Leveraging SharePoint to Increase HR Administration Efficiency

a presentation by Kevin Abel
President, Abel Solutions, Inc.
March 2012
Abel Solutions, Inc. is a leading SharePoint consultant based in Atlanta, GA.

- Focused on solving business problems with Microsoft technology
- Founded by Kevin and Cindy Abel in 1994
- 35 employees/contractors in Alpharetta, GA
- Microsoft Gold Partner since 2000
Leveraging SharePoint to Increase HR Administration Efficiency
Leveraging SharePoint to Increase HR Administration Efficiency

PRESENTATION AGENDA

• The Four Promises of SharePoint
• Streamlining Processes in the HR Department
• The Value of SharePoint Add-ons
• Client Business Case
Leveraging SharePoint to Increase HR Administration Efficiency

SharePoint’s “Four Promises”
Make It a Powerful Knowledge Platform.

ABLE SOLUTIONS INC
Leveraging SharePoint to Increase HR Administration Efficiency

ENABLE COLLABORATION

With increasingly disparate teams of people, both internal and external to the organization, businesses require a place where they can easily and securely share information.

With millions of installations worldwide, SharePoint is an industry-leading collaboration platform.

ABEL SOLUTIONS INC
Leveraging SharePoint to Increase HR Administration Efficiency

FIND AND USE KNOWLEDGE

SharePoint helps companies:
• Effectively leverage the knowledge they already have (Knowledge Management);
• Decrease the amount of redundant information created and stored;
• Manage the changing flow of information (Enterprise Content Management or ECM).
Leveraging SharePoint to Increase HR Administration Efficiency

AUTOMATE BUSINESS PROCESSES

SharePoint provides an automated system that promotes transparency and smoothes the workflow.

This enables the elimination of time-wasting, manual and paper-based business processes.
SharePoint helps companies access and use the information they have to make better, faster business decisions.
Leveraging SharePoint to Increase HR Administration Efficiency

STREAMLINING PROCESSES IN THE HR DEPARTMENT

- End-to-end automation keeps key processes such as on-boarding and off-boarding moving.
- Workflows facilitate accurate and efficient task processing and accountability.
- Dashboards provide instant status visibility.
- Automated account generation, with notifications and authorization reminders, deters task inertia.
Leveraging SharePoint to Increase HR Administration Efficiency

THE VALUE OF SHAREPOINT ADD-ONS

• Rapidly changing business needs may necessitate accelerated development of new processes and workflows.
• Custom development, while valuable, can be too time consuming to meet business requirements.
• Add-ons such as Nintex Workflow facilitate rapid workflow development.
Leveraging SharePoint to Increase HR Administration Efficiency

CLIENT BUSINESS CASE

• Client Summary and Opportunity
• Business Challenge
• Existing Environment
• Proposed Solution
• Key Solution Features
• Solution in Action
• Project Results
North Highland is a global business consultancy that takes a local approach to servicing clients and managing the business of its 49 offices.

The company is experiencing a period of rapid growth and sales forecasts are aggressive.
Leveraging SharePoint to Increase HR Administration Efficiency

BUSINESS CHALLENGE

Forecasts indicated contractor on-boarding at North Highland might increase from 50 per quarter to 200.

Maintaining the current on-boarding process, which took 4-5 days, would overwhelm the system, potentially threatening North Highland’s business viability.
Leveraging SharePoint to Increase HR Administration Efficiency

EXISTING PROCESS

The Contractor Management Process touched most departments in Corporate Services, and significant coordination was required.

The process relied largely on manual triggers using paper-based reminders and email attachments.
Leveraging SharePoint to Increase HR Administration Efficiency

EXISTING ENVIRONMENT

On-boarding, off-boarding, and change management processes engaged multiple roles:

- Requestor
- Revenue Management
- Recruiting Agency
- Account Manager
- Service Desk
- New Hire
Leveraging SharePoint to Increase HR Administration Efficiency

EXISTING ENVIRONMENT

Abel had previously helped North Highland deploy SharePoint Server.

The knowledge management solution, with site templates at four levels—office, account, project and national service area—supported information sharing and collaboration.
Leveraging SharePoint to Increase HR Administration Efficiency

PROPOSED SOLUTION

To avert the impending bottleneck, Abel Solutions recommended SharePoint forms and workflows to improve the on-boarding, off-boarding and change management processes.

