

Intranets

ENTERPRISE STRATEGIES AND SOLUTIONS

BP Logix, Inc.
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Leveraging Our Intranet to Improve Employee Productivity

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When managing a company's business processes, there's something to be said for seeing "the big picture." As group network manager, my team responds to the needs of five companies, including two international firms and a sales and manufacturing plant in India. While GIS (our corporate IT team) drives IT overall, I'm responsible for group-level IT, including business processes, application integrations, and IT initiatives.

Like most companies, we have an intranet that employees rely on to access the forms and information that they need—from policies and procedures to travel and expense forms. When some employees wanted to update these documents to reflect changing business processes, the existing system could not accommodate those changes, leaving employees feeling frustrated. For Liquid Controls, an effective intranet means providing the tools our employees need to

accomplish the work they need to do. With the advent of web-based tools that are intelligent and customizable, our goal was to make our intranet users masters of the workflows and forms they require to be productive and efficient.

Our intranet also includes a sales quoting tool that is used on a daily basis. While the form itself is easy to use, it had no workflow associated with it. Instead, employees would complete the form and then submit it for manual processing. Then the documents were either stored in file cabinets or kept in electronic files. As a result, many of the documents were misplaced and information was frequently lost.

Another issue that arose was the fact that most of the forms available were static. While some could be filled out online, others required the employees to print them and fill them out by hand, which then required additional work for the forms to

be processed. As a result the intranet appeared to be more of a repository than a dynamic portal to information.

CAPITALIZING ON THE INTRANET

When I began to consider improving our intranet, I initially thought I would focus on evaluating online forms processing solutions. I expanded that to incorporate workflows that could address the business processes reflected by those forms. Among my criteria was a product that would not require IT to do extensive back-end development—and one that could roll out quickly.

I also knew that I needed to get a buy-in from key users, so I talked to accounting and quality assurance. Accounting wanted to control the process for capital expenditures and quality assurance wanted all of its quality procedures online. Satisfying those two groups was extremely important, so my IT team did a 90-day needs analysis, looking for a product that would let us embrace workflow as well as electronic forms and document management—and also manage and continuously monitor our processes and activities.

We knew we could always write code, but we questioned how much time we wanted to spend being a development shop. Instead we decided that we needed a product that would enable our users to make changes easily and would be scalable and deployable out of the box. As a result of our evaluation, we selected Workflow Director from

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LEVERAGING OUR INVESTMENT

One rewarding aspect was how quickly we learned that Workflow Director's business

LIQUID CONTROLS GROUP
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QUOTE

Instruction: _____

Company/Customer: _____

Quote Number: 01074 Phone: _____

eMail: _____ Fax: _____

Followup: 7/2/2009 Status: Open Net Amount: _____

Region: 5

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The sales quote entry form is used by sales to view the quote to the customer and the entry form at one time via inline frames.

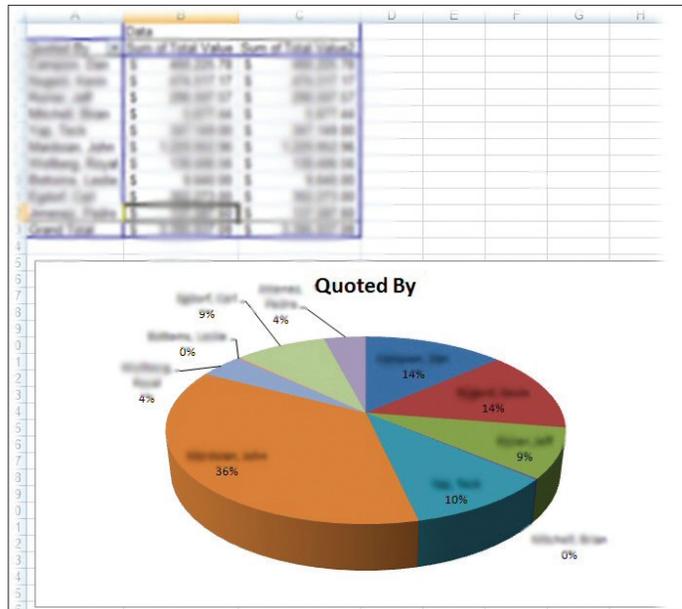


logic would let us (and our users) go as deep as we needed to be consistent with our business processes. That made our lives a lot easier. We then began to put applications ranging from attendance and change control to shop floor work instruction under Workflow Director. This process was not only straightforward, it was interesting.

