



# Deploying an Automation Server

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# Welcome!

Are you using an Automation Server?



AT&T 9:01 AM 97%

“ What's the difference  
between a duck? ”

OK, Ben, here you go:

Input interpretation

What's the difference between a duck?

Result

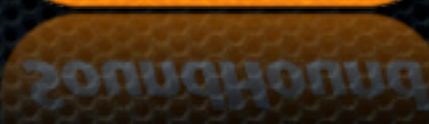
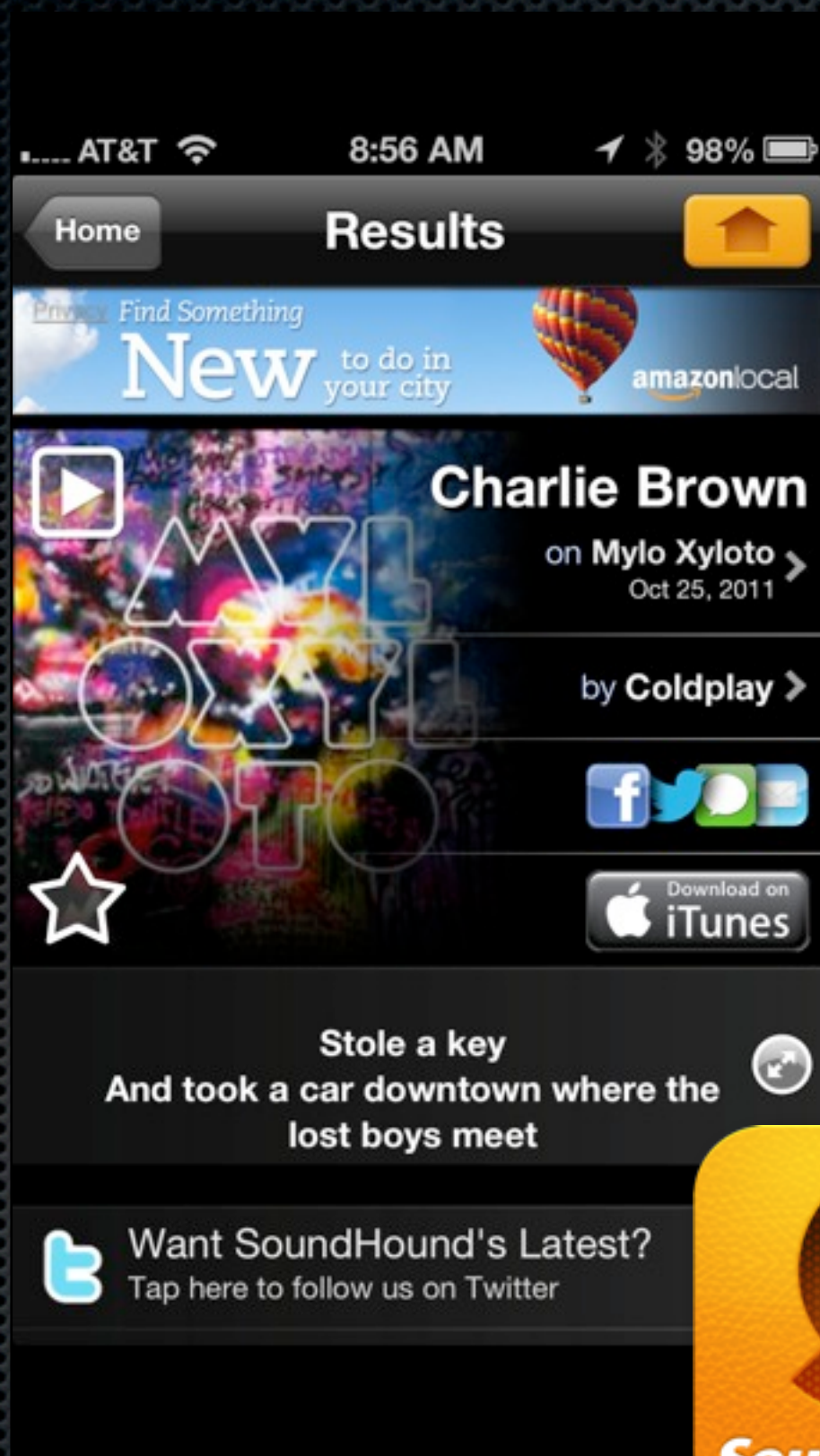
One leg is both the same.

