

# DESIGNING AND DELIVERING END TO END INVESTMENT APPROVAL WORKFLOW APPLICATION FOR WORLD'S LEADING CONFECTIONARY AND GUM **MANUFACTURING COMPANY**



## SUCCESS STORY

### **ENGAGEMENT:**

Short-term

### **INDUSTRY:**

Confectionery

### **OFFERING:**

Enterprise SharePoint Portal

Our client is a fully owned subsidiary of a global conglomerate confectionary and gum manufacturer, headquartered in Lainate, Italy, started its operations in India in 1994. The company today enjoys 30% market share, thus making them one of the leading players in the confectionery industry in India.

Today it has more than 15 brands under their umbrella. It employs 17,000 people and has 30 subsidiaries across the globe and distributes its products in over 130 countries.

## CHALLENGES

Our client was using a traditional way to trace the capex investment approvals from the designated authorities due to which they were facing a lot of issues in terms of:-

**Visibility** The business users were finding it difficult to see the traction on the investment approval workflows.

**Responsibility & Accountability** The management had a tough time tracking for the application as the business users were not accountable for the same.

**Manageability** Managing bulk approval forms in a hard copy format was a cumbersome process and required more effort and cost to manage it.

**Accessibility** It was a tedious work to find the hard copy of the investment approval applications if required by the management for a reference. Manual searching in the piles of papers and applications were the only alternative - consuming a lot of time and effort.

**Realization on ROI** The users were finding this as a monotonous task accessing the old document to check if there is any relation with the new approval application created for the same location, realization on ROI for the old application with the new one was not possible.

**Flexibility** The hard copy forms were not flexible at all because every time any changes which was proposed by the approver or any authority, the application was to be re-done again.

## SOLUTION

Our client wanted to have a system in place, in order to overcome the issues faced by the business users using the traditional or manual approach for the investment approval applications. In this approach the user fills an approval form in excel sheet manually and send across the hardcopy/softcopy for reviewing and approval process in various concern department.

To overcome these challenges, Progressive designed & developed an Investment Approval Workflow Application based on MS SharePoint 2010 to simplify the whole process, have more accurate, error free & fast feedback on the approval process.

The system "Investment Approval Workflow Application" was developed to support and assist management and finance to keep track of amount invested on behalf of the budget allocated on various project running at different location and globally in timely manner.

Not only this, but it also facilitated management to take decision on Budget allocation for the next year for various other projects.

Application is designed to support N level of reviewer and n level of approver, keeping in mind that there could be different reviewing and approving authority in different department.

Application has flexibility to get master data like users details, product details, category of product, location details, department details and other business data either by means of manual form entry, by uploading excel sheet directly into the system and also by fetching data directly from SAP ERP application.

Respective roles were designated to all the users to perform task like to create investment application, review investment application and to approve the same. Only authorized users with specific roles are allowed to login into the system and depending on the roles allocated, user performs his tasks.

Communication between the businesses users is channeled through email notification depending on the level of the "Approval Application" has reached.

The Approval Application designed also maintains the timeline of approval process to facilitate control by the management which also helps in giving the exact picture of the time lag / delay in the process in which stages and by whom.

Rich user view and dashboard displays the current & the pending activities of users, snapshot of the approval form and pictorial view of number of approval from has been closed or pending in a particular period.

## **KEY HIGHLIGHTS**

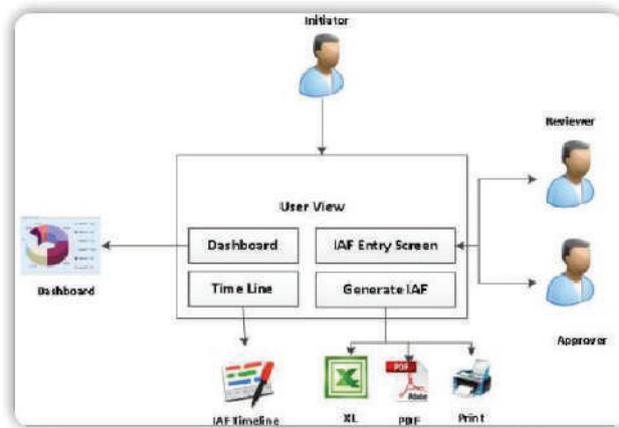
Progressive highlights following points during the deployment of the Investment Approval Workflow Application:-

- Create business value quickly through improved content management and business workflow
- Connect your employees to each other and business information without complex development work.
- Centralize important business documents and processes in a single solution.
- Consolidating data and increasing visibility into and access to associated data and information
- Increasing the flexibility and functionality of current infrastructure and data
- Leveraging existing systems by integrating workflows to business applications
- Establishing a common language and platform for business-IT alignment.
- Realization on ROI is visible because of quick access of investment data and their comparison and analysis on it.
- Integration with SAP to import master data.
- Supports Microsoft Office - Excel to upload bulk data.
- Functionality to export Investment Approval application in multiple formats including excel, pdf.
- Gives clear picture on change in investment amount because of change in global economy.

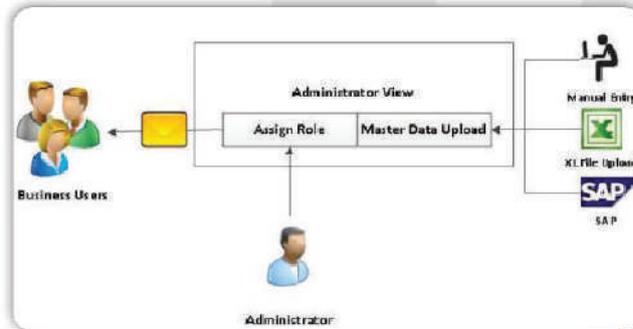
Application will be entirely web based, and requires no software or add-ins on user desktops for execution, reporting and monitoring. Progressive incorporates a web based architecture built with the latest enabling technologies available from Microsoft SharePoint 2010. This increases end user adoption, and minimizes training efforts. The system is IT friendly and designed with enterprise class scalability from departmental installations to global deployments.

Progressive team worked closely with the client to ensure that the installation and user acceptance goes smoothly. After the installation process the solution was tested with the Business user to ensure the performance as per client's requirement and expectation.

**Architecture diagram**  
User View



**Architecture diagram**  
Administrative View



## ABOUT PROGRESSIVE INFOTECH

Trusted IT partner since 1998, Progressive Infotech provides comprehensive suite of transformation and support services. The offerings span across cloud, digital and support operations, delivered through a matured and scalable service delivery model. In every client engagement, Progressive ensures clients realize higher ROI, stretch the intrinsic value of existing IT investments and are better prepared for emergent market changes.

Progressive Infotech is consistently featured as a “mature vendor for IT Outsourcing” in the Gartner hype cycle report for ICT in India for last few years.

Experience the outcomes at [www.progressive.in](http://www.progressive.in)  
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