



Customizing an Automated Report Generation and Document Management System via SharePoint

"Indusa's in-depth knowledge of SharePoint has made the entire process faster and easier than I could have expected. Thanks to our new portals, we will be able to fully automate numerous tasks and better manage our time and resources."

John Sarmanian, MIS Manager, Tampa Armature Works

Customer: Tampa Armature Works

Website: www.tawinc.com

Size: 650 employees

Country or region: USA

Industry: Retail / wholesale

Profile:

An industrial equipment distribution and service company specialized in electric motor repair, switchgear sales and service, and generators sales and service.

Services:

Microsoft SharePoint

Business Needs

Tampa Armature Works (TAW) is a premier provider of generator testing, service, and maintenance services throughout the United States. In order to improve efficiency of their existing processes, the company is seeking to customize Microsoft SharePoint 2013.

TAW was looking for an automated process to generate reports for their electrical equipment repairing process, and publish Management Reporter (MR) reports into their SharePoint library using the Management Reporter tool. They also required a powerful document management system to manage their account and administration department.

Solution and Approach

Indusa developed a portal using SharePoint where users can automatically generate and manage reports, and share them over SharePoint. Once implemented by TAW, this will help with internal communications, including making announcements, sending meeting invites, maintaining calendars, and more. The scope of work included managing report distribution for Management Reporter, developing reports using Excel, and hosting the reports on the SharePoint portal.

A Data Management System (DMS) was also created for the accounting department, and once implemented by TAW, the board will have the capabilities to complete a number of useful tasks: managing documents, participating in discussions, posting blogs related to the format of the reports, using business intelligence to manage reports for performance processing, and creating a task list, assigning, and tracking progress with users.

- Indusa also created the functionality to build powerful SharePoint forms using Nintex forms for the Quality Management System and Motor Repair departments. Other functionalities added to task list were: filtering tasks by priority, such as due tasks, completed tasks, and in progress tasks, and setting alerts and notifications for the processes.

Business Results

As a growing midmarket organization, TAW will now be able to fully utilize SharePoint to organize and automate their existing work processes.

After TAW implements the new portal, the company will have a way to centralize data across all departments. There will be no need

to capture data in Excel worksheets and link to them; rather, users can access one shared space and reference data more easily. Moreover, nameplate data will be easily retrieved from TAW's Dynamics AX ERP via SharePoint.

The easy report sharing between users will **improve the productivity** of users and managers. For example, the report for the motor repairing process will be automated once the implementation is complete. Documents will also be much more easily approved, making the process less administrative or time consuming.

Other features – powerful search, easier and faster error corrections, automating the motor repairing process – will yield benefits in terms of **time, effort, and cost**.

