Manufacturing Company Decreases Asset Approval Time and Reduces Costs with SharePoint

Customer: A leading comprehensive motor manufacturer.

Size: 100,000 employees

Region: : St. Louis, MO

Industry: Manufacturing (EPC)

Profile: A leading global manufacturer of commercial motors, industrial motors, appliance motors, and controls.

Services: Microsoft SharePoint

Business Need

As a leading manufacturer of numerous different types of motors, the client had to process approval requests for fixed assets regularly. These assets, such as gears, ball screws, bearings, brush holders, dryer fans, and any other logistic needs across all departments, were integral to the client's daily operations and required a significant amount of administrative time to manage and maintain. While they had a formal authorization policy, the client was approving all requests manually – requiring an authorization signature by hand. As a result, they had difficulties tracking and monitoring requests, as well as any changes made to the request, and who was working on what projects. Seeing as everything was done manually, no reports were being generated to document the requests or subsequent approvals.

Solution and Approach

In order to streamline the fixed asset request procedures, Synoptek (formerly Indusa) created an integrated SharePoint module. This module would provide the client with an automated Appropriation Request (AR) tracking system and was deployed on a cloud hosted environment. This module contained numerous features that would streamline business processes in order to save the client's time and overhead costs when dealing with appropriation requests.

Some key features included:

AR Entry Form – The form was built to enter key information to generate email notifications and initiate the approval workflow. Documents can also be attached with forms to support the request tracking system.

Workflow Management – This initiates the approval workflow when submitting the AR form based on the gatekeeper's (the individual who originates the request) data entry in the form. The AR tracking module also maintains activity logs for each request.

Permission Management – This functionality sets security access based on the defined roles such as owners, gatekeepers, approvers, and the fixed assets team.

Reports and Search – The feature allow users to search for specific records based on the selected search criteria. Users can hide columns based on their needs and export the relevant information to an Excel spreadsheet.

Email Notification – The system sends weekly notifications to gatekeepers, the fixed asset team, and approvers with an overview of active AR Requests along with a link to the site.

Master Lists – These custom lists contain parameters such as business units, locations, departments, request types, request status, process status and request logs, and can be used as a master data source.

These collective functionalities removed the need for hand-written signatures and moved the entire AR

process into an automated, digital form. As a result, the client could devote more time to important business processes rather than the time-consuming administrative tasks the previous approval system required.

Business Results

As a result of the SharePoint module, the client saw a decrease in the amount of time needed for administrative tasks associated with fixed assets approval requests. The module also improved collaboration between users, clearly displaying which individuals were working on a project, who initiated or approved the request, and other important information. Communication was also improved by creating a better chain of approval and sending out relevant alerts or notifications to users. By giving users the ability to generate reports, the module also improved record keeping and reporting functions.

By relying on Synoptek's wide breadth of SharePoint knowledge, the client received a carefully crafted module that was tailored to their business needs. By automating these business processes, the client was able to reduce their overhead costs associated with approval requests.

The automated workflow also improved the efficiency of their team by removing the need for signatures and provided them with accurate reports of AR processes. Overall, the client was able to reduce costs and improve efficiency by automating routine tasks that had previously been done.