

BUSINESS CASE



# Macro Global's Aira Enterprise DWMS – Productivity Touchpoints Redefined & Reassured

## Executive Summary

The era of digitalisation has changed the phase of today's business world which drives business operations to move beyond insightful and intuitive document and workflow management solution without any time bound on demographics or regional limitation access to the business records. The pace of change in the digital transformation and to stay competitive in business entails the efficient use of modern tools in addition to cloud-based document storage which benefits the organisation to deal with incoherence.

In this business case, we will discuss about the constraints in the legacy approach and how Macro Global's Aira Enterprise DWMS provides entitlement to evolving technologies and merits of collaboration in the cloud platform. Market leaders are embracing their digital future being in the cloud which will enable them to succeed having a seamless processes and communication do well out of an automated Aira Enterprise Document and Workflow Management System (DWMS) to corroborate and quick-witted for new conceivability's business operations.

## Business Challenge

The banking industry is one among the focal in the market gamut. Our client, who is a leading bank provides integrated services and prowess in finance and lending. The organisation strangles with obsolete spreadsheets, behindhand invoicing and obsolescent document management system to ensure business process flow. On the flip side, the antiquated method developed as a burden and ruining the business integrity, swept into ripple and lose track of the bigger picture with fierce competition between adversaries.

As a pioneer in the banking industry, the organisation was not able to adapt quickly to the new technology and emerging new business operations as well as other facets. Living with the existing legacy core system was incompetent to deliver hassle-free service and the organisation was struggling to meet the predicted growth rates.

## Problem Statement

Our client adhered an organised flow, but the limiting factor was being the paper-based operational process that was carried out across all verticals within the organisation and the likelihood of processes lessening through the gaps exist at every juncture due to human intervention. Integrated operational readiness outlines the crucial part in the finance firm with numerous documents evolving every hour and ineffective integration inhibited the team's efficiency and resulted in poor performance.

The legacy on-premises document management system was difficult to scale and upgrade. Documents were stored in network folders remained inaccessible across different departments. The system created an upfront disruption that adversely affected the business operations and became counterproductive. At times, they had to rely on back office operational teams for support at various events.

The organisation were often clueless on the status of the service requests due to numerous requests flown in which left enough room for tasks being overlooked and errors in carrying out the jobs. Eventually, deadlines were not being met and stalling the flow of operations. Coordinating between reviewers and approvers for each request was a tedious task and tracking the task status was complex. The senior management recognised that their approach of controlling the documents was tiresome and due to lack of streamlined approach the workforce spent valuable time in the recurring process which often delayed and hindered the services. The organisation faced the challenge of maintaining a dynamic market response in order to reach the customer and prospects.

## Macro Global's Aira Enterprise DWMS to Drive Business Value

The multi-channel banking industry spans across numerous networks and departments and Macro Global's Aira Enterprise Document and Workflow Management System delivers a centralised solution with complete set of tools required to handle the diverse documents amid different departments and manage the operations more efficient and cost-effective. The integrated approach of Macro Global's Aira Enterprise DWMS ensures that all insights pertaining to business documents are accessible to derive well-informed decision through real-time dashboards which provides an overview on task status, task life span, statistics on the number of tasks categorised by month and recently uploaded documents. Our cloud-based solution with highly intuitive features and interface cut through the client's disarrays and hit the predicament. Our solution enables the organisation to customise the workflows as per their operational needs and gives complete 360-degree visibility.

Our Macro Global's Aira Enterprise DWMS is a unified application that combines – Data Warehouse, Workflow Management, and Data Mining to unite fragmented documents and automate the business processes by delivering a wide array of service through one touchpoint.



### 1 Data Warehouse

A single hub with optimised document management feature facilitates the organisation to store, organise and retrieve the digital files with comprehensive and robust search functionalities. Macro Global's Aira Enterprise DWMS is a desirable and user-friendly document controlling system empowering the organisation with versatility and a platform with the power of technology in hands to control their own business operations. The data warehouse is ideally suited to meet the organisation's requirements by providing a fast, secured, and quick access to the documents/information, and eliminate file redundancy. The system offers facilities to print/download/share the document and provide benefits such as document security, access control and audit trails. In mere seconds, the required document can be retrieved from the centralised database with the command of indexing, advanced search and metadata associated with documents.

## 2 Workflow Management

Macro Global's Aira Enterprise DWMS offers a flexible, no-code platform that enables the firms to move towards the digital transformation goals. By automating the operational process, the ability to track the documents improves the possibility of restructuring the internal complexities through a well-structured design and deployment processes through Aira Enterprise DWMS with intertwined user-friendly GUI which automates the task routing on the fly.

Our Aira Enterprise DWMS provides highly configurable business rules (workflow) for business process-driven area and tasks are no more overlooked. The flow of processes is more streamlined with tracking ability and service requests with much ease. With handy process audit reports and real-time insights, the workforce can monitor and track down the progress of the task. The chances of documents being distorted or information falling through the structured workflow do not exist within our Aira Enterprise DWMS.

## 3 Data Mining

Data mining is becoming strategically an important area for any business organisation including the banking sector. Macro Global's Data Mining tool allows extracting knowledge from the datasets to predict outcomes and assists the banks to look for hidden pattern and discover unknown relationship in the reports. Using the information contained within the data warehouse, data mining provides answers to questions and helps optimise business decisions. It is a process of analysing the data from various perspectives and summarising it into valuable information. Using the data mining technique and trapping condition, it is simple for the workforce to have a data-driven report and to build a successful predictive model to forecast outcomes which helps them to execute better process analysis and prepare action plans and move forward with real processed data.

Our Aira Enterprise Document and Workflow Management System automates the process of managing documents from creation to storage to distribution by increasing efficiency and reducing the clutter of maintaining paper records. Macro Global's Aira Enterprise DWMS meets high standards and ensures a wide variety of document and image files types are securely accessed, viewed, and processed with document privacy standards. Our technology solution supports extensive compatibility with high agility meeting compliance requirements alongside with rigid security controls and process data governance.



## Business Benefits

Macro Global's Aira Enterprise DWMS provides a next-generation document and workflow management platform that improves the business performance by delivering an in-context and flexible experience for accessing and leveraging information residing in the document repositories. Our solution supports a culture of organisational and personal accountability by tracking and auditing individual's turnaround time and quality of vital business documents.

Let's dig in the benefits of Macro Global's robust Aira Enterprise DWMS solution



Categorise and maintain consistency by indexing the documents with custom index fields and automate key business processes like invoice processing with pre-configured workflow.



Workforce no longer need to request follow-ups for status reports rather focus on revenue actions and the business is no longer limited to the office hours.



Monitor the progress of the task and track the task status to avoid slippages or potential issue before they happen.



Dashboard gives a high-level overview on user-specific actions (view, print/download) and task categorised by priority/status and real-time insights improve business decision-making process.



Optimal accountability boosting business process and extraction of vital information from documents through advanced search functionality.

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