

**Printer Friendly Version**WEB LINK - <http://www.expresscomputeronline.com/20070115/management02.shtml>**Document management at an estate office**

*This is the story of how a property management agency broke the shackles of its dependence upon physical files by deploying a document management system. By **Tanu Talwar***

Estate Office is a leading property management agency. In the past it was dependant upon physical files containing documents regarding properties, payments, transactions, ownership details, violations and customer relations. This system had been in place from the company's inception in 1952. To begin with, it worked fine. As the business expanded, however, the company was burdened with stacks of paper files that had to be updated and preserved. Seeing the phenomenal growth of paper files and the concomitant requirement for storage, the company realised that manual file management just wasn't cutting it any more. In addition, it was faced with problems such as incomplete client information, lack of an effective mechanism to address consumer grievances, untraceable payments and so forth.

Amit Talwar, Assistant officer, Estate Office says, "Being a property management agency, we had huge volumes of legal documents that had to be stored and updated continuously. Due to the records being maintained in a physical form, there was no centralised data store resulting in problems at various administrative levels." Preserving old records was a huge problem.

"We have been in operation for over fifty years. Over the years we have grown exponentially and the major challenge is to preserve age old records as these are needed for reference," adds Talwar. With no proper IT infrastructure to store the data, departments regularly found files being torn or misfiled resulting in heavy losses.

**About the Company**

Estate Office came into existence in 1952 to cater to the construction and development of civil infrastructure for the Indian union territory of Chandigarh. It is one of the leading property management agencies in the country allocating sites to individual and institutions. Its functions include selling plots through allotment or auction; collecting rent for government-built tenements and maintaining records vis-a-vis the ownership and lease of property, amongst other tasks.

Furthermore, with no systematic procedure of information transfer, valuable time was wasted in sending information from one department to another resulting in low productivity. Talwar says, "A file needs to be cleared at about seven to eight stages before an application is processed. With no centralised procedure and the entire system being handled manually, it had become tedious and cumbersome to get work done as files had to be physically found and delivered." Then again, there was no tracking or monitoring mechanism in place to immediately obtain the status of an application leading to delays in responding to queries. Moreover, whenever a request or query was generated to fetch information, valuable time was spent searching for the same. However, the biggest challenge encountered by the organisation, that had to be dealt with immediately, was lack of transparency.

Talwar says, "Due to the manual management of records there was no way to instantly gain access to the status of property reflecting the ownership, transactions and violations reported. This, in turn, led to recurring instances of fraud."

Estate decided to engage PricewaterhouseCoopers as consultants to study its internal processes and suggest measures for improving the same. PwC consultants put together a comprehensive report in two months. The report had two recommendations: outsource payment collection and computerise Estate Office by reengineering its business model. Based upon the report, Estate Office signed a Memorandum of Understanding (MoU) with Centurion Bank of Punjab to computerise its operations.

Talwar states, "We required a BPM solution that would help us bring in contemporary and effective work practices, optimise workflow and streamline processes." To achieve these targets the decision was taken to implement a BPM solution, **Newgen's** OmniFlow.

The company considered a number of vendors including Microsoft and Oracle before deciding to go with **Newgen**. Talwar states, "OmniFlow suited our requirement as it provides automation of both front- and back-office processes." Features such as visual route designing, auditing of user work, parallel processing, load balancing and rule based processing helped tilt the scales in **Newgen's** favour. The most important feature was the rule-based engine that permits the automation of processes such as issuing no objection certificates, payment of dues, generation of receipts, notice generation, redressing citizen grievance, maintaining records and accounting systems.

The solution was implemented by **Newgen** over an year at all departments of the Estate Office. A three-member team from **Newgen** studied the requirements of each department and customised its solution accordingly. The team was tasked with the responsibility of recognising key areas of implementation and to impart training. As the documentation was manual there were many hurdles to overcome:

**Employee inhibitions:** Having no experience in working with IT systems, the employees were accustomed to physical procedures when it came to document management. They preferred the manual system of file handling despite it being tedious as they feared that the new one would be complicated to understand and difficult to use.

**No centralised data:** As an established property management agency, Estate had huge piles of paper files. Moreover the files were disorganised. Shifting to a computerised platform made it necessary to collect as much data as possible and upload it to avoid situations where historical data was unavailable in a time of crisis.

To proceed with the implementation a Local Area Network (LAN) was set up at Estate Office as a precursor to the complete automation of its processes. Once the infrastructure was in place, processes were designed and user roles were mapped to said processes. The concerned departments and persons in various branches and sections were identified to demarcate and assign responsibilities based upon which processes were to be streamlined. Employee inhibitions were tackled through training and the **Newgen** team conducted weekly review meetings to tackle problems faced by the end users.

### **Slashing application processing time**

Estate Office immediately got its return on investment. The solution enabled it to be more productive, save money and slash processing time. The company has been able to bring down processing time of an application from 35 to 13 days. Talwar states, "The data storage and integration problems generated information gaps that acted as a hurdle to our development. Prior to the implementation of OmniFlow, a single account statement took over a day to be cleared. Now with all the information being readily available, the same can be achieved in five minutes."

Although the Estate Office continues to maintain paper documents, it asserts that this is due to the necessity of having a backup in the eventuality of a system crash. Data discrepancies that created a potential danger of fraud and faulty analysis have been resolved and the company is able to make timely decisions. Moreover, to address customer grievances, a unique id is generated and applications are directly forwarded to concerned officials. This unique id is used to monitor application status and redress grievances. The company has launched its own Web site. Property details are hosted on this site that is known as the Property Information System (PIS), resulting in greater transparency and fewer instances of fraud.

### **Additional pay-offs**

**Customer Delight:** Whenever a request is received, either internal or external, records can be made available at short notice using the electronic search and transaction tracking mechanism. This has helped improve co-ordination between departments. Moreover, the generation of instant account statements delights customers.

**Reduced staff workload:** The PIS helps customers check information online and reduces the staff's workload.

**Early detection of missing documents:** The issue of short submission of documents was a bottleneck in the older system. As part of the automated solution, the officer

accepting the application runs it through a system controlled check list to ensure that all necessary documents are attached with an application.

**Improved productivity:** As information with respect to property details is hosted and immediately available, there is no time lost in searching for the same.

**Greater accountability:** As part of automation, the Estate Officer (EO) and senior officers get data highlighting the average time taken to process an application and a detailed audit trail to track and identify bottlenecks. Using this, senior officers are in a position to take quick and informed decisions to remove bottlenecks.

**More transparency and less fraud:** Due to the entire system being automated and clear demarcation of responsibilities with extensive monitoring mechanisms, the chances of fraud are next to none. Moreover, all property details have been made available at the company's Web site leading to greater satisfaction amongst the public.

<b>At a Glance</b>	
<b>Organisation</b>	Estate Office
<b>Industry</b>	Property management.
<b>Solution deployed</b>	OmniFlow
<b>Implementation Partner</b>	Newgen
<b>License users</b>	100 users
<b>Time of implementation</b>	March 2004 to May 2005
<b>Server operating system</b>	Windows 2000 Advanced Server
<b>Database</b>	Oracle 8i