



# Overcoming **Document Management** and Procurement Challenges in the **Energy Sector**

A leading player in the energy infrastructure sector, is embarking on a journey to streamline and automate its document management and procurement processes using OspynDocs, a Document Management System (DMS). With a focus on enhancing efficiency and accountability, the company aims to integrate its project document approval workflows seamlessly within OspynDocs, enabling Engineering Procurement Construction (EPC) companies to submit and revise project documents efficiently. The initiative also entails empowering the organization's D&E Department with the tools to oversee and manage the approval process effectively, ensuring smooth collaboration with EPCs. Additionally, the company is extending its use of OspynDocs to develop a Procure to Pay module, aiming to automate and digitize its entire infrastructure project procurement process, from order placement to goods delivery and inspection. This strategic move aligns with the company's commitment to innovation and operational excellence in the energy sector.



# Challenges Faced before adopting OspynDocs



The existing document management and procurement processes were deeply ingrained within legacy systems.



Manual procurement workflows, from order placement to delivery and inspection, were prone to delays, discrepancies, and inefficiencies. The absence of a digitized Procure to Pay module hindered the company's ability to streamline procurement operations and optimize resource utilization.



The absence of a comprehensive document management system made it challenging for the company's D&E Department to oversee and manage the approval process effectively.



Without clear visibility into document status and revision history, ensuring accountability and compliance with project requirements became a daunting task. This lack of oversight heightened the risk of errors, miscommunications, and regulatory non-compliance.



The reliance on physical paperwork led to delays in document processing and hindered collaboration between the organization and EPC companies.

## Solution offered



The company currently leverages DocHub (OspynDocs DMS system) for document storage and process automation. The company is strategically focused on enhancing its operational efficiency by integrating a dedicated Procure to Pay module within OspynDocs. This module is designed to streamline the entirety of the procurement process associated with infrastructure projects, encompassing activities from order placement for finished goods to their delivery at site warehouses, inclusive of inspection procedures.

Presently, the Procure to Pay process operates manually and outside the system framework. By developing this module within OspynDocs, the company aims to centralize and automate these critical procedures, facilitating smoother workflow management and optimizing resource utilization.



# Key Features of the Offered Solution



## Robust Role-Based Access Control

The solution offers meticulous role-based access control, empowering users from Engineering Procurement Construction (EPC) with initiator roles to seamlessly initiate document processes. Simultaneously, users from the D&E Department with approver roles efficiently oversee approvals based on Project mapping.



## Dynamic Routing and Real-Time Monitoring

Experience streamlined workflows with our dynamic routing capabilities, ensuring requests are promptly directed to the designated D&E/OE approvers based on Project mapping. Real-time updates, including document approvals or returns, provide EPC users with immediate visibility and control over the process.



## Comprehensive Document Management Workflow

The solution facilitates efficient document management workflows, allowing EPC users to update uploaded documents in returned status and easily re-initiate approved documents from closed requests. With seamless transitions from Under Processing to the Approved folder in the repository, project progress remains unhindered.



## Enhanced Communication and Notification System

Stay informed at every step with our robust email notification system. EPC users receive timely notifications regarding changes in the status of approval documents, ensuring proactive engagement. D&E/OE users are promptly notified upon receiving a request, fostering transparency and collaboration.



## Efficient Bulk Download and Storage Management

Enjoy hassle-free document retrieval with our bulk download feature, enabling D&E, OE, and EPC users to effortlessly retrieve their respective documents and folders from the repository. Our solution ensures secure storage and dynamic folder creation based on metadata-defined paths, facilitating organized document management.



## Seamless User and Project Management

Simplify project and user management with our intuitive platform. Register projects, EPC, and OE entities effortlessly, and allocate Project assignments to users with ease, optimizing resource allocation and task delegation.



## Secure Repository Access and Integration Capabilities

Our solution prioritizes data security and seamless integration. Enjoy secure access to the repository for privileged users, fostering collaboration and data integrity. With Active Directory integration, authentication and user management are streamlined for enhanced efficiency.



## API Integration for Streamlined Document Handling

Leverage our API integration for seamless document handling. Push Project-related documents into the DMS effortlessly, utilizing predefined paths for accurate categorization and storage within the system.



# Benefits

- ✔ OspynDocs facilitates efficient storage of project documents, allowing the company to categorize them seamlessly based on configured metadata, ensuring easy retrieval and organization.
- ✔ Leveraging OspynDocs' capabilities, the company automates the mapping of uploaded documents to their respective folders, eliminating manual intervention and ensuring accurate placement within the repository.
- ✔ By automating the Engineering Procurement document approval processes through OspynDocs, the company fosters improved collaboration between the D&E Department and EPCs, while enhancing accountability through transparent document tracking and audit trails.
- ✔ OspynDocs streamlines the document revision and approval workflow, enabling seamless communication between the company and EPCs. This automation reduces turnaround time for document revisions, enhancing project efficiency and reducing delays.
- ✔ With OspynDocs, the company ensures strict version control and compliance adherence throughout the document approval process. Automated notifications and status updates facilitate timely revisions and approvals, minimizing errors and mitigating regulatory risks.
- ✔ By automating document approval processes with OspynDocs, the company increases operational efficiency, reduces manual workload, and lowers administrative costs associated with document management, ultimately driving overall project cost savings.



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