

Case Study



Company Profile

With over 60 years of experience, Union Investment develops and manages investment solutions for private and institutional investors with around 4.000 employees. Today, Union Investment is one of the largest fund providers in Germany with around 386 billion euros in managed client assets. More than 4.7 million clients entrust their assets to the company in a total of 1.264 funds.

Technologies

 novaWorxx

 SharePoint

 Teams

Integrated Governance for MS Teams and SharePoint Online

Challenge

- Looking for a modern solution to replace previous Microsoft SharePoint 2013 on-premises solution
- Keeping all the digital collaboration and project spaces
- New cloud-capable provisioning solution required for the provision of digital collaboration spaces

Solution

- M365 platform with focus on Microsoft Teams and SharePoint Online
- Using M365 as technical platform with Azure and standardised provisioning procedures (PnP)
- Implementation of governance at business level with novaWorxx – a scalable solution for individual structuring and management of collaboration based on M365

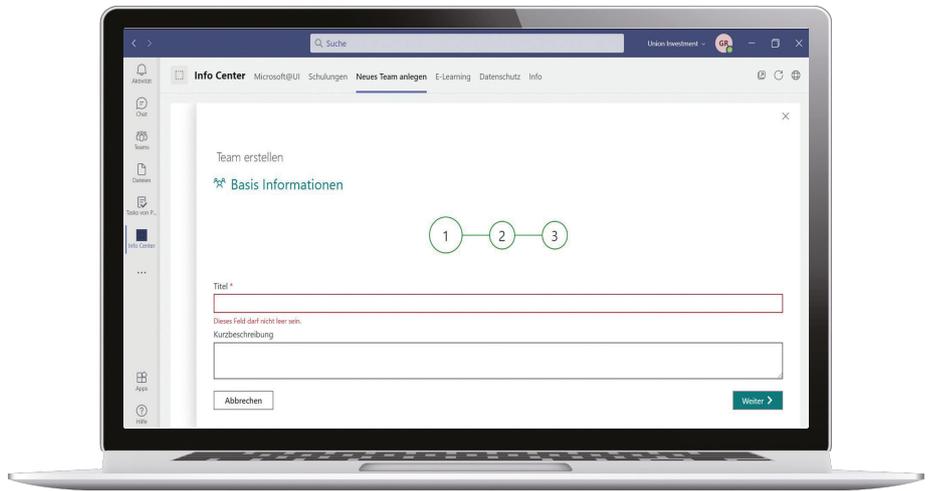
Benefit

- The use of novaWorxx and its customisable options avoid the complex and expensive development of a new provisioning solution
- novaWorxx enables digital project rooms and lifecycle management, authorisation assignment, and logging protocols integrated into the Union Access Management System, room templates, function, and metadata management with corresponding landing page/dashboard as well as navigation and search functionality
- Configuration is simple, no programming knowledge required

Until recently, Union Investment used Microsoft SharePoint 2013 in an on-premises installation for its digital collaboration. This made it technically feasible to reproduce their complex company's structures in virtual collaboration and project rooms. The virtual rooms were generated with a provisioning solution developed in-house on the SharePoint 2013 platform. For the future, Union Investment was aiming for a modern cloud solution. The challenge: the previous solution had not been built for the M365 cloud world and thus an experienced partner was required for the new development.

novaWorxx replaces development effort

The prospect of quickly deploying a ready-made and cloud-based solution led Union Investment to novaCapta. The combination of Azure with M365, MS Teams, and SharePoint Online offered the most convincing solution.



and additional SharePoint sites. In the future, the employees of Union Investment will pass a step by step self-service to create the collaboration rooms they need. novaWorxx comes into play directly where the daily collaboration happens – in MS Teams. For Union Investment, the authorisation assignment and logging were linked to their own Union Access Management System. All collaboration rooms were adjusted to Union Investment's corporate design. They were connected to a



“ With novaCapta, we have gained an experienced partner that complements modern Microsoft solutions with intelligent tools. novaWorxx is easy to use and even grows with our requirements. ”

Christopher Till – Projektleiter / Inhouse Consultant, Union Investment

In addition, no new provisioning solution for virtual collaboration and project spaces was needed: with novaWorxx, novaCapta provided a tool that was both highly adaptable to their requirements and already tried and tested.

One-stop solution: novaWorxx

novaWorxx is a solution that combines managed room provisioning, governance, and lifecycle management for teams, SharePoint sites, planner and O365 groups in a single tool. First of all, Union Investment and novaCapta created customised room templates to set up new digital collaboration and project spaces. In contrast to the on-premises world, it was now no longer sufficient to provide templates for SharePoint only. Therefore, templates from novaWorxx included multiple teams sites

shared landing page and to a dashboard integrated in MS Teams. The navigation was enhanced with additional filter and search functions. Last but not least, a fully integrated lifecycle management was established which lets Union Investment take control of all future rooms.

A modern workplace for Union Investment

Union Investment's proven structures and processes could be transferred seamlessly into the new cloud environment. The tools, self-service functions, and a coherent governance on business level ensure that the rules are transparent and easily understandable for all employees. On top of that, the new workplace solution reduces the workload of the IT department – a win-win for everyone.

novaCapta.de



+49 221 58919-343 • info@novacapta.com

novaCapta Software & Consulting GmbH • Im Mediapark 5c • 50670 Köln



+41 41 392 20 00 • info.schweiz@novacapta.com

novaCapta Software & Consulting Schweiz AG • Industriestrasse 5a • 6210 Sursee