RPA Projects

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Live

OPPD Referral - Daily

We developed and deployed an OPPD Referral automation to streamline the handling of referral forms submitted to the Older People and People with Disabilities service via the council's website. The primary objective was to reduce the significant administrative burden and delays caused by manually processing 15–35 referrals per day in the Mosaic social care system, each previously taking around 20 minutes. To achieve this, we utilised RPA built in UiPath to extract and process data from complex CSV referral forms containing over 100 data fields, download and attach supporting documents, and intelligently route each referral through the appropriate pathway in Mosaic, including new person creation, existing person matching, or subjectless referrals. The outcome was a robust, end-to-end automated solution that reduced processing time to approximately three minutes per referral, improved accuracy and consistency, ensured vulnerable adults were triaged more quickly, and delivered a time saving of just under one full-time equivalent, supported by comprehensive error handling, audit logging, and automated reporting to stakeholders.

iCasework – Monthly

We developed and deployed an iCasework Data Extract automation to support data visualisation and reporting through a Power BI dashboard. The primary objective was to streamline the monthly data preparation pipeline and ensure timely availability of up-to-date casework information for analysis. To achieve this, we utilised RPA to automatically extract reports from the iCasework system, convert them into the required format, and upload them to the appropriate location for ingestion into Power BI. The outcome was a reliable, repeatable process that reduced manual effort, improved data consistency, and ensured stakeholders had access to accurate and current casework insights for informed decision-making.

Closed Accounts in Credit – Weekly

We developed and deployed a Closed Accounts Credit Processing automation to streamline the weekly handling of refunds and credit transfers within the NEC Revenues & Benefits system. The primary objective was to reduce the manual effort involved in processing over 100 transactions each week while ensuring financial accuracy and consistent decision-making. To achieve this, we utilised RPA to read and validate input data from Excel, assess account eligibility based on criteria such as end dates and account status, and manage exceptions including executor

accounts and accounts in debit. The automation automatically created system notes, transferred balances for eligible accounts, and produced a detailed status report summarising successful completions, skipped cases, and failures, with automated notifications triggered when input files were missing. The outcome was a robust, auditable solution that reduced manual effort by approximately 90%, improved accuracy, and delivered significant efficiency and control improvements across the process.

PDF Conversion Pre-Redaction — *Weekly*

We developed and deployed a Document Conversion to PDF automation to standardise incoming documents for secure downstream redaction processes. The primary objective was to ensure consistency and compliance by converting a wide range of file formats, including Word, Excel, CSV, MSG, text, and image files, into a single PDF format. To achieve this, we utilised RPA built with UiPath to automatically process over 800 files per month, convert them into PDFs, and upload the outputs to a designated SharePoint folder. The outcome was a streamlined and reliable document handling process that eliminated manual effort, ensured all files met redaction requirements, improved accuracy, and strengthened compliance across the document management workflow.

Void Duplicate Extract — Weekly

We developed and deployed a Void Duplicate Removal automation to improve data accuracy and streamline record management within the NEC Revenues & Benefits environment. The primary objective was to identify and remove duplicate records by comparing data from two Excel files while maintaining a clear audit trail. To achieve this, we utilised RPA to extract and compare data from both files, remove duplicate entries from the source datasets, and archive the identified duplicates in a separate Excel file for reference and auditing. The automation runs weekly and is integrated with NEC Revenues & Benefits, sending automated email notifications to subject matter experts summarising the outcome, including scenarios where no files are found, no duplicates are identified, or duplicates are successfully processed. The outcome was a reliable, auditable solution that reduced manual effort, improved data integrity, and provided transparent reporting through automated HTML-formatted email summaries.

