



**CASE STUDY**

**QUALITY DOCUMENT MANAGEMENT SYSTEM  
(DMS) POWERED BY POWER AUTOMATE**



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## ABOUT CLIENT

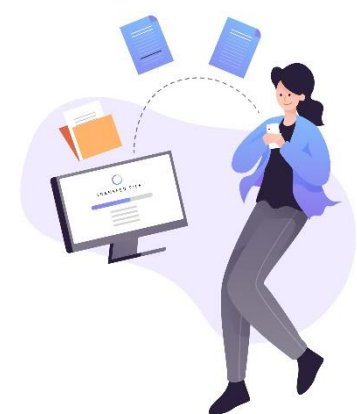
The client is a well-known Emirati firm that has influenced the evolution of the energy sector in Abu Dhabi. They offer proficient solutions and consider customer satisfaction paramount.

## BUSINESS NEED

- The client's business depends on the proper exchange of project information in documents, involves reviews and approvals critical to the success of their deliveries. Their productivity hinges on organized management of project knowledge/content/documents.
- They wanted a solution to help them better manage the flow of information with respective stakeholders and control and provide role-based access to multiple versions of several business-critical documents.
- They wanted to restrict access to reviewers and approvers while the document review was underway.
- They also had to publish PDFs and wanted the solution from CCS to support this requirement.
- The client also wanted to prevent the use of outdated/inoperable information.

## CCS SOLUTION

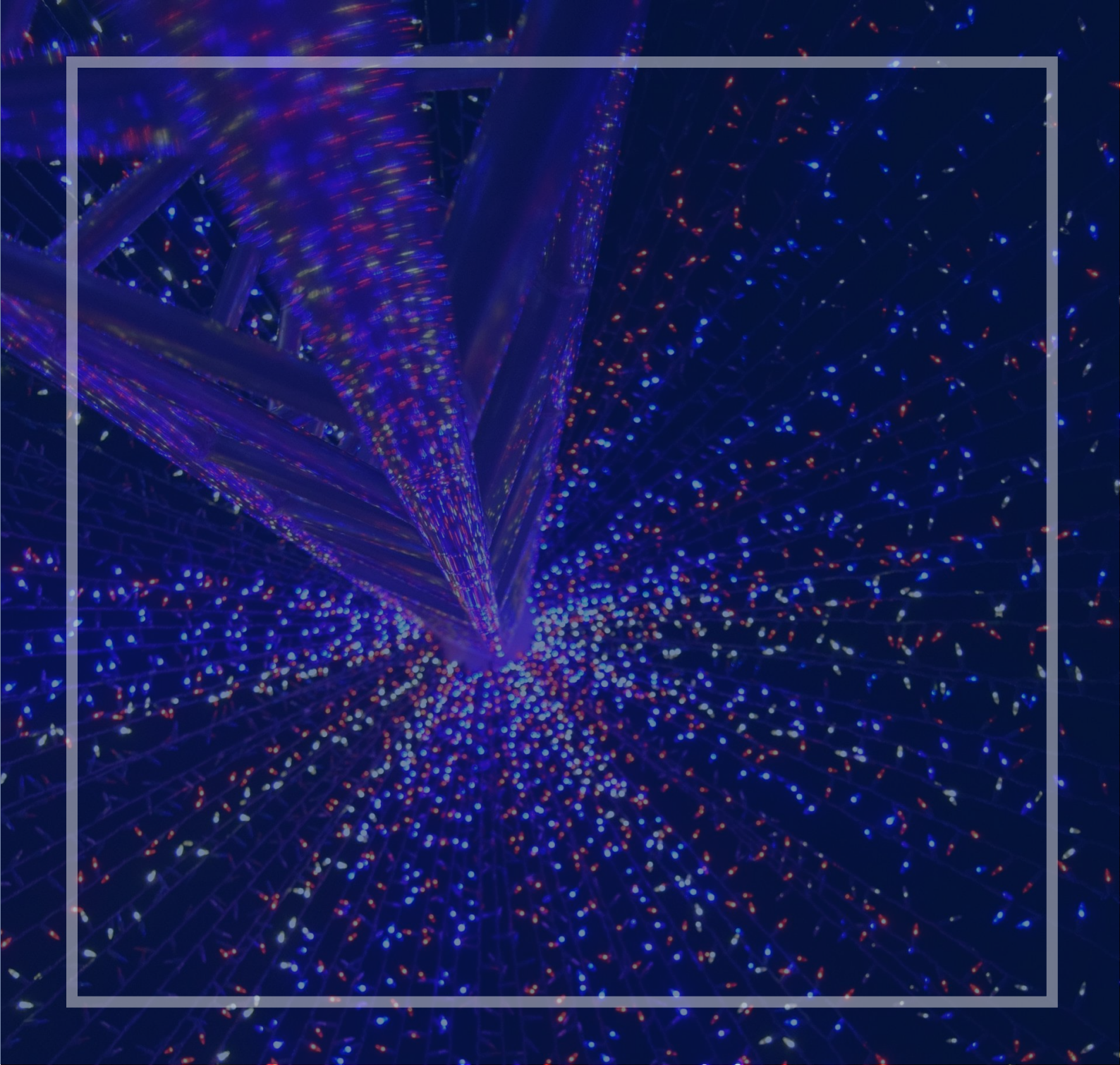
- CCS Engineers proposed workflow-based process automation to streamline the review and approval of documents. The Team engineered a document management system to obtain reviews from multiple users before approval. The QDMS would notify reviewers and approvers about specific tasks/actions.
- Security roles in Microsoft 365 would ensure that designated users get the latest published version of the documents.
- The QDMS would allow an approver to publish the document in any format (native or PDF) based on the business need. Role-based access would appropriately allow edit and read-only rights to specific users.
- The quality document management system would help configure the expiry of documents and notify the concerned users well in advance to either revise or void the document.



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## **BUSINESS BENEFITS**

- Sped the review and approval processes by 2x with timely notifications and tasks.
  - Proper streamlining brought down internal operating costs significantly.
  - The responsive and user-friendly QDMS encouraged users to work from any device.
  - Reduced unauthorized access to documents through automated access restriction.
  - Ensured timely action on documents reaching their expiry dates.
  - The quality document management system helped the client use the latest published document, mitigate workflow hiccups, and deliver their projects within timelines.
  - The QDMS allowed the client to use project knowledge, growing content, and documents in an organized and secure manner. It helped the client double their efficiency and productivity.
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