



DIGITAL TRANSFORMATION - M365

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AGENDA

- Power Platform
- Implementation Approach
- Power Apps Use Cases
- SharePoint Use Cases
- Generic Use Cases

A background image showing two women in a professional setting. One woman is gesturing with her hand while speaking, and the other is listening attentively. The image is overlaid with a purple-to-pink gradient.

AGENDA

POWER PLATFORM SUITE



The low code platform that spans Microsoft 365, Azure, Dynamics 365, and standalone apps.



Power BI
Business analytics



Power Apps
App development



Power Automate
Process automation



Power Virtual Agents
Intelligent virtual agents



Power Pages
External-facing websites



Data connectors

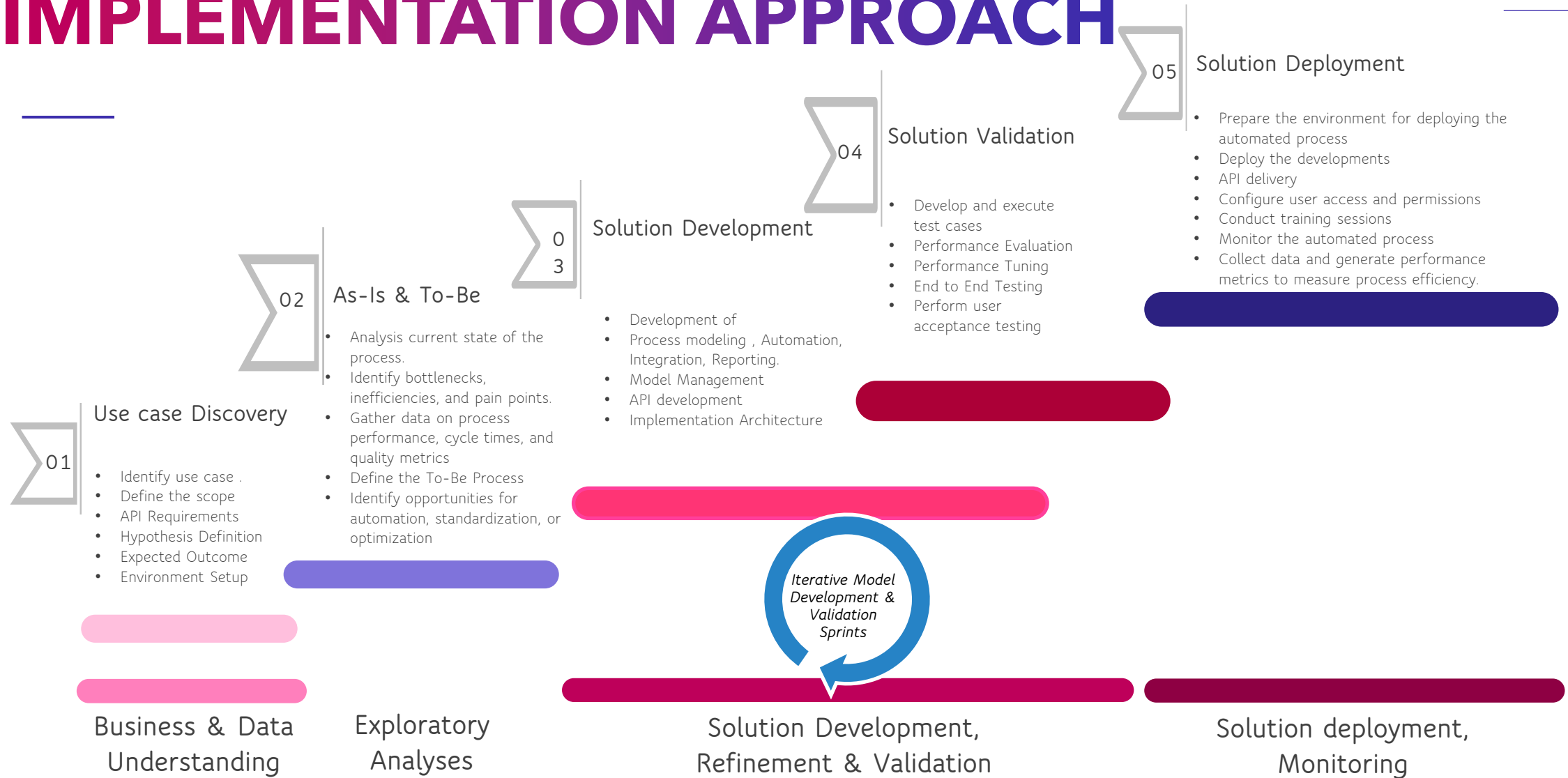


AI Builder



Dataverse

IMPLEMENTATION APPROACH



POWER APPS

Power Apps is a suite of apps, services, and connectors, as well as a data platform, that provides a rapid development environment to build custom apps for your business needs.

Using Power Apps, We can quickly build custom business apps that connect to your data stored either in the underlying data platform (Microsoft Dataverse) or in various online and on-premises data sources (such as SharePoint, Microsoft 365, Dynamics 365, SQL Server, and so on).

Power Apps is a service that lets you build business apps that run in a browser or on a phone or tablet, with Low code platform.

LEAD TRACK - POWER APPS

POWER APPS - LEAD TRACK

SMARTLEAD is a POWER APP tool designed to help businesses manage and track their leads & Resource Management. It provides functionalities to streamline and optimize the sales & Resource Management process.

- Smart Lead allows users to create opportunity and store lead information. It provides a centralized database to manage and organize leads efficiently.
- Opportunity Tracking: Smart Lead App tracks the progress of leads through the opportunity pipeline, allowing users to categorize and prioritize leads based on their potential value or readiness.
- Real-time Tracking: The app allows you to view the opportunity and take actions accordingly.
- Dashboard: Centralized dashboard shows the opportunities that are created, pending and completed and gives a better visibility to management.

POWER APPS - LEAD TRACK



Welcome to

SmartLead - Opportunity Management Application

[CREATE OPPORTUNITY](#)[VIEW/EDIT OPPORTUNITIES](#)

[VIEW ALL OPPORTUNITIES](#)[OPPORTUNITY DASHBOARD](#)

Welcome to

Resource Management Application

[CREATE RESOURCE](#)[VIEW/EDIT RESOURCES](#)[DASHBOARD](#)

