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– David Bryant - Information Systems Manager

A Tasti tale of using SharePoint to improve processes

Formed in 1932, Tasti remains a proudly 100% Kiwi-owned and run company. Their care in choosing only the best ingredients has established them as a leader in their field and their products are a mainstay of Kiwi pantries. True to their heritage, they maintain a focus on quality ingredients, innovative product development and investment in plant, people and facilities.

Deploying a solution

Since late 2012 Tasti has worked with their long-time business solutions partner, Koorb Consulting, to deploy Microsoft SharePoint to help manage two specific business functions: project management and process improvement.
The implementation of SharePoint replaces a system which saw Tasti's documentation stored on their local Windows based filing system or in cabinets. For David Bryant, Tasti's Information Systems Manager, the lack of visibility and the frustration around finding information and tracking projects were key drivers for the welcome change.

A challenging project

Tackling project management was the priority for Bryant. "We have five NPD (New Product Development) staff, each managing a range of projects. Previously they used Microsoft

Project to build and maintain a timeline based on the delivery deadline, and would meet on a weekly basis to review them. Unfortunately there were no metrics around the projected deadlines versus when they were actually completed. So, unless you attended the meetings, you'd have no real idea how the projects were tracking."
This meant it wasn't possible to see if the actions for the projects were done on time, or if the project had actually slipped backwards. The viewing of the project plans was also restricted to the NPD and marketing team.
Project documentation was another problematic issue addressed by SharePoint. Each project manager managed their documents, hard and soft, through their own filing system and protocols. The lack of consistency in document handling presented genuine challenges if someone left part way through a project.

Industry: Food manufacturer
Project Type: SharePoint

Quick Facts:

Website: www.tasti.co.nz

Customer Size: 250

Solutions: Microsoft SharePoint 2010 Enterprise, Microsoft InfoPath, IntelliGantt

Year: 2013

Benefits:
- Visibility and accountability of product development projects including outstanding actions and deadline slippage
- Time savings through task synchronisation between Microsoft Projects and SharePoint
- Traffic light reporting on project status for at-a-glance updates

- Project documentation centralised and easy to search and locate
- Entire workflow process managed by SharePoint, delivering huge improvements in efficiency
- Centralised viewing and managing of NCRs enables a focus on improving issue resolution

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At last, clarity

"With the introduction of SharePoint, there was an immediate improvement in the visibility of projects and documentation," said Bryant. "We now see instantly how projects are tracking against what was agreed. Delivery dates are locked in place so if a change is made to the project plan, SharePoint compares it to the timeline and uses a traffic light device that shows red if you're outside spec, yellow if you're out of spec but close, and green if everything's on schedule."

The project list, complete with traffic lights, can now be viewed on one page in SharePoint. A further drill-down shows the same degree of analysis for each stage of a project, with bottlenecks clearly signalled. And to everyone's relief, project documents can now be searched for and easily found in SharePoint using metadata functionality.

Process improvement

According to Bryant, one of the major benefits of SharePoint is the huge improvement to Tasti's workflow when it comes to the creation of new items in the system.

"Our requirements translated into the most complicated workflow that Koorb's SharePoint consultant had ever done. We'd been struggling using an interface to create new items in our Microsoft Dynamics AX ERP. It was a time consuming and unpopular job. Another issue was caused by the generation of alerts. Before the new item could be created, alerts were sent simultaneously to our master planning, quality control, customer services, marketing, technical, IT and finance departments, to let them know they had critical tasks to perform."

"The problem was that everyone would get an alert at once, regardless of whether they could do their action right away, or were dependent on information from another department, like a BOM, which may not be available until months later. This meant some departments had to repeatedly check in to see if, and when, they could do their bit."

"Additionally, we had a single person spending a significant amount of time every week managing the process with spreadsheets and emails. We had hundreds of actions to be chased up, any of which could impact on the project and push back the launch date."