(for reasons that are not entirely clear to this  
computational knowledge engine, but seem to  
hark back to the Marx brothers)

WolframAlpha











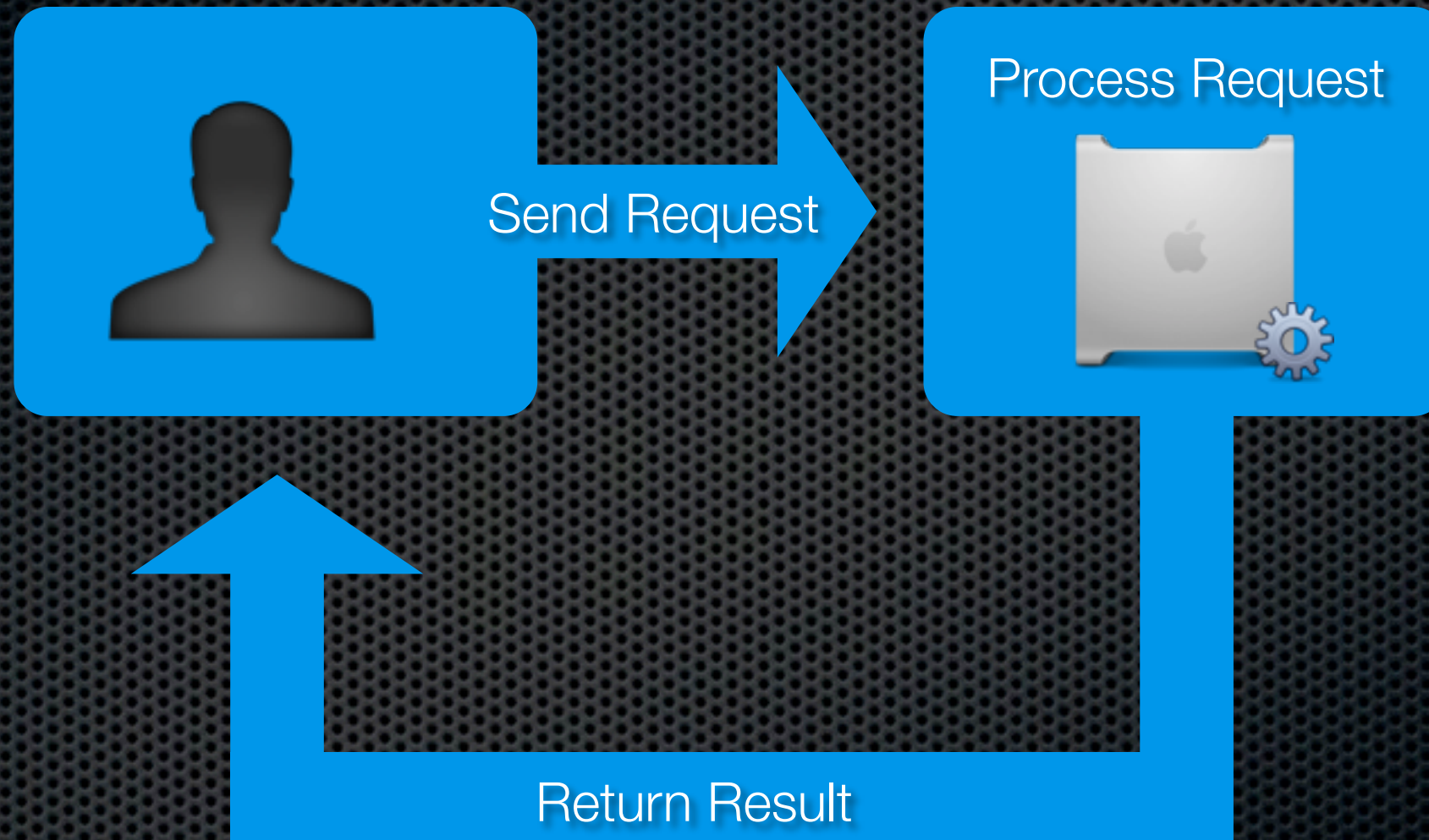
Beatrice and Taylor  
The Steed Family



The Steeds – 2011  
The story of our year.