×

New Opportunity

✓

Account *

Select Account or Enter Account

Ref

Services/Products

Select Services/Products

Delivery Director

Enter Name or Email Address

Opportunity Description *

BU/Group

Stage *

Engagement Manager *

Enter Name or Email Address

Sales Manager

Enter Name or Email Address

Type of Opportunity

Comment

←

My Opportunities

+

Search by Account

Search by Stage

Start Date

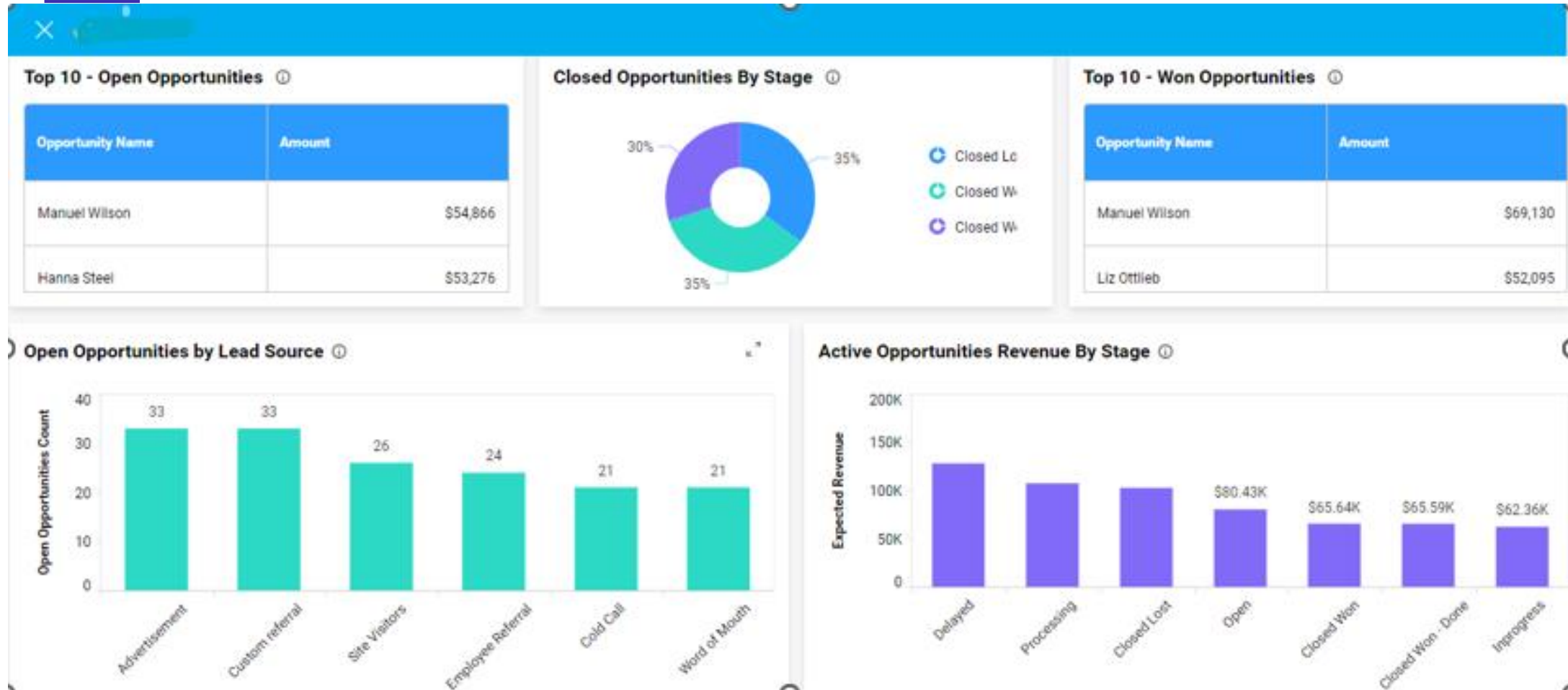
End Date

Export to CSV

Reset

| ID | ACCOUNT | OPPORTUNITY DESCRIPTION | STAGE | CREATED DATE | VIEW | EDIT |
|----|----------|-------------------------|---------|--------------|------|------|
| 15 | SubuTest | Test Opportunity | Stage-2 | 6/3/2023 | | |

POWER APPS - LEAD TRACK



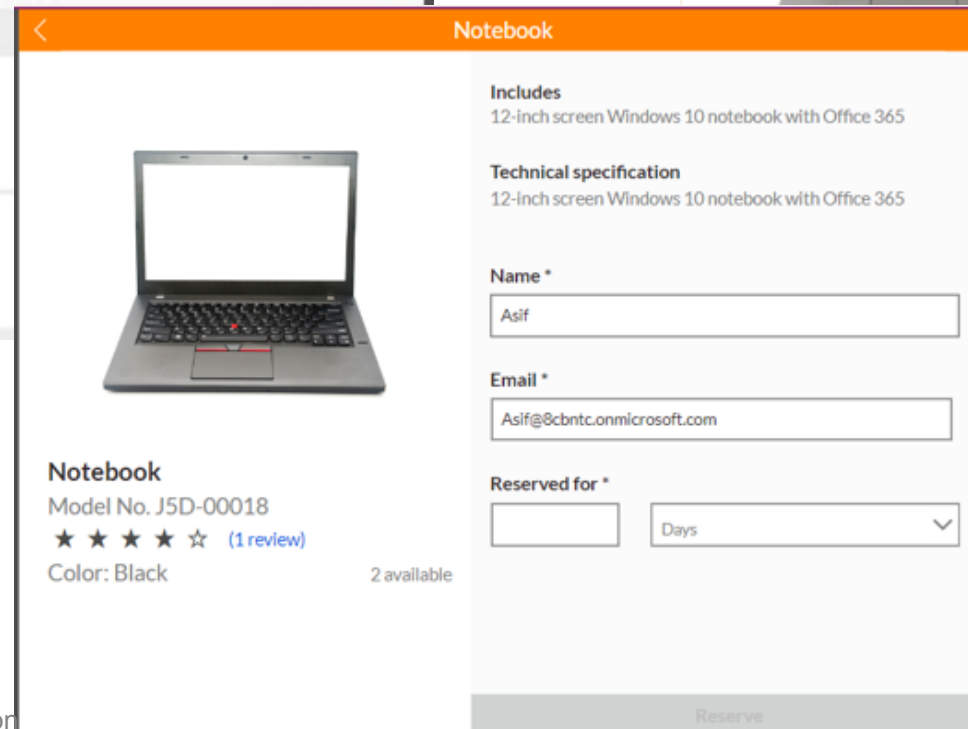
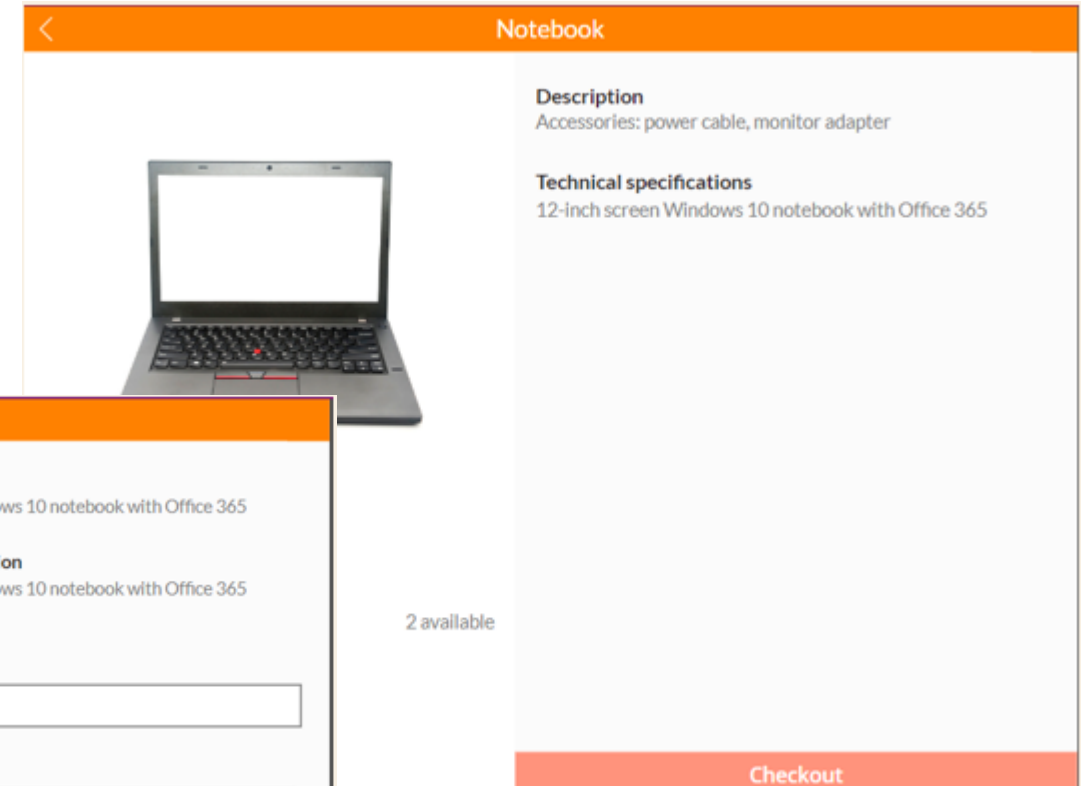
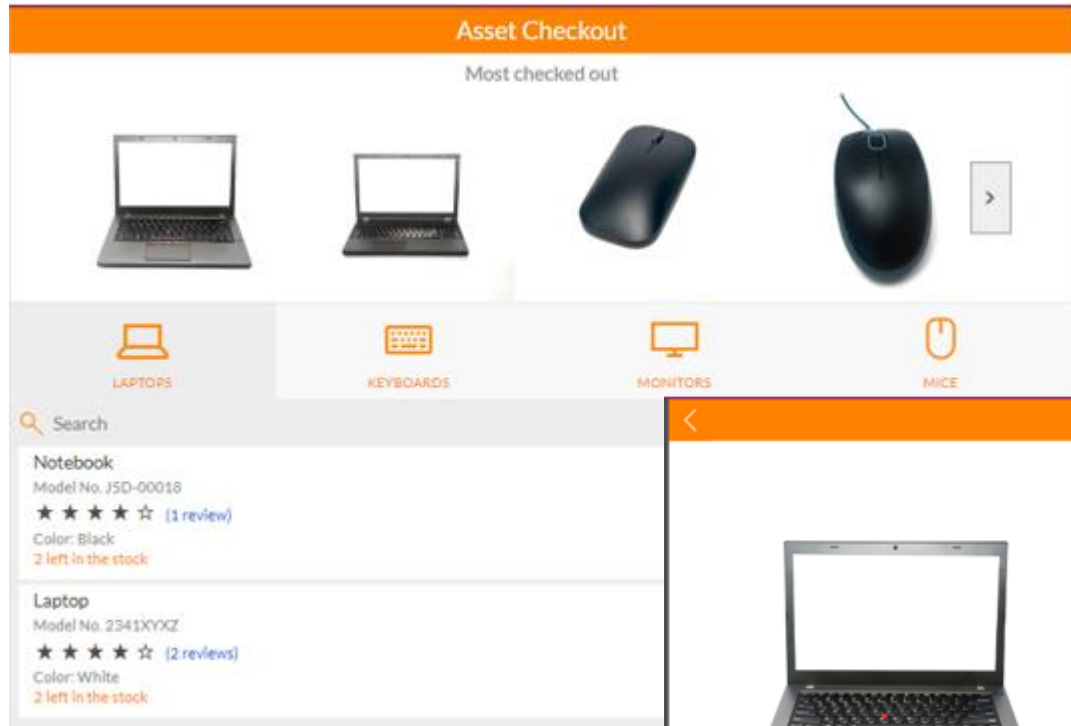
POWER APPS - ASSET MANAGEMENT

Asset Management is primarily a transactional workflow system designed for the purposes of managing capital asset maintenance by managing asset data and work processes. This includes asset maintenance history data and a linear, or hierarchical, asset register.

