



GENAI ENABLED DOCUMENT AND RECORDS MANAGEMENT PLATFORM

Based on Alfresco DMS and MariaDB

Presented by Crest Infosolutions LLC



AGENDA



Crest Infosolutions

- Company Introduction
- Our Presence
- Our Success Stories



GenAI enabled Document Management

- Document Management
- Records Management
- Low-code App development / BPM



GenAI in Business

- Document Summary
- Sensitive Information redaction
- AskAI – Chat / Q & A



Demo time !



Technology deep-dive

- Solution Architecture
- Deployment Options
- Q & A



CREST INFOSOLUTIONS

Company overview and solution offerings
and success stories

CREST INFOSOLUTIONS

Introduction

Crest Infosolutions is a leading provider of **Digital Transformation solutions**, specializing in delivering innovative solutions to help businesses achieve paperless operations, process digitalization, application modernization, using Alfresco ECM / DMS, MariaDB database and Generative AI tools.

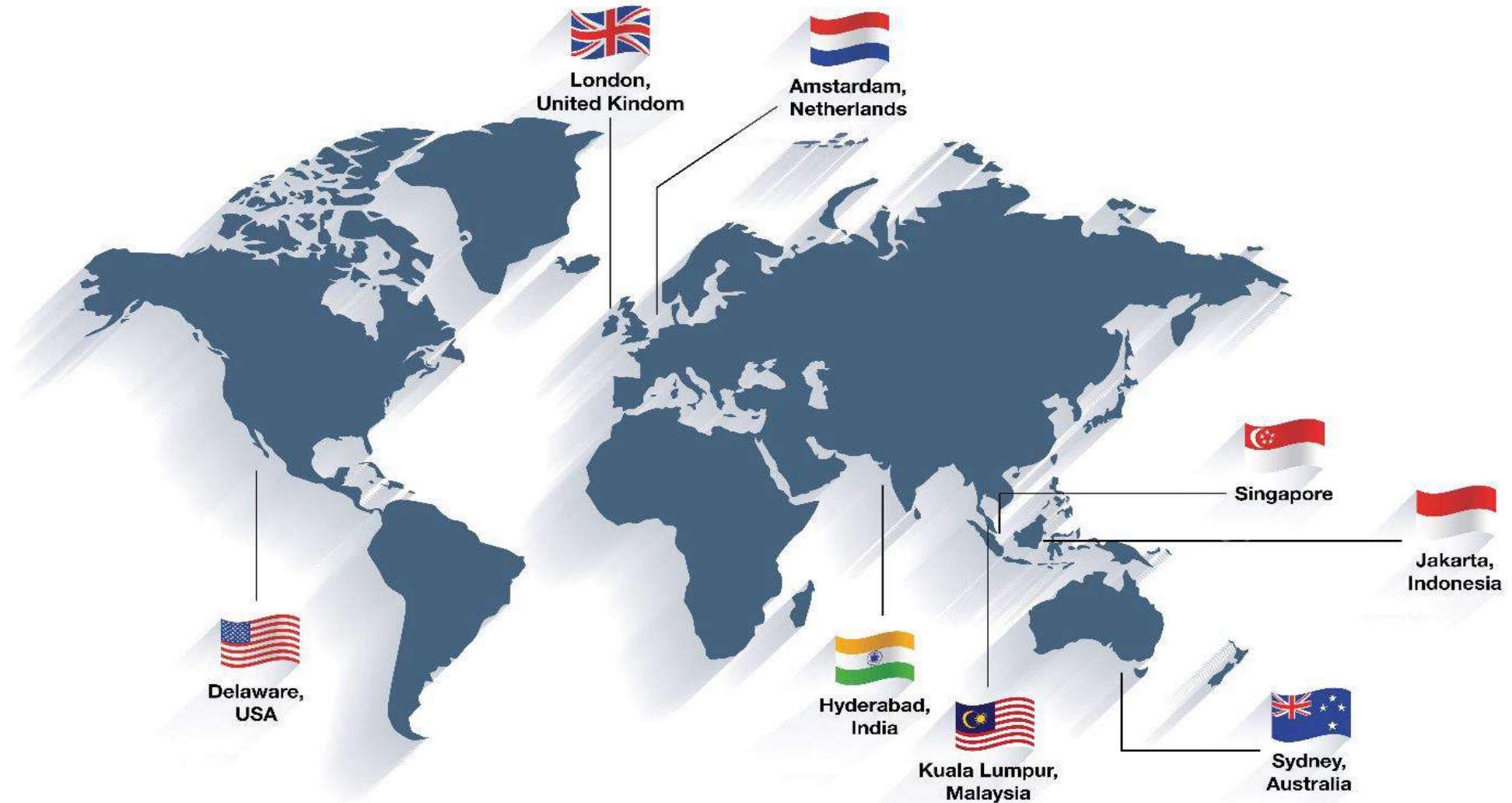
Founded in 2012 and headquartered in Malaysia, Crest Infosolutions currently has sales operations in Singapore, Australia, Indonesia and USA, with customer base spread across Asia Pacific, Europe and USA in various domains including public sector, banking, insurance, retail and energy sectors.

We have been an **Alfresco partner since 2015**, and currently partnered with leading technology companies like Hyland, IBM, SUSE, MariaDB, Kong and Fasoo to deliver technology solutions and support to customers worldwide.

Technology Partners



OUR PRESENCE



SUCCESS STORY

Digital Document Management System (DDMS 2.0) for Government of Malaysia



Powered by Alfresco Enterprise, Digital Document Management System (DDMS 2.0) is a Multi-tenant and ISO 16175 and ISO 27001 compliant Electronic Record Management Platform to manage full life-cycle of the Government Records, including capture, manage, retain, archive and dispose, including support for classified records.

- On-of-a-kind of **Multi-tenant Electronic Records Management** platform support complete life-cycle of records from capture till disposition.
- Currently used by more than 376 public sector agencies, including all ministries and **56,000 active users**.
- Complied to **MS ISO 16175-2:2012** Information and Documentation standards by National Archives of Malaysia.
- Complied to **ISO 27001** for information security standards,
- Support both open and classified records management.
- Recognized as “Champion Top 5” project by WSIS in Information and Communication infrastructure and Enabling Government.

SUCCESS STORY

Workflow / Case Management for Digital Bank

About Customer

Launched on September 1, 2022, our customer is one of the Newest Digital Bank in Singapore.