CDM and F.30 Extract - Monthly

We developed and deployed an automated CDM and F.30 Extract process to streamline monthly data extraction from SAP. The primary objective was to ensure accurate and timely generation of Dunning and No Dunning reports, reducing

manual effort and improving consistency. To achieve this, we utilised UiPath RPA to execute SAP transaction F.30, download the reports, and upload them into designated SharePoint folders. The outcome was a fully automated solution running on a scheduled basis, delivering benefits such as improved data accuracy, reduced operational risk, and enhanced efficiency through automated notifications and structured file management.

Nalytics & FRA Extraction – One off

We developed and delivered a series of one-off RPA automations to support the decommissioning of legacy systems where data extraction was not straightforward or commercially viable. The primary objective was to securely extract, format, and archive critical data from platforms such as Nalytics, Apex, and Egress, enabling the council to retire these systems in a timely and compliant manner. To achieve this, we utilised tailored RPA solutions executed in parallel across multiple machines to meet strict deadlines, processing large and complex datasets including over 100,000 records from Nalytics, thousands of documents from Apex, and more than 30GB of mixed file types from Egress. The outcome was a successful and accelerated decommissioning programme that saved over 1,700 hours of manual effort, reduced operational risk, and contributed to annual licence savings in excess of £140,000.

Borrowbox - Monthly

We developed and deployed an automation to support data ingestion for a Power BI dashboard. The primary objective was to ensure timely and consistent availability of reporting data. To achieve this, we utilised RPA to automatically extract four reports from the BorrowBox system and upload them to SharePoint for ingestion. The outcome was a reliable, hands-free process that reduced manual effort and ensured up-to-date data for reporting and analysis.

Cautionary Contacts – As necessary

We developed and deployed a Cautionary Contacts solution to centralise and manage sensitive contact information across services. The primary objective was to ensure accurate identification and handling of cautionary contacts, improving safeguarding and compliance. To do this we utilised Canvas Apps, Power Automate and RPA. The outcome was a secure, integrated system enabling authorised staff to access and update records efficiently, delivering benefits such as enhanced safety protocols, reduced risk of errors, and improved collaboration between teams.

Planning Consultation – Daily

We developed and deployed a Planning Consultation Data Entry automation to streamline the entry of consultation information into the Civica APP system within the CMU – Complaints Update screen. The primary objective was to eliminate the time-consuming manual entry of planning consultation data, which previously took staff between 15 and 20 minutes per record and often led to backlogs. To achieve this, we utilised RPA to monitor a designated network folder for incoming CSV files, extract and queue each consultation record in Orchestrator, archive the original files for audit purposes, and automatically input the data into Civica APP using front-end UI automation. The outcome was a reliable, end-to-end process that significantly reduced manual workload, improved data accuracy, and ensured timely and consistent updates to the planning consultation log.

TENS file closure – Daily

We developed and deployed a Licensing Closure automation to streamline the daily updating of licensing records within the Civica APP system. The primary objective was to remove the need for manual data entry and ensure timely, accurate closure of licensing records. To achieve this, we utilised RPA to extract licensing closure data from a daily CSV email attachment, process each row as a separate queue item in Orchestrator, and automatically input the information into Civica APP via the L1U – Licensing Update screen. The outcome was a reliable, automated process that improved data accuracy, reduced administrative effort, and ensured licensing records were consistently updated without delay.

Housing Association Formatting Corrections - Weekly

We developed and deployed Housing Association Formatting Corrections automation to ensure consistent and reliable weekly data submissions from housing associations. The primary objective was to standardise incoming CSV files for the Lets and Voids processes, ensuring they met the required structure of 12 columns for Voids and 7 columns for Lets. To achieve this, we utilised RPA to clean and validate each file by removing blank rows, stripping unwanted characters such as commas and quotation marks, formatting all dates to a standard dd-MMM-yyyy format, and identifying structural issues. Rows with insufficient columns were flagged and saved to a separate incomplete records file, while rows with excess columns were corrected by intelligently consolidating surplus data into the final column. The outcome was a robust, automated data cleansing process that produced audit-ready outputs, reduced manual intervention, improved data quality, and delivered clear email summaries to stakeholders, with cleaned files saved back to the network drive ready for use.

