

CASE STUDY



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**DWMS**

**Straight Through Processing (STP)**

## Synopsis

Our Client, a medium-sized electrical motor, and spares manufacturing company has over 250 branches in the UK, Europe & Middle East known for its brand & identity towards quality supply within its business peers.

In this case study, we would surf and dive in deep over the events addressing the client's shortfall towards business operational efficiency due to lack of comprehensive document and workflow management platform to support an end to end business supply chain that would bring visibility and control over their sales, procurement-related documents.

## Business Background

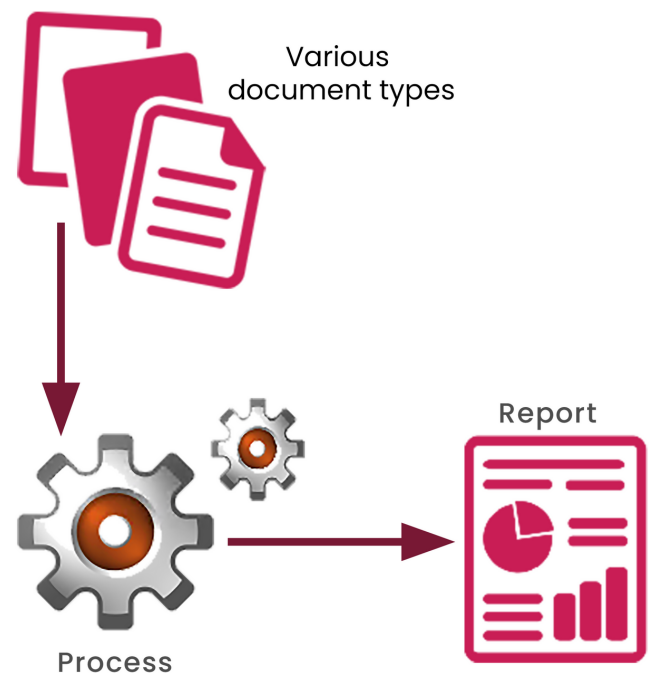
Our client knew the nitty-gritty of their vendors and customer's core business value and cognisant about the importance in achieving strong relationships between the company and its suppliers. Over a period our client began to feel the insinuation of managing the quotations and invoices with archival of historical documents within the legacy document management system, with the present set of circumstances and by assessing the value of business e.g. invoice processing, precisely managing 10,000 records annually.

In an environment a huge volume of records, the quotations, and invoices flown into the organisation was scattered across the different departments and systems. The existing system faced a core problem in searching, classifying, retrieving, and sharing the documents to vendors (suppliers) and customers in order to support their business process. The organisation knew that recovering the real-time information was critical and found the existing process becoming increasingly inefficient which would need a replacement with automated workflow.

## Challenges – A Closer Look

Our client business operation demands a large volume of documents to be processed by cross-functional stakeholders across different business departments. The organisation had to keep track of countless business documents and not limited to quotations, invoices, order forms, and proposals. The legacy application did not provide complete control and visibility over the entire life cycle of documents from initiation to closure and inability to manage external documents and there were many challenges that impede 100% straight-through process rate.

Due to the limitations in their legacy document management system, the workforce had to carry out the jobs manually which handicapped the operations as business continued to grow and their sales and procurement being expanded. Processing various incoming documents was challenging, incredibly time-consuming as the manual entries lead to incomplete and inaccurate data which in turn had an impact on financial reporting, cash flow analysis, and strategic decision-making at risk.



At the same time, non-classified and uncategorised document in-flow from a variety of sources (e.g. buyers, supplier/vendor and various other departments etc.) which exerted pressure on the workforce within the existing business process involved from scanning, uploading and verifying the documents until management approvals due to lack of centralised document management integrated with automated workflow management.

