

# Developing a SharePoint Based File Management System (FMS) Facilitate File Tracking

**Customer:** Gujarat International Finance Tec-City (GIFT)

**Size:** 51-200 employees

**Region:** India

**Industry:** Professional Services

**Profile:** A government organization offering global financial services firms a world class infrastructure and innovative facilities.

**Services:** Microsoft SharePoint

## Business Need

Gujarat International Finance TecCity (GIFT) is an ambitious project in the Indian infrastructure space which seeks to create a global financial hub in Gujarat, India. Information management will be a key contributor to the success of GIFT. Floating in a virtual sea of information, it is important to create and maintain files that are loaded with information in an accessible, intelligent, and usable manner, and to keep track of their movements to support their business and accountability requirements.

GIFT wanted to develop a well-organized File Management System (FMS) to manage files, and keep accurate track of the movement of files from one authority to another.

## Solution and Approach

Synoptek (formerly Indusa) developed an automated FMS on the Microsoft SharePoint platform for GIFT, which provides fast and intuitive file access, and accurately tracks the movement of files in various departments, from one authority to another.

The FMS includes:

- **File Generation Form:** Contains details on the file generated based on category, department, person filling in the form, date, time and other parameters.

- **Workflows:** Created for different departments with configuration for approver and the approval cycle.
- **Barcode:** Automatic generation of barcode and option to print on a sticker.
- **Advanced Search Functionality:** Allows users to instantly locate files. A file is created by the initiator and moves through the approval workflow where comments can be inserted. The receiver reads the file details and confirms receipt by using a barcode reader. The initiator can also close the file once the entire approval process is completed.

Take, for example, the infrastructure department of GIFT: the system was configured to keep accurate track of the movement of files through the approval hierarchy. In this instance, the assistant manager has the rights to close the file, once the entire approval process is completed. With the help of the system, at any point of time, the authorities can track the movement of files.

The system facilitates keeping track of movement of files (inter/intra department) and providing current status of the file including:

- Pending files for a particular duration
- Pending files sent back to the department for a duration
- All pending files for a specific time period

Cross-departmental workflows have also been created for efficient management of files through the FMS.

The FMS was also configured to send alerts for inaction on the files within a particular duration, therefore sending notifications to the respective supervisor and other concerned personnel in the approval hierarchy. Executive management has access to all the files irrespective of the department. A pre-defined naming convention ensures uniformity and easy access. The solution also offers the functionality to reinitiate files or reuse them.

Reports are generated for the list of files under process in a specific department. These reports have information about the history of a specific file. The system also has document libraries with regularly generated email alerts and notifications.

## Business Results

The capability of the FMS to retrieve the history of any specific file including the file destination, user-wise files received, and current status of files among others has streamlined and automated GIFT's file tracking processes tremendously.

The advanced search functionality helps users to perform search on a huge database of files with ease.

Developing an automated FMS based on Microsoft SharePoint has helped GIFT move beyond the traditional "file-and-save" method to an efficient navigational system that allows them to manage files effectively and keep accurate track of their movements.

## About Synoptek

Synoptek is a Global Systems Integrator and Managed IT Services Provider offering Comprehensive IT Management and Consultancy Services to organizations worldwide. Our focus is to provide maximum "business value" to our clients enabling them to grow their businesses, manage their risk/compliance, and increase their competitive position by delivering improved business results.