



Case Study

MIGRATION FROM SHAREPOINT WORKFLOW TO POWER AUTOMATE

ABOUT THE CUSTOMER

A Bioscience & Biotechnology company based out of Denmark that develops natural ingredient solutions for the food, nutritional, pharmaceutical, and agricultural industries.

CHALLENGES FACED

As Microsoft is in the process of retiring SharePoint 2010 workflows, we supported our customer to migrate from SharePoint classic workflow to Power Automate. Due to the SharePoint retirement, the workflows were not available for the new tenants, and the services were also removed from existing tenants. The workflows and the business processes built using the workflows saw a major disruption that impacted our customer's business. We helped them in creating the workflows including the customized ones, for a hassle-free business which was one of their major challenges.

OUR SOLUTION

Our customer approached us to resolve this crucial issue as migration is one of our core strengths. We supported them starting from migration, implementation, and conversion of SharePoint classic workflows to Power Automate. We migrated the application and created a Power Automate flow pertaining to their business with customizations based on our customer's existing workflows and a few value-added features, including email reminders for pending approvals.

PROCESS FLOW

1. Converted the existing SharePoint work flow to Power Automate flow.
2. All the actions, business rules, and triggers built into the SharePoint work flows were converted to Power Automate flows.
3. We converted an approval flow on SharePoint list that stored the Discard details.
4. Once the approvers have approved, the status of the record is updated accordingly.
5. The approval summary then can be captured and tracked based on the date.
6. Automated task reminder email with the details and time of request including the approval hierarchy.

MAIN FEATURES:

1. Quick conversion time
2. Multi-level sequential approvals
3. Management of rejection scenarios
4. Notification emails to the initiator about the process
5. Reminder emails for pending approvals more than 24 hours old
6. Approval summary logging

ABOUT US

Headquartered in Anaheim, CA, UB Technology Innovations Inc. (UBTI) is a Microsoft Gold-Certified Partner in Data Analytics & Application Development. We are an Intelligent solutions company supporting our global customers for over two decades to improve their business efficiencies and streamlining their processes while deriving in-depth & actionable insights. Our Power BI expertise includes Consultation, Development, Database Solutions, Licensing, Corporate Training, Proof of Concepts, and Managed Services.