



Case Study

SoluSoft N2 Workflow and Document Management System

Indian Air Force, India

Introduction

In government offices around the world it is common for documents to be kept for many years either by policy or by regulations requiring that they do so. The information contained in these documents is needed as reference to past decisions and to guide future decisions and policies. Many of these documents or files contain urgent and sensitive information which must be kept secure for reasons of national security. Government entities have the added concern that a lost document would not only be inconvenient but could physical or financial threat to it's operations. With the quantity of documents generated each day the task of retrieving a specific document has numerous issues including storage requirements and the time consuming tasks related to filing and retrieval. Given the likelihood that a document may go through a series of revisions and approvals it may be difficult to be sure that once a document is located that it is the latest or approved version.

Challenge

SoluSoft worked closely with the Indian Air Force (IAF) in Gandhinagar, India to help them implement an N2 Workflow and Document Management System solution that specifically deals with information which needs to be kept highly secure and it is critical that all of the grouped pages stay intact as a unit while going through extensive review and revision processes. Moreover, these documents have to be preserved for years while making them easily accessible to various departments.

Originally the IAF had a process that all documents generally followed. Each document would be passed between departments and team members who would make notes on the originals. After revision cycles, these notes would then be compiled and combined into a revised version.

In addition to the revision process the documents also had to follow an approval process. In order to do this manually a document would be removed from its folder and only that document would be routed through the approval process. This opened up the possibility that a document could be lost in transition. Even if a copy is kept for security, the lost document would have to go through the approval process again once the loss was discovered. The impact of a lost document would take some time to determine and would likely cause a delay in the approval cycle. The comments and notes to this document were linked with reference numbers i.e. Previous Reference and Forward Reference. Retrieving a documents' previous or future reference was another tedious job as numerous versions might have been referenced in the process.

Objective

The ideal solution needed to address the following aspect:

- Centralized storage
- Department wide access
- Linking documents to other documents
- Document comments
- Easy retrieval
- Secured access
- Access to multiple revisions simultaneously
- Maintain an Audit Trail

Solution

SoluSoft thoroughly analyzed solutions to bridge the gap between paper and digital processes and following a competitive evaluation process, selected N2WDMS by SoluSoft Technologies Pvt. Ltd. With this solution, they can quickly and easily capture and convert paper-based into digital data in order to significantly improve its internal processes and provide efficient, timely service.

The solution provided by SoluSoft, centralized the document storage at one location. Templates and folders have been created to group similar documents together. Based on departmental requirements, access to folders and documents are either enabled or restricted. The documents could also be linked with similar or reference documents. The ability to add notes while routing documents to next destination or level is now available.

Document searches are powered with attribute and full text based searches. These features enable easy search, retrieval and view functions. The Multi-File Format viewer allows the users to view all types of document formats on their system. Annotation capabilities such as pre-defined digital stamps, text notes and more are available to enhance the revision and review process. Several workflows are designed for their business processes to enable document routing to predefined destinations. Annotations and text notes are added features. This web-based access provides organization wide access to documents and folders.

The audit trail feature provides logs and data records containing the complete details of all activities performed on the documents. Three levels of security were designed during implementing at the Indian Air Force (IAF). In addition to authentication during login, appropriate rights and privileges are granted to the users using roles and access control lists.

With the implementation of SoluSoft's N2 Workflow and Document Management System, IAF has a secured central storage for their files and documents. These have been linked and grouped for easy search and retrieval. The revision and approval cycles became faster using the document management features like check-in check-out,

annotations, stamps and workflow. All these were executed while maintaining complete security.

Advantage of SoluSoft Solution

- Secured document storage and access
- Organization wide shared access
- Structured documents and information
- Ease in document search and retrieval
- Authentic and latest versions maintained
- No loss of documents
- Automated document routing with comments and suggestions
- Reduced movement of physical papers
- Strong security model
- Audit trails

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