Incorporation of a SharePoint add-on, Nintex Workflow, would enable affordable, complex workflow development in a compressed timeline.
Leveraging SharePoint to Increase HR Administration Efficiency

PROPOSED SOLUTION

Nintex Workflow provides a rich, graphical, web-based interface that enables organizations to build complex workflow processes quickly and easily at a fraction of the cost of custom code.

- Ability to integrate to other systems
- Ability to extend and customize
- Mobile capabilities
Leveraging SharePoint to Increase HR Administration Efficiency

KEY SOLUTION FEATURES

The new, automated on-boarding solution leverages SharePoint and the add-ons to streamline hiring requests:

• Initiates workflows;
• Generates necessary tasks and escalations;
• Creates/pushes mobile alerts;
• Tracks progress through the system.
SOLUTION IN ACTION

The new workflows streamline new user account setup by integrating with key applications:

• Change Point Project and Resource Tracking Software
• Microsoft Active Directory
• Microsoft Exchange
Leveraging SharePoint to Increase HR Administration Efficiency

SOLUTION IN ACTION

• Integration with North Highland’s HEAT ticketing system for requisitioning equipment streamlines contractor outfitting.

• Specialized dashboards enable users to view reports relating to task assignments and processing status.
### My Workflow Tasks

<table>
<thead>
<tr>
<th>Item</th>
<th>Workflow</th>
<th>Status</th>
<th>Waiting since</th>
<th>Approver</th>
<th>Current action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Richmond 014 - Glasser, Andrew</td>
<td>Contractor On-Boarding Workflow</td>
<td></td>
<td>6/3/2010 7:19 AM</td>
<td>Complete the Staffing and Equipment Form</td>
<td></td>
</tr>
</tbody>
</table>

### All Workflow Tasks

<table>
<thead>
<tr>
<th>Item</th>
<th>Workflow</th>
<th>Status</th>
<th>Waiting since</th>
<th>Approver</th>
<th>Current action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Richmond 014 - Glasser, Andrew</td>
<td>Contractor On-Boarding Workflow</td>
<td></td>
<td>6/3/2010 7:19 AM</td>
<td>David Hammond</td>
<td>Complete the Staffing and Equipment Form</td>
</tr>
<tr>
<td>Richmond 014 - Martin, Marilyn</td>
<td>Contractor On-Boarding Workflow</td>
<td></td>
<td>5/21/2010 7:40 AM</td>
<td>NHOB Revenue Management Escalation</td>
<td>Approve On-Boarding Request</td>
</tr>
<tr>
<td>Richmond 014 - Conrad, Jon</td>
<td>Contractor On-Boarding Workflow</td>
<td></td>
<td>5/18/2010 6:36 PM</td>
<td>NHOB Revenue Management Escalation</td>
<td>Approve On-Boarding Request</td>
</tr>
<tr>
<td>Richmond 014 - Jackson, Randy</td>
<td>Contractor On-Boarding Workflow</td>
<td></td>
<td>5/18/2010 3:12 PM</td>
<td>Eric Rhodes</td>
<td>Complete the Staffing and Equipment Form</td>
</tr>
<tr>
<td>Richmond 014 - Swift, Jon</td>
<td>Contractor On-Boarding Workflow</td>
<td></td>
<td>5/13/2010 12:21 PM</td>
<td>Eric Rhodes</td>
<td>Complete the Staffing and Equipment Form</td>
</tr>
<tr>
<td>Richmond 014 - Beezley, Pam</td>
<td>Contractor Off-Boarding Workflow</td>
<td></td>
<td>3/19/2010 5:00 PM</td>
<td>NHOB Revenue Management Escalation</td>
<td>Collect Equipment from Resource</td>
</tr>
<tr>
<td>Richmond 014 - Beezley, Pam</td>
<td>Contractor Off-Boarding Workflow</td>
<td></td>
<td>3/19/2010 5:00 PM</td>
<td>NHOB Service Desk</td>
<td>Verify AD/Exchange Accounts Created</td>
</tr>
<tr>
<td>Richmond 014 - Beezley, Pam</td>
<td>Contractor Off-Boarding Workflow</td>
<td></td>
<td>3/19/2010 5:00 PM</td>
<td>NHOB Revenue Management Escalation</td>
<td>Verify Contractor Survey Completed</td>
</tr>
</tbody>
</table>