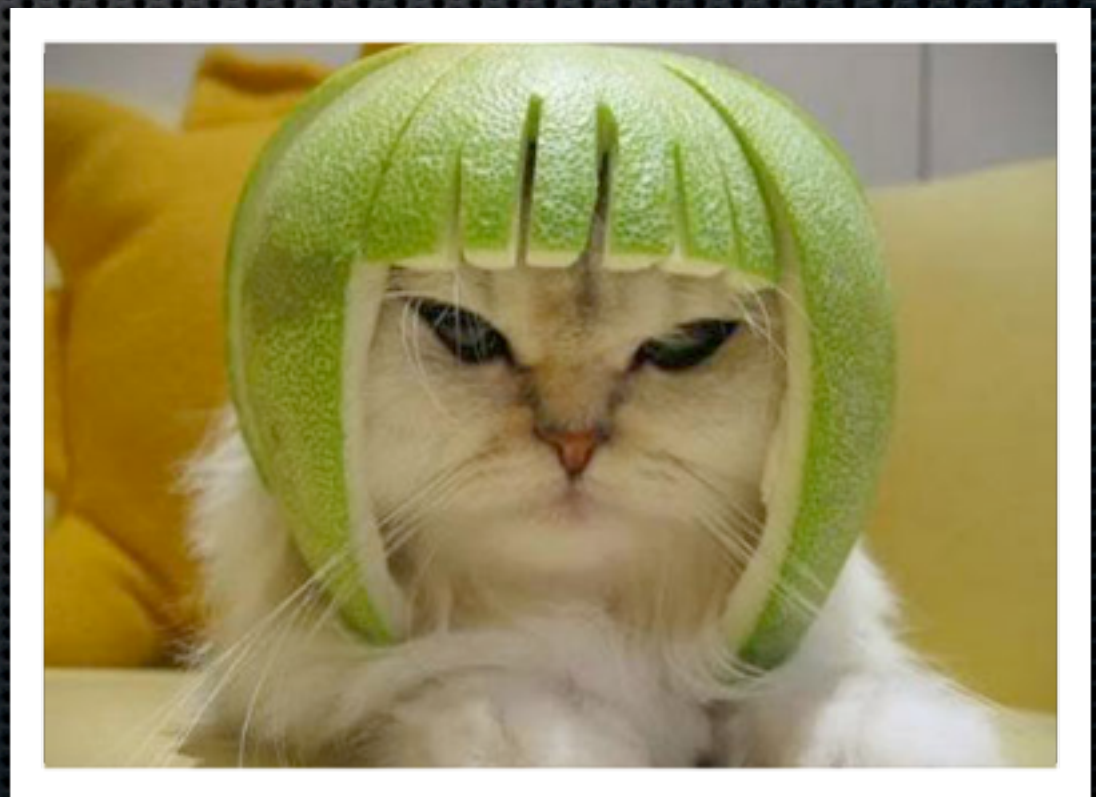






# Put On Your Thinking Cap

Consider Your Own  
Processes





# Automation Q&A

- ✦ Are end user tasks time consuming?
- ✦ Are end user tasks repetitive?
- ✦ Do I have existing automation?
- ✦ Is my existing automation time intensive?
- ✦ Are users unable to do other work during automation?





# What is an Automation Server?



- ✦ Dedicated Mac
  - ✦ Any Mac (Mini, iMac, MacBook, Pro, etc.)
- ✦ Runs unattended scripts, workflows, or other automated tasks



# Benefits of an Automation Server



- ✦ Reduces end user repetition
- ✦ Reduces end user time consuming tasks
- ✦ Frees users to work on other tasks



# Benefits of an Automation Server



- ✦ Supports numerous automated tasks
- ✦ Centralizes workflow management
- ✦ Open for business 24/7



# Types of Automation

- ✦ Automator Workflows
- ✦ AppleScripts
- ✦ Shell scripts





# What Can an Automation Server Do?

“A lot of times,  
people don’t know  
what they want until  
you show it to them.”  
- Steve Jobs





# What Can an Automation Server Do?

- ✦ File and folder maintenance
- ✦ Catalog automation
- ✦ Document construction
- ✦ Image processing
- ✦ Backups of data
- ✦ Almost anything else you can imagine





# Real World Examples of Server Automation

- ✦ Email Archiving (Industry: Legal)
  - ✦ Client must retain all emails for compliance reasons
  - ✦ Email server forwards all incoming/outgoing messages to automation server
  - ✦ Automation server archives messages in FileMaker





# Real World Examples of Server Automation

- ✦ Dropbox Syncing (Industry: Legal)
  - ✦ Client wants to share certain (not all) job files with clients
  - ✦ Automation server monitors root folders for new/removed files
  - ✦ Syncs changes with shared client folders
  - ✦ Clients receive near-instant access to important files





# Real World Examples of Server Automation

- ✦ Document Creation (Industry: Financial)
  - ✦ Client provides signage to offices across country
  - ✦ Signage info entered in Excel and submitted to automation server
  - ✦ Automation server generates signs as PDFs and outputs to server share





