# Case Study:

## Effective Workflow Approval and Document Management for Logistics & Mining Leader

### Project Summary

The client is one of the well-known industry players in mining as well as specialized industrial and bulk logistics services. The client has been using a legacy CMS system meant to handle workflow approvals and document management. The current CMS system lacked the scalability to deliver dynamic functionalities such as timely status tracking to keep up with changing business needs.

### Executive Summary

In view of dynamic business scenarios and changing requirements, the client wanted to revamp the CMS portal. The alternative application would enable the integration of workflow and document management in a more streamlined fashion with the use of automated approvals.

### Goals and Challenges

The client aimed at revamping the existing CMS platform with SharePoint Online portal that offers scalability with expanding business needs and changing strategic requirements. The firm looked for a portal that is easy to develop and maintain, and would offer seamless capabilities for improved collaboration as well as the migration of all functionalities and content from the legacy portal.

### Solution

Raybiztech conducted detailed feasibility of current features and mapped the same with upcoming requirements using fit-gap analysis to deploy SharePoint Online portal.

- Mapping of current features with the SharePoint portal capabilities
- Adding customizations using the appropriate client-model scripts
- Identifying out-of-band (OOB) alternatives for current CMS features
- Automation of business approval workflows powered by SharePoint
- Configuration of content retention policy and preparation of governance plan
- Completion of entire data migration from legacy CMS to SharePoint

### Benefits/Business Case

With the unique solution tailored and deployed by Raybiztech after thorough analysis, the client was able to move workflow approval and documentation from the legacy CMS system to the SharePoint portal. It was able to deliver effective document management and instant approvals. The new system efficiently eliminated bottlenecks by virtue of responsive templates and timesheets for tracking status of delivery across mining sites or fulfillment locations.

## About Raybiztech

Ray Business Technologies Private Limited is a Global Information Technology (IT) Services and Solutions company. We are a CMMI Level 3 company, providing cutting-edge IT Solutions to Enterprises worldwide, enabling them to utilize available resources effectively and manage the operations. Our excellent team of technology professionals works with enterprise clients in North America, Latin America, Australia, Europe, the Middle East, and Asia.

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