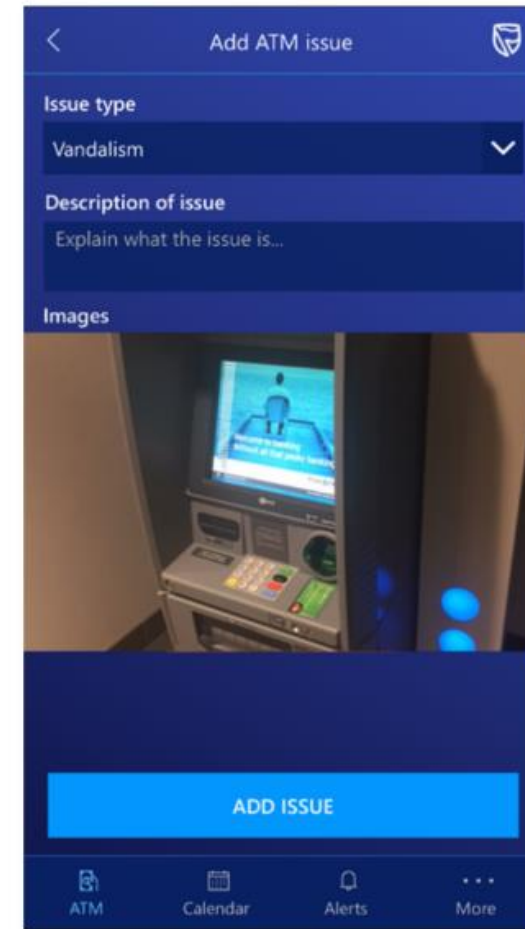
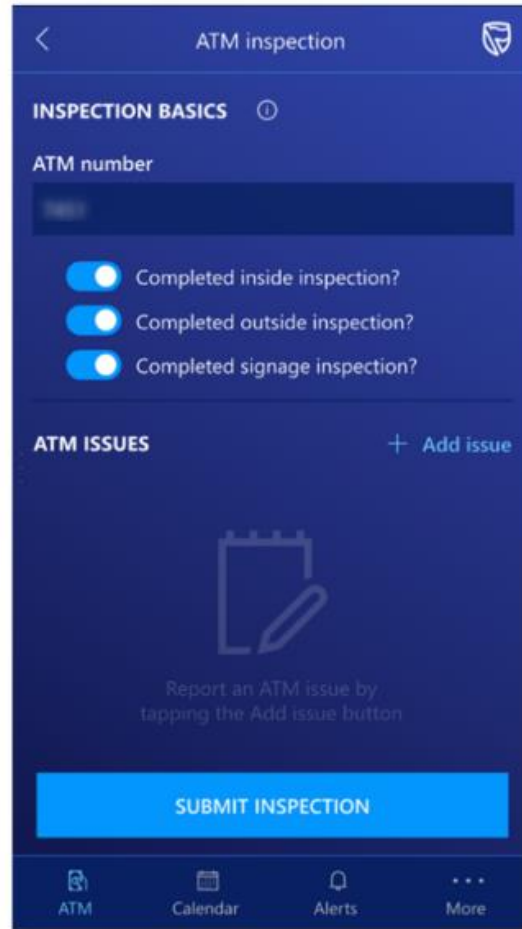
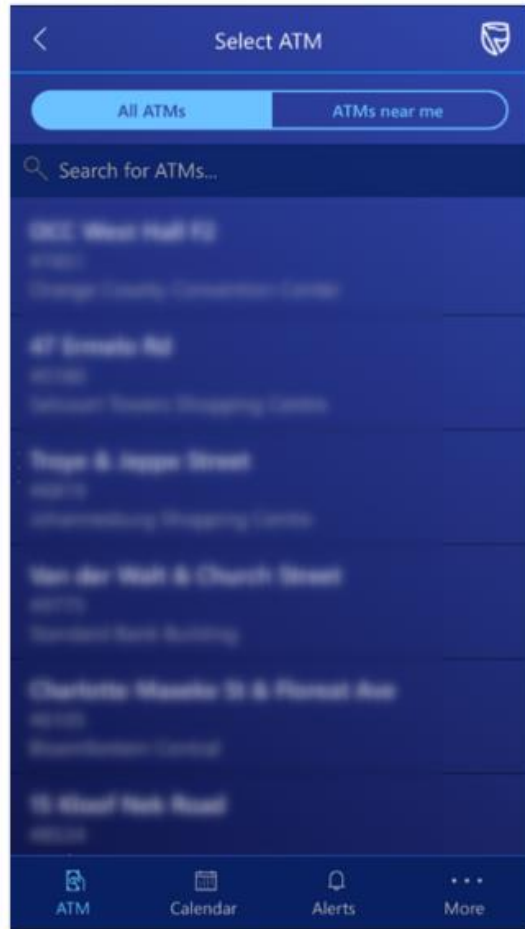
- Identify the asset and allocate to employees
- Checkout asset
- Order any asset and have the track for whom it s allocated
- Monitor number of assets.
- Monitor the value of assets.
- Maintain Asset Register
- Monitor the asset age and identify the assets retirement/replacement.
- When employee resigns, track & receive the assets and complete a smooth exit process.

