

Case Study



Company Profile

ARCONDIS is the largest consulting company exclusively specialized in the life science industry in Switzerland, Germany and Austria. Over 90 consultants support more than 150 customers in the fields of processes, IT management and compliance worldwide.

Technologies



Managing internal reporting fast and accurate – with Power Automate and Azure

Challenges

- Reporting workflow was slow and prone to error
- Incorrect automatic setting of permissions for documents
- Solution only possible with inclusion of third-party product Qlik NPrinting

Solution

- Replacement of SharePoint Designer workflows by modern M365 technologies like Power Automate and Azure Functions
- Automatic selection and insertion of metadata
- Consideration of permissions concept
- Close and successful cooperation with developers of Qlik NPrinting

Benefit

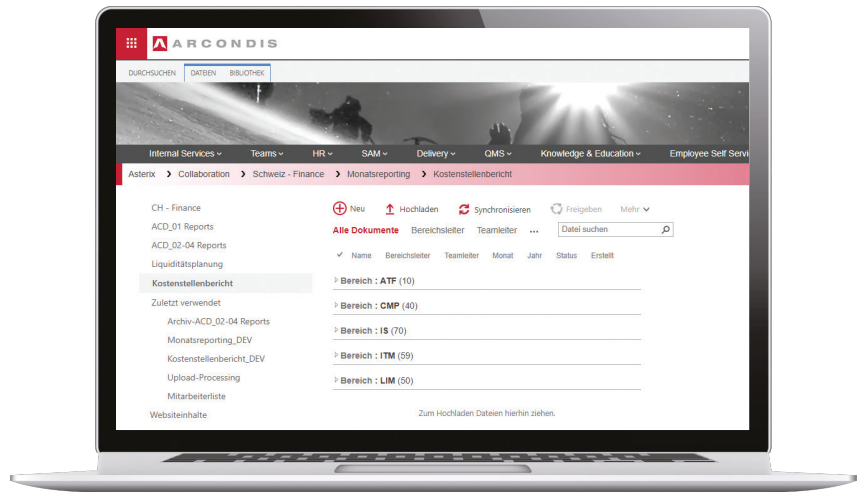
- Fast and accurate solution for the reporting in a globally active company
- Reducing time and money in internal processes
- Future-proof „Serverless Code“-solution that can be adapted to other processes of Operational Reporting

Smart Automation for Reporting

Today is the deadline for all cost center reports, which are generated on a monthly basis by all departments with budget responsibility and then stored in SharePoint. Everyone is looking at the SharePoint library where all reports with matching metadata are automatically stored. And yes – great joy among all parties involved: the cost center reports are complete; the matching metadata and permissions are correct. That's what Michèle Kayser, project manager for updating the reporting workflow, wished for: "Since novaCapta remodeled our cost center workflow with Power Automate and Azure Functions, the process has run fast and flawlessly."

Set Permissions Automatically

In most companies, reports are standard procedure in everyday work. Cost center reports ensure a consistent level of information for budget managers, executives and controlling. ARCONDIS Consulting in Basel organizes the work of its employees in regular reports, too. In the first step, the employees use the third-party product Qlik NPrinting for the reporting. After their creation, the reports are being uploaded in a SharePoint library. In



ARCONDIS saw an urgent need for action here and hired novaCapta to implement a fast and accurate process in a pilot project.

Perfect Interplay of Power Automate & Azure

The novaCapta experts didn't rely on typical third-party workflow products like Nintex or K2 but used the technology stack of Microsoft 365: the process was implemented with Power Automate and Azure Functions. Already during the conception of the workflow, Raphael Stäheli, novaCapta project manager, and his team paid



“ novaCapta realized the project very well and provided us with an extendable reporting solution that can be used for other scenarios as well. ”

Michèle Kayser - Senior consultant Finance & Controlling

doing so, a filename is generated that contains information about the team, the department and the cost center according to company-wide naming conventions. Said filename is then being analyzed by the workflow and the extracted information are being stored as metadata. Permissions are derived by that information as well. In the past, this process was operated by SharePoint Designer workflow – unfortunately very slow and prone to error.

special attention to the possibility of adapting the workflow fast and easy for other scenarios. This way, the solution can be used in all areas of Operational Reporting at ARCONDIS. "We already knew from experience that especially the automatic setting of permissions for report documents would be a challenge." says Michèle Kayser from ARCONDIS.

"But the expert team from novaCapta mastered the problem perfectly."

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