

WHITE PAPER



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creating value through innovation

# The New Era's Digital Ecosystem

## An Eclectic Cloud-Based Solution

## Foreword

Today, thousands of companies are snowed under paper-centric processes and manual workflows and the business process across industries are moving towards digitalised marketplace. Document management plays a quintessential role along with workflow management to manoeuvre within the processes and support the business as usual. Documents are the support system and lifeblood for any modern business and organisations find themselves under pressure to process, organise, and manage their documents dexterously. Operationally, many organisation's businesses are not systemised across functional lineages, such as sales, marketing, dispatch, entries, and stockroom which is getting more complicated or keeping data safe is paramount importance to any business.

In this article, we deep-dive into some of the most common and persistent problems faced across business verticals when it comes to document management and as a knock-on-effect, let's digitise our thoughts through this white paper in setting the stage and to lay down the expectations of the organisations and hindrance to resolve it with a comprehensive Aira Enterprise Document and Workflow Management System (DWMS).

## Document Control Challenges

Over the decades, the challenges which paved the route of various industries to a Aira Enterprise DWMS solution is the maintenance of large volume of paper documents and cut down the manual efforts in retrieval and archival of documents. The speed and scale of document generation and sharing the information is unprecedented in a complex and collaborative workspace. Lack of proper documentation procedure can increase the costs, delay the launch of new products and lead to loss in revenue. An improper document management system can lessen the communication between team members and different departments and subside the flow of information at every stage. On the flip side of the coin, handling these documents, categorising, prioritising, and retrieving as and when required is a tedious task.

Predominantly, the organisation's information is concealed in documents across the board within and the biggest challenge experienced in all verticals is the distribution of information. The document management solution does not enable the full spectrum of document management and collaboration functionality within a single, seamless interface, thereby impacting the business operation inflexible. That's why Aira Enterprise Document and Workflow Management Solution have rushed off the organisation's paw to address the challenges and eliminate the chaos they experience when sieving millions of files for the right information to the right people at the right times.

Let's have a look at the leading constant challenges and bottlenecks faced by the organisations in managing the documents.

### Challenges & Bottlenecks



Security



Regulatory  
Compliance



Inclined  
Productivity



Streamlining  
Business Process



Workflow



Data Mining



## Security

As an organisation, confidential documents floating around in paper format creates an immense risk around potential data privacy and security. Securing the information is a challenge and organisations keep the vital document in locked storage accessible to authorised personnel. Regulating and maintaining access logs in storage folder adds to the cost of storing the documents. Losing or exposing confidential and sensitive information because of ineffective and insufficient security policies is a quick way to lose the brand integrity.



## Regulatory Compliance

Lack of security leads to leakage of information, leading to data breach as organisations are under tremendous pressure to protect documents pertaining to confidential information because of regulations and find it very difficult to retain, secure and manage documents. From external stakeholders to internal controls within the organisation are under the strict scrutiny of federal and state watchdogs. On other hand, the regulatory landscape constantly changes and there are rising expectations from Regulator bodies to establish and prove a culture of trust and integrity.



## Inclined Productivity

The operational compliance initiatives become more entangled, organisations need to adopt a streamlined approach to minimise the redundancies as business handle a greater amount of data where operational readiness, and process efficiency becomes more prominent. Employees often get loaded with the additional work of managing the documents, storing, and accessing them. This process in turns halts the productivity of the employees, sensitive documents are always accessible to everyone. The risk and consequences of failure along the way are very real. For example, if an organisation loses a contract form they can be liable for penalties and/or expensive litigation.



## Streamlining Business Process

In dealing with above-subjected problems, the legacy traditional manual approach is no longer efficient and effective and makes it challenging to consolidate information from different business units across various geolocations. Business operations handle confidential information within the expense reports, legal contracts, acquisition forms. Routine tasks like invoices and sales order processing become extremely tedious as workforce must forward the files to appropriate individuals and gather approvals and it's very important to streamline every process to retrieve information swiftly.



