



# UBTI Simplifies Employee Training Management from Spreadsheets to a Low-Code/No-Code Power App

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### WHO WE ARE

“UB Technology Innovations is a Microsoft Power Platform delivery partner offering no/lowcode solutions, virtual bots, RPA, and data insights. We help clients on their digitalization journey by automating tasks, optimizing workflows, and providing a competitive edge through quick app deployment”

### WHAT WE DO

- Compliance and Security
- Enhance Productivity
- Improve Time to Market
- Reduce Operational Costs
- Maximize Profits
- Customer Experience



### THE CLIENT

The client is a leader in energy services that supports oil and gas operations, infrastructure projects, and industrial activities. With a focus on drilling, well services, and project management, the company has built a strong reputation for delivering innovative and efficient solutions to both local and international clients. Pioneering initiatives, such as the introduction of integrated fracking services and semi-automated rigs, have positioned the company as a trailblazer in the energy sector.



### CHALLENGES

Our client organization provides oil and energy services to several end-clients. Their employees work at different client sites, and each client expects certain safety and technical training to be completed. Some training modules are one-time, while others must be renewed after a fixed period. So, completing the right courses on time is part of being allowed to work for that client.

When a client recommends a course, all employees assigned to that client must complete it. Training institutes conduct these courses and later send completion details to the organization. This looked manageable at first, but as the number of employees, clients, and courses increased, the process became harder to control, leading to issues like:

- Manual Excel-based tracking: Course updates came in Excel files from institutes via email, and teams manually copied data into their trackers. With thousands of records, mistakes and delays became common.
- Low visibility into course completion details: There was no single place to see the course status for each employee. Teams had to check multiple files to get answers.



- Dependence on a few coordinators: Only certain staff knew how to manage the trackers. If they were unavailable, updates slowed down.



## SOLUTION

Our experts at UBTI first spent time understanding the client's training cycle and studying where time was being spent and where errors occurred. We mapped the entire journey from the moment a client recommends a course to the point where completion records are stored for compliance.

Instead of adding another tracker, we built a Low-Code/No-Code Power App for employee training with the following capabilities:

- Designed one central training application: We created a Canvas Power App connected to SharePoint to act as the main database for all training-related information. Employee profiles, client assignments, and course lists are maintained here, ensuring a single reliable record rather than multiple spreadsheets.
- Linked client requirements to employees clearly: Since courses are recommended at a client level, we have structured the app in such a way that when a course is tagged to a client, all employees under that client appear against it.
- Turned institutes' Excel files into automatic updates: Earlier, when the institutes sent Excel sheets, the client's training team manually copied the details. Now, when those emails arrive, our Power Automate flow reads the attachment, checks the format, and pushes the data directly into the training app. So, course completion records update without manual typing.
- Handled incorrect data without breaking records: Sometimes files arrive with missing or mismatched details. Instead of mixing this with clean data, those entries are routed to a separate exception page. Admins can review, correct, and then merge them into the main records.
- Showed admins a clear training snapshot: Our app's home screen gives admins a live count of open, completed, nearly expired, and expired courses. Nearly expiry is marked 90 days before the due date, which helps them act before compliance is at risk.
- Used Microsoft Power BI for comprehensive visibility: For deeper review, Power BI dashboards present training matrices, compliance reports, and upcoming renewals. Leaders can filter by client, role, or location and quickly identify where attention is required.
- Records updated directly by employees: The employees can log in to the app, view assigned courses, upload course completion certificates, and check their past training details. Their records stay attached to their profile for future reference.
- Everyone informed with timely alerts: If a course is pending, employees receive weekly reminder emails until it is completed. Admins also receive alerts when new data is added to the app.



## OUTCOME

- With UBTI's training management solution in place, the organization moved from scattered tracking to a structured and reliable training process, resulting in:
- Less manual work and faster updates: Course completion data now flows from institute emails into the app automatically. The team spends far less time copying data and more time reviewing actual training needs.



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- Clear visibility of training status: Admins and managers can instantly see which courses are open, completed, or nearing expiry. This helps them act early rather than react late.
- Better compliance tracking: Expiry risks are identified in advance, and reminders keep employees informed. This reduces the likelihood that employees will miss mandatory certifications.
- More confident planning and decision-making: Leaders can review training data across locations and roles and plan renewals or future training programs with fewer assumptions.
- A scalable foundation for future growth: The structure now supports adding more employees, clients, and courses without returning to manual tracking methods.

## Conclusion:

Our client firm used to manage employee training requirements through emails and Excel files, trying to keep up with growing client demands and course volumes. UBTI stepped in to redesign how staff data flows by building a Power App for employee training that connects employees, clients, and course requirements into a single, clear system. Today, the organization manages training with greater visibility, lower risk, and a process that supports growth rather than slowing it down. UB Technology Innovations, Inc. continues to work with oil and gas industry leaders to design the best Low-Code/No-Code business applications that bring order to everyday processes and help teams stay prepared as they grow.



## ABOUT US

UB Technology Innovations, Inc. (UBTI) is a leading global technology solution provider with over 3 decades of experience across all industries, specializing in Capital Markets (Asset Management), Logistics, and Healthcare. We are the preferred Microsoft Solutions 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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