

— Case Study

# Improving **document management** for project teams with SharePoint Online

Esri UK





Esri is the world's leading provider of mapping and spatial analytics software, best known for its ArcGIS product range. Esri UK and Esri Ireland have professional services teams who undertake hundreds of projects annually for a broad range of public and private sector organisations. As long-term users of Microsoft 365 and SharePoint Online, Esri UK were looking for a more robust and efficient way to leverage these technologies and implement project-related document management across the entire project lifecycle, from proposal to closure.

**By working with Chorus, Esri UK were able to implement a solution with SharePoint Online which has improved the way their professional services teams manage and collaborate on their proposals and projects.**



## Challenges

- ❖ Creating standardised SharePoint Online 'project workspaces' for projects
- ❖ Enabling secure and easy-to-manage collaboration and file sharing with clients
- ❖ Providing a robust, consistent, document approval process across all projects
- ❖ Enabling users to find previous proposal content relevant to new requirements

## Solutions

- ❖ A centralised, searchable and filterable index of projects
- ❖ Templating and automation for standardised project workspace creation, leveraging SharePoint Online, Azure automation, and PnP provisioning
- ❖ Approval process leveraging Power Platform and SharePoint Framework (SPFx)
- ❖ Indexing and search experience for proposals leveraging Microsoft Lists, Azure automation, and PnP search

## Outcomes

- ❖ Improved user experience and productivity for professional services teams
- ❖ Improved collaboration experience for clients
- ❖ Modern and intuitive site designs
- ❖ Streamlined approval processes with clear audit trails
- ❖ More efficient reuse of proposal content during sales processes

# Overview



Esri UK's professional services teams need to write proposals and manage projects efficiently in SharePoint Online. Due to the repeatable nature of projects and their management, Esri UK wanted standardisation and streamlined processes to reduce the admin burden on their teams.

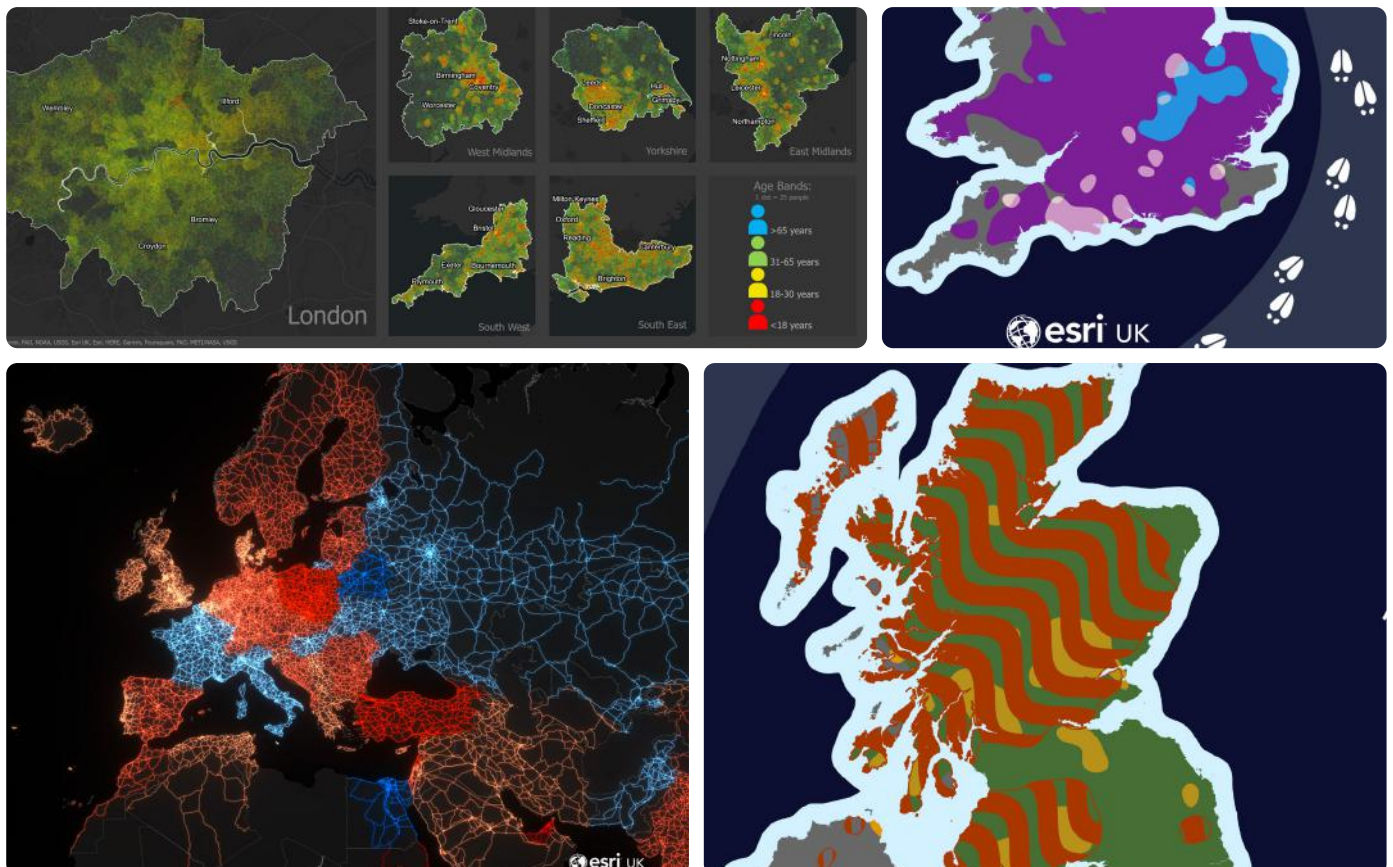
To help Esri UK achieve this, Chorus delivered a solution that included:

- ❖ **A searchable index of proposals:** updated daily, to find relevant examples quickly to assist with new proposal creation.
- ❖ **Standardised project workspaces:** created automatically with a custom form, to save, share and collaborate on project documents easily with colleagues and external clients.
- ❖ **Custom document approval processes:** triggered by a button, to track approvals across project workspaces with an audit trail.



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Chris Greaves, Customer Insights Manager, Esri UK



# Approach



Esri UK assembled a project team of various stakeholders together with technical specialists from Chorus. Esri UK and Chorus chose an agile approach to modernise and improve SharePoint. This allowed the team to deliver results faster and more effectively, by involving multiple stakeholders, prioritising user stories, and planning them into two-week sprints—with rapid stakeholder feedback enabling priorities to be adjusted for future sprints. Throughout this process, Chorus technical specialists were integrated into the broader Esri UK project team, enabling us to challenge requirements and provide guidance on technical best-practices.

**“Esri UK understood the importance of having a fully-engaged project team for this kind of transformative project. The involvement of senior stakeholders ensured that the project never lacked momentum and we were able to capture feedback from the right people, ultimately ensuring a successful and well-received set of solutions.”**

Jason Lee, Collaboration and Information Management Lead at Chorus



## Templating and automation

Templating and automation are common requirements in SharePoint Online. Many organisations need to:

- ❖ Provision sites or teams with a predefined structure
- ❖ Automate the creation of sites or teams (for example when a user submits a form)
- ❖ Provide a central index of specific sites or teams (for example an index of project workspaces, that users can filter by project manager, client, project status, and so on)

The historic approach to these requirements was to create nested SharePoint sites, but this doesn't scale well or align with best practices for modern SharePoint architecture. To meet these requirements for Esri UK, we developed a solution based on Microsoft lists, Azure-hosted automation, and the open-source PnP provisioning framework.

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## Templating

Esri UK have two distinct requirements for each project:

- ❖ A private workspace where specific Esri UK users can manage internal project documentation.
- ❖ A secure client-facing area where the project team can share content with specific people from the client organisation.

At Chorus, we prefer to separate internal and external-facing content at the site level from a governance and access management perspective.

To provide a consistent structure for these project workspaces, we leveraged the PnP provisioning framework – an open-source platform endorsed by the SharePoint product group at Microsoft. The PnP provisioning framework offers unique advantages that enable us to:

- ❖ Create a consistent information architecture for each site, with libraries, lists, views, and columns.
- ❖ Capture a bespoke home page layout as part of a template, including parameterised text, imagery, and web parts.
- ❖ Include supported customisations, such as a launcher for a bespoke approval process.

## Automation

We used Microsoft Lists (SharePoint lists) to drive the project site provisioning process at Esri UK. A central list provides an index of all projects, with each project linking to its associated project site. The list includes columns and rows displaying various project information.

Users can filter by column to find relevant projects, or can use 'views' to apply predefined filter criteria. This enables the user to find any project from a single, centralised starting point, without compromising on the architecture and governance advantages of a flat and granular site structure.

For example, users can use the list to:

- ❖ Locate all active projects for a specific customer.
- ❖ Find relevant projects in a specific industry.
- ❖ Find projects by project manager or solution architect.
- ❖ Filter projects by status, for example to show only active or archived projects.
- ❖ Sort projects by start date.





We built a form that, once completed, adds an item to the project index, which triggers an automated process that creates and configures both the internal and client-facing sites.

To the project manager, this process is seamless – they simply fill in a form, and they receive an email with a link when their new project workspaces are fully configured and ready to use.

In the background, the following technical processes are taking place:

- ❖ **Azure Logic Apps:** orchestrate activities and send notification emails
- ❖ **Azure Functions:** create and configure the sites, including applying the PnP templates
- ❖ **Azure Storage Queues:** provide a loose coupling between the various elements of the automation.