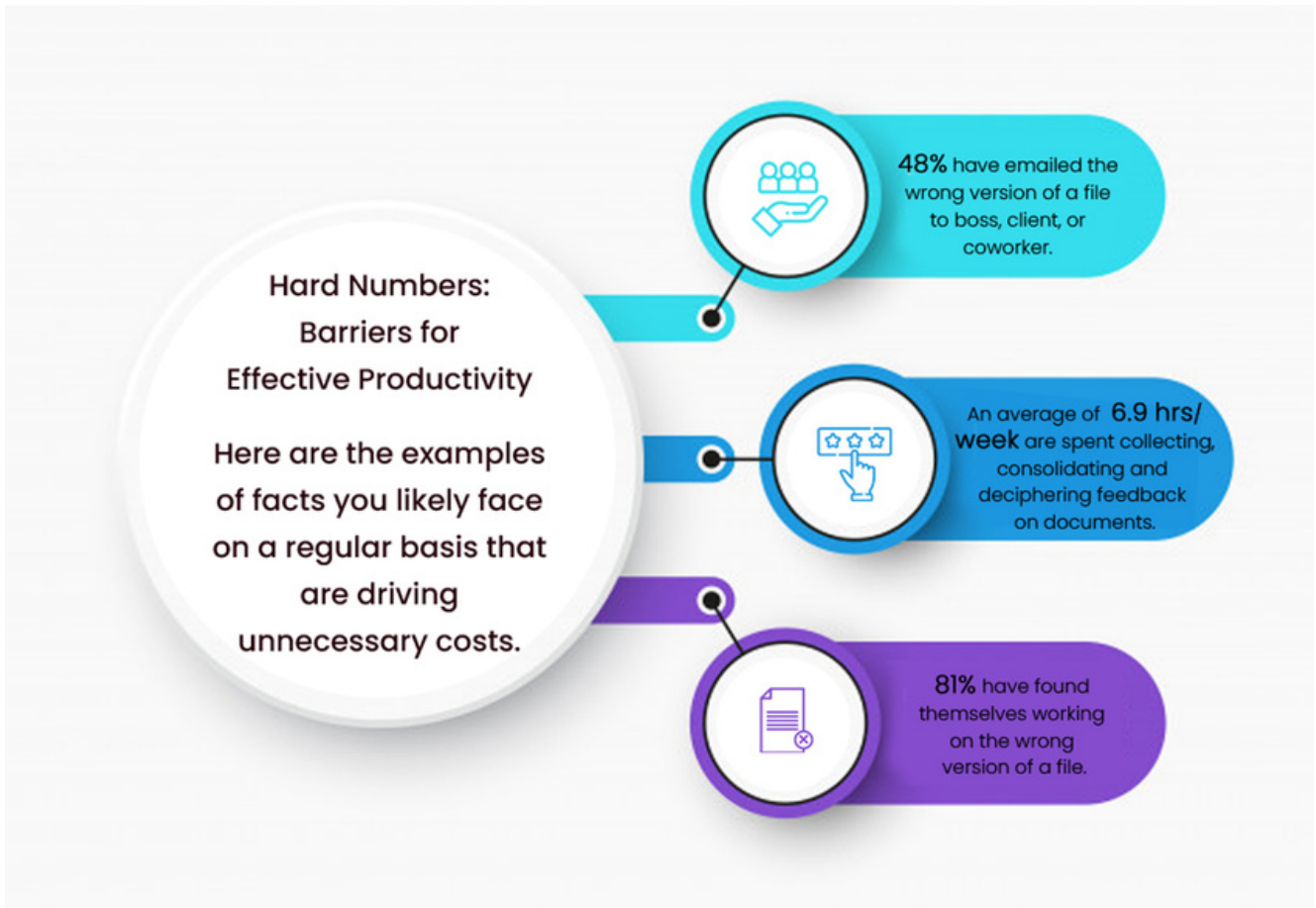
## Workflow

The standard procedure or process of handling the specific types of documents as they enter a company's information management system is one of the key ways to enhance document security, integrity, and future discoverability which are neglected in many organisations. Organisations with legacy workflow management solution also face more uncertainty and challenges than ever and run into trouble with routing, follow-up, distribution, and escalation for document approval/review. Without a streamlined workflow framework, the organisation found it difficult to align the business requirements.



## Data Mining

Data Mining is inhibited by organisation due to the increase in complexity in managing the datasets and quantity of data. Data are messy, improperly organised, and even biased and failing to analyse or focus on both structured and unstructured data hinders the value of information in the document/report. The main problem is the retrieval of required information from massive information and resources and drill down the information. i.e., difficulty in locating the appropriate data or spot the issues.



## Macro Global's Aira Enterprise Document and Workflow Management System – Vision of Going Paperless

Document and Workflow technology with secure storage establish a better-controlled environment, demonstrate compliance, and provide greater protection and recovery.

