

UBTI Helps a Bioscience Company Maintain Business Continuity Through SharePoint Workflow Migration

WHO WE ARE

“UB Technology Innovations is a Microsoft Power Platform delivery partner offering no/low-code 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

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



THE CLIENT

The client is a bioscience and biotechnology company that develops natural-ingredient solutions for the food, nutrition, pharmaceutical, and agricultural industries. They combine scientific research with large-scale production to develop and commercialize bioscience-based solutions for global markets.



CHALLENGES

As Microsoft began retiring SharePoint 2010 workflows, the client needed to move their existing business processes from SharePoint classic workflows to Power Automate. The retirement created several challenges:

- Workflow availability: SharePoint classic workflows were no longer available for new tenants, while the services were also being removed from existing tenants.
- Business process disruption: Existing workflows and the business processes built around them were disrupted, affecting day-to-day operations.
- Custom workflow requirements: The client needed to recreate existing workflows, including customized processes, without disrupting their established approval and business rules.
- Migration continuity: The client needed a structured SharePoint workflow migration approach that could preserve existing functionality while supporting the transition to Power Automate.





SOLUTION

The client approached us to support the migration and conversion of their existing SharePoint classic workflows to Power Automate. We handled the migration, implementation, and conversion in line with the client's existing business processes.

As part of the SharePoint workflow migration, we recreated the existing workflows in Power Automate and added customizations based on the client's requirements. We also introduced value-added features, including automated email reminders for pending approvals, to improve process tracking and follow-up, with the following process flow:

- Converted the existing SharePoint workflows into Power Automate flows.
- Converted the actions, business rules, and triggers built into the SharePoint workflows into corresponding Power Automate flows.
- Converted an approval flow for a SharePoint list that stored discard details.
- Updated the record status once the required approvers completed their approvals.
- Captured and tracked approval summaries based on the date.
- Automated reminder emails with request details, elapsed time, and the approval hierarchy.

Key features of the solution:

- Quick Conversion: Supported faster migration from SharePoint classic workflows to Power Automate.
- Multi-Level Approvals: Enabled sequential approval processes across multiple levels.
- Rejection Management: Supported rejection scenarios within the approval process.
- Initiator Notifications: Sent email notifications to the request initiator about process updates.
- Pending Approval Reminders: Sent reminder emails for approvals that remained pending for more than 24 hours.
- Approval Summary Logging: Captured approval details for easier tracking and review



OUTCOME

The SharePoint workflow migration helped the client move critical business processes to Power Automate while maintaining their existing approval workflows. The updated processes also improved visibility and follow-up for pending requests.

- Improved Process Continuity: Enabled business workflows to continue without disruption after the retirement of SharePoint classic workflows.
- Better Approval Tracking: Made approval status and summaries easier to monitor across multi-level approval processes.
- Timely Follow-Ups: Automated reminders for pending approvals, helping reduce delays in the approval process.



Conclusion

The retirement of SharePoint classic workflows created a need for a reliable migration of SharePoint workflows without disrupting established business processes. UB Technology Innovations, Inc. helped the client convert their existing workflows to Power Automate while retaining key business rules and approval processes. The migration also introduced automated reminders and approval tracking, helping the client maintain smoother and more manageable workflows.



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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