



# SHAREPOINT ONLINE

# CUSTOM DOCUMENT MANAGEMENT SYSTEM

## ABOUT CUSTOMER

The Client is an insurance and financial services – focused IT Services & Solution firm.

## BUSINESS CHALLENGE

The Client had been using SharePoint Online to manage their documents & contents, but the out-of-box features were not meeting their specific business requirements. They need a custom document management system that could integrate with their existing SharePoint Online environment that improves collaboration & productivity among their team members.

## BUSINESS PROBLEM

The primary objective of this proposal is to build a Document Management System.

- Document Management System with Tags, Comments, Version, etc.
- Document Search

- Access Rights Management
- Workflow Management

- Category Management
- Status Management

## SOLUTION DELIVERED

The client engaged us to develop a custom document management system using SPFx in SharePoint Online. The development team worked closely with the client to understand their specific business requirements and user needs.

The custom document management system included the following features:

- **Custom metadata:** The system allowed users to add custom metadata to documents, making it easier to search and categorize documents.
- **Document approval workflows:** The system included custom workflows that allowed users to submit documents for approval before they could be published.
- **Document retention policies:** The system included custom retention policies that ensured that documents were retained for the required amount of time before being deleted.
- **Custom search functionality:** The system included custom search functionality that allowed users to search for documents based on specific criteria, such as metadata, keywords, and document type.

The system was developed using SPFx and integrated with the client's existing SharePoint Online environment. The development team also ensured that the system was mobile-friendly and could be accessed from different devices and browsers.

## SOLUTION BENEFITS

The custom document management system was successfully deployed to the client's SharePoint Online environment. The system was well-received by the users, who found it easy to use which helped them manage their documents more efficiently.

The system also helped improve collaboration among team members, as documents could be easily shared and accessed by different departments and sites.

The client saw significant improvements in productivity and efficiency, as the custom document management system streamlined their document management processes and reduced the time spent on manual tasks.

### About Kryptos Technologies

With more than fifteen years of experience, Kryptos is now a pioneer in managed IT & business services across the continents. Kryptos is an established Microsoft Gold partner, AWS Advanced partner, ISO 20000 & 27001 certified organization.