The brand appeared everywhere in Singapore. People liked the simplicity of the offering and older generations understood it. Sign-ups took off instantly, rocketing to 100,000 newly joined customers aged 18 to 90 within its first 10 days of existence.

Challenges

Our customer was looking for an agile digital platform to automate banking processes using a standard BPMN 2.0 platform, store and manage digital contents of customers in a multi-cloud and micro-services environment.

The solution was expected to interface with several micro-services for fulfil the business function and was expected to be rolled-out quickly.

The Solution

Our team deployed Alfresco Digital Business Platform to achieve the following:

1. Automated several banking processes for customer onboarding, offboarding, and customer services etc.
2. Integrated the above-mention business processes with core business applications as well as with DevOps pipeline for continuous integration and deployment.



GENAI ENABLED DOCUMENT AND RECORDS MANAGEMENT PLATFORM

To get insights from the wealth of documents



Overview of Alfresco DMS

with GenAI enabled capabilities

Alfresco Digital Business Platform helps organizations manage, automate, and optimize processes through integrated content management, business process management, and case management.

It leverages **GenAI capabilities** to enhance decision-making and automate workflows with intelligent document processing and data extraction, improving efficiency and accuracy.

By combining **automation, GenAI, and scalability**, Alfresco drives digital transformation, enhancing collaboration and operational efficiency across industries, including banking and insurance, healthcare and pharmaceuticals, and in public sector organizations.

KEY CAPABILITIES



Document Management



Records Management



Knowledge Management



Low Code App Development / BPM



Reports and Analytics



GenAI enablement

DOCUMENT MANAGEMENT

DOCUMENTS

Browse documents

Edit documents

Document Versions

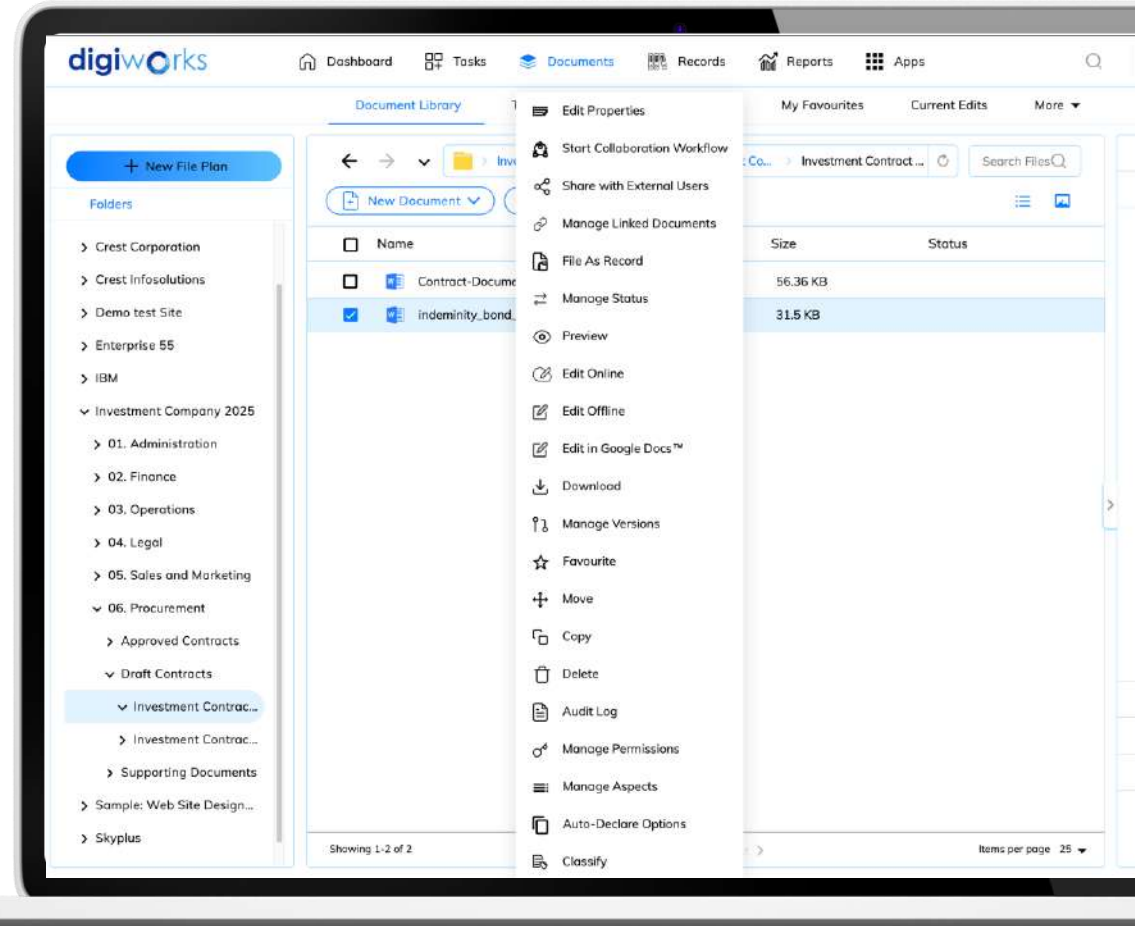
Permissions Management

Documents Audit

Alfresco brings you all the essential document management features designed to make user experience even better.

Effortlessly browse collaboration sites,

- Navigate folder structure in windows-like tree-view manner.
- Edit documents seamlessly using Microsoft Office 365 or Google Workspace.
- Create and manage minor and major document versions.
- Access control and permissions on files and folders.
- Comprehensive Audit trail with date and time—all with ease and simplicity.



