



Robotic Process Automation Helps a Swiss Architecture Company Streamline the SharePoint Site Creation Process

CASE STUDY

Customer: A leading independent Swiss architecture and general planning company

Size: 201 – 500 employees

Location: Zurich, Switzerland

Industry: Architecture and Planning

Profile: The client is an internationally distinguished and technologically prominent architectural company with offices in Switzerland, Germany, and France.

Services: Robotic Process Automation

Business Need

The architecture and planning company has been significantly shaping architecture in Switzerland while also making a name for themselves at an international level. With five offices in Switzerland and three in Germany, the company is ideally positioned in the European Union, with plans to expand globally.

The client was using SharePoint and Microsoft Teams to enable employees to better manage their day-to-day tasks. However, both these applications were open for all; any employee could create a SharePoint or Teams site to meet their individual or team requirements.

However, this caused the client to face several issues with respect to quality and authenticity of data. Many times, multiple employees from the same team ended up creating a site which led to duplication of sites. In addition, if a site owner leaves the organization, it became difficult for the manager to transfer ownership.

Because of these issues, the client was looking to automate the SharePoint and Teams site creation process. The client got in touch with Synoptek for the same.

Solution and Approach

To overcome the challenges the architecture company was facing, Synoptek carried out the project in two phases:

Create Centralized Information Policy

In the first phase, Synoptek suggested creating a centralized governance information policy helped the client build a global Microsoft Teams site, so users could:

- Build Team Site creation request from PowerApps
- Add necessary information including
 - Purpose of app
 - Owner
 - External sharing
 - OneDrive access
 - Team name
- Sign terms and conditions and submit request

As a request is submitted, it is transferred to the manager who approves or rejects it. In either case, the requester gets a notification; approved requests are then sent to a governance body who reviews them and checks if a similar site is available. Any queries are reverted to the user; once the requester resubmits, the request is again reviewed. Once approved, the Team site is ready to be created.

Automate the Site Creation Process

Under normal circumstances, whenever a request gets approved by the governance body, an administrator would create the SharePoint or Teams site and add permissions as well as set governance policies.

However, to make things quicker and more streamlined, Synoptek automated the site creation process using RPA. As soon as a request gets approved, a site is automatically created using a pre-built template. Owners and members are automatically added; and governance information automatically provisioned. The requester is then sent a notification about the site being ready for use.

Business Results

Under Synoptek's guidance and direction, the architecture firm was able to:

- Centralize information policy for better SharePoint and Teams experience
- Automate the site creation process and minimize time taken to create sites

About Synoptek

About Synoptek: Synoptek is a global systems integrator and managed IT services provider, offering comprehensive IT management and consultancy services to organizations worldwide. The company works in partnership with clients of all sizes – from mid-market to Fortune 100, and for over two decades, its focus has been to provide maximum business value to its clients, by enabling them to grow their businesses, manage risk and compliance, and increase their competitive position. Synoptek is committed to delivering improved business results and unmatched service to every client, every time.



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