We have 600 work constructions to build a flow meter, for example. We needed to provide the appropriate workflows to ensure that a new hire would be able to build a product with the high tolerance that we require as effectively as an existing shop-floor employee. And you can imagine how challenging it was to make any changes to instructions before we had an associated workflow. Now it's easy. We have approved instructions that we publish and shop-floor employees work off real-time information.

Another example is the audit procedure. We are always audited at least once a year in addition to SOX (Sarbanes-Oxley Act) and ISO (International Organization for Standardization) audits. If you write a procedure and are ISO-certified, that procedure must be available to all the people who need it and changes must be approved and recorded. Fortunately, with Workflow Director and our intranet working seamlessly, auditors can quickly access the information they need and the approvals are easy to produce.

We also looked for other ways we could assist accounting. They wanted to control all processes related to expenses. At the group level, at the start of each year all of the accounting departments are required to submit capital appropriation requests (CARs). Once approved, the various companies can then spend against those CARs using an expenditure request workflow, available through our intranet. With our new intranet, CAR balances are automatically tracked using the integrated auditing capabilities of Workflow Director. As a result, accounting can take a snapshot of current capital spend at any time using the



The Reporting module is a report generated from data gathered by the sales quotes workflow.

product's built-in reporting functions. And they can do it without requiring IT to help.

Back to the sales quote issue I previously mentioned: These quotes are a critical part of the way we do business, and though we wanted to improve integration, it wasn't a process we wanted to completely reinvent. Under Workflow Director, the sales quote process does not require the sales reps to change how they do business. Once they create a quote, they save the document to a network location. Workflow Director then monitors the network share and imports the quote with the appropriate index data. The sales rep is then notified by email every 2 weeks to update the information associated with the quote. Once the quote is closed, the rep no longer receives notification.

Our director of customer support and service, Jeff Rizner, is now a fan of Workflow Director because it allows his team to work the way it has always worked—but now it can do so electronically. Jeff personally liked to do sales quotes in Word and then email them to customers and prospects. On a monthly basis he also provides what he calls an "Opportunity Report" to management. So we created a form that allows Jeff to send quotes to customers and prospects, like before, and then dump that information into a directory and tag it with meta-

data (such as follow-up dates and the amount of the quote). Once filed using the workflow, it comes back on the date previously identified with an email reminder to call the customer. Jeff and the reps like it—and it works better for my IT team and the company as a whole.

PROCESSES THAT WORK

For us in IT, the world is one of nonstop projects. There is always a queue of people waiting for us to respond to a request. With Workflow Director, it's now easy for employees to drag and drop items to create a form or workflow. And they can now submit requests and check on their status, seeing who has approved the request. This type of visibility from within our intranet gives employees real-time information that was previously available only by calling or emailing the people involved in the approval process of a specific request to determine the status of that request.

Because of the integration of Workflow Director with our intranet, we can also now deploy new applications and processes easily, without having to train employees. Everything they need is located on the intranet. As a result of deploying Workflow Director, there is less repeat work, better parallel tasking, and more standardization.

One of the other things I like is that we can build business rules into the product and have an audit trail that allows us to know to whom tasks were assigned and when they were completed. This makes the entire process a lot more efficient.

Workflow Director has been easy to deploy and our users appreciate its friendliness and the user interface. The fact that it offers familiar screens and simple integration with our email systems, portals, file

systems, and scanners and that it is web-based enables us to drive from the results-side backward.

It's an ideal situation. We are able to customize applications for our business users without having to be a development shop. We are managing our business processes more easily and effectively. We are leveraging our technology investments. And while selecting Workflow Director was not a business decision per se, it was an IT

decision that definitely helped the business: With our new intranet, we can see the whole picture and keep a better eye on the bottom line. **I**

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