

A Global Firm Achieves Total Control with a Centralized Repository System

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### WHO WE ARE

“UB Technology Innovations is a leading provider of Power BI services, offering expertise in crafting exceptional dashboards. Our expertise assists clients in their digital transformation endeavors by streamlining the process and gaining a competitive advantage through rapid app deployment”

### WHAT WE DO

- Streamlined data management process
- Cost-effective
- User interface
- Sustainability
- Scalability



### THE CLIENT

Established in 2007, the client is a global enterprise specializing in technology and business services. They operate across key locations, including Singapore, Chennai, Delaware, London, Sydney, and more. Their expertise spans cloud-native application development, data engineering, product engineering, digital commerce, business process services, and cybersecurity. With a strong presence in multiple industries, they provide end-to-end technology solutions, integrating advanced automation and security measures.



### CHALLENGES

In a field where security and clear processes are vital, keeping track of all documents is a big deal. Good documentation makes sure data is safe, audits run smoothly, and teams work together without hiccups. However, the client faced major issues because:

- **Scattered Files:** Important documents were stored in different systems, making them hard to find and manage.
- **Weak Access Control:** Without strict role-based permissions, sensitive files risk being viewed by the wrong people.
- **Company-Wide Impact:** The lack of a unified system slowed down the review and approval process, confusing departments.

These issues required a company-wide solution that ensured both security and accessibility.





## SOLUTION

To address these challenges, we implemented a centralized document repository management system using Microsoft Power Apps, SharePoint Online, and Power Automate. Its key features include:

- **Intuitive Documentation:** A simple, user-friendly app allowed basic users to upload documents, which were then stored in a dedicated SharePoint library.
- **Central Repository:** All files were securely stored in one place with metadata (details like document owner, status – “Pending”, “Reviewed”, “Approved,” and assigned reviewer) to keep track of each document.
- **Automated Workflows:**
  1. When a document is uploaded, Power Automate automatically sends a notification to the assigned reviewer.
  2. The reviewer accesses the document through Power Apps, adds feedback or comments, and, if needed, sends it back for changes. If satisfied, the reviewer marks it as "Reviewed".
  3. Next, the document moves to an approver who can approve or reject it. An approved document’s status is updated accordingly, while rejected ones go back for modifications.
- **Role-Based Access Control (RBAC):** Permissions were set up as follows:
  1. **Basic Users:** Can upload documents and view only the ones they uploaded.
  2. **Reviewers:** Can only review documents assigned to them.
  3. **Approvers:** Can approve or reject documents after review.
  4. **Admins:** Have full access to view, edit, review, reassign, and approve documents.
  5. **Local Users:** Can see document titles but need permission to view or download content.
  6. **Global Users:** Have full viewing and downloading rights for all documents.





## SOLUTION BENEFITS

The new system brought clear improvements for the client:

- Better Document Organization: All files are in one place and easy to find.
- Stronger Security: Clear access controls protect sensitive documents.
- Faster Reviews and Approvals: Automated workflows speed up the review process and reduce delays.
- Easy Compliance: Tracking metadata such as ownership, document status, and history makes it simple to meet audit and regulatory requirements.
- Improved Collaboration: Everyone works more efficiently with a unified, reliable system.

Conclusion:

Our approach brought all documents together in one centralized document repository management system using Power Apps, SharePoint Online, and Power Automate, enabling automated workflows and precise role-based permissions. This process change accelerated document review processes, improved productivity, and tightened security for the client. At UB Technology Innovations, Inc., we create next-gen document repositories that empower organizations with granular access control, real-time collaboration tools, and agile compliance tracking.



## ABOUT US

UB Technology Innovations, Inc. (UBTI) is a leading global technology solution provider with more than 3 decades of experience across all industries, specializing in Capital Markets (Asset Management), Logistics and Healthcare. We are the preferred Microsoft Gold Certified partner backed by a world-class team of Microsoft Certified experts with rich experience in Azure Cloud Platform and Data Analytics.



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