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CENTRALIZED DOCUMENT MANAGEMENT SOLUTION TO CREATE, SECURE, CONTROL, OPTIMIZE AND COLLABORATE

BUSINESS SCENARIO:

Aiming to get rid of chaotic paperwork, boosting work efficiency across entire organization and securing ownerships of confidential documents, our client was seeking a right productivity tool that could assist them in managing entire documentation of a firm. Mainly involved in catering document management solution to various industry sectors, they pioneered in selling solutions that could save thousands of hours of documentation by empowering teams to generate presentations, documents and proposals in minutes. Also with growing list of clientele, the client was constantly faced with a challenge of managing multiple documentation effectively across various departments and varied business processes.

They were seeking a solution that had following functionalities:

- Secure, Centralized and Scalable Environment to safeguard documents
- Automatic Credentials Storage Facility
- Advanced Reporting Capabilities
- Engaging, Feature Rich, Simplified and Interactive UI
- Locating and Classifying the Content Locally and Globally
- Customized Library for Storing Content Individually

PROJECT DETAILS

- **Customer:** Mid-size Organization
- **Country:** US
- **Domain:** Information Technology
- **Solution:**
 - **Platforms:** Microsoft Office 365, Microsoft Azure, SharePoint Server 2010, 2013 and 2016, Windows Server 2012 R2 Data Center
 - **Development Tools:** Microsoft Visual Studio 2013 & 2015, SharePoint Designer 2013
 - **Database:** Microsoft SQL Server 2012 & 2014, Microsoft Azure SQL Services
 - **Web Technology:** ASP.NET MVC 5.0, Web Services and Web APIs, Office 365 Add-ins
 - **Desktop Applications:** WPF, VSTO Add-ins, Install Shield based installers (MSI & EXE)
 - **Programming Languages:** C#, .NET Framework 4.5, Entity Framework 5.0, Multi-threading
 - **Client-side Scripting:** JavaScript, jQuery, Telerik Kendo UI
 - **Source Code Control:** Atlassian BitBucket Server and Tortoise SVN
 - **Project Management Tools:** Atlassian JIRA & Confluence and HRINNOVA
 - **Reporting Tools:** Microsoft Power BI and Web-based Reporting
 - **Security Implementation:** Windows/Forms based auth., OWIN, OAuth 2.0, SSL Certificates

CYGNET'S SOLUTION:

Cygnnet offered a solution for document assembly and intelligent content curation that managed documents on local desktop, through SharePoint online and through a plugin. Intuitive and smart content tool where the user with access rights uploaded single or bulk files by just drag-drop feature. The solution was highly customizable according to the type of enterprise, firm or agency across any sector.

Key highlights of the solution were:

Document Management

Assisted user in generating document and utilizing resources from across various documents with methods like indexing, searching, processing, splitting and merging, initiating discussions with other users working on editing a document and generating reports to track actions performed on a document. Promoting workflow automation, document management feature enabled intuitive dashboard to view audit logs.

CLIENT'S PROFILE:

Our client ventures into offering smart, secure and stimulating document management system and content solutions for the businesses to document their data. They help organizations eliminate outdated, incorrect content, assist in risk management, and provide compliance to critical tasks involved in document and content management.

- **Document Generator:** With major benefits of merging multiple documents into one, document generator feature offered selecting multiple SharePoint list-items and merging list-data into predefined Word or PowerPoint template. Single documents could be generated stored in the document library.
- **Document Splitter:** Dividing paragraphs, levels, sections or tables of a single Word document or PowerPoint presentation into multiple documents or presentations was possible through the solution. These documents were saved automatically to a Centralized Repository that the Admin could publish to bring the documents to the Document Library.
- **Managing Discussions:** The user initiated a discussion on list-item, template and final document and collaborated with other users by posting a comment of 255 characters. The functionality of edit, delete and like is provided on users' comments.
- **Report Generation:** The operations performed on the documents like create, read, update, delete saved search, files awaiting approval is logged into the database which later can be used to generate reports.
- **Security Mechanism:** The documents placed in the local library can be accessed by Local Knowledge Managers who can create, read, update and delete (CRUD), whereas Global Knowledge Managers have read permission. Similarly, for global library, Global Knowledge Managers can perform CRUD operations on the documents whereas the Local Knowledge Managers can only read the documents.

Library Management

Entire documentation is managed in a central repository – The Library. Acting as the node, entire details of a documentation and metadata can be listed, classified, tracked and accessed from anywhere, anytime securely.

- **Managing List-Items and Libraries:** Varied types of documents and their metadata could be stored in the central library. The listing of documents with metadata is defined as list items in SharePoint. The behavior of these documents could be tracked and managed, this assists in future prediction of the document usage.
- **Re-classifying Content:** In scenarios where documents generated through document generator had to be shifted from one library to the another, they had to be reclassified first. These documents were used as list-items by the users of the document management solution.
- **Managing Resources:** Admin can reset the value/text of common controls like buttons according to the convenience of the user.
Example: Updating the name of button 'Clean' to 'Clear'.
- **Browse Local and Global:** It defined two set of managers- Local Knowledge Manager and Global Knowledge Manager. The Global Knowledge Manager accessed the documents from any of the office locations across the globe through global library whereas the Local Knowledge Manager accessed documents from the local offices through local library.

Dashboard Management

The user can gain a generalized view from the dashboard, gaining insights of total users, total templates, total number of final documents, recent documents and my library displaying the list of the documents generated by a specific user.

Credential Storage Facility

It helped the users to securely store the credentials for both SharePoint online and on local desktop for easy connectivity.

Plugin Facility

Although user logged in manually from the website, for ease of use, the client required plugins that can be installed in Microsoft Word, Microsoft Power Point to create, merge, split and modify documents.

BENEFITS TO THE CLIENT:

- Ease in searching a specific document in the midst of the countless other documents
- Multiple users accessed and updated documents remotely on multiple devices
- The documents were saved and were made available to be used for later purpose
- Access rights on the documents due to privacy clause
- Ease of document access encouraged local and global office cultures
- Employee productivity increased by 70%
- Lock feature enabled document security
- Plugins promoted seamless document usage at anytime, anywhere
- Audit log and Report generation on the activities of the documents



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