# Real World Examples of Server Automation

- ✦ Catalog Automation (Industry: Travel)
  - ✦ Client prepares regular catalogs of product data
  - ✦ Data is prepared in FileMaker and exported to automation server
  - ✦ Automation server generates catalog





# Real World Examples of Server Automation

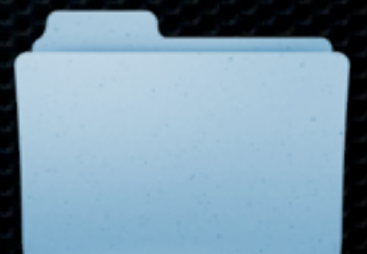
- ✦ Coupon Automation (Industry: General Retail)
  - ✦ Client regularly prepares large batches of coupons
  - ✦ Automation server extracts data from delimited data files
  - ✦ Automation server generates coupons and outputs in layout and image format





# Real World Examples of Server Automation

- Folder Structure Maintenance (Industry: News/Publishing/Financial)
  - Automation servers regularly monitor folder structures and archive old content, create new job folders, cleans up file names, etc.





# Setting Up an Automation Server

Getting started...





# Automation Server Triggers

- ✦ Folder watching
  - ✦ Folder actions
  - ✦ Stay-opened AppleScripts





# Automation Server Triggers

- ✦ Scheduling
  - ✦ Stay-opened AppleScripts
  - ✦ iCal alarms
  - ✦ cron





# Automation Server Triggers

- ✦ Database
  - ✦ Watch for new records
  - ✦ Watch for flagged records





# Automation Server Triggers

- ✦ Email
  - ✦ Mail and Outlook rules
  - ✦ Watch for new messages





# Automation Server Triggers

- ✦ Monitor web pages
- ✦ Social media
- ✦ iMessage





# Good Automation Server Features

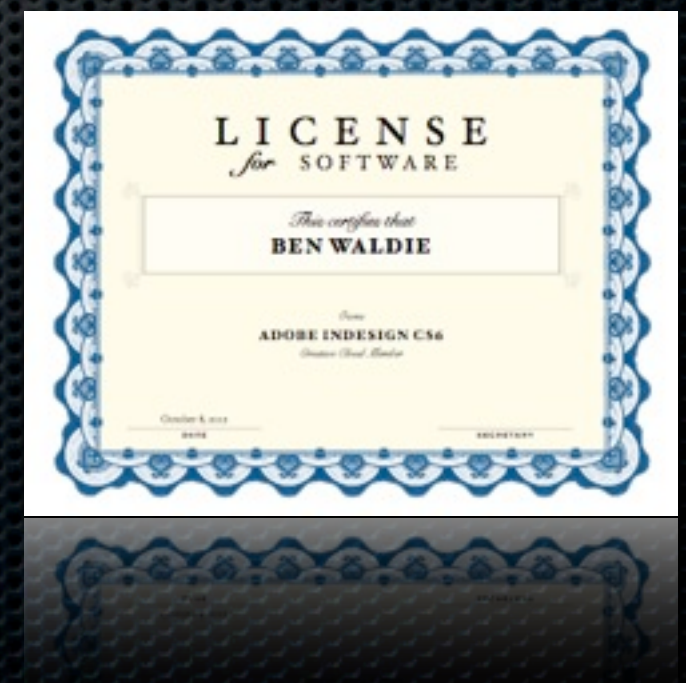
- ✦ Automatic share mounting
- ✦ Email notifications
- ✦ Logging
- ✦ Error handling
- ✦ Load balancing
- ✦ Feeder apps





# Licensing Restrictions

- ✦ Some companies restrict server automation of desktop apps
- ✦ Consult licensing agreement or contact company with questions





# Licensing Restrictions



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### 2.1.7 Server Use.

2.1.7.1 As permitted in a separate purchasing document or Documentation and subject to license restrictions stated in this Agreement, Customer may install the Software on a Server only for the purpose of allowing an individual from a Computer within the same Internal Network ("Network User") to access and use the Software. The Network User who has access to such Software on the Server is referred to as "Server Software User". The total number of Server Software Users (not the concurrent number of users) may not exceed the Permitted Number. By way of example, if Customer has purchased 10 licenses of Software (Permitted Number is 10) and Customer elects to install the Software on a Server, then Customer can only allow up to 10 Server Software Users the access to the Software (even though Customer may have more than 10 Network Users or fewer than 10 concurrent users of the Software).



# Demo Time

Let's take a look...



