

## Document Management System

**Challenge:** Our customer provides consultancy to those who venture into new business. However, there are several cases in which government provides subsidy or gives loans at subsidized rates. Our customer has several clients almost up-to 150 of which few require continuous consultancy and few are contract based. Our customer has three different locations and several documents travel in between these locations. Moreover, there are approximately 6 different services our customer provides and approximately 40 different documents required for each service. Over and above this our customer has to know which client requires which document at what point of time and at which stage is his project. As one can observe the complexity our customer was dealing with was mind boggling.

**Solution by Arun InfoTech:** Arun Info Tech created a document management system for them, some modules of ERP and their website and finally integrated all three of them. Our customer need not have different consoles for different software's as all were integrated. As soon as one logs in he can see the clients name uploaded from inquiry form. He can choose a service from different services available and after choosing, all the corresponding forms become visible to him. He can again choose which forms the client has to submit. Submitted forms are scanned and then uploaded on the site itself so that he can see which are already submitted & which are yet to be submitted. Hence, a very complex task can now be handled by a very simple software based system. Apart from this facility, after logging in on the home tab one can see his reminders, daily tasks, news & events. He has an inquiry form on which inquiry can be filled in, searched and status can be seen. This filled inquiry comes in handy as mentioned above. Further, charges to be levied can also be controlled from this portal itself and then invoicing can be done, as well. Finally, tasks can be assigned to the team members by their team leader. These tasks can also be transferred between team members. A report can be generated and sent to the superior at the end of day which contains a comprehensive report on the work done throughout day. Below screen shot emulates partial document management system.

## Enquiry Form:

The screenshot shows a web browser window with the URL "103.247.149.32:4747/Tab\_Main\_Page.aspx". The page header includes "DEMO" and the slogan "Price Is What You Pay, Value Is What You Get." The navigation menu contains: Home, Enquiry, Enquiry Status, Client, Client Status, Fees, General, Task, Reports, Personal Settings, Settings. The main form is titled "New Enquiry" and includes the following fields:

- Company Name:
- Date: 29/08/2014 11:24:27
- Address:
- Enquiry Type: By Phone
- Contact Person:
- Reference BY:
- Service Type: -Selected Service Type
- Phone:
- Process: Going On
- Email Id:
- Select Location: -Selected Location-
- Investment Amount:
- Comments: No Comments
- Status:

Additional options include "Add to Reminder" checkboxes and a "Save" button.

## Different forms according to service:

The screenshot shows the "Service Plan/Type" section of the application. It includes a "Submit All" checkbox and a "Basic Paper" checkbox. The "Service Plan/Type" dropdown is set to "PSI - 2007" with a "CR" button. Below this, there are radio buttons for "Stage1", "Stage2", and "Other".

**Basic Paper**

**Stage One Paper**

- Loan Sanction Letter
- Certified True copy of Building Plan
- Plant & Machinery List (Soft Copy)
- MPCB Consent
- Firm Quotation MSEDCL
- Electric Load Sanction Letter
- Architect Certificate
- Civil Estimate
- Declaration
- Board Resolution (if PVT. LTD)
- Central Excise Registration Certificate, PF. Registration Certificate.
- Share Holding Pattern
- List of Raw Materials

**Stage Two Paper**

**Other Paper**

## Reports generation page:

The screenshot displays a web browser window with the following elements:

- Browser Tab:** SKD Consultants
- Address Bar:** 103.247.149.32:4747/Tab\_Main\_Page.aspx/dms:sund&as:MSS%20PNEGA%20PVT.LTD&bs:PSI - 2007
- Page Header:** A banner with the word "DEMO" in large black letters on the left and a green background on the right featuring silhouettes of people in a meeting. Below the silhouettes is the text: "Price Is What You Pay, Value Is What You Get."
- Navigation Bar:** A blue bar containing the text "GOOD MORNING ADMIN LOCATION ALL SKD.Chat Open page Logout".
- Menu:** A horizontal menu with items: Home, Enquiry, Enquiry Status, Client, Client Status, Fees, General, Task, Reports (highlighted), Personal Settings, Settings.
- Sub-Menu:** A secondary menu with items: Task, Datewise Task Report, Daily Reports, Enquiry (highlighted), Client, Pending Enquiry.
- Main Content Area:** A search form titled "Search Locationwise Enquiry" with the following fields:
  - Select Enquiry By: Location wise (dropdown)
  - Select Location: --Selected Location-- (dropdown)
  - Select Service Type Wise: Service Type Wise (dropdown)
  - Select Service: --Selected Service Typ (dropdown)
- Buttons:** A "Print" button is located below the search form.