

CASE STUDY



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AIRA ENTERPRISE DWMS

with Secured & Seamless
Interoperability

Synopsis

In most organisations with rising events of data breaches, the need for retweaking the security practices mount in handling the confidential data. Relying on different platforms with the legacy systems instead of a central repository for business documents exposes the organisation to security risk when trying to manage and access the information. Security, accessibility, and backup are turning out to be imperatives in the **Aira Enterprise Document and Workflow Management System (DWMS)** and its role in business planning are significant.

In this case study, we will discuss how our Macro Global's cloud-based **DWMS** platform managed to address the security concerns over confidential document and workflow management within organisational key business operations. In the emerging global market, the adoption and transition towards secured cloud-based platform is inevitable, as the legacy system needs to be revamped with cost-effective measures and with more documents being integrated electronically, organisations ought for **Aira Enterprise document and workflow management system** as an integral tool with a host of benefits including secured data management practices, effective collaboration and increased productivity.

Business Background

Our client, the financial service company managed paper-based documents which includes loan agreements, contracts, payment records, and bankruptcy documents in a legacy fashion which directly and indirectly introduced risk into the operation by making it difficult to access the records which weakened the business operation vulnerable losing the visibility over their information assets. Trusting multiple platforms for managing and sharing documents exposed the organisation to a risk of lapse in security and interoperability. The firm was drawn against a number of roadblocks from increased competition to rising regulatory demands on customer information security. This led the firm to explore advance technology to drive down costs, safeguard information, and improve the quality.

Challenges – A Closer Look

”Security and interoperability over confidential information is a significant consideration for the financial service company.”

On a high note, the organisation's undefended security risk and management of large volume records and lack of interoperability created document management incompetent. The financial service company (Client) operated in a legacy system to handle their process with disparate systems facing discrepancies and limitations in accessing the business documents and introduced the risk into the business operation. The outdated method of document management made it extremely hard to find, manage, share, and secure information across the organisation's exhaustive volume of documents. Over a period, lack of security and audit was a roadblock with tedious manual processes declining the workforce performance and directly impacting the business operations.

Operating in the security industry required the financial service company to enforce a high level of document confidentiality and protection of information assets produced by the organisation and its business partners were of utmost importance. The legacy system could not protect the operations against cyber-attacks and the software lacked integration with other applications internally. The growing number of data breaches forced system administrators to monitor the threats continuously. With inefficient standardisation process and lack of accountability in managing the documents, the organisation has developed ineptitude in scaling the operations for a high-volume business. Inaccuracies due to manual entry of information created limitation and an overall lack of efficiency in business process. The sheer amount of information that organisations are confronted demands a change in the way that documents and information are managed. The task of managing the documents and records deters significant time from an organisation's mission-critical objectives.

What we did – Obsolete to Modern

“ Document and Workflow Management System are not complete without robust security options.”

The financial service operation demanded a high level of security, and a resilient with proficiency to accurately file and retrieve specific documents. The consequences of any misplaced file could potentially devastate the firm's brand integrity, reduce the confidence in their ability to run their business, and may create liability to lawsuits and penalties. Macro Global and the client armed a roadmap to transform the existing obsolete document management system to a cloud-based modern platform.

Our Macro Global subject matter experts and professionals worked along with the client and analysed the organisational's objective to integrate a right Aira Enterprise document and workflow management system handholding the document security acutely. The permission control and module access rights enabled the firm for protecting the confidential information and other sensitive records. Incorporating automation reduced the operational cost and foster consistent business process. The organisation's documents are protected and backed-up to ensure the utmost security and the information is accessed through Secure Socket Layer (SSL).

Macro Global's Aira Enterprise DWMS solution prevents from security breaches and below are the security considerations to bring value to the business operations and increase efficiency.



Interoperability – Reports are transferred from the data repositories achieved through our Aira Enterprise DWMS middleware. Our solution provides external API's for retrieving the data (SWIFT, Equation, Email Plugin, etc.). Communicate with external data repositories/external messaging platforms and transfer the documents/reports to our Aira Enterprise DWMS. As an outcome, the integration streamlines the business processes and promotes productivity to the organisation through improved scalability, performance, and flexibility.