Workflow efficiency

The decision to move this process to SharePoint meant an efficient workflow could be implemented. To facilitate this Koorb used Microsoft InfoPath, a software application for designing, distributing, filling and submitting electronic forms. "Now, when a new item gets raised," said Bryant, "each department is automatically notified, but only once it's their turn to complete their tasks. When they fill out and submit their form into the workflow an item is created in Dynamics AX for them, so that's another action we no longer need to do manually."

"We can now see at any point in time what stage each and every project is at, and what outstanding items need to be completed. The system recognises uncompleted tasks and sends out reminders, following up by email every two days until they're done. SharePoint now manages the whole process. It's a long way from the paper-based process we had, and a massive improvement. We've had a lot of good feedback from our people about it."

Getting smart with project tasks

Another smart idea which helps Tasti's project managers to generate significant time savings is the use of IntelliGantt. Koorb implemented the add-on to enable Microsoft Project tasks to be synchronised with task lists in SharePoint, and vice versa.

"The project manager creates their timeline in Project, syncs it with the appropriate SharePoint task list and generates easy-to-read charts," said Bryant. "Although we're not using all the functionality yet, in the future we'll assign tasks to individuals. Using the web interface they'll be able to mark their tasks as complete. As tasks are ticked off the traffic light feature automatically updates, so it's easy to see what's been done, and what's outstanding."

Non-conformance reports

Microsoft InfoPath has also been a winning solution for developing and handling NCRs (non-conformance reports). Tasti has a stringent quality control process and a number of NCRs to cover a range of issues from incorrectly completed paperwork to manufacturing and packaging issues.

The quality team can pick the appropriate electronic form for the issue, add further detail and even photographs from a tablet, and have it allocated against a particular item in AX. This means that the entire history of a product run can be documented, with problems viewed and isolated by production line or department and addressed by the managers of those sections.

This new process replaced the circulation of a Word document via manually generated emails, with responses then transferred over to a spreadsheet owned by the quality team.

"We can analyse issues by department and process," said Bryant, "and get a clear picture of where problems are occurring and the resolution rate. Now the manager of each department or process can see open and closed NCRs and the detail behind them, and can focus on improving performance."

Super super-users

Bryant is one of two super-users at Tasti, trained to train others, and solve any non-critical issues. Their SharePoint solution has been so intuitive that the uptake has been rapid and painless. "We have people who've been here for 30 years, and they've picked up and run with this easily. I just sat down for an hour with the group and showed them what to do, and that was it. Simple."

Next steps

A stylish staff intranet to complement their public facing website is next on Bryant's list. "We want to achieve a cool funky-looking website so our staff can browse up-to-date information on Tasti, our organisational structure, new internal jobs, company announcements, photos of maybe a building development, and other projects that might be going on."

A job well done

For Bryant the partnership with Koorb on this project has been a valued one. "Given our strong relationship, Koorb were a natural choice, and they have certainly delivered a great result. We've pretty much come with a problem, and a list of things we wanted to achieve, and Koorb came back with the solutions. Our SharePoint project has run to schedule and budget and provided some excellent outcomes."

About Koorb Consulting

Koorb is a 100% NZ owned company - privately owned and operated by the Directors, Nicholas Birch and Paul McDowell-Hook. Both Directors work in the company. The company was established over 12 years ago and has offices in Auckland, Wellington, Christchurch and Dunedin.

The main focus of our business is implementing and supporting Microsoft Dynamics AX, Dynamics CRM, Microsoft Business Intelligence (BI) Solutions and Microsoft Collaboration and Content. Our 50 consultants together comprise the largest Microsoft Dynamics AX, CRM and Microsoft BI practice in New Zealand. All are certified and have extensive and wide-ranging industry experience.

We have implemented and are supporting over 60% of all Dynamics AX sites in New Zealand. This is a direct reflection of our strong leadership, highly experienced people and proven methodologies.

In both 2007 and 2010 we won the Microsoft Partner Award for the Dynamics ERP Solution of the Year.

Microsoft Partner
Gold Enterprise Resource Planning
Gold Customer Relationship Management
Gold Business Intelligence
Silver Collaboration and Content

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