



**Infrassist**  
Helping MSPs Scale

# Case Study

Automation of Business Workflows  
Using Microsoft Power Platform



**Industry:**

Non-Profit - Healthcare



**Location:**

Geneva, Switzerland

## Project Overview

Infrassist is providing a solution to a prominent non-profit organization in Geneva, to automate a key business workflow. This healthcare non-profit organisation required an **automated solution for generating reports** that verify the presence of files within specific pre-defined subfolders in their SharePoint Online environment.

### ► Project Scope:

- The primary scope of this project includes developing an automated process that generates an Excel report to verify the existence of files across project folders, uniquely identified by a reference code.
- It also includes creating a simple, intuitive UI in SharePoint Online to trigger the automation workflow that automates the creation of required pre-defined folder structure in SharePoint library, along with automating user permissions assignment and access management.

## Technical Challenges

The healthcare non-profit was already utilizing SharePoint Online as the central repository for document storage and collaboration.

Their existing process involved using a macro-enabled Excel sheet to generate project reference codes, followed by the manual creation of project folders and access assignment in SharePoint Online site by the respective project stake holder. This process was not only time-consuming and involved inconsistencies but also prone to errors in folder creation and access rights assignment to specific users and teams.

Additionally, generating and maintaining an Excel report (which is a part of their process) to ensure all necessary documents were uploaded & exists for any given project involved a lot of manual effort.

## Solution

*The aim of this project is to automate the business workflow for setting up project folders and access management of the same within SharePoint Online, ensuring that all required supporting documents are consistently uploaded and available.*

To streamline this process, we implemented the following solutions:

- **Automated Folder Creation & Access Management:** Developed a Power App form with super simple UI on the frontend where users input the project reference code, triggering a backend flow in Power Automate that automatically creates the required folder structure in SharePoint Document Library, along with custom assignment of access rights as defined in the flow.
- **Automated Reporting:** Built a separate Power Automate flow to automatically update an Excel report every hour. This report checks the presence of files in each project's subfolders and updates the status with a "Yes/No" indicator, fully automating the process of verifying that all necessary documents are uploaded and available.

“Automating business workflows isn't just about efficiency; it's about empowering teams to stay organized and focus on what truly matters by eliminating repetitive tasks and ensuring consistent, reliable outcomes.”

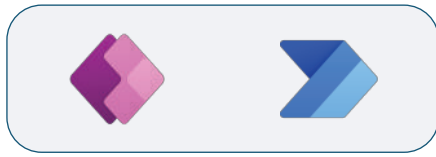


**Milan Ramani**

Director of Professional Services



## Technologies Used



Microsoft Power Platform  
(Power Apps, Power Automate)



Microsoft SharePoint Online

## Outcome

This project successfully automated the creation and management of project folders in SharePoint Online, reducing manual errors and ensuring consistent permissions management. The automated report now provides real-time updates on the status of required documents, significantly improving operational efficiency.

### ➤ Key Benefits

- Enhanced Operational Efficiency
- Optimised Document Management Workflow
- Improved Data Integrity & Compliance
- Streamlined Access Management
- Better Collaboration & Productivity
- Time Saving

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