

Regional User Group

Speakers

- **Sarah Hall** - VP of Customer Success
- **Steve Carlin** -VP of Product Management
- **Kemal Sangrar** - VP of Product Development
- **Clare Dunn** - Senior Operations Manager, Hargreaves Lansdown

AutoRek



Agenda

- 13:30** Registrations & networking
- 14:00** Customer Success Vision - [Sarah Hall, VP - Customer Success](#)
- 14:15** Introduction to Product Management - how you can engage and benefit - [Steve Carlin, VP - Product Management](#)
- 14:30** Q&A with Hargreaves Lansdown – [Clare Dunn - Senior Operations Manager](#)
- 14:50** AutoRek V6 highlights - [Kemal Sangrar, Head of Product Development](#)
- 15:15** Interview with Stanlib
- 15:30** Refreshment break
- 15:50** Roundtable discussions
- 16:50** Closing comments
- 17:00** Food & drinks

Customer Success Vision

Sarah Hall, VP of Customer Success

AutoRek



Customer Success Vision

Engagement Model



Value Propositions



Customer Voice



Industry best practice – return on investment and value realisation

Introduction to Product Management

How you can engage and benefit

Steve Carlin, VP of Product Management

AutoRek



Intro

Hi.

Product

What / Why / Who

Solutions

are going beyond features.

How

it works.

I / O

from you, for you.

You

can play a part.

Introduction

Joined AutoRek in 2015:

- Senior Consultant
- Managing Consultant
- Head of Delivery
- VP Product Management

Previously Scrum Master, SQL Dev, DBA.

Likes coffee, my kids and my unkempt lawn.

