CASE STUDY on Electronic Document Management System
Client Profile

• Sebata Muncipal Solutions, South Africa based company required to develop a web based software application which covers Dynamic workflow with Document Management System. This **EDMS (Electronic Document Management System)** is mainly for municipalities with end to end processes, data management system and its operations.

• Sebata discussed their requirements with us to develop a robust web based solution with built up an integrated solution based on **Microsoft Office SharePoint® Server 2007 and M S Office 2007** to carry out the end to end processes of the technical operational work flow and employee management. We had accepted to make a web based solution for both the preferences and started our processes of making the software.
Business Challenges

• As the operations were very intricate and massive, we took estimated steps and conducted system requirement analysis at the live site. After the project feasibility analysis, risk analysis and all the technical conclusions were done, they were submitted to the client finally for their approval. Following that was the design prototype submission to give a realistic visualization to the project.

• The Web Application “Electronic Document Management System” of the legacy version encompasses new and interactive features for a smooth handling of the huge document data that are otherwise a herculean task to handle and keep record of them.

• The Application consists of general operations of Uploading, Versioning, and hierarchical communication between the users and transforms old system build from scratch starting user interface system to Deliverable with whole system.

• In consequence of the system requirements analysis, KCS enlisted the project details for Different modules as below.
1) Document Operation Module

I) **Document Upload** - Document of any format can be uploaded. Both single document upload and multiple document upload are possible. Documents of recommended cumulative size up to 2 GB can be uploaded. Interestingly, the documents can be selected with traditional methods or can also drag and drop on the space provided. This makes document upload quick and easy.

II) **Document Versioning** - From here documents can be get check in and checkout from selected version.

III) **Major and Minor Versioning** - A document is assigned minor version status that is sequential from 0.1 from the first upload; it ascends as minor versions until it is published as a Major version. The version number can be seen against each of the document row under the Version column. Every Check out makes the document version to move a step ahead and Check in for the same finalizes the version thereby acknowledging it as the version specified. For E.g.: A 0.1 version when checked out makes the version as 0.2 and check in for the same version acknowledges the same there by making it open for others.
IV) **Version History** - You can see the Version History of the document that gives all the details of the documents right from its first upload. It gives the details with the date and time of modification, person modified by, size of the document and comments that were put at the time of checking in the document version.

V) **Restore Older Version** - You can restore a previous version to make it as a newest version.

VI) **Add/Edit Document** - A document can be added/edited from EDMS to make a newer version or can also be replaced into the current version. The document will get saved to EDMS on the appropriate library as it was assigned with the same who has edited and with the version specified while saving. This would be possible only when MS Office is configured to get integrated with EDMS.
2) Document Workflow Module

I) Document Archival - This workflow is a provision to archive the document. It can be archived only after its predefined archival date that was stated while uploading the document. A document can be archived even when there is any reference to it in the system.

II) Document Disposal - This workflow is a provision to dispose the document off. Only when the disposal authority, that was predefined while uploading document, runs this workflow; the document gets disposed off. However, a document cannot be disposed off when there is any reference to it in the system.

III) Inform Sender Via Email - This workflow is a provision to send a mail to the sender of the document confirming the successful upload of the document with the details of the document like the Name, Size, Upload date etc.

IV) Receive Comments (Documents) - This is a Workflow meant for asking comments on a specific document. When “Receive Comments for Documents” Workflow is started, all the users who were selected as assignees while uploading document are assigned tasks which will be listed in their “Tasks” Section of EDMS.
3) Tasks Workflow Module

- Tasks are one of the important sections of EDMS. The tasks assigned to the user either from various areas of the system or tasks created or assigned specifically from tasks section only are displayed with some purpose.

4) Item Workflow Module

I) Receive Comments (Items) - This is a Workflow meant for asking comments on a specific Item. When “Receive Comments for Items” Workflow is started, all the users who were selected as assignees while creating the item are assigned tasks which will be listed in their “Tasks” Section of EDMS.

II) Item Disposal - This workflow is a provision to dispose the Item off. Only when the disposal authority, that was predefined while creating the item, runs this workflow; the item gets disposed off. However, an item cannot be disposed off when there is any reference to it in the system.

III) Item Archival - This workflow is a provision to archive the item. It can be archived only after its predefined archival date that was stated while creating the item. Noticeably, an item can be archived even when there is any reference to it in the system.
5) Resolution Workflow Module

I) Resolution Approval - Resolutions Approval is a workflow meant for taking the approval from the members who have been assigned for when the resolution was created. When Resolution Approval workflow is started, the related tasks are assigned to the assignees who have been assigned for when the resolution was created and are listed in their “Tasks” Section of EDMS.

II) Resolution Archival - This workflow is a provision to archive the resolution. It can be archived only after its predefined archival date that was stated while creating the resolution. Noticeably, a solution can be archived even when there is any reference to it in the system.
6) Complaint Workflow Module

I) **Manage Complaints** - Manage Complaints is a workflow meant for assigning the complaint to one user who will be responsible for attending the Complaint from end to end.

II) **Completion Acknowledgement Mail** - This workflow is a provision to send a mail to the complainant confirming the completion of their Complaint.

7) Add On Features Module

I) **Calendar** - Calendar allows you to schedule events that are held or to be reminded and so on for specific dates. Reminders are also got for the events.

II) **Contacts** - This is the master database of customers or complainants whose information can be trapped in the EDMS database using this section of EDMS.

III) **Announcements** - You can add any announcement that is to be declared between all the EDMS users.

IV) **Links** - You can add useful links to be shared between the users of EDMS.

www.rubixile.com
V) Email - Emails can be sent to email ids from this section of EDMS.

VI) SMS - SMS can be sent to Mobile from this section of EDMS.

8) Archived Module

I) Archived Document - Documents archived from Documents section can be seen in “Archived Documents” section of EDMS.

II) Archived Item - Items archived from Items section can be seen in “Archived Items” section of EDMS.

III) Archived Resolutions - Resolution archived from Items section can be seen in “Archived Resolution” section of EDMS.

9) Report Module

• There are various reports which are required for MIS Management. And other more reports are available in this system to show the all documents and information.
The Solutions

• The team felt that Microsoft Office SharePoint® Server 2007 offered the functionality needed to build a robust, feature-rich solution.
• Easily manageable.
• To efficiently organize information within the new system, the team used the site collection capability in Office SharePoint Server 2007 to implement a hierarchical flow that corresponds to real-life project organization.
• Because a single complaint may be handled by several persons at the same time, KCSPL created an intelligent linking mechanism to allow users to reference complaints and their metadata. This way, the users do not need to maintain multiple versions of the complaints. Office SharePoint Server 2007 ensures that file permissions are observed so only authorized users can make edits.
• Within Office SharePoint Server 2007, users can view documents, approve them if necessary using an electronic signature, or decline them and provide comments.
• The system saves all signatures used in the workflow alongside the relevant version of the document. At any time, users can see who approved which version, when, and their respective role.
• The complaints whose status become obsolete and should no longer be used are locked down to prevent further editing. However they are still available for viewing for archiving reasons, but they can no longer be edited.
Screenshots

To display a few screenshots of the system,

**Login Page:** User needs to enter username and password for login.

![Windows Security screenshot](image-url)
**Settings:** User views their settings of application.
Dashboard: After login, User can view dashboard.
Publish Major Version: To Publish major version of selected document.
• **Restore older Version**: To restore the older version of selected document.
**Edit Document:** To edit selected document.
Workflow: To create new workflow for selected document.
Create Task: To create new task for application.
**Add Item**: To add new item.
Add Complaints: To create new Complaints.
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Contact Us

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Thank You!