

# Digitized document lifecycle management & simplified document-driven collaborations with SharePoint DMS



## Overview

# Document management system

Enabling streamlined document creation, storage, tracking, retrieval, and effortless collaboration with a highly agile, scalable document management software. The system improves accessibility, enhances security, and streamlines complex workflows, resulting in significant cost reduction and enhanced productivity.

### Client

A leading petroleum refining company in India with global presence and extensive network of branches. With scattered documents and fragmented systems, the team suffered from inefficient document handling, hindered collaborations, lack of transparency, and huge operational costs daily.



## Requirement

Implement a Microsoft SharePoint based document management system for the refinery in Mumbai. A scalable document management system ensures efficient collaboration to empower teams with easily accessible information and effective data security controls.

## Challenges

Manual document management was inefficient with scattered data and no central repository where all critical documents can be easily tracked and archived. This led to several operational issues:

- **Lack of a systematic process** for document creation, retrieval, and management. Historical analysis was challenging
- **Lack of a central documentation system** resulted in poor tracking. Outdated manual processes were severely inadequate in current digital ecosystem.
- Without a digitized document management system, **lack of visibility and control** access of critical documents was impossible.
- Traditional documentation systems faced challenges in document creation, sharing, making updates, with **no options of retrieving** previous versions.
- Poor document management led to **unstructured and insecure data storage**. Data security was severely compromised without any standard security measures in place.
- **Lack of document version controls** resulted in serious drawbacks. Once deleted, documents were lost for good.
- Teams had **no control over document duplication**
- **Inadequate document access** and storage security control posed a serious threat, especially regarding critical documents, reports.

- **Limited document search options** delayed workflows.

## Solution

Aufait Technologies implemented a document management system that provided the client with a centralized solution, ensuring:

- Implementing the system established standardized document creation, sharing, tracking, and management
- The ability to upload customized document screens eliminated document duplication
- E-signature capture capabilities made approvals effortless and significantly reduced downtime.
- OCR- [Optical Character Recognition] identifies printed text, search by contents, edit scanned document.
- Pre-built templates made document creation easy.
- Custom access controls ensured greater security. Only registered users with prior permission could access and make changes to critical documents.
- Implementing agile SharePoint based document management system expedited document approval workflow.
- Version control capabilities ensured no document duplication, saving thousands of hours of human effort and eliminating cluttered document management.

This SharePoint-based document management system enabled department-wise document creation and sharing, giving the management team better control over documents.

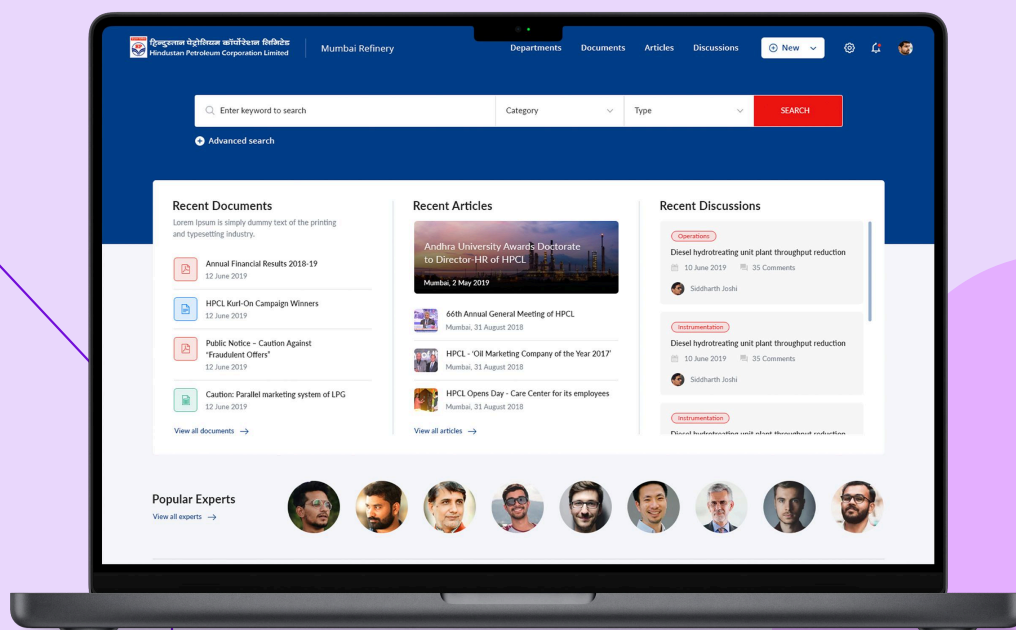
- **Centralised repository:**  
The system served as a central repository by fully automating document creation, sharing, and storing. Data categorization and filtering features made information management easy and documents more easily accessible.
- **Role based access controls:**  
The system eliminated lack of document security and standardization by implementing processes and policies that ensured quality standards for each document type. The system allows employees to systematically create documents. Role based access controls enhance security.
- **Customized user interface:**  
User interfaces customized for admins to ensure better access control, superior task allocation, without relying on the IT department. Easy to customize user interface enables users to create diverse content types, metadata, and document libraries efficiently, from a single screen.



# Results

Leveraging the unique and advanced capabilities of MS SharePoint, our DMS software had some powerful features. Post implementation, the client achieved phenomenal results.

- Efficient document management
- Reduced employee workload
- Easy document search and retrieval
- Comprehensive view of shared documents
- Superior data security



## Business benefits

Benefits of implementing our SharePoint based document management system are manifold. Eliminating all manual processes and bringing in automated document management ensured:

- **Easy to Implement Solution:**  
The system is easy to deploy and scalable to a robust knowledge management system, ensuring it can grow alongside the business needs.
- **Scalability:**  
The SharePoint-based document management system is highly scalable, allowing the organization to easily expand its document management capabilities as the company grows
- **One-Time Investment:**  
SharePoint powered DMS is a cost-effective solution with long-term benefits. Leveraging existing investment of SharePoint, businesses ensure optimal use of resources.
- **Superior Data Security:**  
The system provides enhanced data security through custom access controls and role-based permissions, ensuring that sensitive information is protected.

■ **Compliance with Leading Security Standards:**

Leveraging the security features of SharePoint, the system ensures compliance with industry-leading security standards, giving peace of mind that documents are managed securely.

■ **Industry-Leading Expertise:**

Aufait Technologies is a leading provider of digital workplace solutions with long-standing clients across the globe, ensuring a reliable and professional service.

■ **Low Cost of Implementation and Maintenance:**

By utilizing SharePoint, the document management system benefits from a low cost of implementation and maintenance, reducing the overall expenditure for the organization.

## About Aufait Technologies

Aufait is a trusted software product engineering and digital transformation partner that empowers enterprises to transform ideas to commercially successful products and run highly profitable businesses. We help organizations adopt disruptive technologies such as AI and ML, Enterprise 2.0, Mobility and Cloud.

Aufait offers end-to-end enterprise solutions; from concept to design, design to development and implementation, to product launch and continued high-impact digital marketing services to transform your idea to a unicorn, Aufait Technologies is your one-stop destination for all IT solutions.

As a Microsoft Gold Partner with Portals and Collaboration competency and Yammer affiliate, Aufait offers enterprise solutions such as Intranet/Internet Portals, Document Management Solutions (DMS) and Workflow/BPM solutions around SharePoint and Office technologies.

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