K2 SmartForms Workflow Project for Manufacturing Firm

This client requested our assistance with a project to take advantage of licenses it acquired for K2 Cloud software for workflow and forms. This project was important across the company, with focus areas on workflows and forms relating to:

‣ Capital expenditure planning and processing

‣ Change management

‣ Customer relations

For each of these areas, our client's internal IT team wished to migrate workflow processes from SharePoint and InfoPath, in recognition that InfoPath support would come to an end a few years down the road.

At the start of the project, Concurrency's project team, including a business analyst and a SharePoint architect, conducted onsite workshops to evaluate the current state, define the desired future state, and identify any gaps between the two. This "milestone one" phase identified areas to improve existing processes—most significantly, opportunities to introduce additional automations in approvals processes. These automations made it possible to eliminate emailing back and forth between parties. The detailed work to establish requirements enabled an efficient development and roll-out process to follow.

Once the business needs—including detailed workflows—were established, the project moved to migration and deployment. This work included migrating existing data from SharePoint and InfoPath into a newly created SharePoint list that could be used by K2. This was a detailed-oriented process that involved dissecting all the information in the system, transforming it, and preparing it for future use.

Working with our client's IT group, Concurrency's project team redesigned and developed the outdated InfoPath forms using K2 SmartForms—providing provide user-friendly and browser-based forms that don't require users to have InfoPath software on their computers.

Another aspect of the "Modern Workplace" experience implemented with K2 Cloud was improvements in approval processes through an improved workspace, mobile app and the ability to action tasks using email replies.

Working closely with our client's internal team, the project proceeded smoothly throughout its approximately six-month time period and completed within the established project budget.

The internal team ensured a smooth transition for the company's users to the new K2-based workflows by developing and sharing documentation and step-by-step training. Because the K2 cloud application is integrated within SharePoint, accessible through Office 365 online services, users continued to click into workflows as they had before, allowing a nearly seamless transition.

Organization
Manufacturing Firm

Organization Type

Organization Profile