ASSET MANAGEMENT – POWER APPS

POWER APPS - ASSET MANAGEMENT

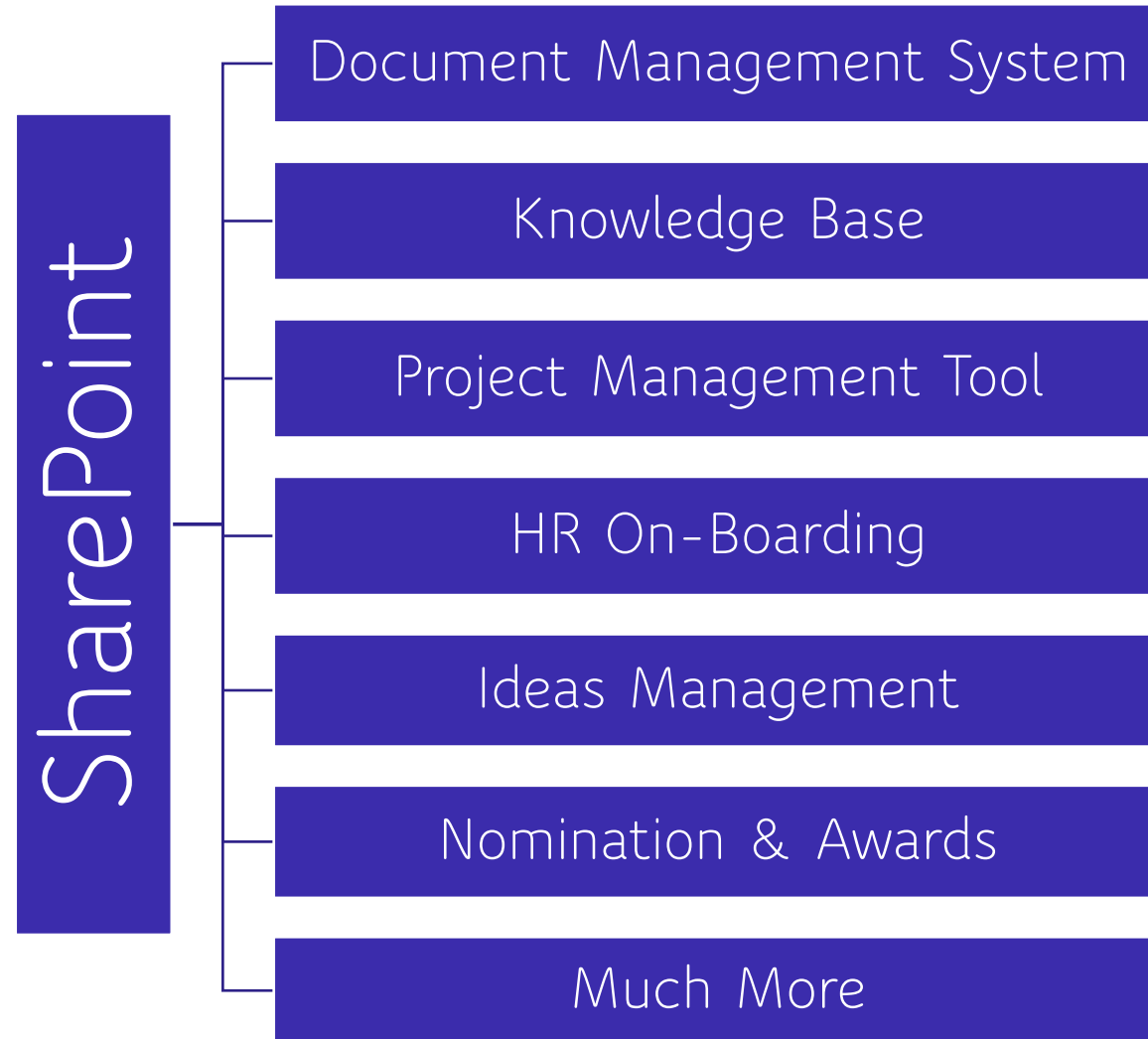


POWER APPS – INSPECTION MANAGEMENT USE CASE



Screenshots of the ATM inspection mobile PowerApp

SHAREPOINT AS INTRANET - USE CASES



DOCUMENT MANAGEMENT - SHAREPOINT

MANUAL DOCUMENT MANAGEMENT

Disorganization

Without a proper system in place, documents can become disorganized, leading to difficulties in locating specific files when needed. This can result in wasted time and decreased efficiency.

Limited Accessibility

Physical documents are often stored in specific locations, making it challenging for individuals to access them remotely. This can hinder collaboration and workflow, especially in situations where team members are working from different locations.

Security Concerns

Physical documents are susceptible to loss, theft, or damage. Maintaining the security of sensitive information becomes more challenging without the use of digital security measures such as encryption, access controls, and audit trails.

Version Control Issues

Managing document versions manually can lead to confusion and errors. Without a centralized system, it can be challenging to track changes, updates, or revisions, potentially resulting in the use of outdated information.

Limited Collaboration

Manual document management can hinder collaboration among team members. Sharing and updating physical documents require more time and effort compared to digital alternatives, slowing down the collaborative process.

Paper Consumption and Environmental Impact

A manual document management system often relies heavily on paper, contributing to increased paper consumption and environmental impact. This can conflict with sustainability goals and may also result in additional costs for paper and printing.

Approval Control

Manual sign-off on the documents and verifications missing out the latest approved versions.

DOCUMENT MANAGEMENT - SHAREPOINT KEY FEATURES

- Tracking multiple versions of a document to prevent duplication of the same document, accidental or unwanted changes in documents, and enable restoring a previous version if needed.

Versioning



- Locking a document for editing by other users when a user edits it during co-authoring, which helps protect documents from accidental changes or overwriting.

Check-in/check-out



- Restoring of documents created during the last 30 days.

Backup and recovery



- Permission-based access permissions ranging from only viewing a document to full control: a user can create, upload, modify, delete, and share documents.

Access control



- When users download or access these files from SharePoint or OneDrive, the sensitivity label and any encryption settings from the label are enforced and remain with the file, wherever it is stored. Ensure you provide user guidance to use only labels to protect documents.

AIP Labelling



- Automated routing of documents for collecting approvals, feedback or signatures.

Approval Automation



- Scheduling document retention and automatic elimination of unnecessary files after a certain period, as required by government and industry-specific regulations (e.g., GDPR, GLBA, SOX, HIPAA, PCI DSS).

Retention and deletion policies



- Authoring a document by several users simultaneously. DMS tracks the time of access to the document by users and marks modifications made by co-authors in different colors.

Co-authoring



SHAREPOINT DMS - CLIENT USE CASE

Customer

- The Customer is a telecommunication company located in Singapore. The company has diverse policies and procedures that need to be followed with complex approvals.

Challenge

- Documents are scattered and they are facing many versioning issues while submitting to management. Difficult to find the right approver when the approver leaves the organization leading to delay in submission. No proper storage etc.,

Solution

- In accordance with the Customer's needs, We had setup Document Library in SharePoint enabling key features to organize their policies & procedures documents, Dynamic approval has been implemented using Microsoft Power Automate. These workflows allowed for specifying an approver's name, generating automated notifications about a document's rejection or approval, and automated setting a read-only permission to the approved document.

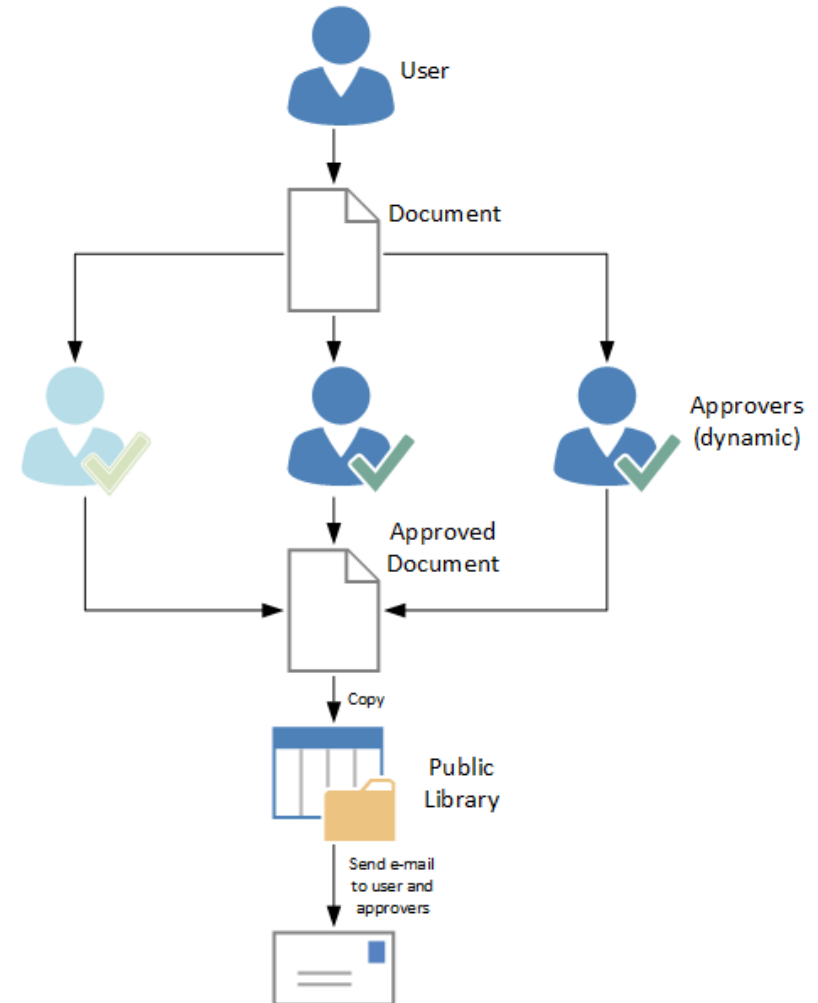
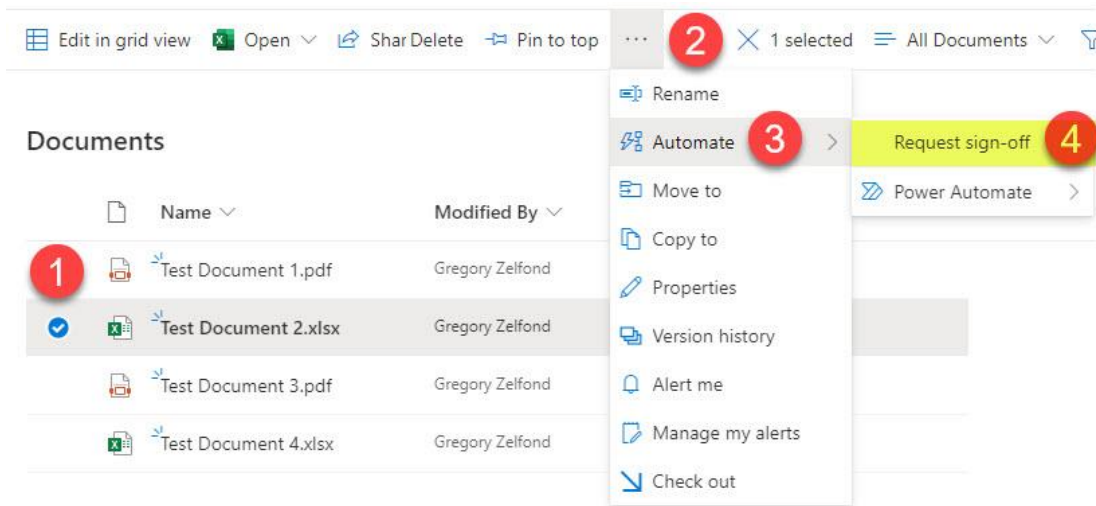
Results

- With the new SharePoint DMS solution, the Customer streamlined document lifecycle due to approval workflow automation and accelerated document-driven business processes. Also, the SharePoint DMS helped improve employee productivity due to providing the employees with easy access to the key company's content and other systems.