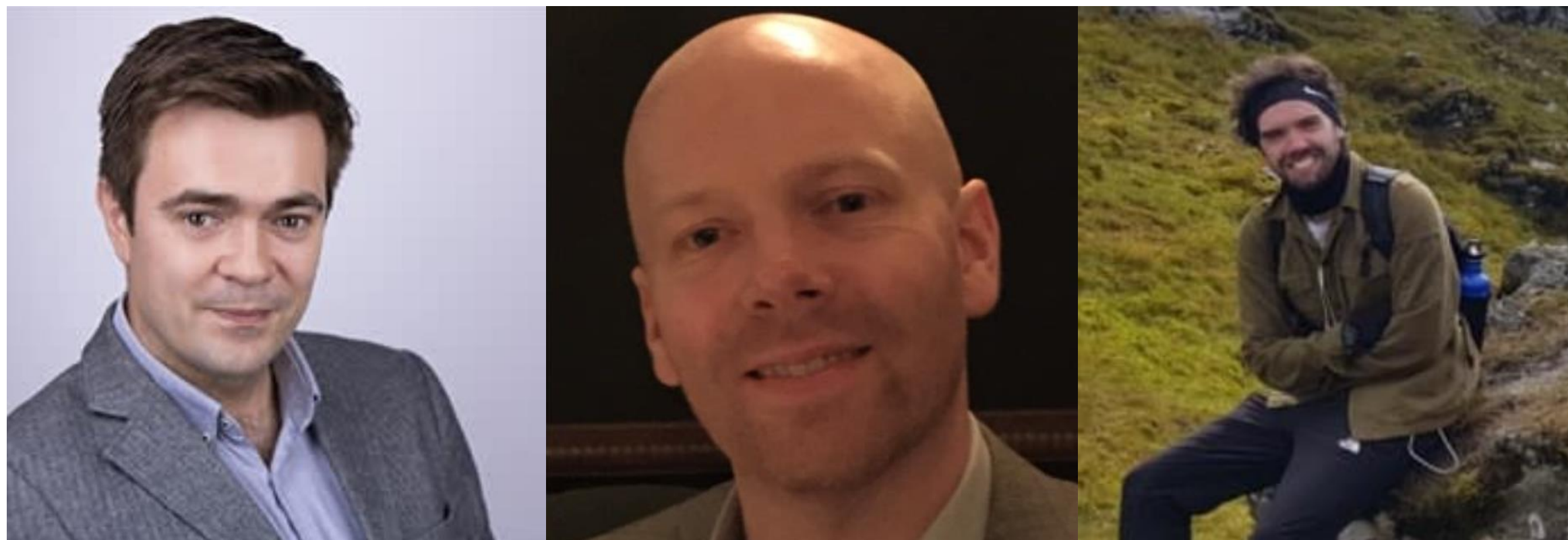


Product Management

■ What

■ Why

■ Who



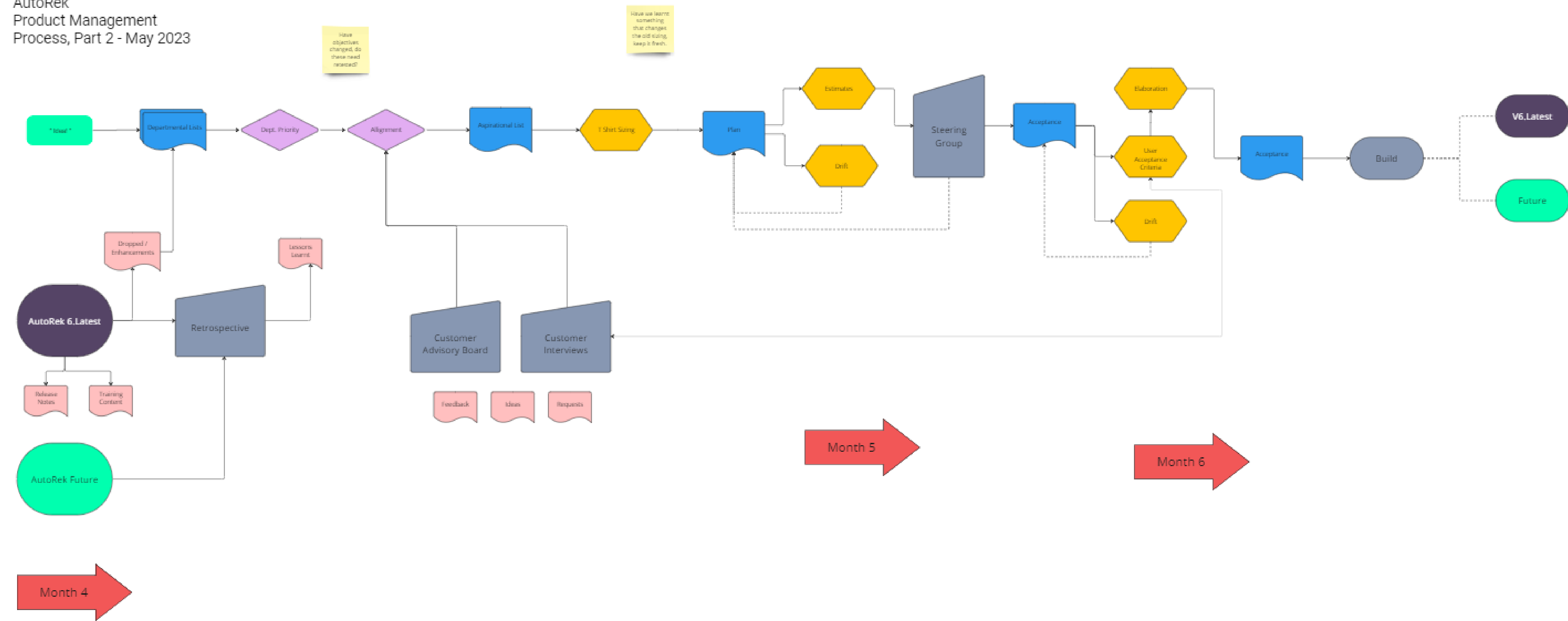
Solutions Engineering

- CASS 7 – *Test*
- Safeguarding – *Development*
- CASS 6 – *Design Underway*
- Roadmap - *Under Construction*



How does this work?

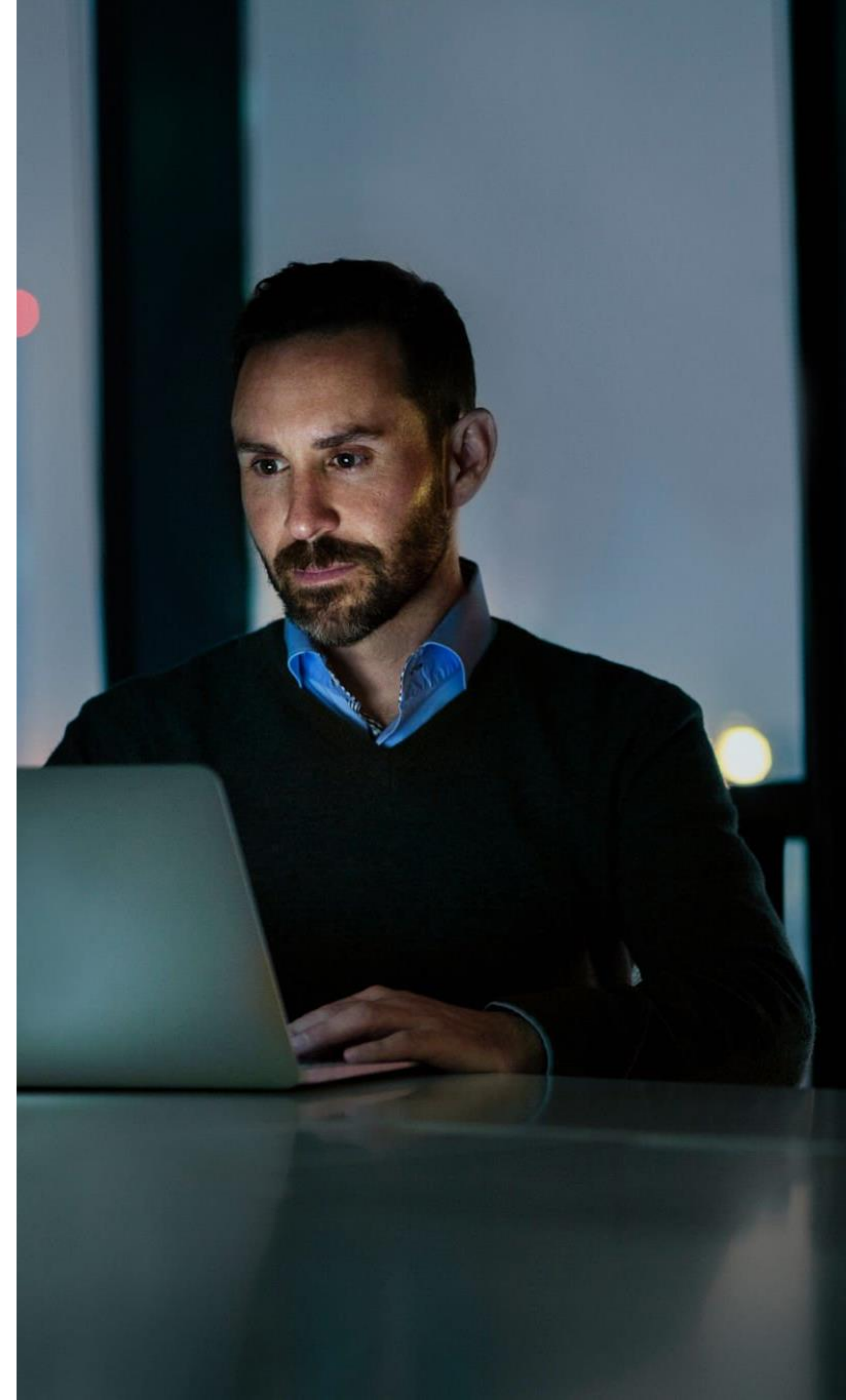
AutoRek
Product Management
Process, Part 2 - May 2023



Inputs

Direct, and indirect, ways you play a part.