**“We were very impressed with the technical expertise that Chorus demonstrated throughout the project. Their understanding of how to leverage the full capabilities of SharePoint Online, in combination with other Microsoft technologies, has enabled us to benefit from a simple and elegant solution that solves several of our key challenges.”**

Esri, Kat Bedócs, Business Collaboration Analyst

## Approvals

Esri UK require a standardised but flexible approval process for project documents, which is a common requirement for organisations.

We built an approval process using Microsoft Power Automate, which was the preferred platform due to its robust building blocks for approval processes.

To make this approval process available on every project site, we developed a SharePoint Framework (SPFx) solution that adds a custom approval button to certain document library toolbars.



# Proposals search

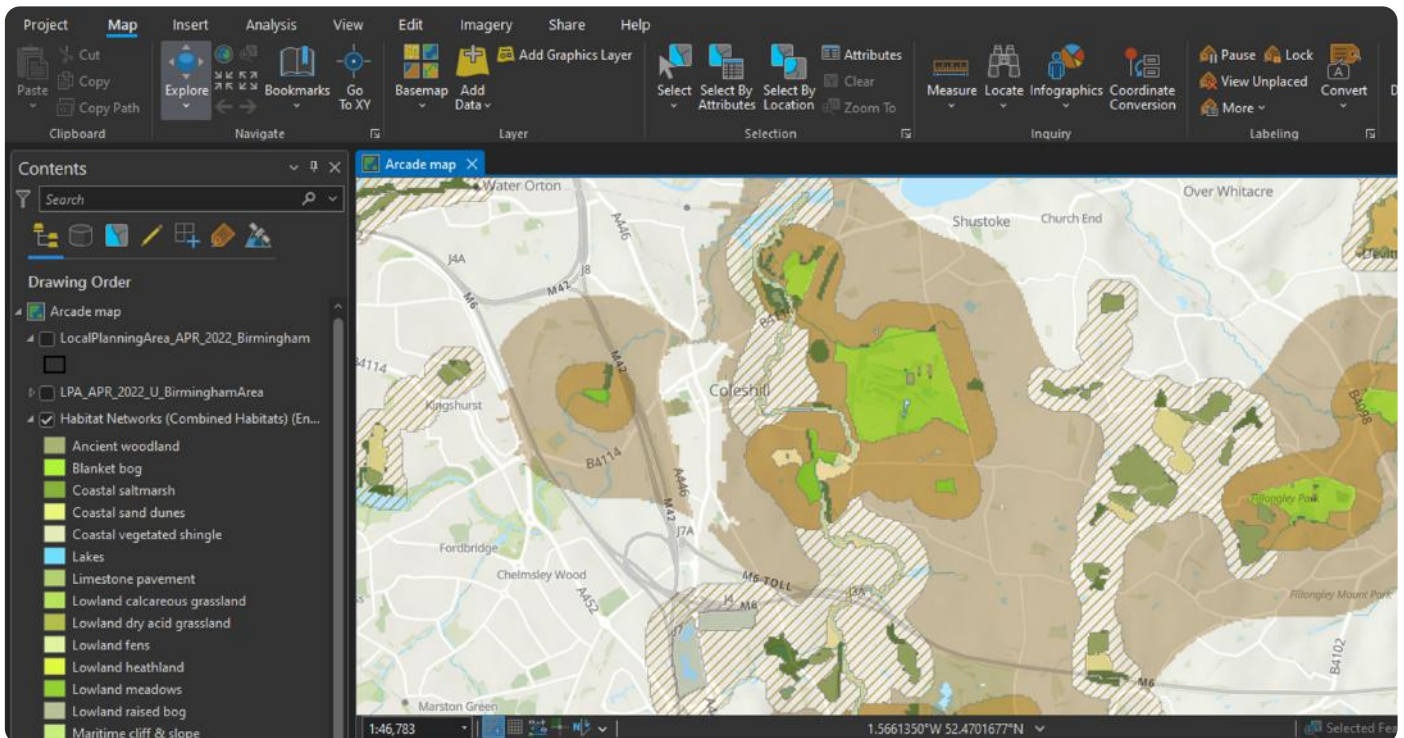


Like many organisations, Esri UK wanted to make the process of responding to tenders or RFPs as efficient as possible. One of the most effective ways to do this is to make it easier for people to find relevant content from previous responses with similar requirements. To achieve this, we took a multi-pronged approach:

- ❖ We run nightly automation using Azure Logic Apps to identify proposal responses in project workspaces, in this case based on metadata tags on files.
- ❖ When new proposal responses are identified, the automation adds the proposal to an index and prompts the associated project manager to provide more information on the proposal, including delivery model, the commercial model, the value, technical elements, and various other key pieces of information.
- ❖ We built a bespoke search experience, using PnP Modern Search building blocks, that enables users who are working on tenders or RFPs to search for relevant proposals and filter the results to find the most useful content.

## Conclusion

As a result of these solutions, the professional services teams at Esri UK have a more streamlined process in how they manage their project content.





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