## What we did to achieve STP

Our Macro Global subject matter experts conducted an operational readiness evaluation over the client's procurement and sales process to understand the organisation's business process and requirements. During the initial analysis phase, Macro Global's product team along with the client identified the true grounds of organisation's soft and hard edges within the business operations and as an outcome it helped the transition of a highly inefficient process to an automated handoff approach which enabled the organisation to focus more on an important task like evaluating the data and make proactive data-driven decision for business growth. Macro Global's **Aira Enterprise DWMS** puts each document right at the organisation's fingertip and remove manual touchpoints using OCR technology which captures the data automatically. Through robust features, the organisation acquired complete visibility and real-time management in every aspect of its business operations.

Our proposed solution along with Microsoft MVC based generic architecture enabled the client to handle the document processes more efficiently which streamlined their business operations by automating the tasks and restructuring the in-house document classifications and complexities. Our client was able to automate the process of routing the documents to individuals for approval and assigning them for final processing and the data-rich environment provided the opportunity for timely decision.

Through our cloud-based **Aira Enterprise DWMS**, the client achieved the fundamental aspects towards building a robust **Aira Enterprise Document and Workflow Management System**.

- Created a centralised repository which supports 25+ file formats (e.g. PDF, DOC, XLSX, JPG/PNG, etc.) and categorise the documents based on the type of data or branch/department classification.

- Apply indexing and recognise specific items tagged to categorise the documents by employing OCR to improve the accuracy rate.
- Smart and advanced document search achieved through tagging/indexing or document name/content or document categories, etc. to increase the operation efficiency.
- Role-based access control (RBAC) supports permission and access rights to validate and approve the documents which ensure accessibility and traceability (document history).
- Routing the documents digitally to initiate a straight-through process based on highly configurable business rules.
- Audit history of document action to reduce the likelihood of disputes or disagreements over past versions and approvals with comprehensive document logs.
- Build end-to-end process by customising the workflow with no-code platform for each business operations.
- Workflow process reflects the tasks life span and task status insights which in turn empowers to redefine business productivity.

Macro Global's **Aira Enterprise DWMS** solution enabled our clients to focus on expanding their business with a streamlined workflow process. With an efficient and cost-effective document and workflow management process in place, it was much easier to minimise potential errors and disruptions and improve the organisation's operational efficiency through a reduction in turnaround time.

## Outcome

Macro Global's cloud-based Aira Enterprise DWMS simplified our client's document storage and retrieval through a secure and highly organised, indexed, and catalogued universal internal data repository. Our solution empowers smooth functioning of processes through an insightful dashboard and clients can build their own document processing workflows with different approval workflows with different standards and let our software handle the rest.

- ▶ Our user-friendly web form captures the organisation's documents and populate document search results more accurately to reduce errors and eliminates inefficient operational processes.
- ▶ Our workflow platform allows the organisation to map, replicate, and update the business process which provides visibility over document control.
- ▶ Our application connects the line of business entities and systems to reduce document duplication and improve accuracy.
- ▶ Our effective solution enables the organisation to identify the bottlenecks and keep them proactively informed over the task status.

Overall to strike a balance, our client was provident in having a rational solution to manage customer relationship, seamless document and workflow management, oversight, and controls on day-to-day operations. The senior management of the client decided to adopt the holistic approach which supports full traceability, integrity, and accountability to streamline the business process.

## Our Success Story

- ✓ Our effective Aira Enterprise Document and Workflow Management System enabled client to shift attention to other vital facets, such as focusing on strategies and tactics to attain organisational growth.
- ✓ Strong security controls over documents and ensure regulatory compliance to maintain and strengthen customer relationships.
- ✓ Delivered a self-reliant solution through process re-engineering and optimisation by digitising documents, automating processes, and adding smart workflows which facilitated our client reducing the business operational risk and streamlined the resilient document and workflow management processes.
- ✓ The productivity of the inbound and outbound sales and procurement team increased considerably, and the possibilities of cross-functional collaboration offered by Macro Global's Aira Enterprise DWMS allowed to reduce the process flows and improved the quality of deliverables.
- ✓ Completely configurable platform adaptable to each use case and implies a long-term technological commitment with continued service that guarantees the sustained updating over time and resolution of any incident.

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