- Sales Motion
- Scoping & Design Reviews
- Project Retrospectives
- Customer Feedback
- Helpdesk Tickets
- Usage Patterns



Outputs

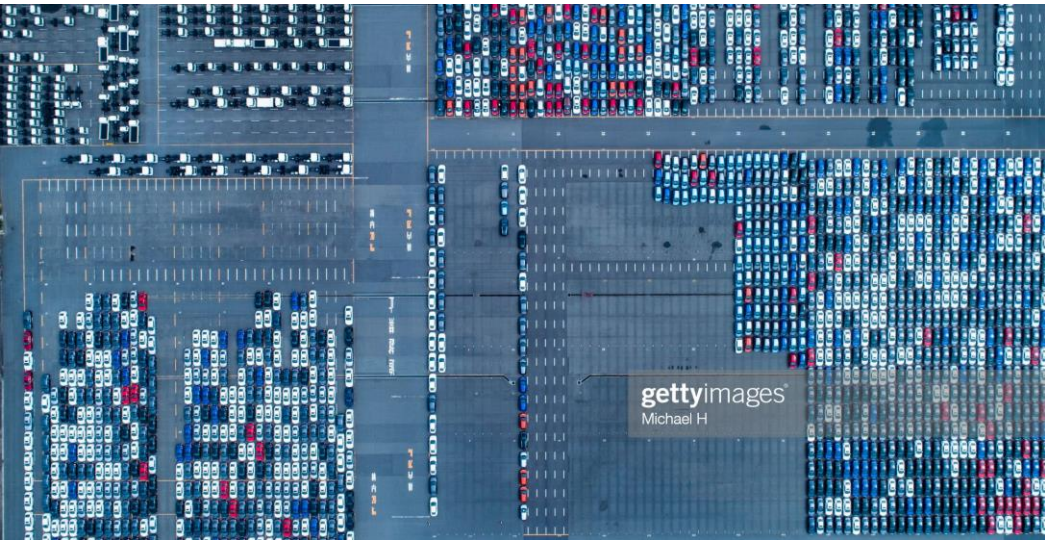
Interaction



Documentation



Roadmap

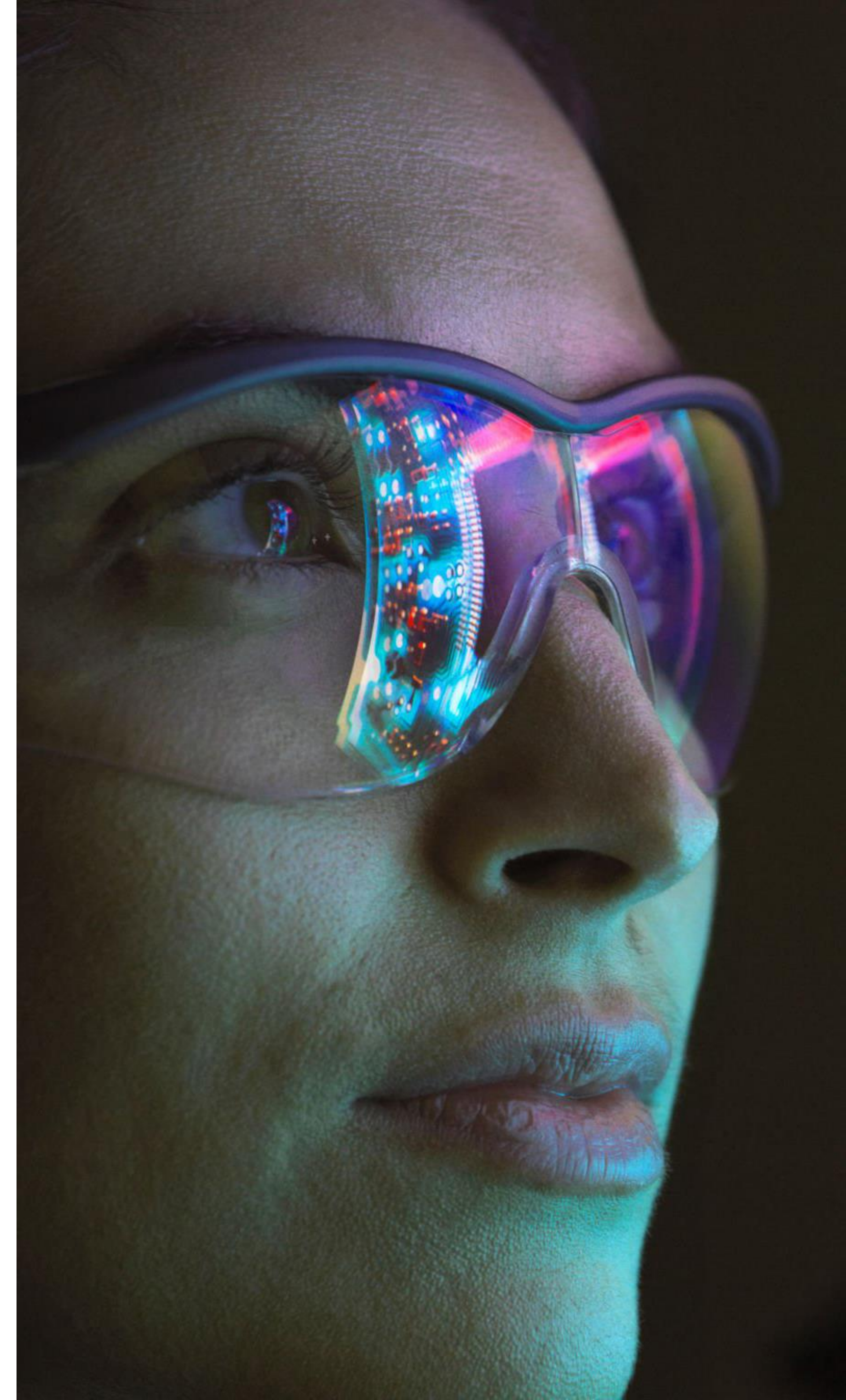


6.x & Future



Being Involved

- Product Feedback
- Other Feedback (Process, Self-Sufficiency, etc)
- Feature Requests
- Solution Reviews
- User Group & Events
- CSM Events (QBR, Service Reviews, Classrooms, etc.)
- Customer Advisory Board