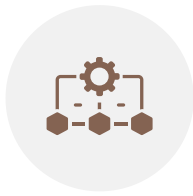
Every business relies on some form of document management system to store and keep track of the innumerable documents generated every day. Macro Global's Aira Enterprise Document and Workflow Management System provides a simple and comprehensive technology solution that allows all type of business organisation to manage the documents, collaborate efficiently, and reduce chaos by cutting down the time. Our solution fills the gap created by traditional document management by enabling an intuitive collaborative document management tool where resources can access their documents from anywhere and anytime.

Macro Global's Aira Enterprise DWMS consolidates the documents in a single platform where users can collaborate and share files. Our solution enhances the team performance by facilitating them to work effectively. By centralising the documents in the cloud platform, users have access to the same information, eliminating multiple entries. Business process are much easier to manage and organisations have complete visibility over document lifecycle and can perform audits for compliance and security. The web-based interface offers a fast way to manage and organise documents in electronic format.

Macro Global's Aira Enterprise DWMS platform derives unbounded facet with the following components and this article provides an insight over the key features of the solution.



**Document Management**



**Workflow Management**



**Tagging & Searching**



**Document Security**



**Advanced Features**

## Document Management



### Document Capture & Upload

Documents captured from external data repositories are organised in a secured centralised location enabled with quick retrieval and access.

Upload or drag-n-drop single document or multiple documents up to 20 files in a single go with more than 25+ file formats supported.



### Document Versioning

Built-in rules to automatically manage the incremental version of the document as they are updated. Makes the process simpler by upholding all versions, and a complete history of the document life cycle is retained.



### Document Nodes & Relationships

Users can configure the relationships between the documents which allow grouping and easy access & retrieval of documents to make an informed decision. Ensures that each document has its own document classifications (categories) which locate to the required document.



### Document Preview

Preview document content of all standard file formats (e.g. Word, Excel, Email, Tiff, PDF/JPEG). Simply open the documents and get a full preview directly without native application installed.

## Workflow Management



### Configurable Workflow

An integrated platform where new documents can be uploaded, or documents stored in the repositories can be circulated within the Workflow management which helps to automate the processes like document approval, invoices/order processing, etc. making the process more streamlined, error-free and handle the document-centric process in less time-consuming manner. Create and build workflow process with a user-friendly GUI and no-code platform intended with Maker-Checker model to authorise the workflow for integrity. The system supports auto and manual escalation of documents for peer review.



### Task Status & Watchlist

Users can verify the status of the task (in progress, review, approval, etc.) which serves as a key process indicator for a task and allows to determine the next action. Also, a Smart Tracking Mechanism is designed which can be used to identify the status of the ongoing task.

## Tagging and Searching



### Document Tagging

Allows to assign a group of custom index fields (text, list value, date, etc.) called 'Tagging' to identify and search for documents based on customised index field and its values. Add valuable information to any document for quick retrieval and create unique classification to find relevant documents. The system has the capability to capture data from the document and pre-fill the index field value which is achieved through the Autofill option. Tagging/Indexing is customisable while uploading the documents.



### Document Search

The primary objective of Aira Enterprise DWMS is to retrieve the documents with various levels of pre-defined search criteria and obtain accurate results. Search criteria can be saved (Autosave option) by reducing the time to fill the search details again. The search results can be sorted through various options but not limited to the document name, document type, etc. The system supports searching a non-indexed document and the user can retrieve the current version of the document in one click. Our solution enables us to find the documents through a comprehensive search mechanism.

- 🔦 **Quick Search** – allows to search by document name, description, document contents, and the system supports to search documents with full or partial keywords.
- 🔦 **Advanced Search** – allows searching the document with the combination of quick search and index field.

## Security

A secure Aira Enterprise Document and Workflow Management System helps to protect the documents and here's how our Aira Enterprise DWMS solution is compliant with strict regulations that govern document compliance.

- 💡 Microsoft Enterprise Grade Security
- 💡 Robust 256-bits SSL Encryption
- 💡 Malware Protection
- 💡 Data Centre Level Firewall
- 💡 Secure Customer Authentication
- 💡 Unique Access URL
- 💡 Periodic Vulnerability Assessment to the website/webserver
- 💡 Continuous Security exercises
- 💡 Periodic Penetration Testing (VAPT) to avoid SQL Injections, Cross-site Scripting (XSS), Cross-site Resource Forgery, etc
- 💡 Applying security patches in a timely manner
- 💡 IP Based Restrictions
- 💡 Session Management
- 💡 Ability to implement NTLM (NT Lan Manager) Authentication principle for SSO as per business needs

Our system provides law-enforcement-grade security and access control to help the organisation to meet the most demanding of user-rights data protection requirements.





### Data Security & Compliance

Procure both security and compliance with a robust document management strategy through the above-subjected security measures and integrate regulatory compliance with Macro Global's Aira Enterprise DWMS to meet the standards.