Egress Extraction – One off

We developed and deployed an automated Egress Data Extract process to facilitate the migration of files from the Egress platform to SharePoint following its decommissioning. The primary objective was to ensure accurate and timely transfer of large volumes of data while reducing manual effort and risk of errors. To achieve this, we utilised UiPath RPA to log into Egress, zip subfolders, create replica directories, and upload files to designated SharePoint folders. The outcome was a one-time automated solution that delivered significant time savings, improved data integrity, and enhanced efficiency through structured file management and automated status reporting.

FC & P - Daily

We developed and deployed a Shared Mailbox Statistics Reporting automation to provide consistent, data-driven insight into email volumes and performance across multiple council mailboxes. The primary objective was to replace manual monitoring with an automated, repeatable reporting process that delivered clear and timely operational metrics. To achieve this, we utilised RPA to extract key statistics from each shared mailbox, including completed, incoming, and outstanding email volumes, average email age, and the oldest outstanding item, with additional SAP-based analysis for specific mailboxes covering vendor creation, amendments, queries, and blocking activities. The automation incorporates robust exception handling for undelivered emails, comprehensive logging, and automatically emails stakeholders a summary report containing an HTML-formatted table of key metrics and a dynamic bar chart for visual clarity. The outcome was a reliable reporting solution that improved transparency, reduced manual effort, and enabled more effective workload management and performance oversight.

Food Business Registration – 3X weekly

We developed and deployed a Food Business Registration Upload automation to streamline the handling of registration forms within the Civica APP system. The primary objective was to eliminate the manual effort involved in uploading food business registration forms received via email, ensuring timely and consistent updates for the Environmental Health service. To achieve this, we utilised RPA to monitor a dedicated inbox for incoming registration emails, extract the required details, and upload the original PDF forms directly into the relevant records via the Complaints Update screen in Civica APP. The outcome was an efficient and reliable process that saved approximately 15 minutes per transaction, improved data consistency, and ensured registrations were processed promptly and accurately.

BIDs Refund – 3X weekly

We developed and deployed an automated BIDs Refund process to streamline the handling of refund requests for overpaid BID levies. The primary objective was to reduce manual effort, improve accuracy, and accelerate the refund process. To achieve this, we utilised UiPath RPA to extract refund request forms from NECDM, validate details against NEC BIDS, populate a pre-formatted Excel template, and email the refund request to the relevant BID company. The outcome was a fully automated solution running on a scheduled basis, delivering benefits such as faster processing, improved data integrity, and reduced operational risk through automated logging and exception handling.

ASC Invoices - Weekly

We developed and deployed an automated ASC Invoices process to streamline the handling of care provider invoices within the MOSAIC system. The primary objective was to reduce manual effort, improve accuracy, and ensure timely record management for auditing and payment purposes. To achieve this, we utilised UiPath RPA to download invoices from Outlook, extract the MOSAIC ID, log into MOSAIC, and upload the invoice to the correct provider profile. The outcome was a fully automated solution running on a scheduled basis, delivering benefits such as faster processing, improved data integrity, and reduced operational risk through automated logging and exception handling.

Air Quality Data Extract – As necessary

We developed and deployed an Air Quality Data Extract automation to support the Power BI team in delivering an air quality dashboard. The primary objective was to resolve an ingestion issue caused by source files being received in legacy .XLS format, which was incompatible with the dashboard pipeline. To achieve this, we utilised RPA to automatically receive the .XLS files, convert them into .XLSX format, and securely save them to SharePoint for ingestion. The outcome was a streamlined, hands-free process that eliminated manual intervention, reduced the risk of data handling errors, and ensured timely, consistent data availability for reporting and analysis.

Performance Dashboard Data Extract – Monthly

We developed and deployed an automation that extracts two files from six different systems, converts them into .XLSX format, and saves them to SharePoint for

ingestion into a performance dashboard, ensuring consistent and timely data availability.