RECORDS MANAGEMENT

RECORDS

Records Categories

Records Folders

Retention Policies

Records Audit

Search and retrieval

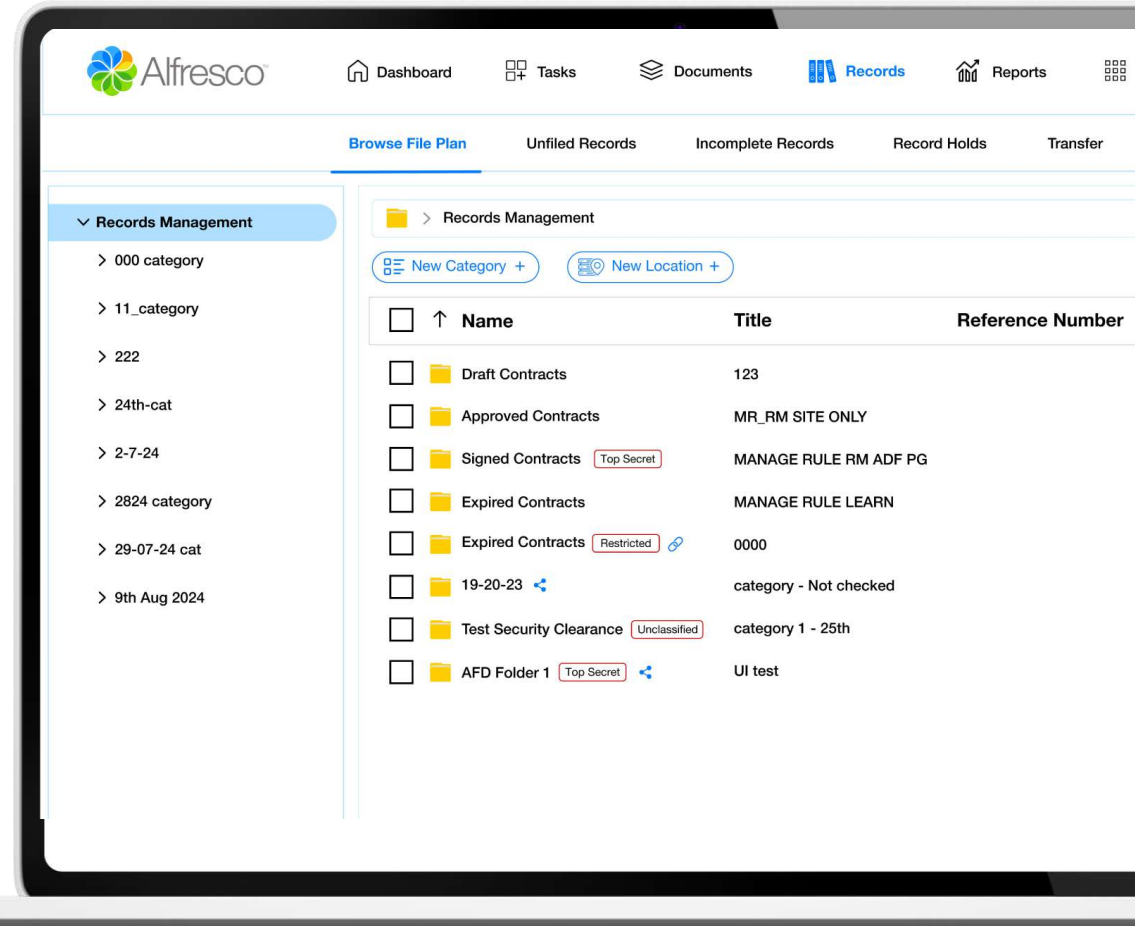
Compliance to Standards

- ISO 16175
- ISO 27001
- HIPPA / HL7 etc.

Alfresco offers robust information governance and records management capabilities with an intuitive, modern interface designed to enhance productivity.

Records managers and administrators can work efficiently with;

- Automated File Plans, with auto-numbering.
- Effortless Retention policy management,
- Easy Security Classification on Records
- Convenient Audit browsing, and
- An all-around more engaging way to handle records like never before.



KNOWLEDGE MANAGEMENT

KNOWLEDGE

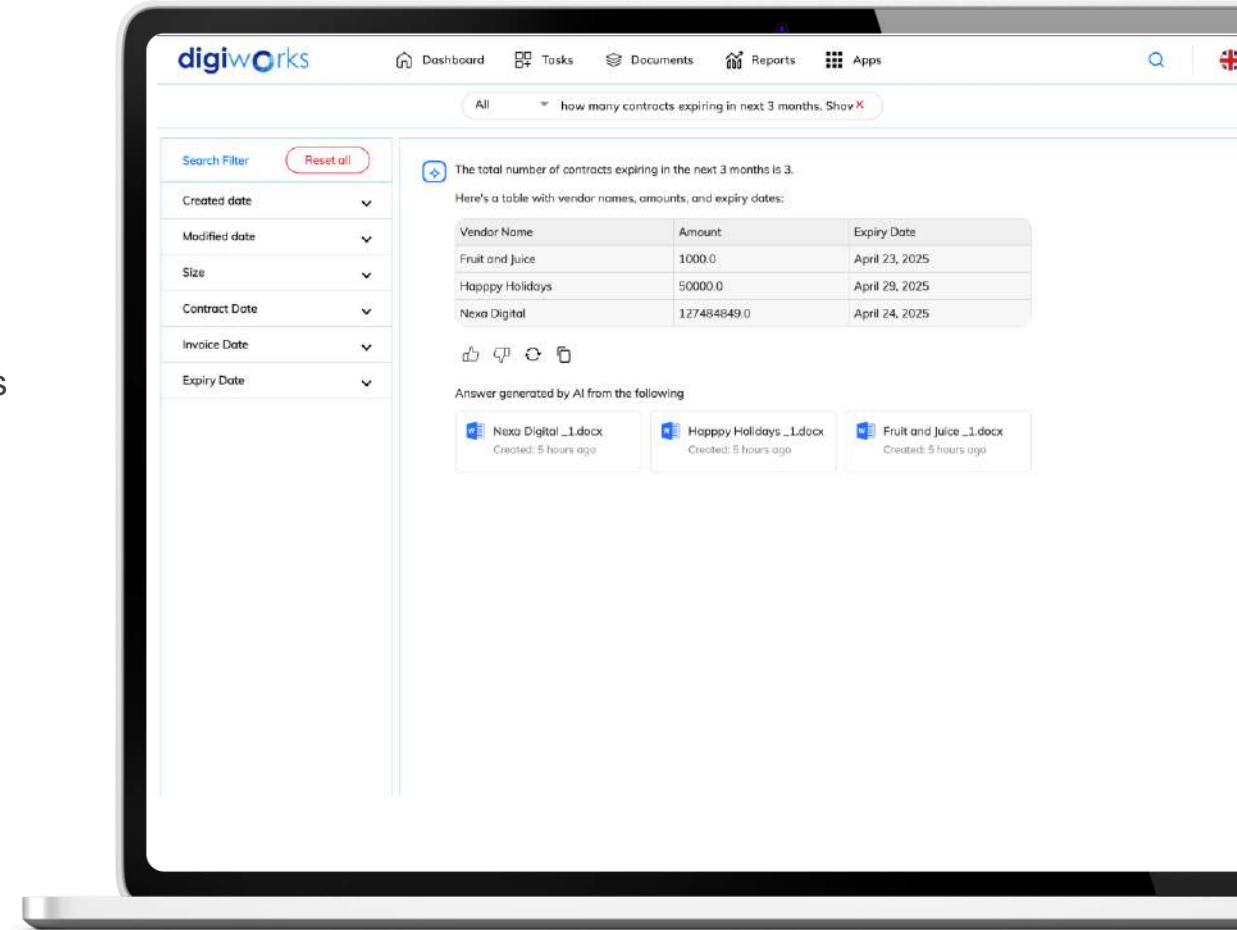
Knowledge Retrieval

Save Search

Knowledge Insights

Alfresco enables efficient knowledge capture through automated content indexing and intelligent document management.