### Data Protection & Recovery

We safeguard the data by offering multiple ways to protect the documents using critical document sealing functions with the security measures mentioned above. Quickly catalogue and recover all the files needed during the audit process.



### Document Retention

Documents can be maintained for a specific time periods based on policies around document retention and management. Our solution adheres to data retention regulations and ensure that performance is not comprised, and data size remains manageable.



### Audit Trail

Audit Trail enables the complete history of the activities performed on a document within Aira Enterprise DWMS. Audit log supports document history using different search criteria and reports. Comprehensive time-stamped audit trails enable document ownership internally and externally and its historic traces.



### Access Controls

The role-based access controls restrict to improve the security posture, comply with regulations, and reduces operational overhead. The core principle is to assign only appropriate access to the user within the process according to operational user profiling. Extended access control features

- Ability to grant permissions for the user actions such as Upload, Download, View, Print, Share, Delete, Update Tag, Merge PDFs etc. at Document Category level.
- Deletion follows 4-eyes authorisation principle and permission can be granted at both user and user group level.



### User Profiling

Custom Profiling enables operational groups within the organisation to define and create user profiles based on roles and privileges within the business process hierarchy.



## Advanced Features



### Dashboard

A focal point which provides an overview on task status/priority/task life span, track the recent task, and statistics on the number of tasks managed categorised by month. The dashboard has an extended feature over specific user actions (upload/download/print/share) on the documents in real time.



### Email Add-ins

As an additional channel to smartly classify, organise and tag the email communication and attachments. Our solution provides reliable email collection and retention capabilities to archive and securely protect organisation's inbound and outbound emails.



### Notifications

Notification keeps well-informed of changes or updates within the system. User/user group gets an alert notification as a bell icon when a user deletes or uploads a document to a specific category. Email alerts will be triggered when a user is created, or user credential is changed. Notification will be sent to the designated user group when a user responds to a task.



### Single Sign On

Integration with Microsoft Active Directory allows users to log into the Aira Enterprise DWMS application using their Windows login credentials eliminating the need for remembering separate passwords.



### Easy to use GUI

Robust, easy-to-use GUI and intuitive platform coupled with comprehensive knowledge base ensuring minimal training for using our solution.



### Report Mining

Reports with massive figures and large pool of datasets require Data Mining techniques to identify the information uncovered. Our solution transforms complex data into accessible visualisation. The Data Mining model helps to analyse the holes in the report/data and reduce the number of errors by enhancing the daily process of the organisation. The system allows the organisation to scale up the information through the consolidated report and apply the mining technique across the business lines to maintain the trust of customer and gain insight from their abundant origin of data lake. Email alerts to specific user groups with consolidated reports upon completion of data mining operations.

## Macro Global's Aira Enterprise DWMS Solution Benefits

Our Aira Enterprise DWMS help businesses increase their visibility in real-time of an entire business documents lifecycle and control over the information by tracking and auditing the turnaround time and quality of business-critical document management.

- 💡 Provide user-friendly access to the information contained in documents throughout their lifecycle.
- 💡 View, access, collaborate and share the documents across the organisation or with external or internal stakeholders.
- 💡 Instantly find documents based on the document information they hold, including tagging/indexing, full-text, or partial-text search of their entire content.
- 💡 Streamline approvals and document distribution processes. Review, Approval through integrated and custom workflow functions.
- 💡 Eliminate error-prone manual paper handling and increase accuracy.
- 💡 Security and compliance process to minimise the risk and cost of litigation over confidential information which helps to increase visibility over the document management process and information security.
- 💡 Increased productivity by automating the business processes and improve operational efficiency.
- 💡 Offer more reliable data backup and recovery services to quickly restore the data.
- 💡 Manage huge volumes of documents and make them available on-demand to potentially thousands of users.
- 💡 Eliminate costs associated with large filing cabinets and expensive commercial space used to store the documents.
- 💡 Offers a great balance of custom features and a user-friendly interface and the platform allows the workforce to effectively create a foundation for data mining.

Together we can build up and enhance the productivity and efficiency of the organisation's business operations to the next level of profitable growth through Macro Global's Aira Enterprise Document and Workflow Management System and reduce the business operational risk.

# We are here to help you

If you want to learn more about our products or services or just have a question?

If you need advice from our expert team who understand your business better than our peers?

If you want to know how we transformed businesses using our unparalleled industry and domain expertise?

Please click on the web link below to access our sales desk telephone numbers and email and we will be in touch straight back to you.

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