



Africa's leading staffing company leverages **SharePoint Document management system** to organize its key company information and improve employee's productivity

Business Description

Our Client is a leading staffing and recruiting service provider in Central/Eastern Africa which excels in providing the most innovative and valuable human resources solutions for their clients.

Challenge

The client had issues because of inadequate document storage and sharing process. Their offices were spread out in multiple locations and departments.

The staffing firm wanted to store and share crucial company documents across offices in different locations, but this was not possible due to a lack of the common document repository. They were not able to take timely decisions due to an unstructured document storage system. Other challenges included:

- ◆ Lack of shared document repository
- ◆ Difficulty locating updated versions of a document
- ◆ Documents could not be shared to multiple locations and departments
- ◆ Employees wasting productive hours searching for the required information
- ◆ Difficult to manage user permissions
- ◆ Employees performing low-value tasks like updating manual paper files
- ◆ Delayed document approval or rejection process
- ◆ The huge cost of paper files as well as occupying physical space in each office

How we helped

We helped the client develop a **web-based Document Management System** to manage the life cycle of their crucial company documents. The application was built using SharePoint so the client could leverage their Office 365 license.



Digitizing workflow

By working together, we helped the client implement a system that digitized their manual document managing process.

Categorization of documents

We created different **Document libraries for each location and department** so when a document was assigned to a library, it was automatically available for employees in that department and location to access the information per their user permissions.



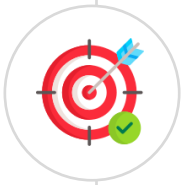
Assigning user permissions for restricted access

To restrict access, we **created different user groups** like the uploader, approver, and view-only groups. Different level of access permissions was also managed using SharePoint user permission settings.

Keyword searchable documents

Using SharePoint made it possible to **tag documents with specific keywords**, to make them easily **searchable**.





Multi-Functional for different purposes

We created different sections for each user role. Let's check out the purpose of each of these functionalities.

1. Upload document function

This function helps users upload a document(s), with the option to choose a common category, keyword or metatags for the selected document(s). The name of the user uploading the document(s) and upload date-time was captured along with the option to enter additional information. The uploaded documents are added to a folder based on the selected category. An email is then sent to the Reviewer(Category admin) to review.

2. Approve and reject the document function

This module allows the Reviewer/Approver to review unapproved document(s). The reviewer can approve/reject/archive document(s). Once approved the document(s) are available to other users forview. In case of rejection, an email is sent to the uploader of that document(s) with the rejection reason.

3. Search or browse document function

Users can now search and download approved document(s) based on their current needs. The user can narrow the result(s) using multiple filter options and keyword searches using the in-document search. Multiple documents can be selected and downloaded at once. The username, date time and the reason for download are captured for record-keeping purposes. Users can also share a link to the files with another employee using the share option.

4. Archive document function

This module allows the content to be archived manually or automatically by certain dates.



Supporting documents of all formats

Users can add documents in multiple formats (word, excel, ppt, images, etc.).

Document version management

Different versions of the same document were managed properly. The approver can control if only the latest, approved version is visible to all.



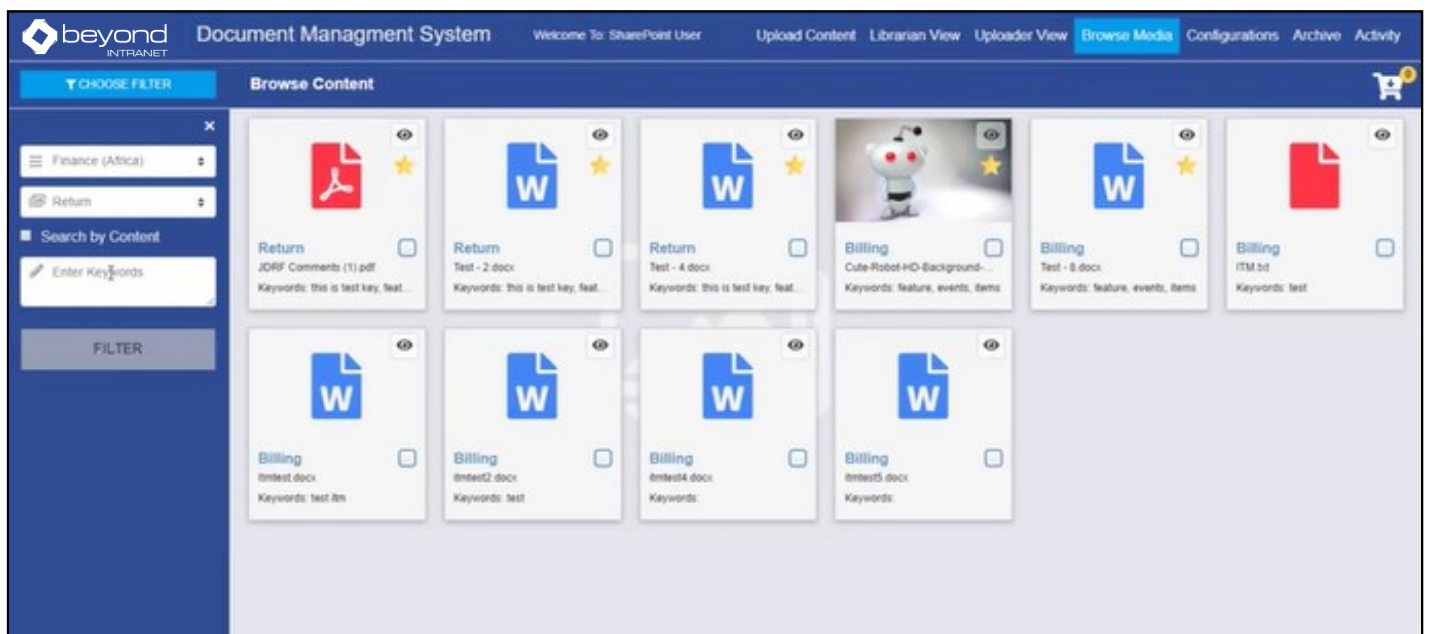


Results

The SharePoint based Document Management became the central repository for the client's business, stakeholders and all the employees as well. They used it to save documents, share quick information and save time. It helped the company improve collaboration to a great extent.

- ◆ The client now has a centralized, digitalized document repository.
- ◆ The process of document submission, approval and visibility were streamlined.
- ◆ Team collaboration was enhanced because email notifications kept team members of their responsibilities and deadlines.
- ◆ They saved time, money and efforts managing their data.
- ◆ Searching for the required information was easy than before. It helped employees to save 35% of their productive time.
- ◆ The client made better use of their Microsoft 365 license thus making it a cost-effective solution.

Document Management System



Document Upload

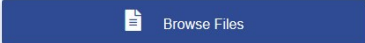
beyond INTRANET Document Management System Welcome To: SharePoint User **Upload Content** Reviewer View Uploader View Browse Media Archive Configurations Activity

DOCUMENT UPLOAD

Select Department Select Category

Enter Keywords

Approval Required Is Featured

 Browse Files

UPLOAD RESET