



Infrassist
Helping MSPs Scale

Case Study

Design Intranet Portal and
Document Management System
with SharePoint Online



Industry:
Facilities Management



Location:
Brisbane, Australia

Project Overview

Infrassist Technologies Pvt Ltd is engaged to conduct a thorough assessment of the SharePoint environment of a Brisbane-based Facilities Management Company.

The project scope included producing a roadmap report of best practices recommendations for designing and revamping of their existing Intranet Portal, building standardized DMS structure, followed by migrating existing folders and file data to newly provisioned sites & document libraries in a phased manner.

Technical Challenges

During the assessment and consulting phase, several key challenges were identified in the client's SharePoint Online setup:

- The current system was built using the classic SharePoint experience, relying on a rigid hierarchy of site collections and sub-sites with inherited navigation, permissions, and site designs. This architecture was outdated, inflexible and difficult to maintain.
- Access permissions were managed using legacy SharePoint Groups, making it challenging to control access to different parts of the system.

Solution

The goal was to design a modern Intranet Portal and create a standardized Document Management System (DMS). This included migrating existing folders and data to new, optimized sites and document libraries in a phased manner.

Solution architects and cloud engineers at Infrassist developed a strategic roadmap, breaking down the project in manageable phases:

➤ Phase 1: Detailed Discovery & Scoping Sessions

- Design and scoping workshop with the project stake holders
- Detail assessment of their current SharePoint and Teams to understand current capabilities and gaps

➤ Phase 2: Design and Build Modern SharePoint Intranet and Teams' Site

- Create a central landing page on the Intranet site with approved design
- Creation of focused site pages for different departments
- Set up intuitive navigation from the main landing page to different departmental pages
- News integration on landing page and implementation of any additional functionality finalized during discovery and scoping session

➤ **Phase 3: Create SharePoint DMS Structure and Content Approval Flows**

- Design and develop a custom DMS based on approved metadata structure
- Set up major/minor versioning
- Create term store tags for consistent column and document tagging
- Create a custom content approval flow using Power Automate so that users can approve documents via email or Teams.
- Migrate data from the old system to the new one, ensuring correct indexing and thorough quality assurance
- Create a comprehensive user guide and conduct user training for smooth functioning and ongoing management of the new system

“Today's digital infrastructure demands rethinking the fundamentals and redefining organizational collaboration. I believe the future of work lies in integrated, well-organized systems that bring clarity, control, and connectivity to every corner of the organization.”



Milan Ramani

Director of Professional Services



Technologies Used



SharePoint
Online



Microsoft Power
Automate



Microsoft
PowerShell



SharePoint
Framework (SPFx)



M365 Suite

(Microsoft Teams, Word, Excel, PowerPoint, Outlook, OneDrive, OneNote, Exchange Online)

Outcome

The new SharePoint Online Intranet Portal and Document Management System transformed the client company's operations by modernizing its intranet with a user-friendly design, streamlining document management through a cohesive structure, and enhancing search functionality with advanced filters. Overall, it led to streamlined workflows and greater efficiency.

➤ Key Benefits

- Efficient Document Management
- User-Friendly Experience
- Streamlined Workflows
- Operational Efficiency
- Improved Security
- Simplified Access Management
- Time Saving

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