It fosters knowledge sharing by providing collaboration tools, seamless integration, version control, and real-time access, ensuring valuable information is easily disseminated across teams.



LOW-CODE APP DEVELOPMENT / BPM

BPM / CASES

Task Management

Workflows Management

Workflow History

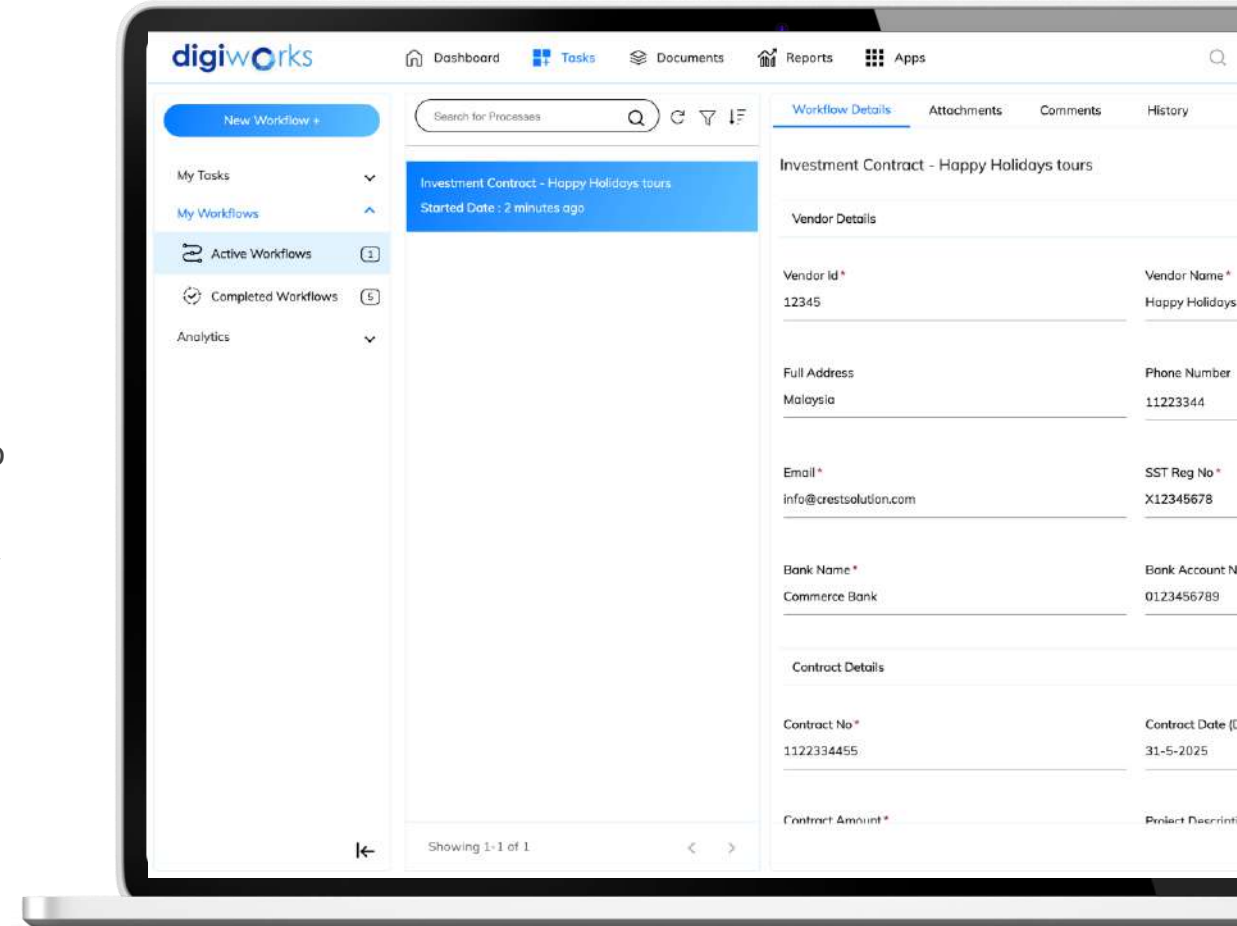
Reports and Analytics

Digital Signature
integration

Alfresco elevates workflow / case management user experience by providing seamless access to tasks and workflow processes defined in Alfresco Process Services (APS).

Business users can:

- Access tasks assigned to them or to the group (pooled tasks).
- Work with tasks – approve, reject or re-assign.
- View and provide inputs in attached electronic forms and documents.
- View workflow history in timeline manner and generate reports.
- Sign documents seamless (integration with SigningCloud).