Customer Advisory Board

Our first regular Customer board.

- Purpose
- Format
- Outline of the session
- Value to the attendees
- Q3 Board, Thursday 24th August, Remote Event
- Q4 Board, AM of the User Group, London



AutoRek V6 highlights

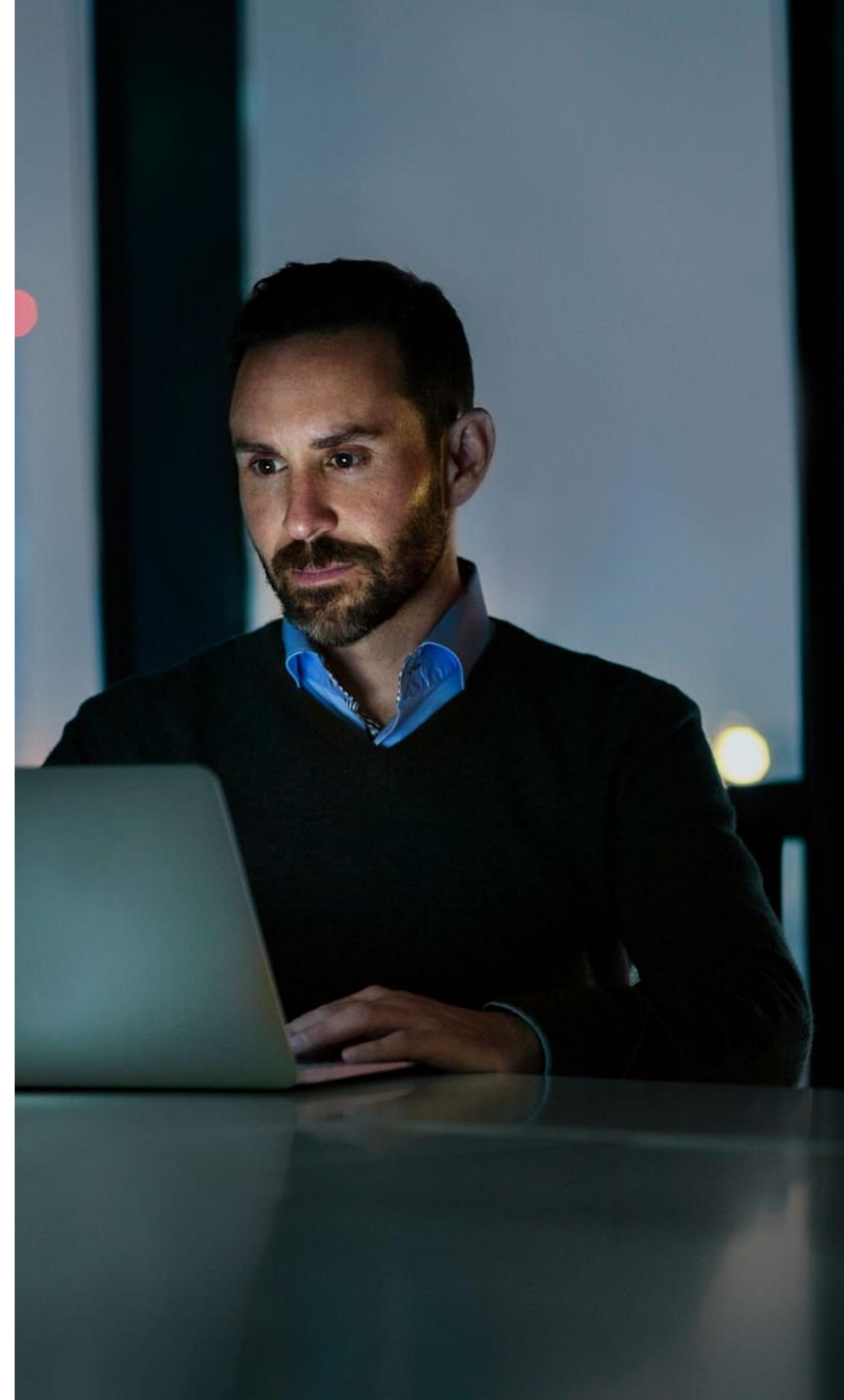
Kemal Sangrar, VP of Product Development

