

Case Study

Customization of SharePoint workflows for better collaboration



➤ THE CUSTOMER

A global leader in the science of heart valves and hemodynamic monitoring, with more than five decades of experience in developing life savings innovations and selling medical technologies in nearly 100 countries with sales touching \$1 billion.

➤ THEIR NEED

Enable better collaboration within and between various departments (marketing, sales, clinical, and education), by using SharePoint to upload and share documents across the departments. The documents also had to go through an approval process once they were uploaded. Each department had its own approval process (4 levels in marketing and sales, 3 in clinical and 3 in Education) and the system was required to send an automatic mail notification to the concerned person for approval when a document was uploaded.

➤ OUR DEED

Aspire created a document library and custom approval workflow by using out of the box functionality of Sharepoint. Three content types were created based on each department (Sales & Marketing, Clinical and Education), as each department would have its own workflow.

The workflow was created for “N” approval levels, which could be configured at any time. Custom email notifications, reminders and the flexibility to reassign tasks were some of the other unique features built.

Key Features designed and developed:

- The approval workflow could be used for ‘N’ number of levels
- Configuration of levels was possible at any point of time.
- Reminders are sent if the document is pending approval for more than n days
- Flexibility to reassign tasks was provided
- Custom email notifications on each level of approval
- Dashboard showing the document files and status using KPI

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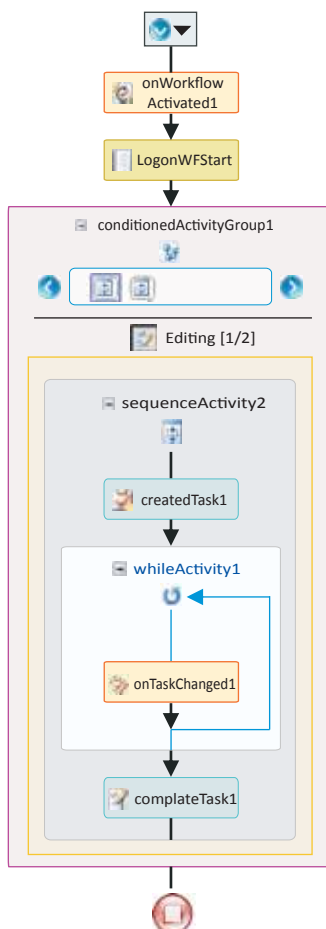
Document approval workflow

When a new document is uploaded in the customer's document library, an email is sent to the Workflow originator about the new document. This is done by an external event handler in Sharepoint.

The workflow routes a document or item that is saved to a list or library to a group of people for approval. By default, the workflow is associated with the Document content type (ie. based on each department internally) and it is thus automatically available in document libraries.

The workflow supports business processes that involve sending a document or item to colleagues or managers for approval. It makes an approval business process more efficient by managing and tracking all of the human tasks involved with the process and by providing a record of the process after it is completed.

The diagram below shows the Level1 process flow with the delay activity enabled:



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The Workflow triggers the on workflow Activated event and the Workflow status will be In Progress. Once the workflow is activated it moves to the Create Task Activity, a new task will be created. Once the task is created, the workflow moves to the OnTaskChanged Activity. If the Task Status is changed, the workflow status will be either Approved or Rejected. The Complete Task Activity checks if all workflow tasks are completed

Approval Form

A custom form was created that facilitates the approve, reject or cancel option. Flexibility to reassign tasks is also provided. If a document is approved, a notification is sent to the Level 2 approver (for example: VP of Sales, Director of Regions) stating that a new task has been created and is awaiting secondary level approval. If rejected, the workflow gets rejected and a notification is sent to the workflow originator and previous level approvers on rejection

Delay Activity

A delay activity is set for each level of approval. If a task is not approved and is awaiting approval for say, more than 5 days, a notification is sent to the approval authority saying the task has been pending for 5days, along with the task details.

SharePoint Dashboard

When users view the dashboard, they can see all the relevant document information for their specific projects. They are shown the documents that they are currently working on (Project files), the status of those documents, and KPIs (Key Performance Indicators) to show the Approval status of the document.

Benefits to the Customer

- ➔ Streamlined way of sharing critical information across multiple departments
- ➔ Efficient business approval process
- ➔ Better decisions through powerful decision support capabilities
- ➔ Timeliness in task completion
- ➔ Reduced turn around time for requests by 40%

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ABOUT ASPIRE SYSTEMS

Aspire Systems is an Outsourced Product Development firm committed to helping our customers build software products better and faster. We work with some of the world's most innovative Independent Software Vendors and software-enabled businesses, ranging from start-ups to established industry leaders, transforming the way software is built.

Aspire provides complete product lifecycle services, ranging from new product development and product advancement to product migration, re-engineering, sustenance and support. We are headquartered at Chennai, India with offices in USA and UK.

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