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Simple Getaways, Inc., a travel agency with twelve (12) offices located throughout the western United States, employing roughly one hundred eighty (180) to three hundred sixty (360) employees, experienced challenges of process and productivity related to company growth. Among these are a decentralized systems environment, limited office and systems collaboration, and legacy (paper flow) human resource and administrative processes. SGI executives understand that further organization growth may be limited if the technological and process challenges are not addressed and have approved the implementation of an updated information system to improve productivity. Key Stakeholder Challenges

Several challenges currently affect the business operations for Simple Getaways, Inc. staff and management. Among them is the need to collaborate on documents both inter-office and intra-office. SGI currently operates with each location housing their own internal file server where the locations’ documents are stored which limits the availability and access between offices. Any interoffice sharing of documents is generally accomplished through email which is then edited and either returned to the original sender or forwarded to additional offices. This has historically produced results such as multiple document versions in distribution, and incorrect or outdated information being utilized in the decision making process. This can have a negative impact on customer service if the incorrect information is utilized to book travel for a client with pricing that is either too high or too low. It can also affect SGI as a company if outdated information is used in planning for future travel promotions, discounts, and financial projections.

The previously mentioned challenge currently affecting Simple Getaways, Inc. is also exacerbated by the fact that each office maintains their own individual Microsoft exchange (email) and windows file servers, allowing each location to function within its own domain. This decentralized method of systems and document management has hampered interoperability between locations, making it difficult to share documents and services efficiently. Simple Getaways, Inc. legacy administrative and human resources process is another challenge currently affecting the organization. Administrative tasks such as vacation approvals, employee leave, address information, tax forms, etc. are currently handled through a paper forms process and stored in physical file cabinets at each location. When documents need to be provided to the headquarters regarding any employee information or requests, they are generally either faxed or photocopied and sent through postal mail. This can lead to delays in processing certain employee requests and creates complications when dealing with time sensitive documentation. Actual vs Desired Performance

Current: Sharing of documents between staff at various locations is currently accomplished by emailing the documents between offices, editing the document, and returning the edited version to the original sender or to additional locations. This has historically produced multiple document versions and often resulted in incorrect and outdated information being shared and utilized. Desired: Document collaboration capability allowing the retrieval, editing, and updating of documents and information in near real time, provide some form of version control, and eliminate the need to email documents between staff for editing. Current: Document storage for Simple Getaways Inc. is currently accomplished utilizing individual file servers at each location, no interoperability is in place.

This creates a difficulty in retrieving information stored at each location. Desired: A document management solution which would allow for the storage and sharing of documents from a centralized repository and better interoperability between office locations. Current: Simple Getaways, Inc. currently performs administrative and HR duties utilizing a legacy paper-flow process. Storage of these documents is accomplished by file cabinet at each location and request for documents regarding employees are accomplished through fax or postal mail. Desired: A redesigned and automated human resources/administrative process utilizing digital forms, online approvals of employee requests, online access to employee and company information. Recommended Solution

Simple Getaways, Inc. currently utilizes the Microsoft productivity suite at each of its locations. The solution recommend therefore seeks to minimize the disruption inherent with a system and process transition. The recommended solution to address both the document management and storage accessibility challenges, in addition to the document collaboration needs would be Microsoft’s Office 365 Business Premium Suite. This solution was chosen for several reasons: 1) This suite of products would allow the users to retain some product familiarity as the basic office applications currently in use remain virtually the same (i. e. Word™, Excel™, PowerPoint™); 2) The solution provides “ Team Site” functionality for document collaboration, including real time editing, version control, and sharing, eliminating the need for emailing documents between offices. (Microsoft, 2015); 3)

It includes one terabyte (1TB) of data storage per user which can be accessed from virtually anywhere, and files can be shared inside or outside of the organization; 4) It features a fifty gigabyte (50GB) email account per user and online calendar and conferencing options. As a hosted software solution, Microsoft’s Office 365 Business Premium Suite allows Simple Getaways, Inc. to centralize and improve its document management, document storage, and email management capabilities providing for better collaboration and sharing internally. It also allows for the elimination of the onsite file and email servers at each location, removing the decentralized system infrastructure and improving upon the interoffice interoperability. The proposed solution to meet the administrative and human resources task challenge would also be a hosted solution provided by BambooHR. The BambooHR solution provides a full service human resources system which includes a secure employee self-service portal where vacation requests, sick leave, address updates, etc. can be submitted and approved, eliminating the need for paper documents.

It also offers online employee onboarding and off boarding, reporting capabilities for viewing details such as employee leave tracking and benefits, as well as an area to upload documents into the system to be attached to the employee records. It also offers an API interface which can be utilized to integrate with any custom software currently utilized by SGI. (BambooHR, 2015). BambooHR offers an evaluation period which Simple Getaways, Inc. will be able to utilize the product to become accustomed with how the system will integrate into their business operations. To accomplish the task of digitizing the documents currently stored at each office into the chosen HR system, each office will need to provide a workgroup class multifunction copier which has a scan-to-storage capability.

The existing documents will then need to be individually scanned to a secured, temporary location on the file server or on human resources team site depending on the process stage the location is in at that time. Once the locations’ documents are scanned, they will need to be renamed appropriately and uploaded to the system into the defined directory structure for their location. Human resources administrators from headquarters will then sort the documents and attach them to the correct employee profile. When this process is completed, the need for paper flow processes will be virtually eliminated. Implementing both proposed solutions, Microsoft Office 365 Business Premium Suite and BambooHR, will allow Simple Getaways, Inc. to alleviate the challenges currently faced within the organization and prepare it to move forward with confidence on upcoming growth initiatives.

References

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