AutoRek

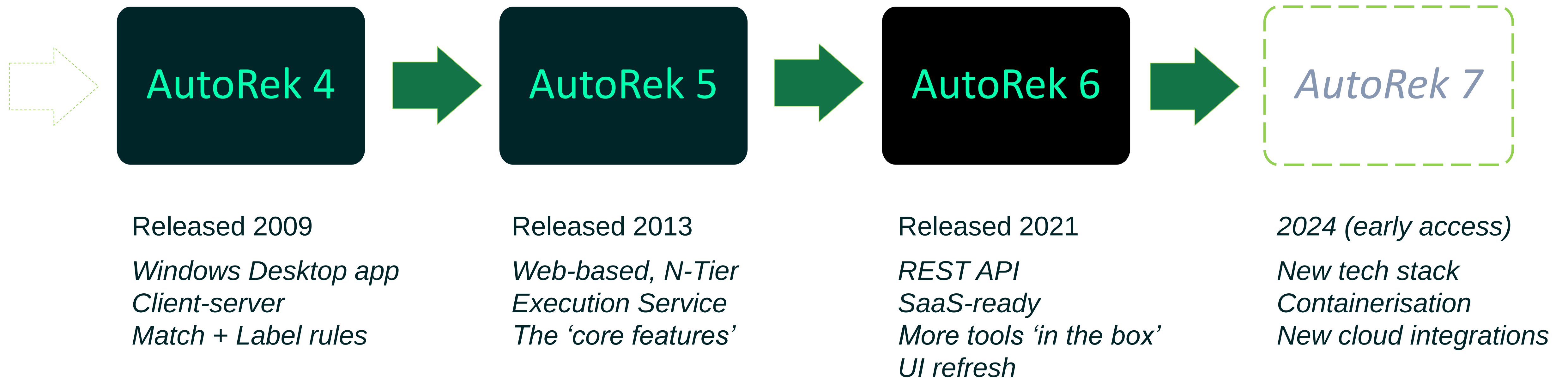


Agenda

- AutoRek 4 to AutoRek 6 (and beyond)
- New to AutoRek 6?
- Latest AutoRek 6 features
- Upgrading to AutoRek 6



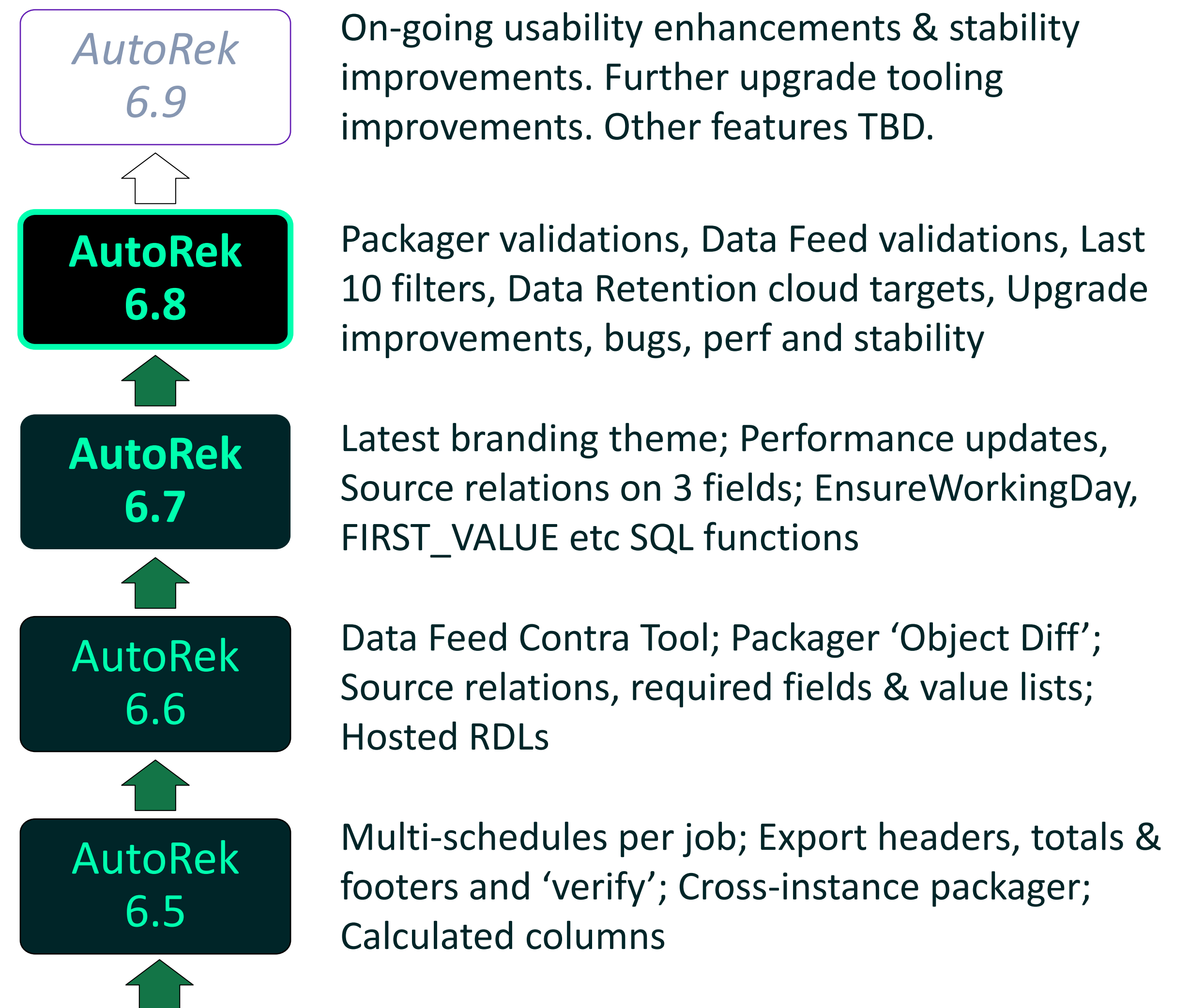
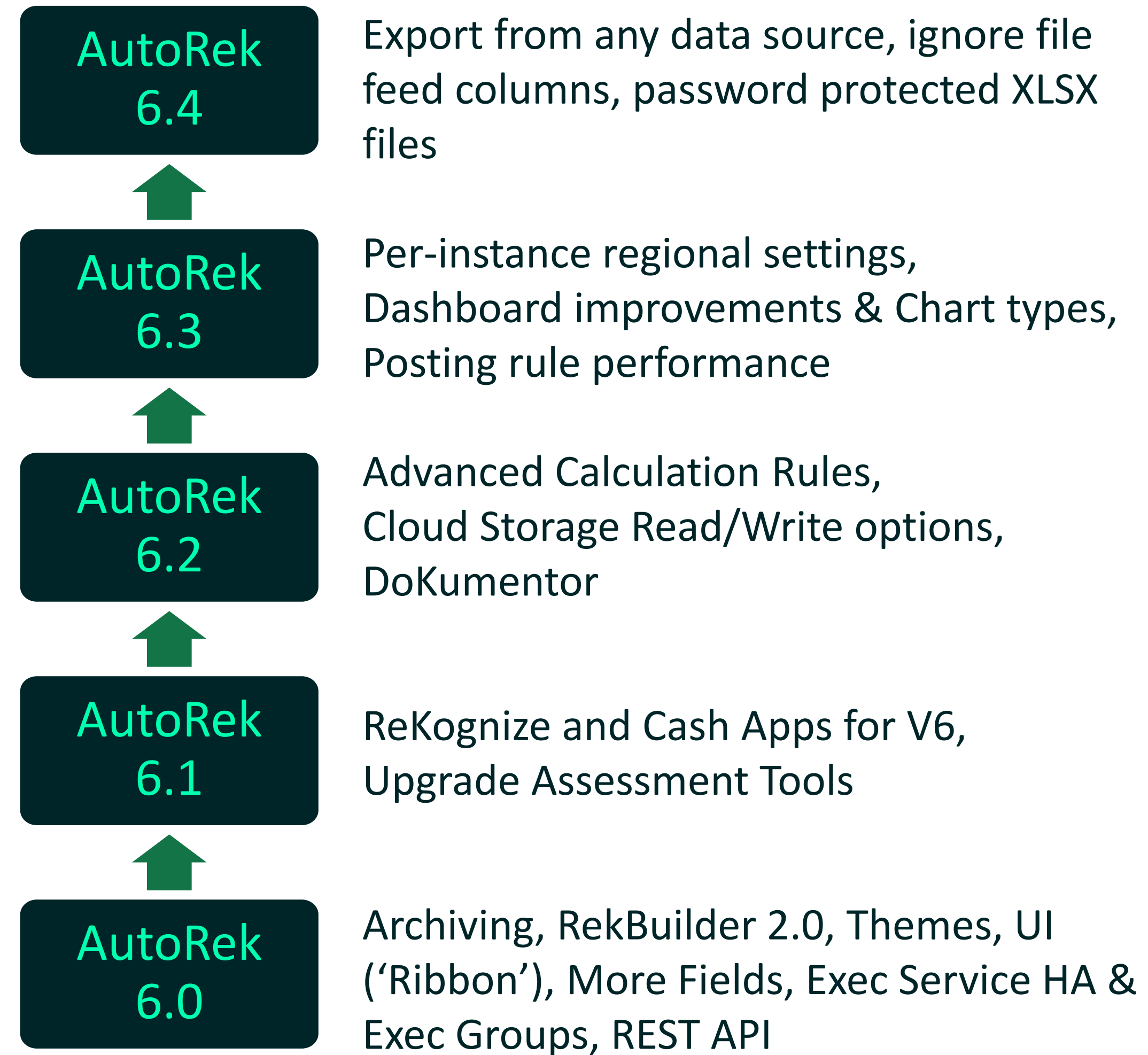
AutoRek Timeline