Tools used

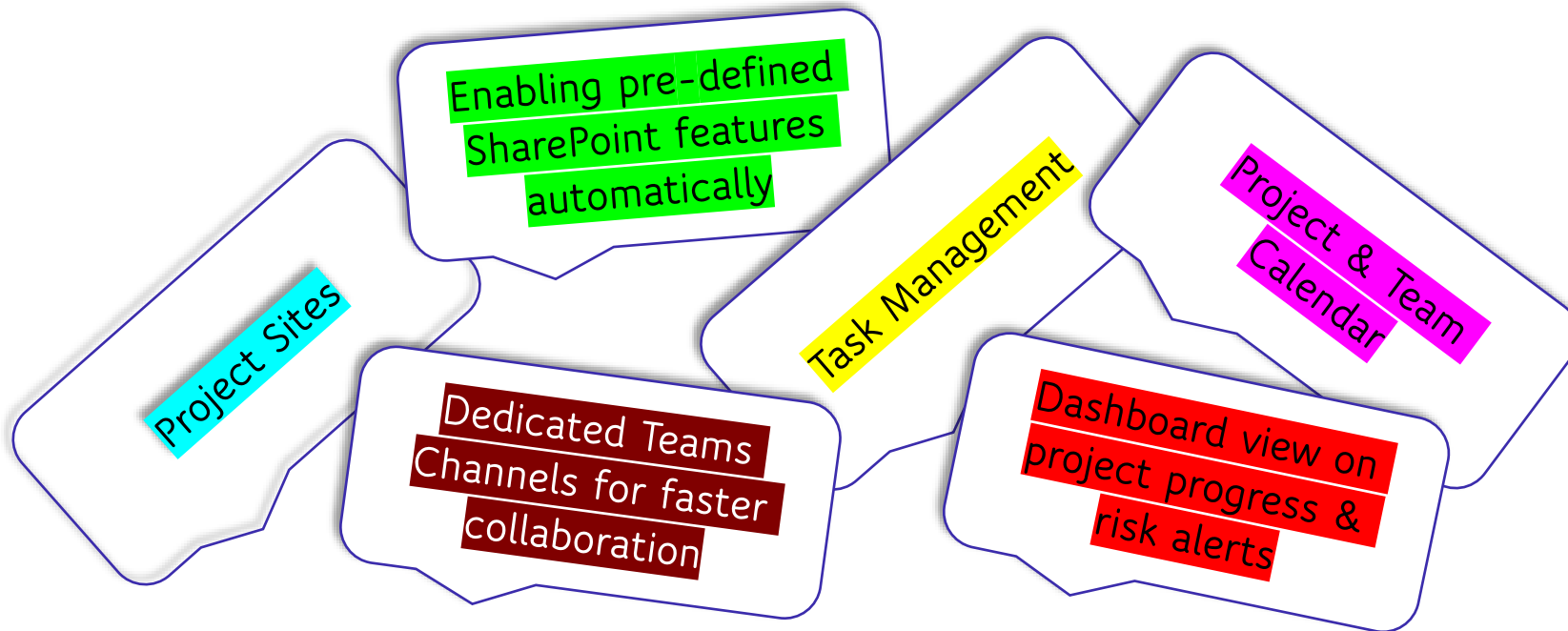
- SharePoint Online, Document Library Features, Microsoft Power Automate for Approval, JSON Formatting for visually appealing output

SHAREPOINT DMS



PROJECT MANAGEMENT - SHAREPOINT

PROJECT MANAGEMENT - SHAREPOINT



SharePoint is a tool that facilitates project management that has potential to benefit organizations handling a range of project sizes, structures and complexities. The access to centralized information, ability to communicate and collaborate, clear approval and permission features, streamlined workflows are what make SharePoint an apt choice for project managers.

By following best practices and ensuring adequate training is imparted to team members, organizations can harness the true potential of SharePoint to achieve goals and deliver projects on time. Explore SharePoint for your project management requirements and experience the power of its user-friendly features in reducing redundancy, improving efficiency in your projects.

PROJECT MANAGEMENT - SHAREPOINT



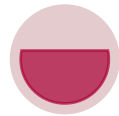
Project initiation

when the business case and project charter are created



Project planning

when scope, budget, and schedule are defined



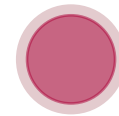
Execution

this is when the project is being actively executed and requires tracking, KPIs, and forecasts to keep an eye on



Monitor & Control

Alerts and notification to Project managers on tasks that is reaching deadlines etc.



Project Close

when completed project is assessed and lessons learned are extracted for future projects

PROJECT MANAGEMENT - CLIENT USE CASE

Customer

- The Customer is a healthcare NGO company located in United States. The company initiates projects frequently and want to digitalize it.

Challenge

- Relying on manual management of projects they are missing their targets, difficult to track on the projects status. Unable to maintain the documents in effective manner etc.,

Solution

- In accordance with the Customer's needs, We had setup Dynamic Project site creation in SharePoint enabling key features to organize their Team contacts Project calendar, Team leave information and resource planning, document repository relevant to the project. Tracking of project task and overall project status. Assessing the risk of achieving the project timeline.

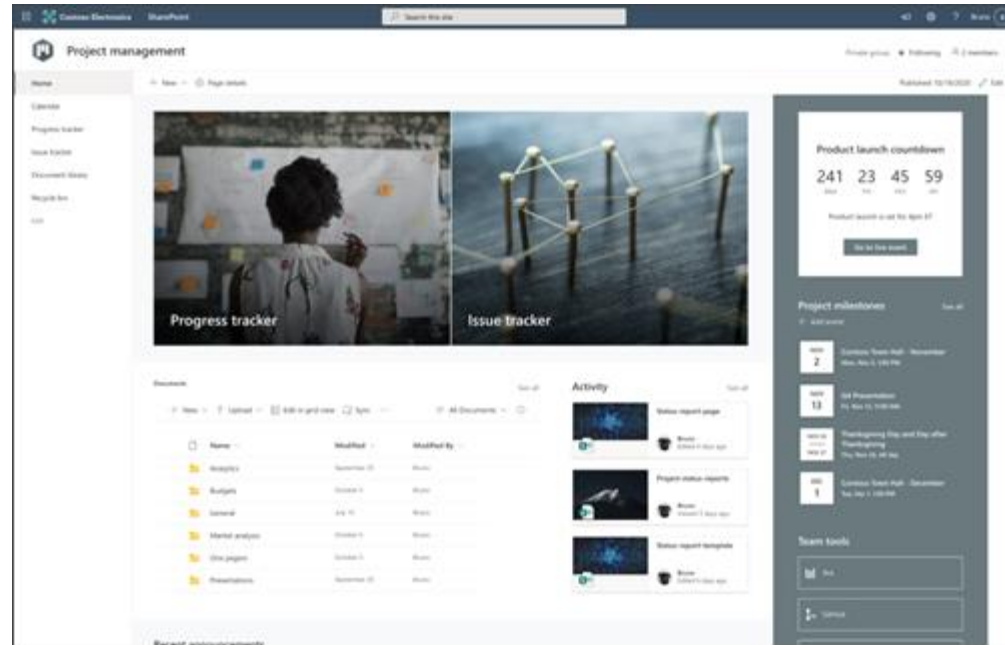
Results

- After implementing the Project Management Portal, The Project managers and Management has a good view on the project status. Enabled tight collaboration between the team and acts as a onestop location for the project team members. Improved resource utilization etc.,

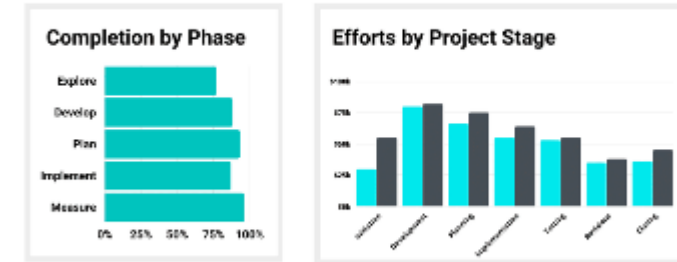
Tools used

- SharePoint Online, Document Library Features, Microsoft Power Automate for Approval, SPFX Web parts, Power Apps, Power BI

