

Socius Formulates Document Management Strategy for Nachurs Alpine Solutions with SharePoint

CUSTOMER

Nachurs Alpine Solutions

INDUSTRY

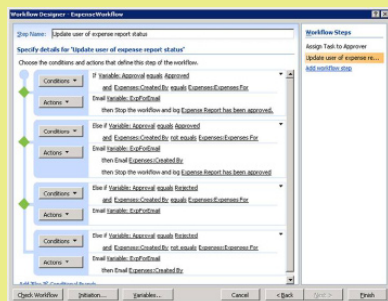
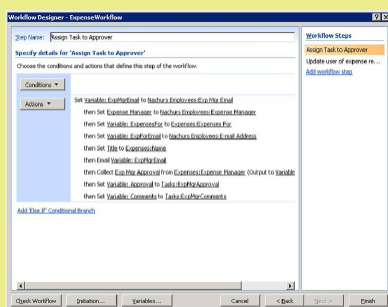
Chemical Manufacturing

LOCATION

Marion, OH

SYSTEM

Microsoft Dynamics GP
SharePoint 2007



Nachurs Alpine Solutions is a manufacturer and distributor of high quality liquid starter fertilizers, other fertility amendments, and a variety of industrial products.

Despite being long-time Microsoft customers, Nachurs had a large number of disorganized Microsoft Office files that they used as templates. They realized that they needed a place where they could standardize their Office templates and establish a document approval process.

Socius, Nachurs' long-time Microsoft Dynamics GP partner, leveraged Microsoft SharePoint to create a document library. The two organizations worked together to create base Office templates that would be the defaults in the library. By storing standardized templates in the document library, Nachurs was able to eliminate redundancy in document creation which in turn saves time and helps to prevent errors.

Additionally, Socius created an employee list within SharePoint. They

also developed a workflow that pulls the appropriate approver from the employee list so that specific managers would be able to review and approve necessary documents during the routing process.

One area where this process has been particularly helpful is in the processing of internal expenses. Employees can now access their personalized expense templates and submit their expenses online using the SharePoint site. That expense report is then automatically routed to the individual's approver. Once the individual's manager either approves or rejects the expense report, the individual who submitted it is automatically notified by email of the status of the report and can take any necessary action.

The streamlined document management and processing that Nachurs has achieved through SharePoint has saved them time and prevented costly errors, enabling them to operate more efficiently and focus on continuing to grow their business.

CHALLENGE

Nachurs Alpine Solutions had disorganized Office files that they were using as templates which led to manual processes that left them vulnerable to errors and redundancy.

SOLUTION

Socius leveraged SharePoint to create an Office template document library and a workflow to streamline document routing through the appropriate employees automatically.

RESULTS

Employees are now able to create and submit templates which are processed through a workflow, saving time and effort.