AutoRek 6 Highlights



AutoRek 6 Highlights

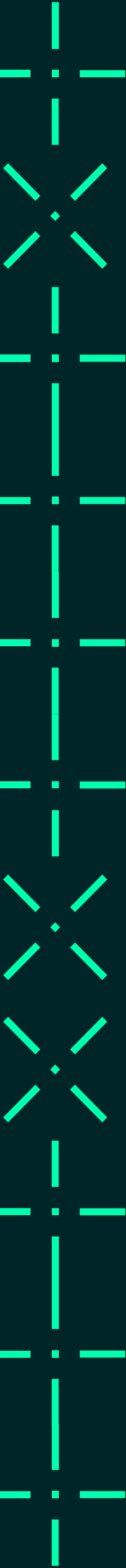


AutoRek

New To AutoRek 6?

Some key highlights for users of AutoRek 5

AutoRek



Key Features for AutoRek 5 users

- Archiving and Data Retention
- RekBuilder
- OpenID 'OAuth' authentication
- Cluster Aware Execution Service
- REST API for developers
- Data Processing Enhancements
 - More transaction fields (inc. long fields)
 - FX rate table
 - Working day system
 - Multi-label rules
 - More...
- Ribbon toolbar in Exception Grid
- 'Vector' icons – retina screen support
- Customisable Theme Colours
- Dark Theme
- Paging in grids
- Dashboard improvements & new charts

Updates to the User Interface

The AutoRek 6 UI has been completely refreshed to provide a modern usable aesthetic

Since AutoRek 6.7 the UI reflects the new branding

Features

- New Login screen
- Themes, including Dark Mode
- Vector Icons for high-resolution screen support
- Ribbon toolbar in Exceptions Grid

Benefits

- Icons remain sharp at high DPI or if zoomed in, supporting a wider range of devices
- Custom themes can help with accessibility
- Work from home can take advantage of customisation options
- Ribbon toolbar improves ease of use; very good for onboarding and can be customised
- Most grids and lists offer more search and filter controls

Archiving and Data Retention

A comprehensive data retention and archiving policy system.