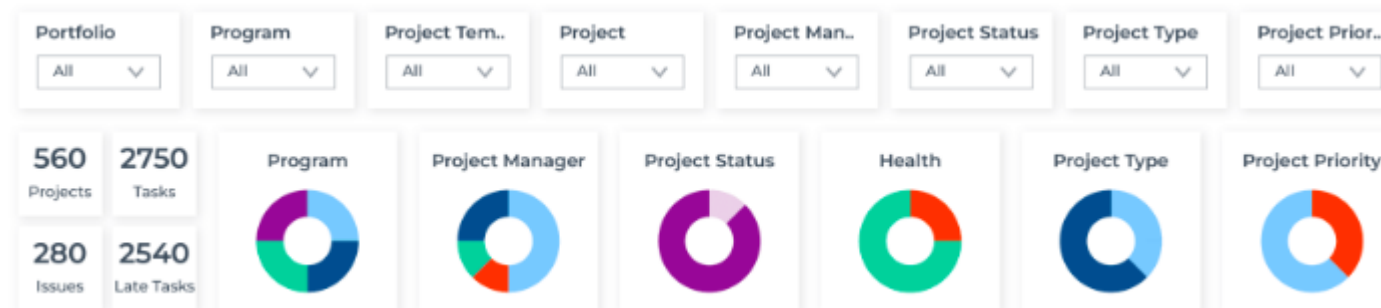
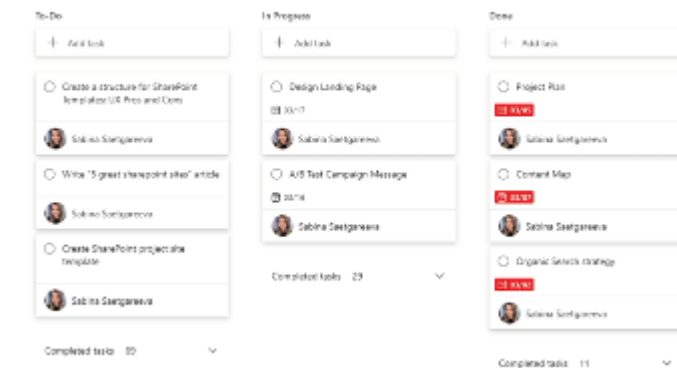
PROJECT MANAGEMENT



PERFORMANCE DASHBOARD

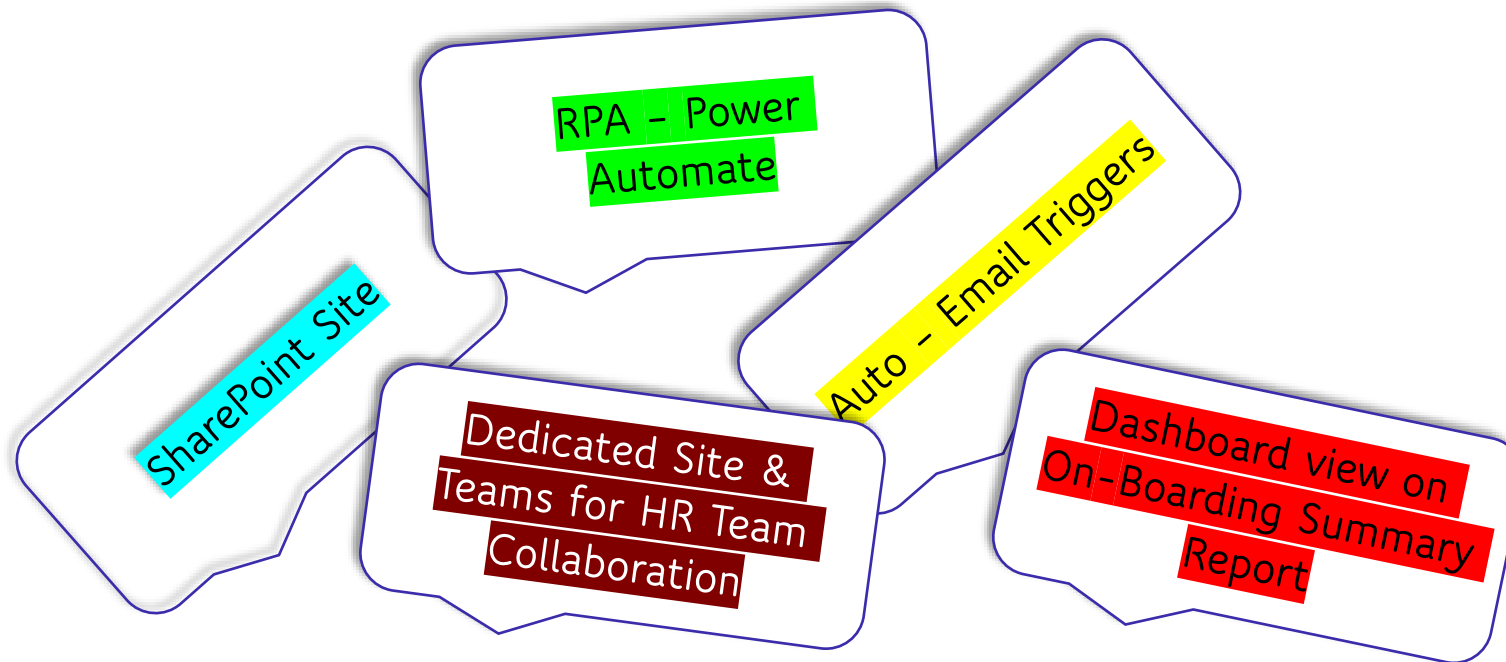


PROJECT TASKS



ON-BOARDING- SHAREPOINT

EMPLOYEE ON-BOARDING AUTOMATION - SHAREPOINT



Power Automate



Power BI



SharePoint Facilitate Resource Management team enters the new employee details in the Onboarding form

- Once the respective form fields are filled, the Resource Management team will trigger the automated flow.
- The automated flow captures and sends the employee information through email to the User Management team.
- The User Management Team will reply to the received email with the newly created "Email ID" of the onboarded employee.
- The Automated flow captures this newly generated "Email ID" from the User Management Team and further triggers notification with onboarding details to the following teams for their necessary action.
 - Support Team
 - Training Team
 - Reporting Officer
 - Employee

SHAREPOINT PMS - CLIENT USE CASE

Customer

- The Customer is an IT Services company located in Singapore. The company has diverse policies and procedures that need to be followed with complex approvals.

Challenge

- Team currently onboarding new employees by manual process, The process includes several stages. Involves repeated tasks utilizes more time

Solution

- A centralized location to input new onboarding employee details gives more visibility and helps to track the status.
- Reports & analytics can be generated since the data has been stored in centralized way.
- Role based restricted permissions can be applied on the stored data.

Results

- With the new system, the Customer streamlined Auto triggers the process for onboarding which reduces follow-up and reduces manual mistakes.
- No manual effort to write more emails to different teams like the Support team, Training team, Managers, New employees.

Tools used

- SharePoint Online, List Features, Microsoft Power Automate for RPA and Email Triggers, JSON Formatting for visually appealing output, Power BI for Reports

On Boarding

Save Cancel Copy link

New Employee Onboarding

Employee Details

| | | | |
|---|---|---|---|
| Staff Name * | Sur Name * | Staff Image | Staff Personal Email |
| <input type="text" value="Enter value here"/> | <input type="text" value="Enter value here"/> | <input type="text" value="Add an image"/> | <input type="text" value="Enter value here"/> |
| <small>You can't leave this blank.</small> | | | |

Joining Details

| | | | |
|---|---|---|---|
| Join Date * | Designation | Contract From * | Contract To * |
| <input type="text" value="Enter a date"/> | <input type="text" value="Enter value here"/> | <input type="text" value="Enter a date"/> | <input type="text" value="Enter a date"/> |
| FunctionalContact | ReportingOfficer | Tower | Group * |
| <input type="text" value="Select an option"/> | <input type="text" value="Select an option"/> | <input type="text" value="Enter value here"/> | <input type="text" value="—"/> |

Access Details

| | | | |
|---------------------------------|---------------------------------|---------------------------------|----------------------------------|
| Global Timesheet Required | Equipment Assigned | Name Card | Outlook Account |
| <input type="text" value="—"/> | <input type="text" value="—"/> | <input type="text" value="No"/> | <input type="text" value="Yes"/> |
| Phone Extn | Access To NEC Office? | Print Name Tag? | Create ADID? |
| <input type="text" value="—"/> | <input type="text" value="No"/> | <input type="text" value="No"/> | <input type="text" value="No"/> |
| WBS Allocation? | | | |
| <input type="text" value="No"/> | | | |

Location Details

| | | | |
|--------------------------------|---|--------------------------------|---|
| Agency | Office Location | Organization | Project |
| <input type="text" value="—"/> | <input type="text" value="Enter value here"/> | <input type="text" value="—"/> | <input type="text" value="Enter value here"/> |

Email for New Joiner Starter Kit

- Auto trigger 3 days before the onboarding date

| | |
|-----|--|
| To: | <ul style="list-style-type: none">New Joiner's EmailNew Joiner's Personal Email |
| CC: | <ul style="list-style-type: none">Resource Management Team |

