

Workflow Scenario: New Hire Workflow

The following is an example of a common business issue that can be addressed by SharePoint through customization

Background ABC company is a retail chain with 25 locations. Staff turnover is quite high at its stores, because of the use of seasonal labor such as students during the summer months. The problem with their paper based system was that it is too slow. In some cases the clerk would resign before the New Hire paperwork had been completed at head office.

Business Challenges

- The paper based on-boarding process took too long. New hires typically filled out an application form, after which the forms were faxed and mailed to the head office. This was followed by a background check. Once completed, the employment contract was mailed back to the branch retail location. Often, this process took 2-3 weeks.
- Inaccuracies occurred because of lost papers and manual transcription of paper forms.
- Record keeping had become more difficult as the chain grew from 2 to 25 locations.

Solution

The solution comprises the following components:

- The application form was converted into an ASP.net based form that was inserted into the company's website ("Positions Available" section).
- The information is captured into a SQL database and emailed as a populated InfoPath form to the head office HR department and applicable store manager.
- The information is published to a SharePoint list, with status set to "In progress".
- Once the background check and administrative tasks are completed, the process status is set to Approved or Declined. This is updated in the SharePoint list and followed by an email to all parties involved.
- The final step is for the manager to print out the completed InfoPath form to capture the applicant's signature of acceptance.

Workflow Scenario: Expense Approval

The following is an example of a common business issue addressed by SharePoint through customization

Background ABC company is a 9 year old professional services organization with 35 consultants that mostly travel to client sites. They provide system integration services. On an ongoing basis, consultants needed to get manager approval for expenses (e.g., computer hardware, cell phones, flights & accommodations).

- Business Challenges**
- The current system of emailing a manager for approval was too difficult to manage. It was a challenge for the managers to keep track of various expenses.
 - Conflicts and duplication often arose because there was no central list to keep track various claims.
 - Consultants did not know who to escalate the approval to if their manager was unavailable. This would lead to calling or emailing various people to determine the correct escalation.
 - It was difficult to track the status and accompanying documentation through the email threads.

Solution The company decided to upgrade the SharePoint portal and create a simple workflow based expense approval system.

- Using SharePoint Designer and WSS, the administrator creates a workflow where an approval request is submitted to the portal. The accompanying documentation (e.g. quotes) is submitted to a temporary document library.
- If the manager approves the expense, the documents are moved to a document library that is accessible by the Accounting department for reference.
- The recipient receives an email indicating the status of the request (i.e. accept/deny).
- A ticket number is generated by the workflow, which is used in all follow up actions by the Accounting department (e.g. Accounts Payable) or the requestor.

Doc. Mngment Scenario: Company Policy

The following is an example of a common business issue addressed by SharePoint.

Background ABC firm does placement of accounting professionals at companies that require short term staff augmentation (e.g. during year-end or acquisitions). About 40 CPAs are contracted on a full or part-time basis and placed at various customers sites in the Texas area. One of the recurring issues that came up at company meetings was the ever changing company policies on travel allowances and expenses. The company was printing out booklets that were handed out at company meetings.

Business Challenges

- The continual changes and updates to the company policies presented a challenge to travelling consultants.
- Revenue was lost where claims were filed under outdated policy rules.
- Multiple people continually collaborated on the policies – creating versioning and “last saved” challenges.

Solution

The solution was to upload the company policy documents (legal, fiscal and HR in Word format) in the MOSS portal. Through the check-in and checkout process, the document version integrity is now preserved.

Also, CPA's can access the latest versions via quick searches and go back in history on previous policies. Management).

Doc. Mngment Scenario : Legal Documents

The following is an example of a common business issue addressed by SharePoint through customization

Background A property management company employs about 65 people. As part of the property management lifecycle, they collaborate on a large number of legal documents. Examples of these documents are leasing contracts, service level agreements and litigation procedures. Keeping track and managing these documents as part of a paper process became extremely complex.

Business Challenges

- Documents were lost in transit. Because documents were often filled out on site (at the leased premises), documents had to either hand carried or couriered. Courier costs alone ran into several thousand dollars per month.
- Duplication and version tracking. As amendments were commonplace on contracts, someone had to manually keep track of the latest version of the documentation. Sometimes clients had to sign the same documents two or three times due to confusion or versioning mistakes.
- Multiple versions of a certain document could exist across the company. The admin staff were responsible for determining the templates (or standards) of certain basic legal documents (e.g. Non disclosure agreements). But it often resulted that two versions existed on people's computer or laptops. This exposed the company to potential litigation procedures where old or outdated documents were used in the contracting process.

Doc. Mngment Scenario : Legal Documents

Solution

The solution was to employ the ECM services in SharePoint to offer a basic content management solution for the legal documents.

- For the first phase of this project, documents are scanned into the document library. This enables users to search metadata tags and document properties to quickly find documents online. It also enables people to modify documents in a controlled manner through the check-in /checkout process.
- The second phase of this project entailed developing a workflow solution that allows for finer control of the upload process (e.g. more fine grained security and metadata) and enables creating task specific workflows (e.g. Contract Management).

Workflow Scenario: Purchase Order Process

The following is an example of a common business issue addressed by SharePoint

Background ABC firm is a 30 year old sandblasting, plastering and painting company. The company's service area covers multiple counties in a highly populated state. With over 80 employees, they struggled to keep track of purchase orders in different branches and locations. Revenue was lost due to duplicate orders being issued, Purchase Orders lost in transit, and overpayment of vendors.

- Business Challenges**
- Purchase orders were issued verbally (because of time pressures) or it took too long to generate a paper order (which usually meant the engineer had to stop by the office first).
 - At the various field offices, paper Purchase Orders were entered into an Excel spreadsheet by hand, and emailed to head office for consolidation. This led to some errors (e.g. typos or duplication).
 - The paper process was too slow. It could take 30 to 60 days for the data to be reconciled from the various operations.

Solution The company implemented a basic Purchase Order workflow utilizing MOSS and InfoPath. With internet access at most field offices, participation in the process has become much easier. Operators log in to the Portal and submit Purchase orders online. They can immediately access a consolidated list of all outstanding PO's, and approve or decline these in real time.