REPORTS AND ANALYTICS

ANALYTICS

Documents Reports

Records Reports

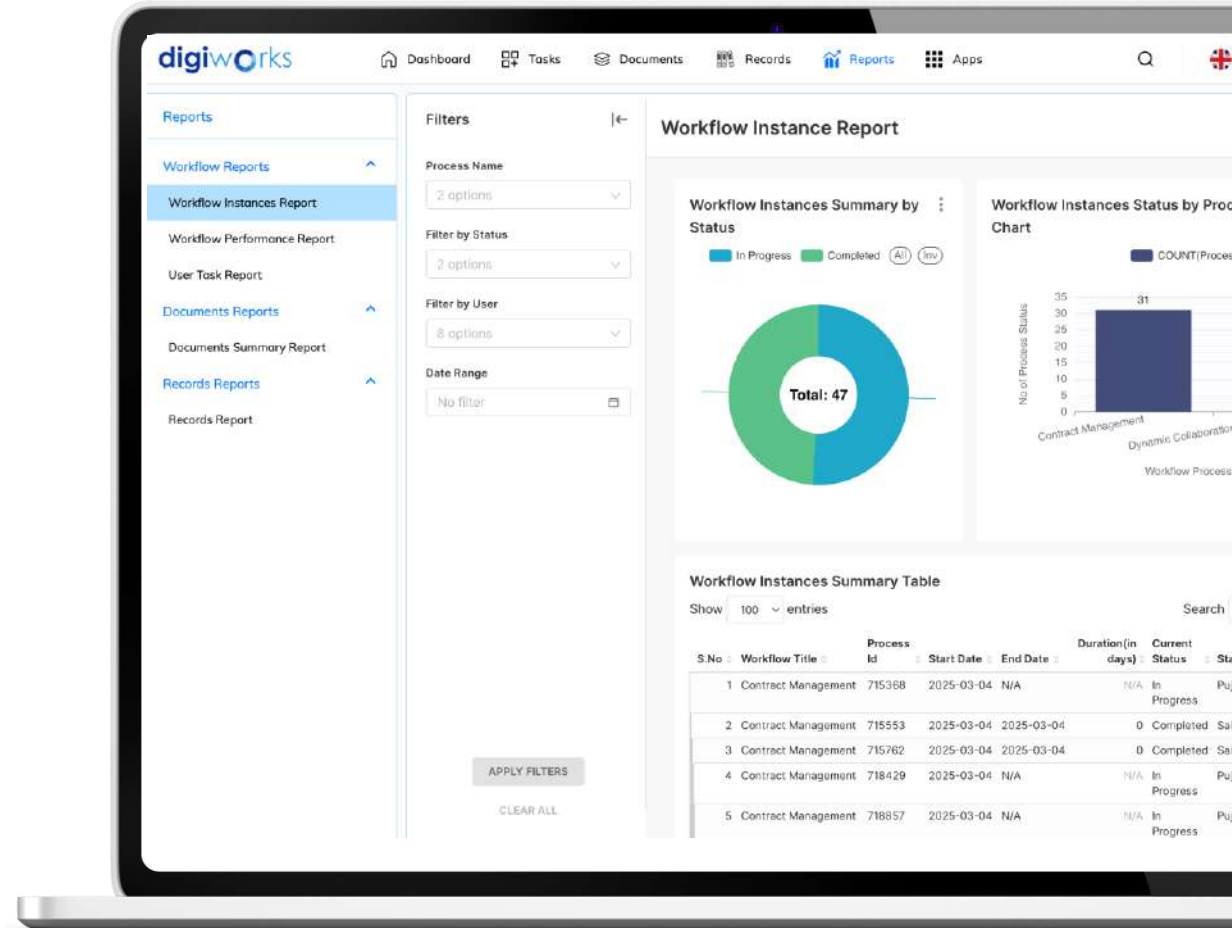
Workflow Reports

Ad-hoc Reports

Alfresco incorporates robust reports and visualization tool using open-source framework, allowing users to get real-time insights from documents and processes.

Business users can:

- Access to pre-defined reports for documents, records, tasks and workflows.
- Drill-down reports for insights and export them in xls or pdf.
- Generate custom ad-hoc reports as per business requirements.





GENAI IN BUSINESS

Unstructured data changed and GenAI use cases across various industries



DOCUMENTS AND BUSINESS PROCESS (TRADITIONAL)



Sharon is a Line of Business executive responsible for driving growth through operational efficiency.

Her team processes various business contracts and gathers sensitive information on vendors and customers.



Sharon's company is running their Document Management System (DMS) system to store and manage thousands of active and expired contracts.

She relies on her team to appropriately handle sensitive contract information and that is found in draft and approved contract documents as well as supporting documents, such as bank statements.

Because of the large volume of such documents, compliance risks arises regularly.

The team handles sensitive information manually and relies purely on permissions access control to manage such information.



As there are several steps involved with reviewing and managing contracts, the team works with plenty of care. The documents overflow with vendor names, contract amount, bank account numbers, and directors IDs, which presents multiple challenges:

- **Data-entry errors:** Entering of critical information happen in external tools with multiple phases where the wrong data is entered.
- **High processing times:** Each 50-page contract takes a reviewer 4-6 hours to review for important clauses.
- **Sensitive information remains unmasked:** Sharon has no control over sensitive information, which might accidentally flow to unprotected storage.



The contract reviews are running late so the business uses the temporary confirmation documents, willingly assuming high legal compliance risk.

Kathryn spends her weekend following-up with various stakeholders to complete the reviews on time.

She wonders if there is a way to speed up their contract processing in a reliable manner to ensure consistent delivery times and reduce the compliance risks.

DOCUMENTS AND BUSINESS PROCESS (GENAI)



Sharon hears from their DMS system provider about new **GenAI enabled Document and Records Management** system to improve user productivity and compliance through summarizing and redacting documents automatically.

Her team start working with their GenAI DMS system provider to enable and test these new features.



The new GenAI enabled document management system can be easily integrated with existing system.

The new system also has capability to **run fully on-premise**, while offering modern GenAI capabilities to meet data sovereignty requirements.



The new solution now:

- a. **Reduces decision making errors**, boosting team productivity.
- b. **Can automatically summarize, tag**, translate and remove sensitive data for efficient and effective personal information redaction.
- c. **Ensures compliance with regulations** for data security and privacy.
- d. **Meets organization's data sovereignty, security**, performance, and availability requirements.



With this GenAI enabled DMS system in place, Sharon's team can **process contract documents faster at an improved compliance level**, reducing risks significantly.