Template

Dear <Employee's Full Name>,

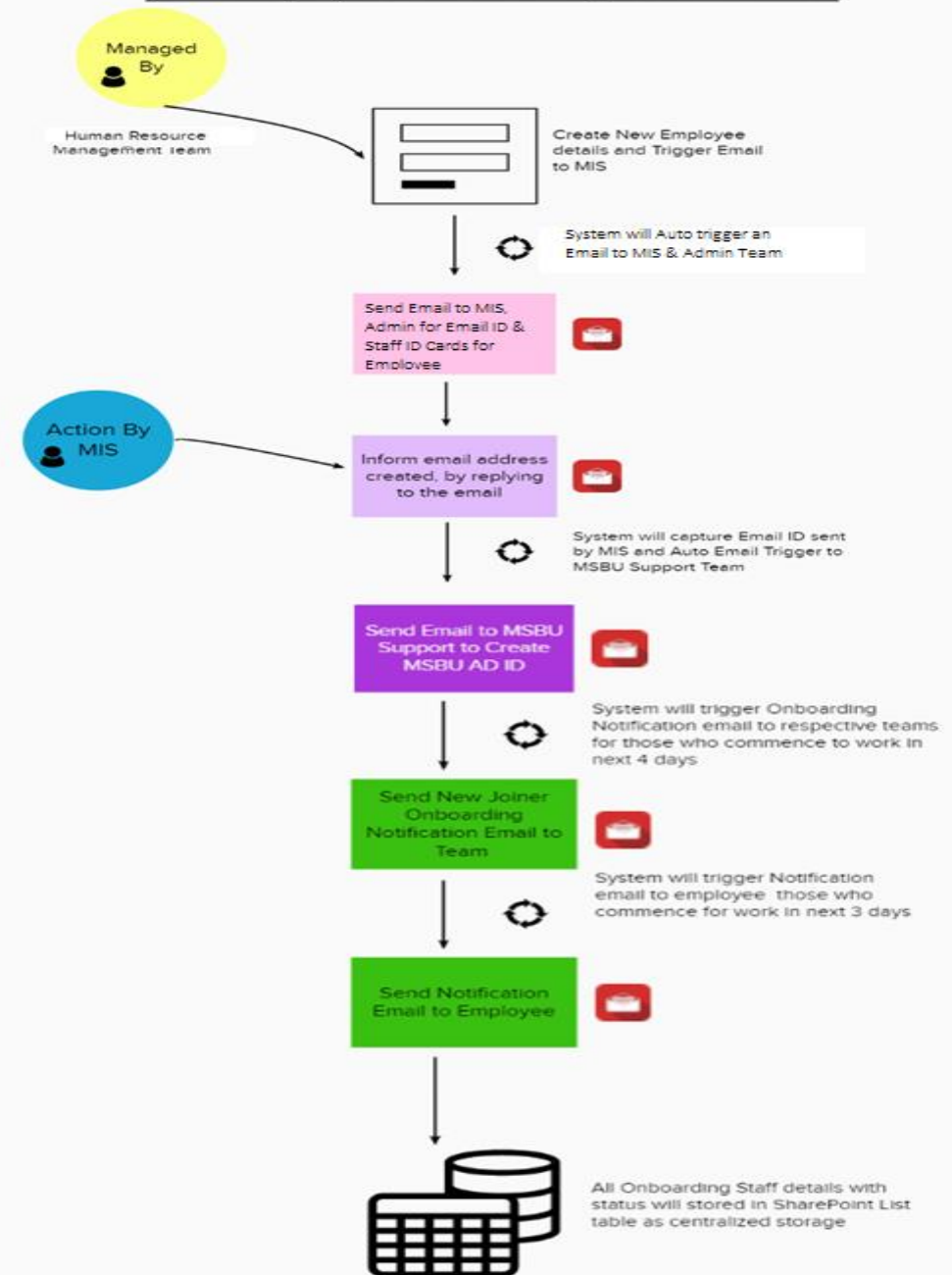
Welcome On Board!

This is an auto-generated email, it will be explained during the HR Orientation conducted on your first day.

A. Reporting Officer Details

| | |
|----------------------------|--------------------------|
| Reporting Contact Details: | Name: Contact Number: |
|----------------------------|--------------------------|

Employee Onboarding Process

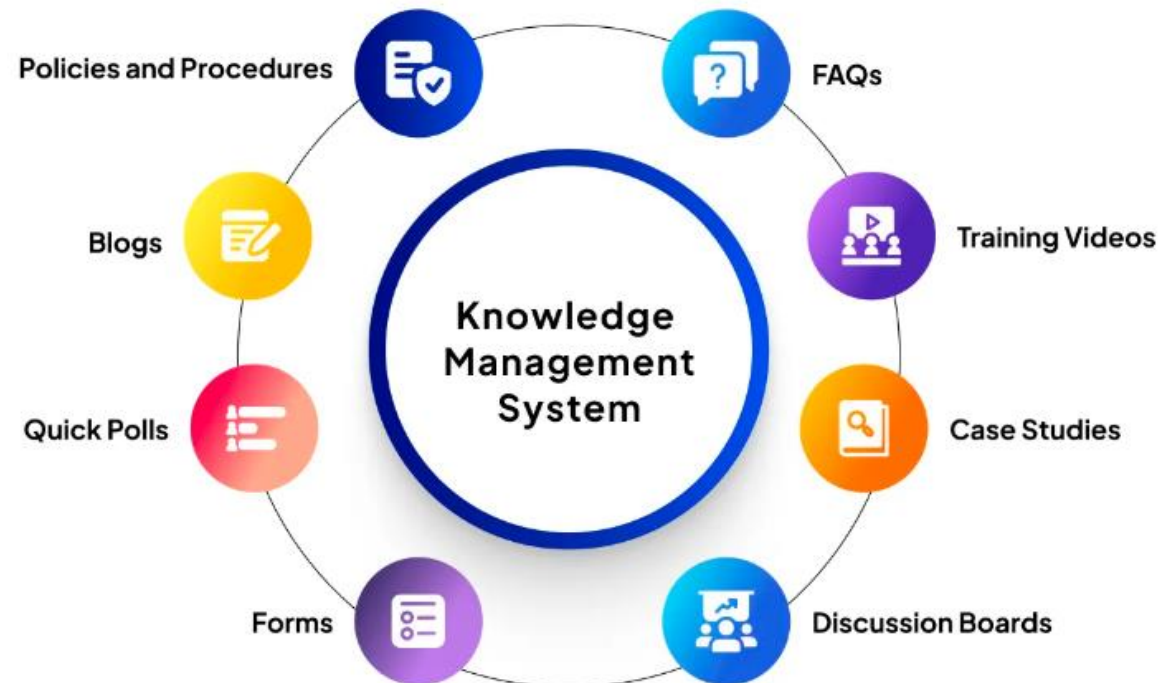


KNOWLEDGE BASE - SHAREPOINT

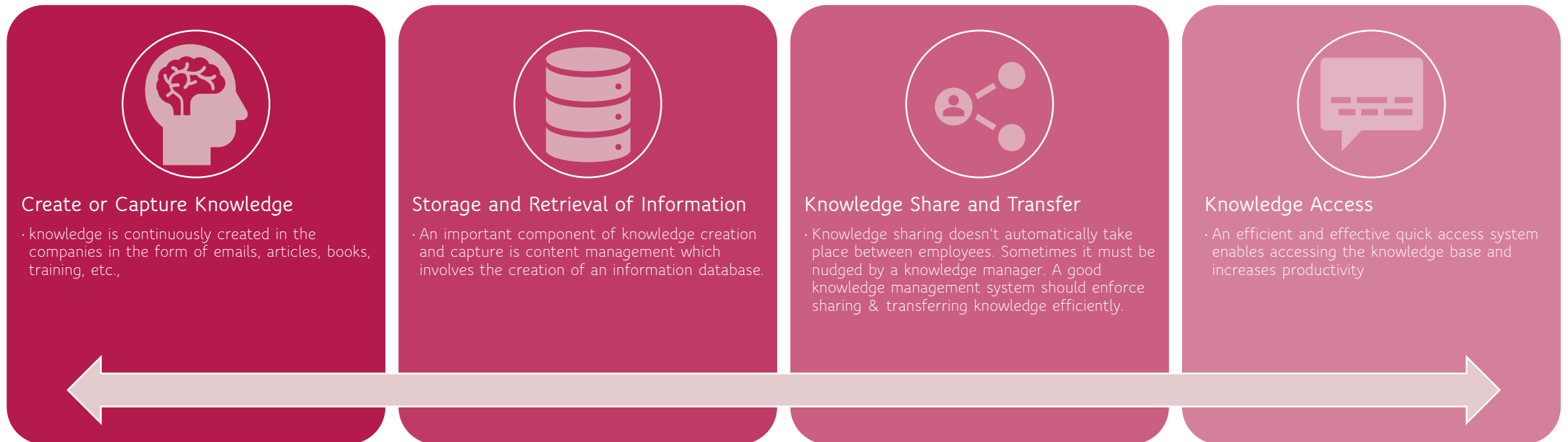
KNOWLEDGE BASE - SHAREPOINT

Most organizations have years' worth of data, information, and knowledge stored as hard copies. needless to say storing, organizing, and preserving them is a time-consuming task.