Using this system AutoRek can manage the data in your installation using a fully customisable rule-based system to move, export, or remove data according to user needs

Features

- Create rule-based archiving policies for all the primary data sources in AutoRek
- Decide how to handle the targeted data:
 - Move data to an archive database – retain ability to use AutoRek tools to access it
 - Move data to files – retain for audit purposes or can be imported into other systems for reporting
 - Delete the data outright if not needed
- For transactions, optionally define a replacement strategy to keep balances unchanged

Benefits

- No need for bespoke archiving solution – everything ‘in the toolkit’
- You are in full control – add & remove policies to meet your own needs

AutoRek

RekBuilder

Performs real time match analysis to suggest suitable match rules for new reconciliations.

Data in input files is compared to identify key columns and provide potential match rules.

Features

- In memory operation – gives you immediate results
- More intelligent than previous tools
- Recognizes more data types
- Remembers previous results
- Creates a full suite of feeds, roll-forwards, match rules and a schedule

Benefits

- Ease of use
- Can be used to try out new recs
- Recs created this way are easily extended in the usual way

Top Tips

- Make targeted data file(s) with representative data...
- Use RekBuilder on your Dev environment...
- Let it do the hard work of creating sources, rules etc
- Use Packager to deploy to production

Data Processing Enhancements

More transactional data fields allows wider, more complex data to be loaded, new rule types, new support tables and functions

Many Data Processing Enhancements

- More fields
 - 10 new BIGINT fields
 - 10 new 'long text' fields (60 text fields in total)
- FX Rates support
- Working Days support
- Multi-label rules

Benefits

- Load wider, more complex data with ease
- Standardised methods to handle FX rates
- Standardised methods to working days
- Single pass to set multiple labels is easier to configure and performs better

Execution Service '2.0'

Cluster-aware and with support for execution groups

Features

- Can run multiple services
- Load is shared between active services
- Tasks can be given execution groups to control parallel or sequential execution

Benefits

- No more error if 2 services accidentally started
- Improved reliability when running multiple services – should one drop, another can take up the tasks
- Execution groups allow you to execute independent actions in parallel
- Execution groups allow you to execute complex interdependent multi-instance activities in sequence

REST API for developers

AutoRek 6 provides a fully documented REST API which can perform all functions available through the AutoRek UI

Documentation is available via an Open API JSON file.

Features

- An advanced feature, but very powerful
- Full API access to all features of the application (*Same API as the UI uses*)
- Full **Open API** documentation file available (*so-called 'Swagger' docs*)
- Easily programmed in JavaScript or C# or other common programming languages.

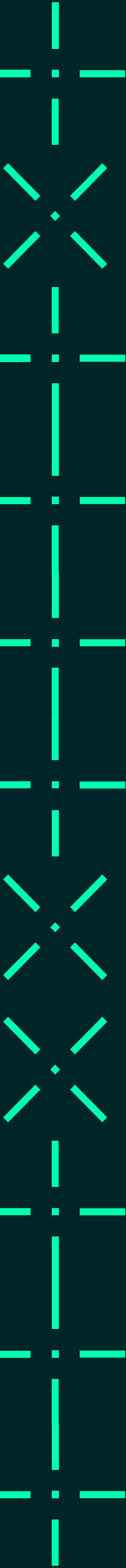
Benefits

- Complete flexibility to harness AutoRek's full power
- Programmatically send data to AutoRek from other systems
- Programmatically extract data from AutoRek for other systems
- Automate essentially anything AutoRek can do.

Latest AutoRek 6 features

A whistlestop tour of the most recently added features

AutoRek



New features in V6

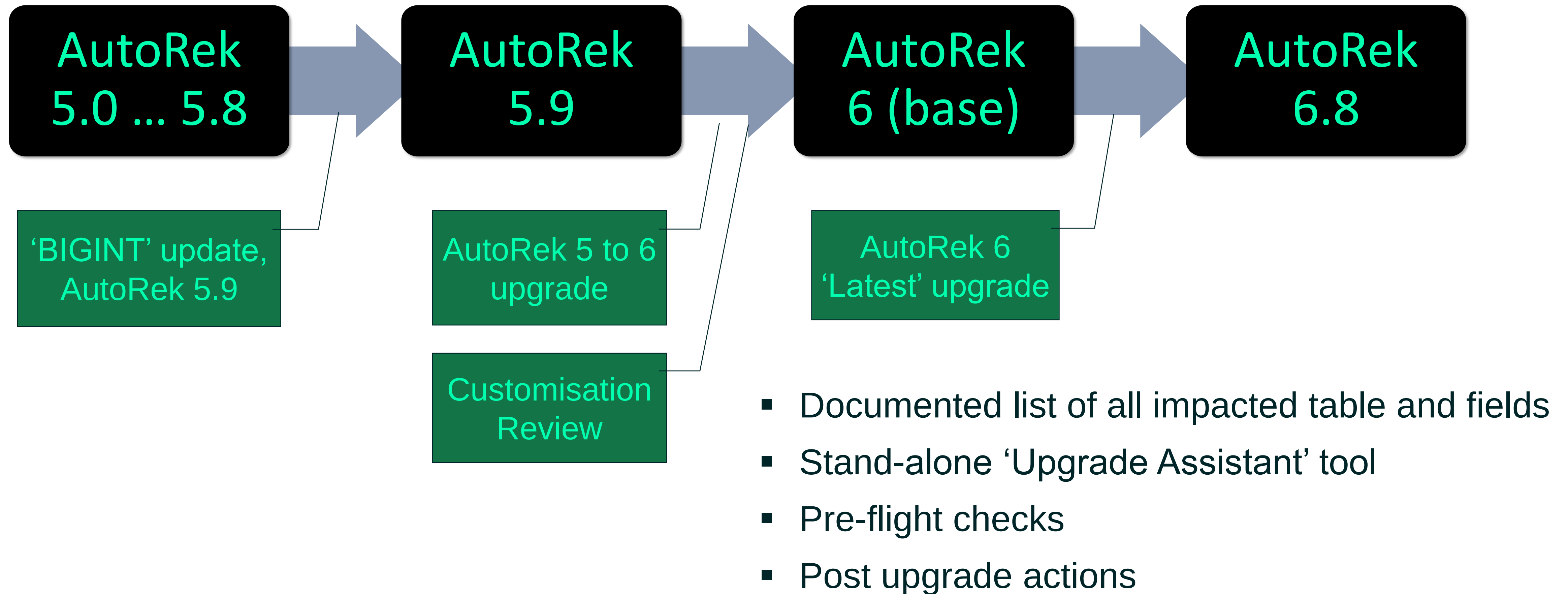
Recently Added Features:

- Data Feed Contra File generation
- Multiple Schedules Per Job
- Custom fields for labels
- New Excel handling features
- Linked Sources
- Calculated Columns on Roll Forward
- Advanced Calculation Rules
- Exports from other AutoRek data sources
- Cloud locations for feeds, exports
- 'Read Acknowledgement' on case notes
- Improved validations & errors
- Many performance enhancements

Coming soon:

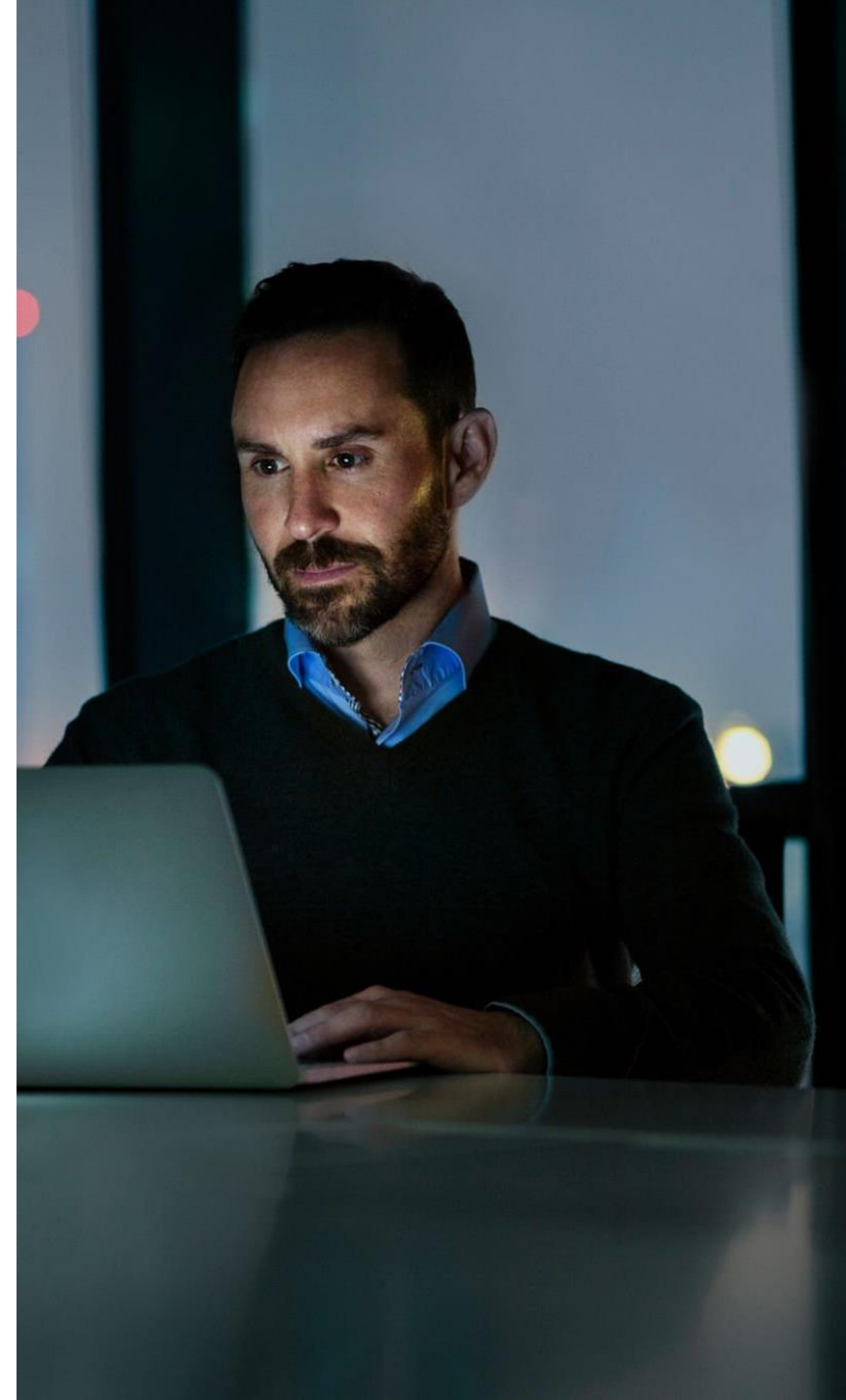
- Suggest Match can Label/Add Notes
- Match & Label rules support for label fields
- Parameters for shared filters
- Ongoing V5 upgrade support tooling

Upgrade Path



Summary

- AutoRek 4 to AutoRek 6 and beyond
- What's new in AutoRek 6 for V5 users
- Latest AutoRek 6 developments
(and how important the user groups are!)
- High-level overview upgrading to AutoRek 6



Refreshment Break 🍰

See you at 15:50!

Roundtable Discussion

1. What is the biggest challenge facing your teams today and how can AutoRek help?
2. What are the value levers for AutoRek solution in your business – how can we help you maximise ROI?
3. If you could change one thing about AutoRek what would it be?
4. Open feedback – what message would you like us to share with our leadership from this session?



Closing comments

AutoRek