# Resources



- ✦ Mac OS X Automation (Apple)
  - ✦ <http://macosxautomation.com>



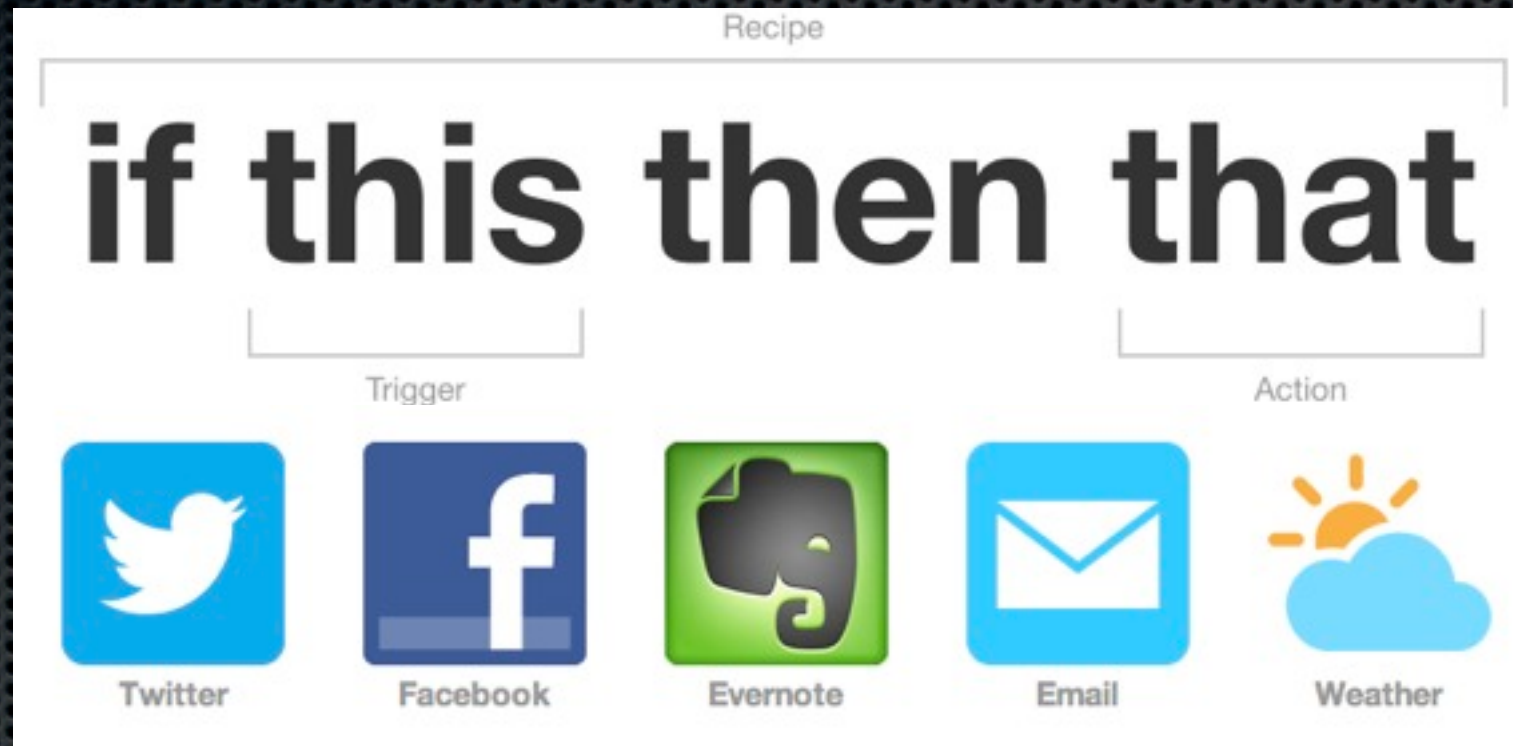
# Resources



- ✦ [www.automatedworkflows.com](http://www.automatedworkflows.com)
  - ✦ My website
  - ✦ AppleScript & Automator tips, articles, videos, etc.
    - ✦ [www.automatedworkflows.com/tips](http://www.automatedworkflows.com/tips)



# Resources



- ✦ <https://ifttt.com>



# Future of Automation Servers in OS X

- ✦ Increased need and demand
- ✦ Cloud Folder Watching
  - ✦ Process data from mobile devices
  - ✦ Dropbox folder watching





# One more thing...

Another demo



# Q&A

- ✦ Have questions about Automation Servers, AppleScript, Automator, etc.? Find me at the conference or email me at:  
[ben@automatedworkflows.com](mailto:ben@automatedworkflows.com)