

CASE STUDY:

Large Federal Institution Boosted by Powerful Document Solution

Customer Profile

The Federal Institution, a unique and unparalleled institution, stands as the world's most extensive library. Its vast collections, encompassing millions of books, recordings, photographs, newspapers, maps, and manuscripts, serve as the leading research arm of the U.S. Congress and the home of the U.S. Copyright Office.



Business Challenge

As a singular government agency, the Federal Institution grappled with a multitude of significant challenges in managing, producing, and distributing various documents. These documents required review and approval from key government stakeholders, and several federal bodies. The document creation, evaluation, and distribution process, while crucial, was often complex and error-prone due to reliance on manual methods and outdated tools. This led to significant document processing and approval delays, a burden the new solution has effectively lifted.

The existing process required authors to email their documents to five distinct review panels and a physical authorization form. This approach was fraught with issues:

- **Tracking Difficulty**
Monitoring the progress of documents was cumbersome and often required convening meetings.
- **Iteration Management**
Managing different versions of documents was challenging.
- **Administrative Burden**
The process was manual, time-consuming, and prone to errors.

The Federal Institution needed a modern solution that would automate the document management and tracking workflow, enhance collaboration among authors and reviewers, and provide visibility and insights into document progress and status.

Solution Provided by ampiO Solutions

Recognizing the Federal Institution's distinct needs, ampiO Solutions, a leading provider of SharePoint, Microsoft Dataverse, and Power Platform solutions, designed and implemented a custom solution. Their deep understanding of the Institution's complex document management and tracking requirements ensured a seamless and efficient workflow.

ampiO Solutions leveraged the robust capabilities of Microsoft Dataverse, SharePoint, and the Power Platform to engineer a comprehensive solution from scratch. Microsoft Dataverse served as the primary data repository, offering a scalable and secure platform for managing the Institution's extensive data. SharePoint provided additional collaboration features, while the Power Platform—comprising Power Apps and Power Automate—streamlined the automation, tracking, and progress assessment of products. Power BI was integrated to provide advanced reporting functionalities.

The solution consisted of the following components:

- **Microsoft Dataverse**
Dataverse served as the central data repository, securely storing all documents, metadata, and workflow information. It provided a unified data model and ensured data integrity and scalability, which is crucial for managing the extensive collections of the Federal Institution.
- **SharePoint**
SharePoint complemented Dataverse by offering enhanced collaboration features such as document sharing, co-authoring, and version control. It was used to create libraries and lists that facilitated document organization and access.
- **Power Apps**
Power Apps created a user-friendly and responsive web application that empowered users to interact with the solution. The app allows users to create, upload, download, edit, and delete documents, view and update the workflow status and comments, and integrate with Office 365 tools like Word and Outlook for seamless document editing and email notifications. This user-centric approach was critical to the success of the new system.
- **Power Automate**
It was used to automate the document review and approval process, using its built-in connectors and flows. The solution triggered workflows based on predefined rules and conditions, such as document type, review stage, and reviewer feedback. The workflows also sent automatic emails to notify users of relevant events and actions, such as document submission, approval, rejection, or escalation.
- **Power BI**
Power BI was used to create interactive dashboards and reports that displayed the solution's critical performance indicators (KPIs) and metrics, such as the number, type, and status of documents, the average time and number of iterations for each review stage, and reviewers' feedback and ratings. The dashboards and reports also allowed users to filter and drill down into the data and export and share the results.



Business Benefits Realized: Efficiency, Security, and Collaboration

The solution delivered by ampiO Solutions provided the Federal Institution with several tangible benefits. These include enhanced collaboration, streamlined document management, increased productivity, improved access and mobility, robust security and compliance, customization and extensibility, scalability, business intelligence and reporting, and significant cost savings.

- **Enhanced Collaboration**
SharePoint and Dataverse facilitated better teamwork through features like document sharing, co-authoring, and version control. This allowed team members to work on documents simultaneously and communicate effectively within the platform.
- **Streamlined Document Management**
The structured organization of documents, leveraging metadata and tagging, and implementing version control simplified the management of document iterations.
- **Increased Productivity**
Automating business processes such as approval workflows and task assignments reduced manual effort and minimized errors, allowing employees to focus on higher-value tasks.
- **Improved Access and Mobility**
Integration with Microsoft 365 enhanced document access and mobility, enabling users to work from anywhere.
- **Robust Security and Compliance**
The platform enforced security measures and permissions to protect sensitive information and ensure compliance with regulatory standards.
- **Customization and Extensibility**
The customization options allowed the solution to be tailored to specific needs and extended through additional apps and tools.
- **Scalability**
The solution's scalability ensured it could meet the needs of any size enterprise, providing the flexibility to grow as organizational needs evolved.
- **Business Intelligence and Reporting**
Power BI enabled the Federal Institution to harness business intelligence and reporting features, gaining insights and making informed decisions.
- **Cost Savings and ROI**
The optimized workflows, improved information sharing, and increased efficiency provided a solid return on investment, leading to significant cost savings.



Conclusion

The Federal Institution has undergone a revolutionary transformation in its document management and distribution process through ampiO Solutions' expertise. The collective benefits of the solution have not just improved but significantly transformed the Federal Institution's working environment, making it more efficient, secure, and collaborative. Integrating Microsoft Dataverse, SharePoint, and the Power Platform led to a more efficient, secure, and collaborative working environment, catapulting the organization toward tremendous success and productivity. This case study is a testament to the potential of leveraging modern technology to conquer traditional challenges and achieve significant operational improvements.