

Digital Transformation of a **Hydro-power consortium in India** with **OspynDocs DMS and File** **Management System**



ABOUT THE CLIENT

The client is a consortium of Hydroelectric power producing companies, with capacities ranging from micro hydel to medium sized projects. Being one of the leading players in the industry, they operate close to its key regional markets, with manufacturing and supply points across the world.

Key Challenges faced by the client

For an organization operating at such large scale, the challenges it faced in handling the administrative, operations, sales and human resource related processes were plenty. There was no system to carry out retrieval, storage and management of official documents. Some of the major challenges faced during the management of documents and processes were,

- ▶ Difficulty in recognizing document sources.
- ▶ Lack of proper bifurcation to retrieve the documents.
- ▶ Missing Number/Naming conventions of files.
- ▶ A link between Official Email and Filing system to optimize processing time
- ▶ Identifying document duplicity.



Solution: OspynDocs File Management System and DMS

An organized filing system supported by a centralized Document management system is the solution offered to the client by Ospyn.

As part of the digital transformation, manual processing of documents/letters received was transformed to a complete digital process. The documents and letters were uploaded and meta-data was captured at the point of receiving the documents. The incoming letters can now be forwarded to the users based on the workflow process defined by the client in the system. System provides flexibility for forwarding to different users based on the subject of the received.

System also provided the option to capture the comments (annotations) from different users, based on which a decision can be made against a letter received. Users have the provision to create draft letters (response letter) based on the templates configured in the system. These drafts are sent to the Head of the department or an authorized user for approval, after which the approved document (Response letter) can be despatched from the office. A record of every despatch is stored in the system for later reference.

Major processes/modules included in the implemented solution are,



Correspondence Management

- ▶ Create the digital copy of the physical document by uploading the scanned document and entering required related data.
- ▶ The digital copy can be sent to the designated officer who is supposed to take actions based on the subject of the correspondence.
- ▶ A sequence number will be generated by the system.
- ▶ All scanned correspondence is added to a File and are moved digitally from one user to another through a work-flow which can be defined by the user based on the nature of required action.



File-Flow Management

- ▶ Create a new file or add to an existing file for taking actions against the correspondence.
- ▶ Files can be marked as confidential, and access to information in files can be restricted to selected users only.
- ▶ A due date can be marked to complete processing of each file based on the subject of the file.
- ▶ The file can be forwarded between the officers back and forth any number of times
- ▶ System will have provisions for the officers to track the pendency of file with the officers under their hierarchy
- ▶ Reply letters can be drafted based on pre-defined letter templates configured in the system
- ▶ After approval/confirmation of the draft in the system a final letter document can be generated in pdf format.
- ▶ System can be configured to generate automated notifications for escalating the pendency as required.
- ▶ Reminders can be configured in the system to inform the user on his pending work.



Search Management

- ▶ General Search based on a keyword to search for inwards, files, documents, despatches or even notes that contains the keyword used for searching
- ▶ Inward Search for exclusively tracking Inwards

- ▶ File/Document Search for exclusively tracking files and Documents
- ▶ Despatch Search for the exclusive search of reply letters. The status and history of all the reply letters can be tracked with the help of Despatch Search.



DMS

- ▶ A centralized repository for storage and retrieval of all the business documents
- ▶ A well-structured folder hierarchy to store the files, configured as per organization's requirements
- ▶ Categorization of documents along with metadata
- ▶ Access to folders and documents are granted to users or groups.
- ▶ Users are granted specific levels of permissions in order to access/delete/update documents



Use Cases

The Organization has the system implemented in their main office where 20+ departments are depending on OspynDocs for File processing and document management. Some of the departments are,

- ▶ Operations and Maintenance
- ▶ Administration
- ▶ Business Development
- ▶ CEO
- ▶ Commercial Compliance & Approval
- ▶ COO
- ▶ Information Technology (IT)
- ▶ Legal
- ▶ Finance & Accounts
- ▶ Purchase
- ▶ Human Resource
- ▶ Indirect Taxation
- ▶ Internal Audit
- ▶ Power Sales
- ▶ Transmission

Files pertaining to each of these departments are created, processed, approved and stored in the system for later access and retrieval by the employees depending on the permissions granted to them.



Transformations and benefits experienced after OspynDocs implementation

- ▶ Digitalization of document-oriented processes across multiple departments
- ▶ Cross-departmental collaboration in the organization
- ▶ Track the movement of files between employees
- ▶ Anytime, anywhere access and retrieval of files based on granted permission
- ▶ Assured security and confidentiality of data and documents
- ▶ Easy uploading and downloading of documents into/from the common system
- ▶ Efficient tracking of document inflow from different sources
- ▶ Seamless email integration allowing employees to have an undemanding working experience
- ▶ Effortless identification and counteraction on duplicate documents

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