Synoptek

Case study

A Suite of Workforce Productivity Services Helps a Mental Health and Welfare Agency Boost Enterprise Productivity and Efficiency

Customer Overview

Customer:

A mental health and welfare agency

Profile:

The agency provides innovative and effective programs and services for children, youth, young adults, and families facing serious life challenges.

Industry:

Healthcare

Services:

Workforce Productivity

Business Need

The health and welfare agency was heavily reliant on manual processes. Most users manually performed data entry tasks from the incident tracking portal into Excel sheets, which not only added to human effort but also increased the probability of errors. The use of Microsoft Access Database to maintain their growing data further added to their woes.

At the same time, although the agency was using SharePoint for internal communication and collaboration, the team was forced to manually download forms, fill up the information, and then send an email notification to the supervisors – who in turn sent an approval or rejection email.

Once a request was approved, the user sent the approved form to the ERMHS coordinator, who uploaded a PDF version to SharePoint. The user also parallelly sent the approved form to the ERMHS Leadership, Compliance, and Research team via email who then entered incident details in an Excel spreadsheet. Based on the Excel data, the research team generates the Special Incident Report (SIR).

Solution and Approach

To overcome the issues caused by manual processes and enhance workforce productivity and efficiency, Synoptek delivered a number of services:

BOT implementation using Microsoft Robotic Process Automation

Synoptek designed and implemented a BOT that no longer requires user interaction to perform data entry tasks. The BOT automatically logs in to the Incident Tracking Portal and adds filter criteria in the Start Date and End Date fields to collect information about incidents.

After submitting the filter criteria, the BOT will display a list of incidents for the specified date range as well as specify incident details including incident and license number, certified parent name, facility name and address, incident date, time, and location etc. The BOT executes tasks every day, generates an Excel report, and sends the report to respective users via email.

Microsoft PowerApps implementation for ERMHS

To streamline the data entry and report generation process, Synoptek developed a form in PowerApps to capture the SIR information and made it accessible using a URL. As and when a team member fills up the form, the application sends an automatic email notification with a PowerApps form link to the approver or supervisor.

The supervisor then opens the form using the link, reviews the details, and approves or rejects the SIR form. Post approval, the application generates a PDF version of the form, uploads it on the SharePoint portal, and sends a notification to ERMHS Leadership and Compliance Team. Once a request has been approved, no team member can update the data as part of confidentiality.

The application allows users to view logs, right from tracking when a request was created or what the current approval status is.

Database Migration from Microsoft Access to SharePoint Online

To streamline database management, Synoptek also helped migrate their data from Microsoft Access to the new SharePoint Online platform. The migration enables users to access data using the SharePoint site URL from any laptop or desktop system.

The application allows users to view logs, right from tracking when a request was created or what the current approval status is.

Business Benefits

The Workforce Productivity Services provided by Synoptek have enabled the healthcare agency to take advantage of the latest technologies as well as leverage new-age UI and security features in SharePoint. With the PowerApps implementation, they have achieved a number of business benefits, including:

- Reduced manual effort and minimized errors via automated processes
- Anytime, anywhere application access
- Faster and more accurate data entry via bots with fewer clicks
- Better employee productivity and efficiency
- Reduced chances of fraudulent data

About Synoptek

Synoptek delivers accelerated business results through advisory led transformative systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.