GenAI CAPABILITIES

To support business transformation



GENERATIVE AI FOR INNOVATION

GenAI tools

Summarize Documents

Translate Documents

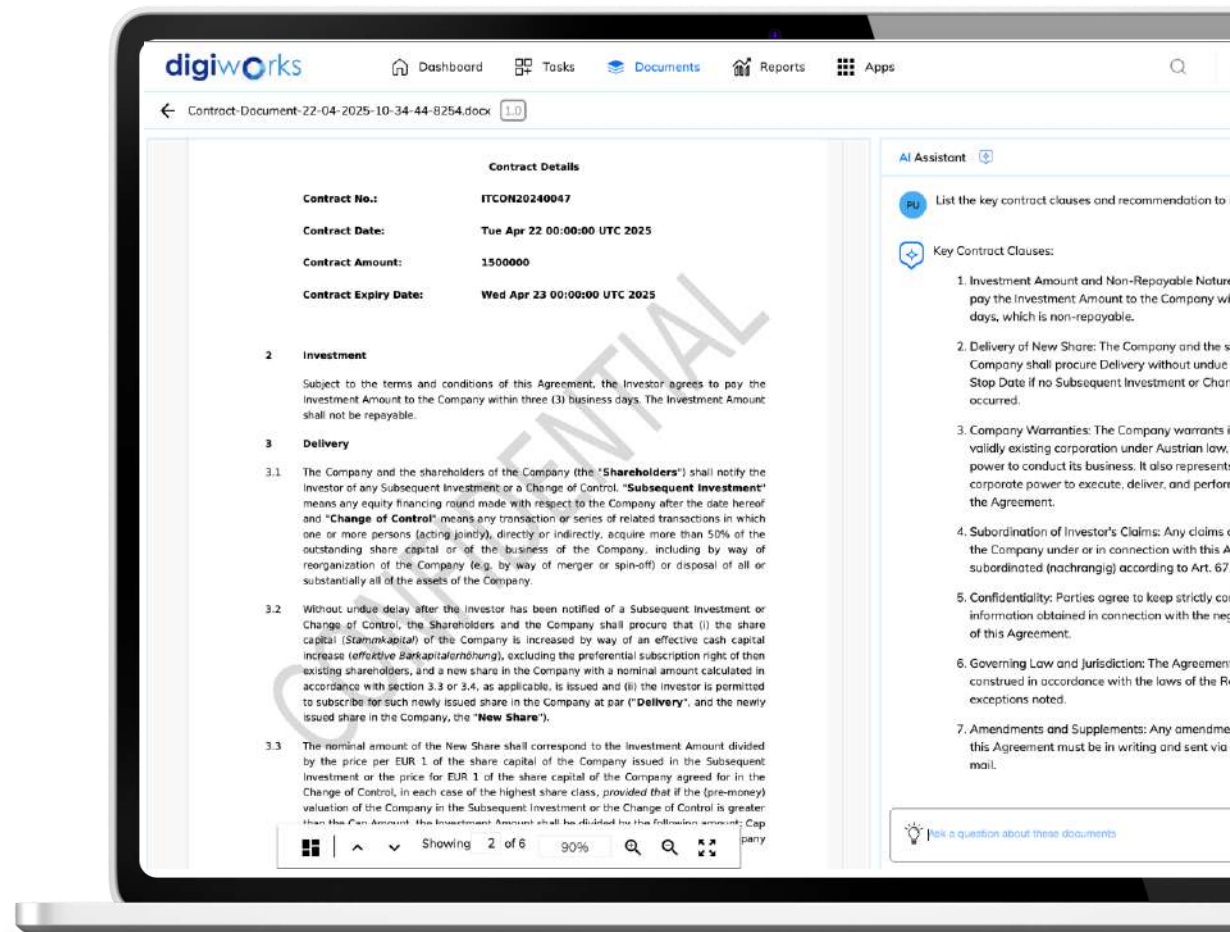
PII detection and redaction

Generate Tags / Metadata

AI Chat / Q & A

The built-in GenAI module enhances the DMS and RMS capabilities of Alfresco DMS to improve user productivity.

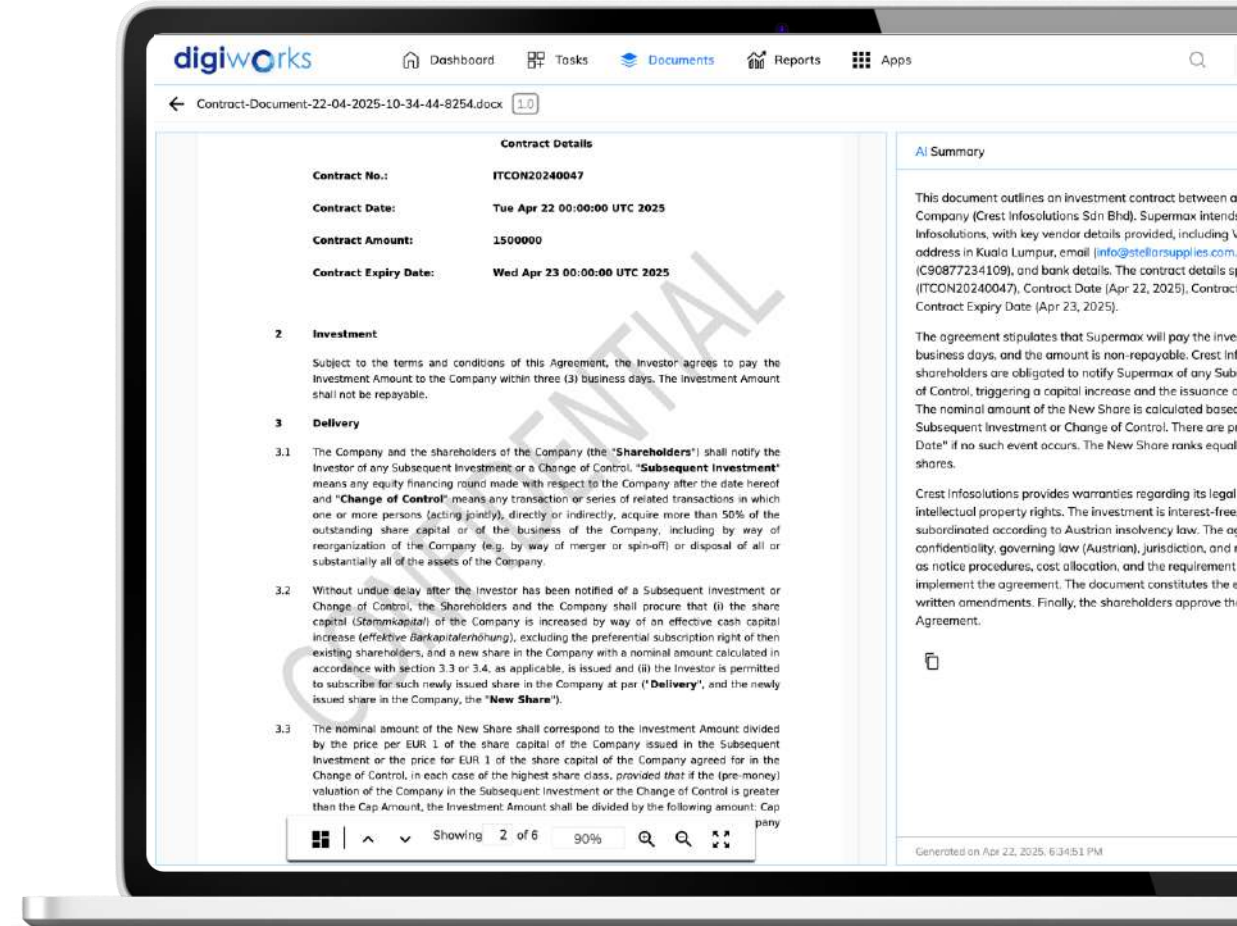
The embedded GenAI capabilities ensure users get seamless experience and do not have to duplicate data to specialized AI systems or spend time in juggling between multiple systems to avail benefits of Gen AI.