Change of Tenants – Daily

We developed and deployed a Change of Tenants automation in alignment with IEG4 to streamline the processing of landlord-submitted forms received via the Southwark website. The primary objective was to reduce manual effort for the Revenue Team by enabling updates to tenant records within NEC Revenue & Benefits. To achieve this, we utilised RPA to extract data from XML files generated by the IEG4 process, transform it into a CSV in the required format, and save it to a shared network drive. The outcome was an integrated, end-to-end process that enabled IEG4's automation to upload the data directly into NEC Revenue & Benefits, improving processing efficiency, data accuracy, and turnaround times while reducing the risk of human error

Premise Update Request – Twice weekly

We developed and deployed a Premise Update Request automation to improve the management of premise records within Civica APP. The primary objective was to reduce the administrative burden and ensure timely processing of change requests submitted by business users who do not have direct access to the system. To achieve this, we utilised RPA to automatically pick up requests submitted via Chaplin, which were previously received by administrators via email, and apply the required updates in Civica APP. This includes creating new premises, editing existing records, and deactivating or reactivating premises. The outcome was a streamlined and efficient process that saved administrator time, ensured prompt and consistent updates, and improved overall data accuracy and service responsiveness.

Council Properties Update – On request

We developed and deployed a Council Properties Update automation to improve the accuracy of property ownership data within the NEC Revenue & Benefits system. The primary objective was to ensure the Revenue Team had reliable information on which properties are council-owned, as these properties follow distinct rules and processes. To achieve this, we utilised RPA to process an Excel file provided by the team, automatically accessing property profiles in NEC Revenue & Benefits to remove incorrect council ownership indicators and then reapply the tick box only to properties confirmed as council owned. The outcome was a cleansed and accurate dataset that improved operational decision-making, reduced the risk of incorrect processing, and strengthened data integrity across the system.

Noise Complaints – Daily

We developed and deployed a Noise Complaints automation to support the efficient handling of complaints submitted by Southwark residents via the website. The primary objective was to reduce the manual effort required by the Noise Complaints team, who previously had to transfer multiple complaint records into Civica APP each day. To achieve this, we utilised RPA to automatically upload complaint data from the website into Civica APP. The outcome was a faster, more reliable process that improved data accuracy, reduced administrative workload, and ensured complaints were recorded promptly, enabling the team to respond more effectively to residents.

Email Address Cleanser – One Off

We developed and deployed an Email Address Cleanser automation to improve data quality within the NEC Revenue & Benefits system, which maintains profiles for both people and places to support Council Tax and related services. The primary objective was to remove invalid email addresses that were impacting communication and data integrity. To achieve this, we utilised RPA to process a report containing approximately 2,400 invalid email addresses, automatically accessing the relevant profiles in NEC Revenue & Benefits and closing the incorrect email records. The outcome was a cleaner, more reliable dataset that improved communication accuracy, reduced failed correspondence, and strengthened overall system data quality.

NRS Data Extract

We developed and deployed an NRS Data Preservation automation to protect critical equipment monitoring data following the liquidation of the NRS system used by the council. The primary objective was to ensure no resident equipment data was lost during the unplanned system closure. To achieve this, we utilised RPA to automatically extract daily reports over a three-week period and store them securely. The outcome was a successful data preservation effort that mitigated risk, maintained data continuity, and safeguarded essential records during the transition.

Service Charge Refund - weekly

We developed and deployed a Service Charge Refund automation to streamline the processing of refund requests submitted by Southwark residents via the website. The primary objective was to reduce manual handling and ensure accurate, timely updates to refund records once applications had been approved. To achieve this, we

utilised RPA to automatically pick up both the original application and the signed-off payment request document from NEC Document Management and update the corresponding refund request in NEC Housing with the validated bank details. The outcome was an efficient, end-to-end process that improved processing times, reduced the risk of data entry errors, and ensured residents received refunds promptly and accurately.