### Workflows I've Started

<table>
<thead>
<tr>
<th>Item</th>
<th>Workflow</th>
<th>Initiated</th>
<th>Idle for / Completed</th>
<th>Current action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Richmond 014 - Jackson, Randy</td>
<td>Contractor On-Boarding Workflow</td>
<td>5/18/2010 3:12 PM</td>
<td>15 days 16 hours 12 minutes</td>
<td>Complete the Staffing and Equipment Form</td>
</tr>
<tr>
<td>Richmond 014 - Martin, Marilyn</td>
<td>Contractor On-Boarding Workflow</td>
<td>5/21/2010 7:36 AM</td>
<td>12 days 23 hours 45 minutes</td>
<td>Approve On-Boarding Request</td>
</tr>
<tr>
<td>Richmond 014 - Glasser, Andrew</td>
<td>Contractor On-Boarding Workflow</td>
<td>6/3/2010 7:19 AM</td>
<td>6 minutes</td>
<td>Complete the Staffing and Equipment Form</td>
</tr>
</tbody>
</table>
Leveraging SharePoint to Increase HR Administration Efficiency

SOLUTION IN ACTION

• Change Request workflows ensure rapid, accurate processing when changes are required.

• Automated off-boarding workflows remove contractors from the system quickly and efficiently, preserving company security.
Leveraging SharePoint to Increase HR Administration Efficiency

SOLUTION IN ACTION

• Robust reporting and metrics provide detailed visibility into on-boarding, change request, and off-boarding requests and other processes.
Leveraging SharePoint to Increase HR Administration Efficiency

**Workflow Statistics: Contractor On-Boarding Workflow**

Use this page to view statistics for all instances of a workflow.

<table>
<thead>
<tr>
<th>Workflow Statistics</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Last modified</td>
<td>1/5/2012</td>
<td>9:12:49 AM</td>
<td></td>
<td></td>
<td>Total Runs:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Completed</td>
<td>42</td>
<td></td>
<td></td>
<td></td>
<td>In progress:</td>
<td>68</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Error</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td>Cancelled:</td>
<td>11</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Min. Duration</td>
<td>9 minutes 49 Seconds</td>
<td></td>
<td></td>
<td></td>
<td>Max. Duration:</td>
<td>10 days 5 hours 24 minutes 32 Seconds</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Workflow Reports**

Use this report to view a list of workflow approvers, their average response time and the total number of workflow instances that are overdue, overclue and delegated.

**Approver Performance Statistics**

<table>
<thead>
<tr>
<th>Approver</th>
<th>Total Assigned</th>
<th>Completed</th>
<th>Completed On Time</th>
<th>In Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albert</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Alice</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Betty</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Christopher</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>David</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Eric</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Fred</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

**Workflow Reports**

- Select a report
  - 12 Month Usage Summary
  - 3 Month Usage Summary
  - 30 Day Usage Summary
  - Approver Performance Statistics
  - Completed Workflows
  - Error Workflows
  - Overdue Workflows
  - Workflow Actions
  - Workflow Performance
  - Workflows In Progress

**Workflow Statistics**

- 121 Total Runs
- 68 In progress
- 11 Cancelled
- 10 days 5 hours 24 minutes 32 Seconds Max. Duration
- 48 minutes Average Response Time
- 4 minutes 41 Seconds Average Completion Time

**Workflow Reports**

- 121 Total Runs
- 68 In progress
- 11 Cancelled
- 10 days 5 hours 24 minutes 32 Seconds Max. Duration
- 48 minutes Average Response Time
- 4 minutes 41 Seconds Average Completion Time
Leveraging SharePoint to Increase HR Administration Efficiency

PROJECT RESULTS

• The time for contractor on-boarding has been reduced from 4-5 days to 4-5 hours—an 80% improvement.

• All employees required for each on-boarding effort receive timely notification and can perform review and approval in minutes.
Leveraging SharePoint to Increase HR Administration Efficiency

PROJECT RESULTS

• The new system increased on-boarding, off-boarding and change request processing capacity in HR by as much as 4x.

• The end-to-end development process for the new on-boarding solution with specialized workflows took fewer than two months.
Leveraging SharePoint to Increase HR Administration Efficiency

PROJECT RESULTS

• The implementation was so successful that North Highland has since developed additional HR-related workflows:
  • PTO Requests
  • Expense Reports
  • Contract Management