GENERATIVE AI FOR INNOVATION

Document Summarization

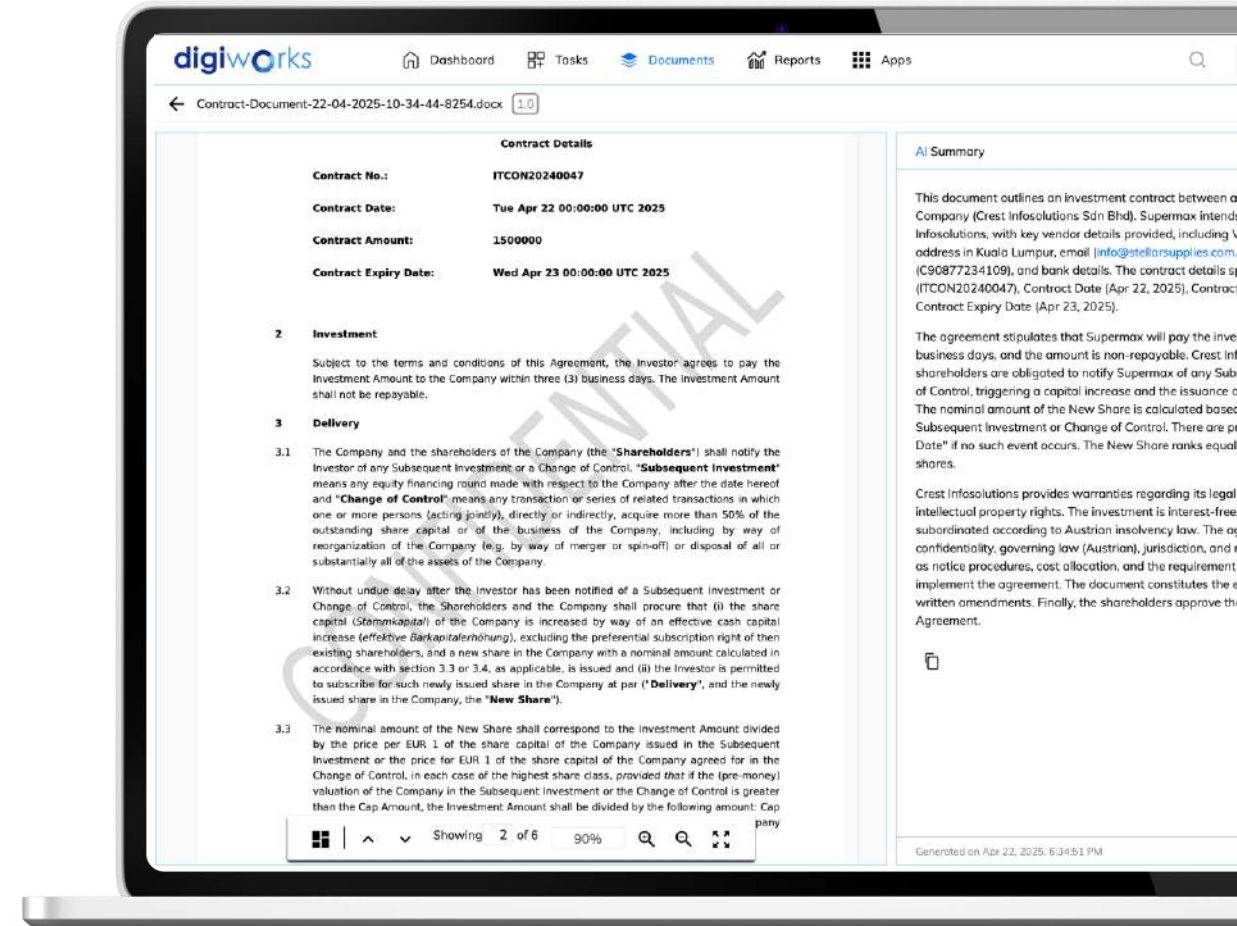
- Automatically summarize documents for faster and better decision making.
- Reduce human errors and oversight on important documents.



