶ Located in 50 countries
- Eight US and Worldwide Patents
- Founded 1997, privately owned



Questions and contact

Sumin Tchen

Belarc, Inc.

stchen@belarc.com

info@belarc.com

www.Belarc.com