Document Distribution – Storing documents digitally makes it prominent to share and control access to information. Document rights technology to limit and share electronic documents via email and protect confidential data by authorising user permission for an effective operational procedure which helps significantly reduces the risk of data breaches.



Role-Based Access Control – RBAC prevents unauthorised access to information based on user profiling & privileges by restricting and enabling the access to confidential information. Grant users or user groups varying degree of access to different documents limiting to read only/approve/delete and restrict the download/print functionality and ensure only authorised individuals can access or share the documents.

Password Protection – Deployed with strict password policies such as password complexity for user profiles to comply with security.



Secure Transmission – Documents and the information are transmitted through a secure SSL connection. They are encrypted before sending and decrypted at the receiving end in the cloud for safe storage.



Compliance – Committed to high standards of information security, data privacy and transparency to manage the document in accordance with the Regulations. Results in clarity for the business process and comply with regulatory guidelines and make it easy to catalogue and retrieve everything in the event of an audit.

Data Backup – Data backup is managed in two dimensions,

- Product Driven automated by our platform.
- Customer Driven where customer can backup at any time manually to their preferred location or a scheduled SFTP to their external storage account.

Backup strategy forms the foundation for a disaster recovery plan. The documents in the backup folder provides recovery points in case of cyber-attack and automated backup remove the burden of reliance on IT resources.



Disaster Recovery/Contingency Plan – The key to disaster preparedness and business continuity entails preservation and access to business-critical documents to minimise business disruption. Data is stored in a secured cloud environment designed to provide high availability. The service is available on-demand with redundant backups which enables organisations to tailor business continuity solutions to their needs in the face of natural disasters.

Document Archival – Archiving enables the organisation to retain important documents and define the document span of placing the document in storage that needs to be handy (neither used actively nor in the future) and ease the day-to-day operations in the long-run.



Document Retention Control – Retention policies are created to hold settings that determine how an organisation's retention strategy is implemented on documents. A period can be specified in the policy to stipulate at what time a document should be deleted from the system. Document retention and destruction comply with security protocols and documents will be deleted once the legally mandated period for the storage has surpassed.

Macro Global's Aira Enterprise DWMS helped our client to overturn the financial and technological challenges head-on by redefining, redesigning & restructuring their legacy DWMS by integrating with an intuitive and robust solution.

Win-Win Situation

Macro Global's Aira Enterprise DWMS is a web-based interface built from ground-up using Microsoft Technologies and SaaS (Software-as-a-Service) licencing model technologies. The intuitive software offers powerful document and workflow management features that include tools a business requires to digitally manage their documents over the cloud and can be used by companies of all sizes across all verticals. Our solution allows the users to retain control over confidential information and ensure documents can be accessed only by authorised individual and leading to an improved flow of information.

- Powerful search features, including search promptings and the facility to apply filters to retrieve the relevant information.
- Smart folders facilitate content discovery by categorising the documents.
- Strong indexing technique to process documents automatically for business operation.
- Automated workflows simplify document review and approval, and process definitions streamline the document life cycle.
- Multiple layers of access permission to upload/download, print and delete documents.
- Document versioning simplifies document tracking and protects file integrity.
- Simple and robust Aira Enterprise Document and Workflow Management System strengthens and complies with governance policies.
- Deploy proper checks for records disposition by assigning clear roles for approvals and final disposition.

Our Success Story

The twin pillar factor of our Aira Enterprise Document and Workflow Management System holds a strong ground empowering the financial services with interoperability and security. Macro Global's Aira Enterprise DWMS being a cloud-based solution facilitates more flexible access round the clock and manage the confidential organisational assets by enabling secured document distribution with increased efficiency.

- ✓ Real-time insights over documents and task status can be used to measure the progress of various operations. User-friendly GUI workflow platform facilitates the flexibility to update a business process.
- ✓ Capture and categorisation of business documents and streamlined workflow empowers client to conduct business operation in an orderly, efficient, and accountable fashion.
- ✓ Facilitate effective performance of activities and support document policy information and managerial decision making.
- ✓ Implementation of Macro Global's Aira Enterprise DWMS help the organisation increases its visibility into real-time information acquiring new intellect.
- ✓ Provides consistency, continuity and productivity and establishes evidence of improved and controlled business activity.
- ✓ Enforce structured policies for document archival and destruction across the organisation.

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