Bulk Upload Creator – Twice Weekly

The Bulk Upload Creator is an automated process designed to streamline how service charge adjustments are prepared for upload into the NEC Housing system. Previously, the team manually reformatted Excel reports into the required .dat file, which was time-consuming and prone to errors. The automation now monitors a shared network folder, extracts the necessary data from Excel files, and converts it into a correctly structured .dat format. The purpose of the automation is to reduce manual effort, eliminate formatting errors, and ensure that the bulk upload data is delivered quickly and consistently. The key objectives are to improve accuracy, enhance operational efficiency, reduce turnaround time, and create a reliable, repeatable method of processing service charge adjustments.

FS Score Update – One off

We developed and deployed a Food Safety Score Update automation to support compliance with a change in legislation affecting food business records held in Civica. The primary objective was to efficiently update existing records with the new Food Safety (FS) score and investigation date, ensuring the data remained accurate and legally compliant. To achieve this, we utilised RPA to process a text file containing approximately 300 record numbers and their corresponding new FS scores, automatically accessing each record in Civica and applying the required updates. The outcome was a timely and accurate bulk update process that reduced manual effort, minimised the risk of errors, and ensured continued compliance with regulatory requirements.

Collating Final Account Letters - Weekly

The Collating Final Accounts process automates the preparation and distribution of Major Works invoices to account holders. Previously, staff manually reviewed, split, and matched summary letters and invoices before sending them to each account holder. The automated workflow now extracts two bulk PDFs from the shared network drive, separates the documents into individual letters and invoices, matches them using the property reference number, combines the correct documents into a single pack for each recipient, and produces an audit spreadsheet. The purpose of

automating this process is to remove manual effort, reduce processing time, and eliminate human error. The objective is to ensure each account holder receives the correct documents reliably and consistently, while improving operational efficiency, accuracy, and reporting visibility.

Benefit Overpayment Closure – One off

An error was identified in Housing Benefit claims for Temporary Accommodation tenants within NEC Revenue and Benefits, affecting approximately 1,260 accounts with outstanding overpayments requiring recovery. The affected cases were provided via a spreadsheet containing claim numbers and transaction details. An RPA solution was implemented to automate the correction process. The bot extracted case details from the spreadsheet into a processing queue, logged into NEC Revenue and Benefits, and searched for each relevant claim number. It navigated to the outstanding overpayments table and located the relevant transaction. If the transaction status was marked as suspended, the bot skipped the case. For all other transactions, the bot cross-referenced the start date, end date, amount, reason code, and recovery start date. Once validated, the bot opened the transaction, removed the recovery start date, and updated the recovery action to ‘HOU – Rents’. A case note was then added to the account.

In UAT

- **Customer Creation & Amendment** - We are automating the creation and amendment of customer records in SAP by extracting data from macro-enabled Excel request forms emailed to the FC & P Customers inbox and processing them directly in SAP, ensuring accurate validation and profile updates.

- **Adult Safeguarding** - We are automating the uploading of adult social safeguarding referrals from multiple sources, including the ambulance, police, professionals, friends, family, and staff. The robot will be uploading the heavy data directly into the MOSAIC system.

- **Rent Refunds** - We are automating the processing of rent refund applications submitted via the Southwark website by extracting approved cases from NEC DM, updating NEC Housing with unauthorised transactions, and logging outcomes in Excel for correspondence.

In Development

- **Service Charge** - We are automating the initial stage of the Revenue Service Charge process by extracting CSV repair data from emails, separating records by contractor into their respective service areas, and distributing the organised sheets to the relevant team members for further analysis of rechargeable costs.

In Discovery

- MASH
- Payment Processing- Trees
- BACs Refund
- Assure management
- Garage Waiting List
- MRI Duplicate Records
- Mortgage Team Letters
- Remise UPRN Update
- Premise Ward Code Update
- Liability Order Enforcements