

Document Management System



Industry

Banking, Financial Services and Insurance

Overview

Many organizations today continue to face problems occurring due to large volumes of data. Compliance requirements create further challenges in the form of increased data volumes. When information flows across various sources, it hampers the process of consolidation of data and, consistency and transparency of information is affected.

Streamline New Product Launch Process



Client

The client is one of the leading fund houses in the country with an investor base of over 5.8 million and over 20 years of rich experience in fund management consistently delivering value to its investors.

- Maintainability of MOMs/Memorandum documents
- Traceability of documents
- Inefficient Coordination for meetings
- Seamless flow of data across departments

Business needs

The following were the core business needs which were the drivers for the project:

- DMS solution for centralized storage and retrieval of data
- Automated workflow solutions for two key business processes
 - Product development approval process
 - Creation of secretarial meetings
- Provision of system generated alerts via Email integration
- Digitization of backlog data for persistent storage

Datamatics' Solution

Datamatics implemented a customized DMS solution for Client, as a part of which the following items were executed:

- Definition of custom metadata and a central well defined taxonomy in DMS
- Development of workflow solutions based on the DMS framework
- Integration with email solutions for generating Calendar Requests and Email alerts
- Development of a web application based access to DMS with authentication based on LDAP
- Seamless integration with domain server via Active Directory
- Optimization of data storage

Challenges

- Manual intensive new product launch process

Datamatics' Advantage

- Global Information Technology (IT) & Business Process Management (BPM) organization taking you forward on your route to Digital Transformation
- Trusted partner to several Fortune 500 companies globally
- Capabilities built around technology, domain expertise & knowledge of business processes
- Alliances with global technology leaders such as Microsoft, IBM & EMC²
- More than 7,500 employees globally
- Certified for SEI CMMI Level 4 V1.3, ISO 27001:2013 & ISO 9001:2008
- SSAE 16 compliant processes
- Global presence: U.S., UK, Australia, Dubai & India

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Approach

Datamatics designed and implemented a Document Management solution using EMC Documentum suite of products. The solution was aimed at meeting the following requirements:

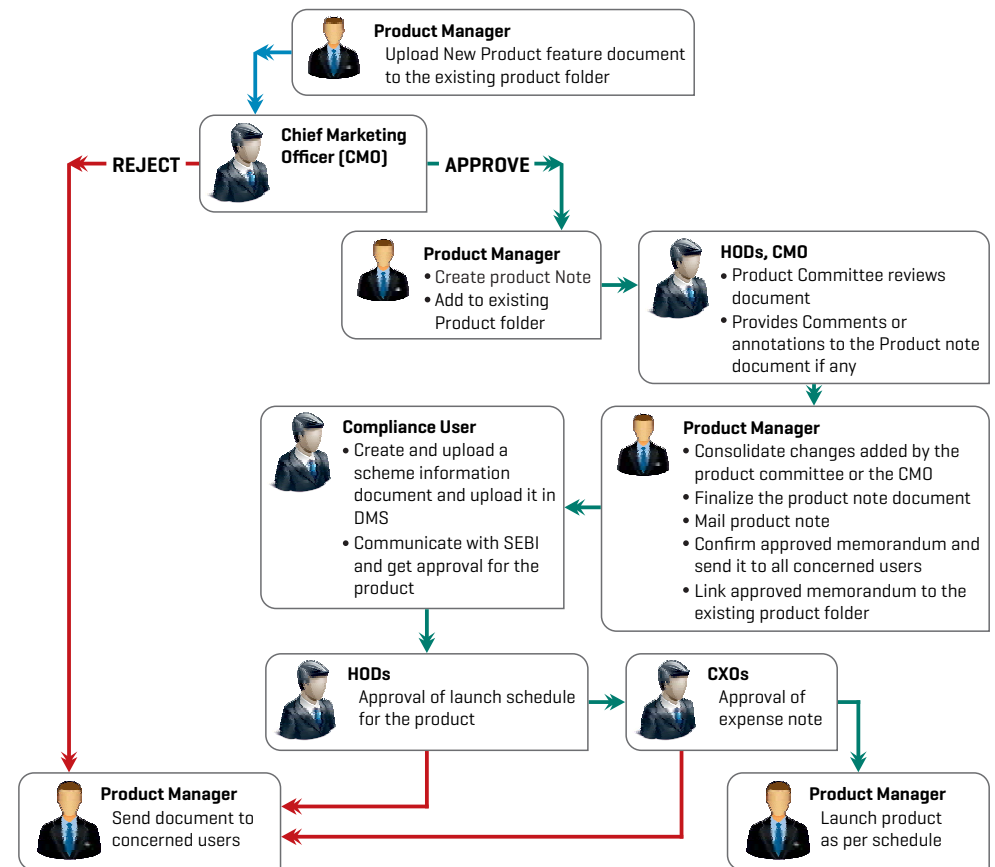
- Centralized storage and retrieval of documents
- Automation for new product launch related processes
- Reduction in manual work and response time
- Automation of processes for organizing meetings
- Access to real-time information from a singular, centralized location
- Secure environment to maintain the confidentiality of documents

Thus, Datamatics Document Management solution provided a holistic approach to tackle the problems faced by Client.

Benefits

- Availability of up-to-date content due to effective content management
- Easy access to documents
- Significant reduction in time and cost for retrieving documents
- Increased collaboration and better communication between employees across departments
- Improved document control and security
- Improved speed and efficiency in meeting creation and new product launch related processes
- Increased operational efficiency and productivity
- Organized, Co-ordinated and faster process of Decision making

Process



Result

The implementation of the DMS solution resulted in increased productivity, higher security and greater operational performance. It allowed active users in collaborating more efficiently resulting in improved faster and organized decision making.