

SharePoint Development Services Help a Building Materials Manufacturer Streamline the Process of Travel Request and Claims Processing

Customer: A building materials manufacturer

Industry: Building Materials

Size: 501-1000 employees

Profile: With the aim of providing clean water for everyone everywhere, the client manufactures pipes and fittings for plumbing, irrigation, and sewerage requirements.

Location: Mumbai, India

Services: SharePoint Development

Business Need

With water conservation becoming a pressing challenge for economies across the world, the pipes manufacturer is committed towards continuous innovations in plumbing, irrigation, and sewerage technologies to keep pace with the constantly increasing water demands. Through its relentless efforts, the client aims to provide clean water for everyone and everywhere – from the smallest villages to the largest cities.

To build robust infrastructure in order to meet their goal, employees from client's different divisions often have to travel across the length and breadth of the country. However, the client's existing travel request and claims process was inept to handle the volume of requests. Even after the client automated some of the activities – there was no visibility into the requested raised and users and admins had no mechanism to check the status of requests. The lack of visibility at all ends led to substantial delay in approvals of the requests, which further delayed the claims processing as well.

The building materials manufacturer was looking to implement a SharePoint portal that could offer a modern travel request + travel claim module. The aim was to make the process of submitting travel requests easy for the employees and the process of tracking and approving these requests easy for admins. The client engaged with Synoptek as their Services Partner to build a portal and streamline travel request and claims processing.

Solution and Approach

To meet the client's requirement, Synoptek began the engagement by identifying the pain points and analyzing their current systems and business processes. After a detailed study, Synoptek came up with a SharePoint workflow solution. Synoptek then developed and integrated a new travel module on SharePoint Online using SharePoint Add-ins. In the process, Microsoft Azure was leveraged to host certain services and to facilitate integration with client's ERP system.

As part of the engagement, Synoptek carried out the following activities:

Travel Request

- Developed a SharePoint workflow that allows authenticated users to raise a travel request.
- Created extensive forms that allows users to add multiple requests and fill in relevant information including:
 - Onward and Return journey
 - Hotel-related information
- Provided traveling option to users based on the grades defined by the admin and also enabled them to request advance amount for travel purposes.
- Enabled admins to approve, complete, or reject requests by adding relevant comments and allowed users to address those comments and resubmit their requests.

- Configured push email notifications to automatically send requests to HODs and admins as soon as a travel request is submitted or updated.

Travel Claim

- Developed SharePoint workflow that allows users to request travel reimbursement.
- Allowed users to upload all travel-related receipts.
- Defined rules that set reimbursement limit for each user based on the employee grade; enabled system to automatically send an alert to the admin when the claimed amount by a user exceeded the set limit.
- Allowed admins to review every request submitted in the system and approve, reject, or complete them.
- Integrated an export functionality that allows admins to export all travel claim requests for business accounting purposes.

Admin Module

In addition, Synoptek also developed and implemented an extensive Admin module that was highly configurable and provided:

- Master Management
- Application Configuration Management
- User and Permission Management
- Export Module – to export claim related data into MS Excel
- Print module – to print approved claim from the system

If any minor change must be made, the admins can simply edit rules and make the changes available to the end users.

Business Results

With Synoptek's SharePoint development services, the client has been able to:

- Allow users to seamlessly log into the system, submit requests, and receive money for every travel expense made.
- Improve the efficiency and accuracy of travel requests and claims processing.
- Reduce the manual efforts and time taken in submitting and approving requests.
- Get end-to-end visibility into when a request is submitted, by whom, and where it currently is in the approval cycle.
- Get notifications when rules are violated and take action to ensure claims are authentic and accurate.

About Synoptek

Synoptek is a Global Systems Integrator and Managed IT Services Provider offering Comprehensive IT Management and Consultancy Services to organizations worldwide. Our focus is to provide maximum "business value" to our clients enabling them to grow their businesses, manage their risk/compliance, and increase their competitive position by delivering improved business results.