As per the image below, most organizations do not have centralized knowledge management systems and the percentage of knowledge stored in employee's brains outweighs all the formats



KNOWLEDGE BASE - SHAREPOINT



KNOWLEDGE BASE - CLIENT USE CASE

Customer

- The Customer is a Banking Organization located in United States. The company needs a Knowledge base system to serve its customers quickly on the queries.

Challenge

- The banks everyday handling user queries on debit card, credit card queries in thousands, without having a proper knowledge base system support personnel struggling to answer the quires in correct and timely manner.

Solution

- Implemented a SharePoint Knowledge base Portal, Provided solutions to create and upload contents and tag them with appropriate category. Implemented approval process for contents to be verified by the expertise before publishing. Implemented efficient searching mechanism

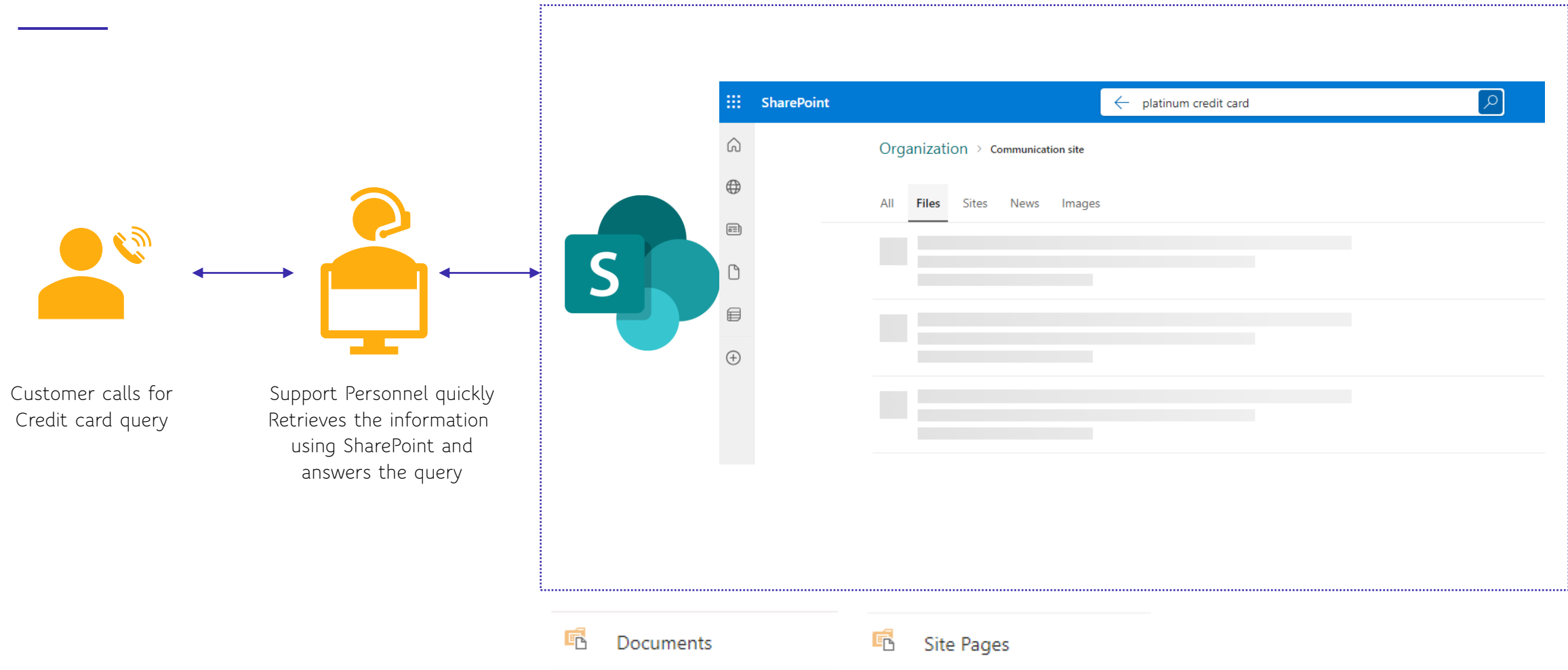
Results

- After implementing knowledge base, Support personnels efficiently searched the articles, documents and answered the user queries in a timely and effective manner, which increased the call quality and quantity and resulted in greater benefits

Tools used

- SharePoint Online, Document Library Site Pages, Lists, Search, Tagging, Managed Metadata Terms stores etc.,

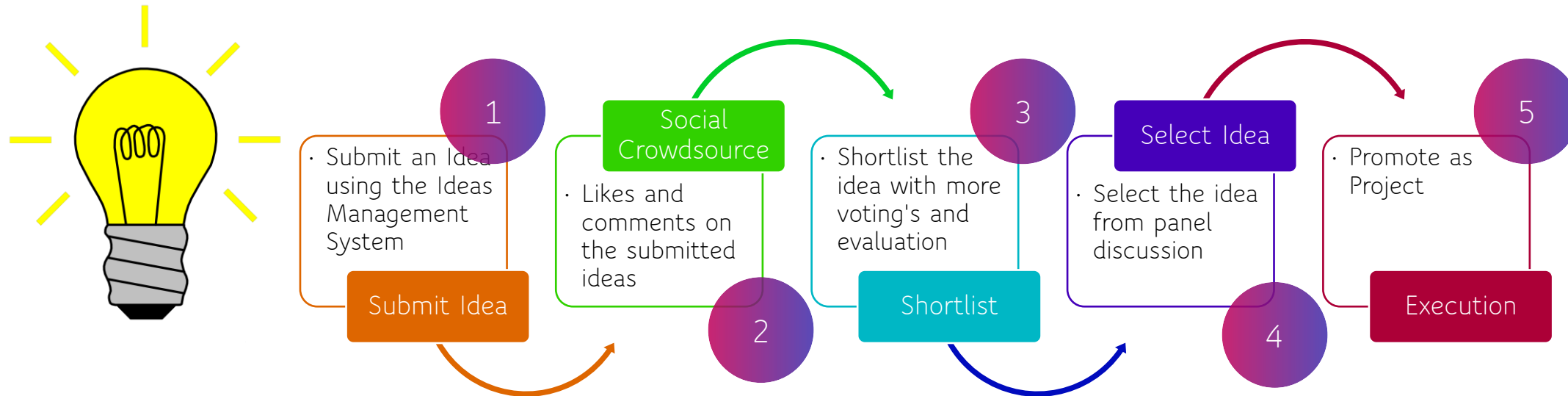
KNOWLEDGE BASE



IDEAS - SHAREPOINT

IDEAS - SHAREPOINT

Idea management is a part of both existing processes and cultural change. Organizations should focus on fostering innovation in applications people use the most. With the combined capabilities of SharePoint, each team and business unit can turn separate but valuable ideas into a continuous innovation process.



IDEAS - CLIENT USE CASE

Customer

- The Customer is a Government Agency located in Singapore. The company needs a Ideas Management System to get great ideas within organization and convert it as successful project.

Challenge

- Email based submission of ideas leads to difficult follow-up and unable to make effective collaboration with wide audience.

Solution

- Implemented a Ideas Management System using SharePoint. Given collaboration features on Ideas submission with wide audience, they can like comment the ideas, Get the voting for their ideas. Promote the ideas to panel discussion upon selection convert as projects.

Results

- Organization employees are interested in submitting new ideas due to its collaborative features. They can able to respond to their queries immediately that has been raised by other audience. Giving a great platform to submit their ideas.

Tools used

- SharePoint Online, Power Apps SPFX, Power Automate, Power BI

SOME GENERIC - USE CASES

— BOTS using Co-Pilot Studio

Mailbox Automation & Creating Tickets

Leave Application

Field Service Apps

Invoice Management

Birthday Reminders

Work Anniversary Reminders

AI Builder features to extract and save data from Documents

Automation using Power Automate to Increase Productivity

O365 SERVICES / SHAREPOINT

Microsoft has tightly integrated the O365 suite of Apps, Using the Power of Power Platform and other services we can provide great solutions to the organizations with different Use cases based on the need.

A smiling woman with dark, curly hair and glasses, looking off to the side. The image is partially obscured by a purple and pink gradient overlay at the bottom.

THANK YOU!

<https://effortz.com> | sales@effortz.com