



Cygnets **Infotech**
IT is about you



SharePoint based Document Automation Solution for South Africa based IT Company

BUSINESS SCENARIO:

An IT company with prime focus on delivering best-in-class Document Management Solutions, our client catered to several premier firms in law, management consulting, financial services and similar companies where creating and managing stacks of document is the major part of their work. In an existing framework, the client desperately needed to build appropriate features to simplify the complicated process of creating, editing, maintaining and managing of these documents. Shortage of staff, lack of upgraded technical skills and mounting costs these factors forced them to seek an affordable backend development partner. Cygnets' technology expertise and quality delivery topped their charts. The following functionalities were listed as the key requirements:

- Development of Plugins that support in Microsoft Word, Microsoft Power Point, Microsoft Excel
- Different templates for various kinds of documents
- Easy Filter search for documents

PROJECT DETAILS

- **Customer Size:** Medium Organization
- **Country:** South Africa
- **Domain:** IT
- **Solutions:**
 - Technology: SharePoint 2010 and SharePoint 2013
 - Programming Language: C#
 - Development Framework: .NET Framework 4.5
 - Database: SQL Server 2008 and 2012
 - Browser Compatibility: Firefox, Chrome, IE 8 to 11, Edge, Safari
 - Development Environment: Windows

CYGNET'S SOLUTION:

After understanding the requirements, Cygnet team designed and developed features in an existing framework of the Document Management system. The client desired development of website, plugins and additional functions using SharePoint framework to enhance user experience. Further, to automate the process Cygnet used SharePoint designer workflow. Following are the major functionalities of a SharePoint based web portal and plugin:

- **Efficiently Managing Documents:** Web Portal and plugin are created with a motive to simplify complicated process of managing lengthy yet important documents such as RFP and legal files. Users can create, share, edit, modify, give comments, in these documents along with uploading files and images for reference.
- **Plugin Development:** Although users can log in manually from the website, for ease of use the client required a plugin that can be installed in Microsoft Office. User-friendly solution was the thumb rule, hence easy to use plugin that supported in Microsoft Word, Power point and Excel was provided. The plugin allows users to merge multiple documents containing many pages into one or separate them into multiple files.
- **Assistance with Uniformity:** Since the target industries require uniformity in their documents, the need to maintain the same format for documents was essential. Hence, professionals are provided with different types of templates to choose from for different kinds of documents including Microsoft PowerPoint, Word and Excel.

CLIENT'S PROFILE:

South Africa based Software Company helps well-known firms and organizations in streamlining the process of creating, maintaining and developing critical documents accurately and efficiently. Since 2010, the client has been creating easy to use software targeting non-tech people, thus, the software provides facilities for various types of documents such as presentations, proposals, contracts, statements of work, RFP etc.

- **User Rights Management System:** All users are categorized into three parts.
 1. Standard users hold the right to create, change, modify, update and allot tasks to Lite users. When the document contains many pages, the Standard user can allot relevant sections of the file to relevant lite users according to their expert areas. They can view all the activities performed by other users such as who searched for which documents and who was assigned which tasks as well as how much progress is made on the same.
 2. Lite users can edit, modify, add comments and update the files allotted to them.
 3. Guest users have limited rights where they can work and view allotted files only.
- **Project Management:** Users can view and manage projects from the Dashboard that allows them to create projects, add content, upload files that can be shared across multiple users. They can view their tasks in the display calendar along with their status. Admin holds the rights to view total number of projects allotted to members or created and assigned by others. After the tasks are assigned, users can view, review, edit or comment on projects.
- **Simplified Task Search:** Users can search projects depending upon the categories such as approved, unapproved, suggested content etc. Searching documents from such vast repository can be challenging, hence to simplify, lengthy, complicated and critical business documents, the client required extensive search. Color coding documents was key highlight of the solution, Cygnet provided with categories like Red, Amber and Green options which further assisted in highlighting their hierarchy and priority. Task status included the following: Started, not started, in progress, Created, Allocated, Assigned, Completed, Allocation, Review, Approved, Deferred, Rejected, Declined.

BENEFITS OF THE SOLUTION

- Increased RFP responses by 60%
- Simplified and eased content search by 50%
- 80% faster creation of documents
- 40% faster document formatting
- 30% less time managing content
- Reduced time spent amongst cross-departments
- Encouraged working from across global locations
- Easier Management of critical documents
- Developed healthy relationship with end clients due to user friendly Product
- Cost Efficient and Time saving



Cygnets Infotech

IT is about you

For more information, please visit www.cygnets-infotech.com **or email** inquiry@cygnets-infotech.com

US Office: Cygnets Infotech LLC. 125 Village Boulevard, Suite 315, Princeton, NJ 08540
Tel +1-609-245-0971 | Fax +1-201-642-1181

Other Offices: SOUTH AFRICA | AUSTRALIA | NEW ZEALAND | UK | GERMANY | INDIA - AHMEDABAD
AND PUNE

Connect with us and stay in touch

