

Processes Automation using SharePoint

SharePoint has been around for more than two decades now. It has grabbed the limelight by enabling organizations to strengthen their collaboration and communication. As a Document Management System (DMS) and Intranet, SharePoint has catalysed seamless team working for organizations. However, SharePoint's capabilities go much beyond these functions. Inherently, SharePoint is a very flexible platform helping businesses to build applications and automation with coding. With all the requisite data stored in SharePoint, it makes more sense for organizations to invest in building [process automation solutions](#) on this platform rather than integrating the same data with costly COTS (commercial off-the-shelf) products. But, due to some common challenges in SharePoint custom development, organizations often refrain from exploring the platform beyond its out-of-the-box capabilities.

As aforementioned, SharePoint app and process automation development involves significant coding. To develop process automation on SharePoint, organizations need to rely on professionals with excellent SharePoint coding skills. However, only a few organizations possess professionals with such skill sets. And even if they do, they face time, budget, and knowledge (of process) gaps. Building a SharePoint process automation solution utilizing the conventional coding approach can consume much time and end up with unfulfilled expectations. Consequently, most SharePoint custom development projects are shunned mid-way. It keeps the organizations from maximizing the potential of SharePoint and maximizing their technology investment.

No/ Low-code solutions for SharePoint are a game-changer

No/ Low-code solutions empower business users to develop their apps and process automation based on their process knowledge. It mitigates cumbersome coding tasks with simple point-and-click configuration and prebuilt templates. 2023 will witness a rapid rise in the utilization of SharePoint as a process automation platform. And No-code solutions will be the flagbearers of this change. Organizations will automate many mundane processes on SharePoint to improve productivity and enable employees to focus on mission-critical tasks.

With that thought in mind, let's take a few examples of processes organizations can automate on SharePoint utilizing the No-code solutions.

Four Processes to automate on SharePoint

#1: Employee Onboarding

Seamless [employee onboarding](#) is critical for organizations as it familiarizes new hires with their job roles, company work culture, and how the organization can help them in their career growth. However, onboarding new hires manually can be a tedious and time-consuming process. For every new candidate, a host of small tasks must be completed as part of the employee onboarding checklist. Leveraging a No-code process automation solution on

SharePoint, organizations can automate employee onboarding processes and ensure new employee satisfaction, performance, and overall efficiency.

Utilizing SharePoint to automate employee onboarding, organizations can provide a streamlined experience that guides new hires through every step of their onboarding program - without any manual effort or paperwork. HR professionals can set up an automated process for training new hires, arrange IT resources, update demographics, orchestrate back end services, and connecting new joiners with peers, and service departments.

#2: IT Support Ticketing System

An [IT support ticketing system](#) empowers organizations to provide impeccable services to customers and internal employees at a faster turnaround time. Helpdesk professionals can use the platform to track every inquiry till its resolution. However, purchasing COTS tools can be a costly affair. They are sometimes incompatible with the line of business (LOB) systems and are difficult to use. Therefore, building an IT support ticketing system on SharePoint is very helpful for organizations already leveraging the SharePoint environment.

With a SharePoint-based ticketing system, enterprises can implement several features to automate the ticketing system end-to-end, such as approvals, delegations, notifications, email alerts, and escalations of requests. The system can also provide useful reports, charts and dashboards for analytics and measurements of SLA.

#3: Roster Management

Leveraging [Roster management](#), organizations can ensure the availability of employees in the office whenever required while preventing burnout. They can track the duration for which the employees work, assign tasks to employees, and generate reports on employee productivity and efficiency. The transition to remote and hybrid work has made it difficult for organizations to track employee shift schedules - clock-in and clock-out timings, operational hours, and leaves.

While many Roster Management Systems are available, implementing off-the-shelf products will only add to operational costs. Organizations leveraging SharePoint as their DMS, and collaboration solution can leverage the platform further to build a powerful Roster Management System. Such an approach enables organizations to maximize their SharePoint investments and reduces costs.

#4: Sales Reporting

A sales dashboard graphically represents an organization's sales department performance, cycle lengths, and sales funnels. It highlights the sales operation areas that need attention. However, [building a dashboard](#) for sales reporting can be tricky as it needs to bring together data from multiple sources and teams.

A SharePoint-based sales dashboard can help professionals' aggregate sales data from multiple locations, visualize the voluminous data at a centralized location, and get analytical insights. These insights can empower managers and stakeholders to control KPIs, make better sales strategies and improve decision-making.

Enhance efficiency and transparency with SharePoint BPA

Process Automation on SharePoint can enable organizations to enhance efficiency and transparency. In 2023, organizations will invest a lot of effort in building automation solutions to overcome the challenges of paper-based and mundane processes. Apart from the list mentioned above, organizations will also automate document approvals, leave requests, and purchase orders during the coming year.

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