



Cygnets **Infotech**
IT is about you



SharePoint Based Comprehensive Document Management And Digitization Solution

BUSINESS SCENARIO:

Our client raised the requirement for the right-fit productivity tool that could help them manage and archive all the industry specific documents of their organization, thereby aiming to eliminate their dependency on paperwork, enhance operational effectiveness and securing the ownership of the documents. Mainly involved in offering supply chain management solutions across the African continent, they continually faced challenges of effectively managing multiple industry specific documentations across different departments and business procedures for their organization.

They were actively seeking for feature rich solution with the following functionalities:

- Engaging, simplified and interactive UI
- Secure and scalable environment to safeguard archived documents
- Archiving, scanning and parsing of the documents
- Powerful and interactive dashboard
- Report generation
- Seamless integration with external systems
- Role-based rights and privileges to access documents for security reasons

Knowing Cygnet's expertise in providing a scalable and robust solution along with various other fronts, the client reached out to us to design an automated and feature-rich document management solution.

PROJECT DETAILS

- **Customer Size:** Large Organization
- **Country:** South Africa
- **Domain:** Information Technology
- **Solution:**
 - Technology: SharePoint 2010, SharePoint 2013 and SharePoint 2016
 - 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:

Cygnet offered a highly customizable document management solution that managed various documents through SharePoint. The smart solution also enabled document digitization by providing features like scanning and parsing (manual/automated). The solution offered was highly customizable and generic.

The key highlights of the solution were:

- **Document Management:** The solution assisted the user to access various resources across varied documents with methods like indexing, searching, creating documents and document templates. It also enabled to generate detailed reports to track various actions performed on the document. The system promotes workflow automation which offers a smart dashboard to view audit logs. The most remarkable feature of this DMS is that it enables document digitization
- **Document Scanning:** Document scanning enables document digitization by allowing the user to scan the document with appropriate quality check. It also allows the user to scan multiple documents in a batch followed by auto indexing of the defined documents. In case of auto indexing failure, manual indexing is performed. The documents are then stored where the storage will trigger a notification to the user via email, fax, SMS etc.

CLIENT'S PROFILE:

Our client ventures into offering the best-of-breed logistics management, warehouse and transport solutions with their prime focus on the African continent for over 20 years. They aim to help their clients enhance their operational effectiveness and ensure sustainable competitive advantage in the global market with their technological innovations which keeps them always at a competitive edge.

- **Document Parsing:** The solution allows the automated parsing of the documents received from various sources like Email, Fax, Scanned documents, SMS and web services with appropriate quality verification. This is followed by document archiving. Manual parsing is allowed in case the user receives an alert for new document type which is not previously defined where the user will have to map the regions of the document with the document template tags. The system shall allow the users to view parsed document details in a list view with hyperlinks on the related documents.
- **Document Archiving:** The system allows tenants to define document archiving rules according to which documents will be archived by the system. The system enables retrieval of a document from the archived documents as and when required.
- **Document Templates and Workflows:** The system enables a user to add/edit/delete document templates for various types of documents. Apart from creating standard areas in the template, user will be able to add hyperlinks to the documents in the repository which will allow the system to open the relevant document. Document workflows are closely associated with document templates. The system enables queues for approval/rejection for any new document that is injected in the system and based on that next stage for the document is decided. Document versioning is strictly maintained throughout the execution.
- **User Rights Management System:** The system categorizes the users in three parts: Super Admin, Tenant and Subscriber
 - **Super Admin:** Super Admin holds supreme rights to create and manage tenants wherein they will be responsible for assigning administrative rights to the tenants for their organization.
 - **Tenants:** The tenant will be the one who will create and manage users of his organization. They will also be responsible for configuring the business rules for different modules to be accessed by subscribers.
 - **Subscribers:** The subscribers will be any internal or external users who will perform the document management activities. Any third-party users (e.g. customers, suppliers) will also be considered as subscribers and they will be accessing the application based on the rights/permissions given to them. They can view/edit other subscriber's documents based on the rights assigned to them.
- **Seamless Integration with external systems:** The system allows all the users to interact with external systems like Emails, Fax, SMS, Web services, Windows office, scanners and laser disks.
- **Intuitive Dashboard and Reports:** Users can view and manage various documents from the dashboard in the predefined format. All the operations performed on the documents like create, scan, parse, update, delete is logged into the database which later can be used to generate reports.

BENEFITS TO THE CLIENT:

- Improved operational effectiveness by 80%
- Efficiently manages storage of documents in a way that facilitates easy retrieval of particular document when required
- Safeguards document with dual objectives of preventing unauthorized access and protecting vital documents from physical loss/damage
- Access rights on documents to support the privacy clause and avoid any breach
- Employee productivity increased by 70%
- Detailed report generation and audit log provided on activities of documents
- Version control helps largely in maintaining multiple versions of the document



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 | UK | GERMANY | INDIA - AHMEDABAD AND PUNE

Connect with us and stay in touch