GENERATIVE AI FOR INNOVATION

Document Translation

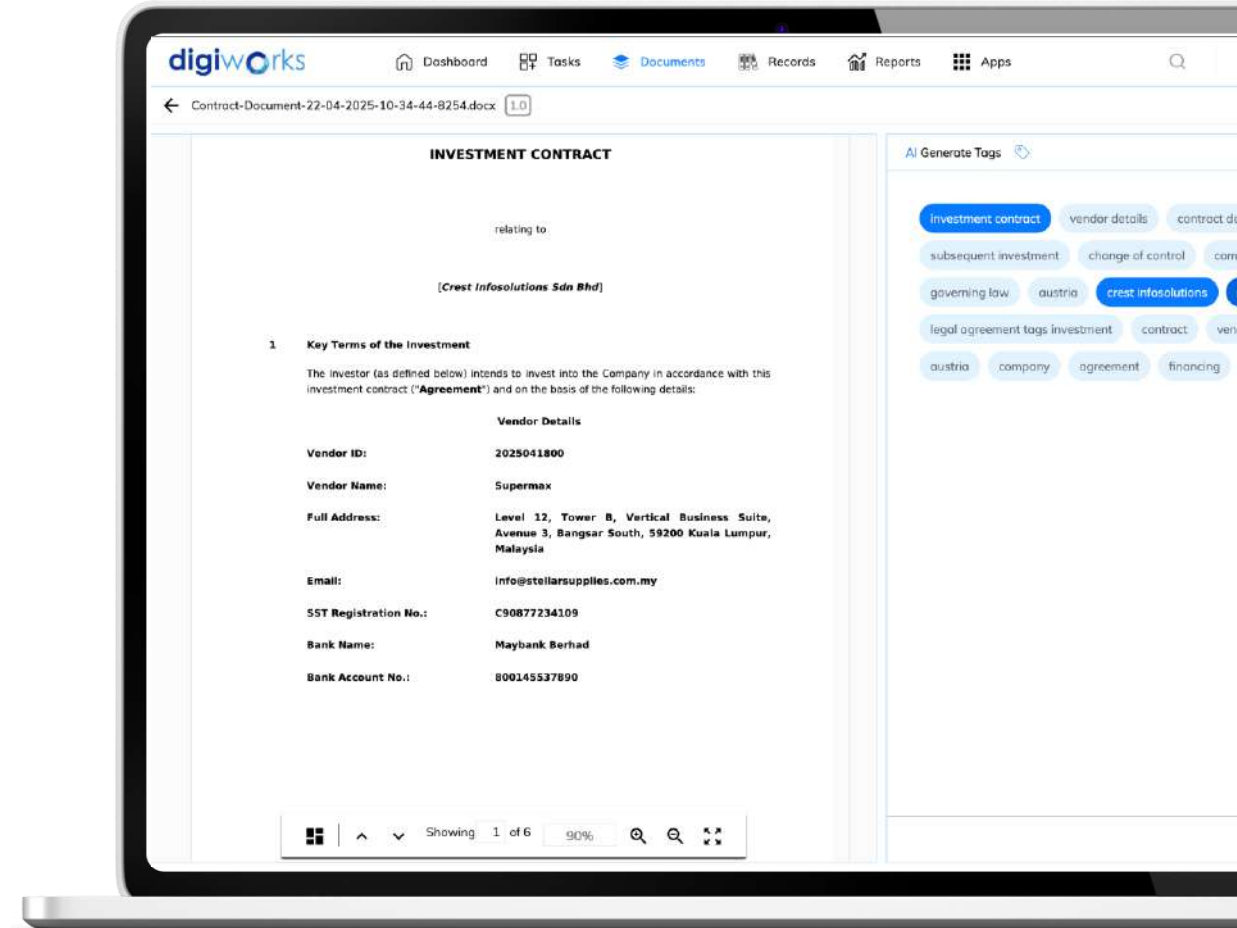
- Automatically translate documents in various languages without exposing to public platforms.
- 120+ languages supported, including German, Italian, Spanish, Simplified Chinese, Japanese, Vietnamese, Thai and Arabic etc.



GENERATIVE AI FOR INNOVATION

Metadata Tags Generation

- Categorize documents automatically upon upload / ingestion and add meta tags to find and group easily.
- Save on manual efforts, improve accuracy and organize documents as per category.

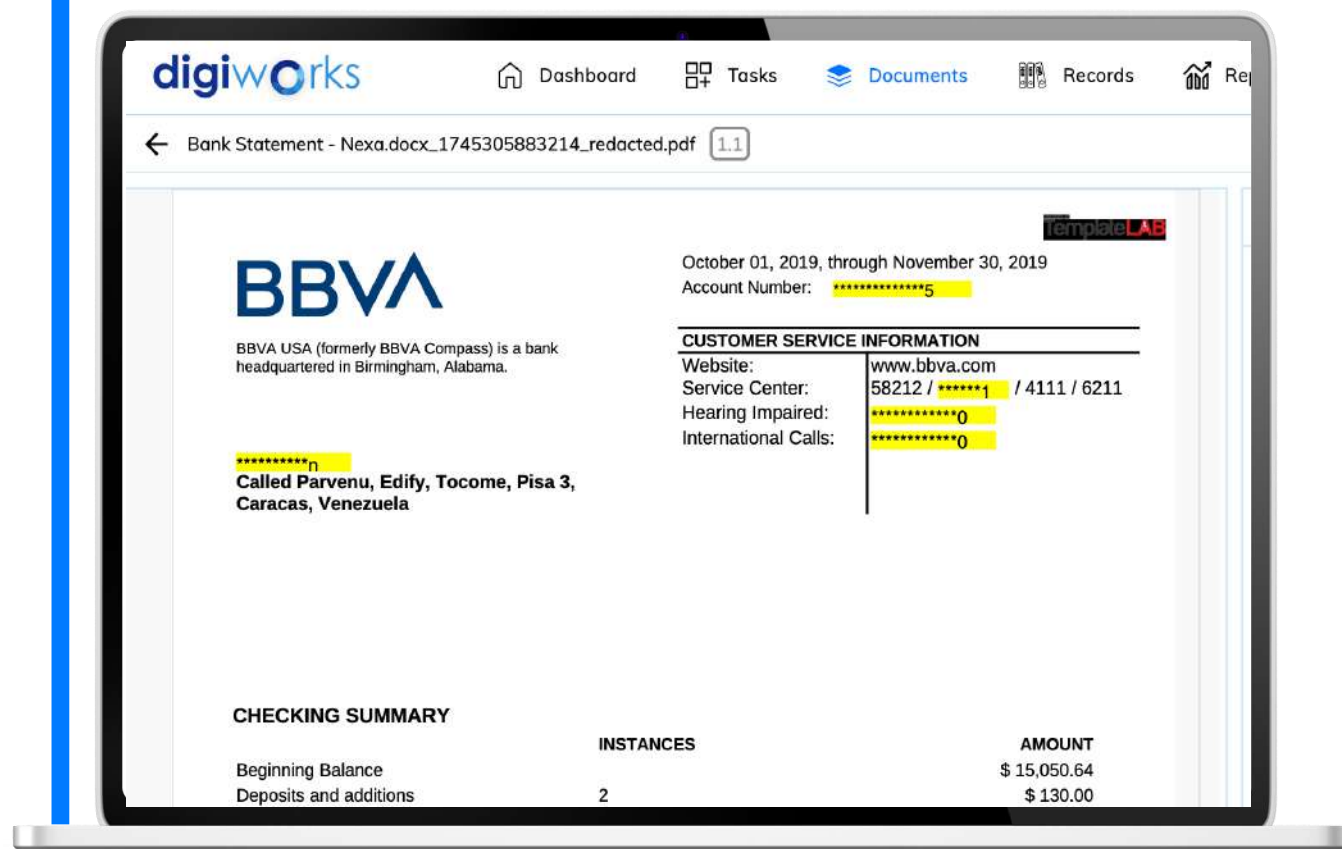


GENERATIVE AI FOR INNOVATION

PII detection and redaction

Detect and Redact PII automatically from documents uploaded in Alfresco repository based on folder roles to minimize the risk of sensitive information leak.

- Redaction parameters can be configured to completely redact the sensitive information and leave the first or last few digits or letter to validate in future, if required.
- Redact is permanent and irreversible and redacted copy will be uploaded as pdf file.
- Formats supported; doc, docx, xls, xlsx, ppt, pptx, pdf, tiff, jpeg, png



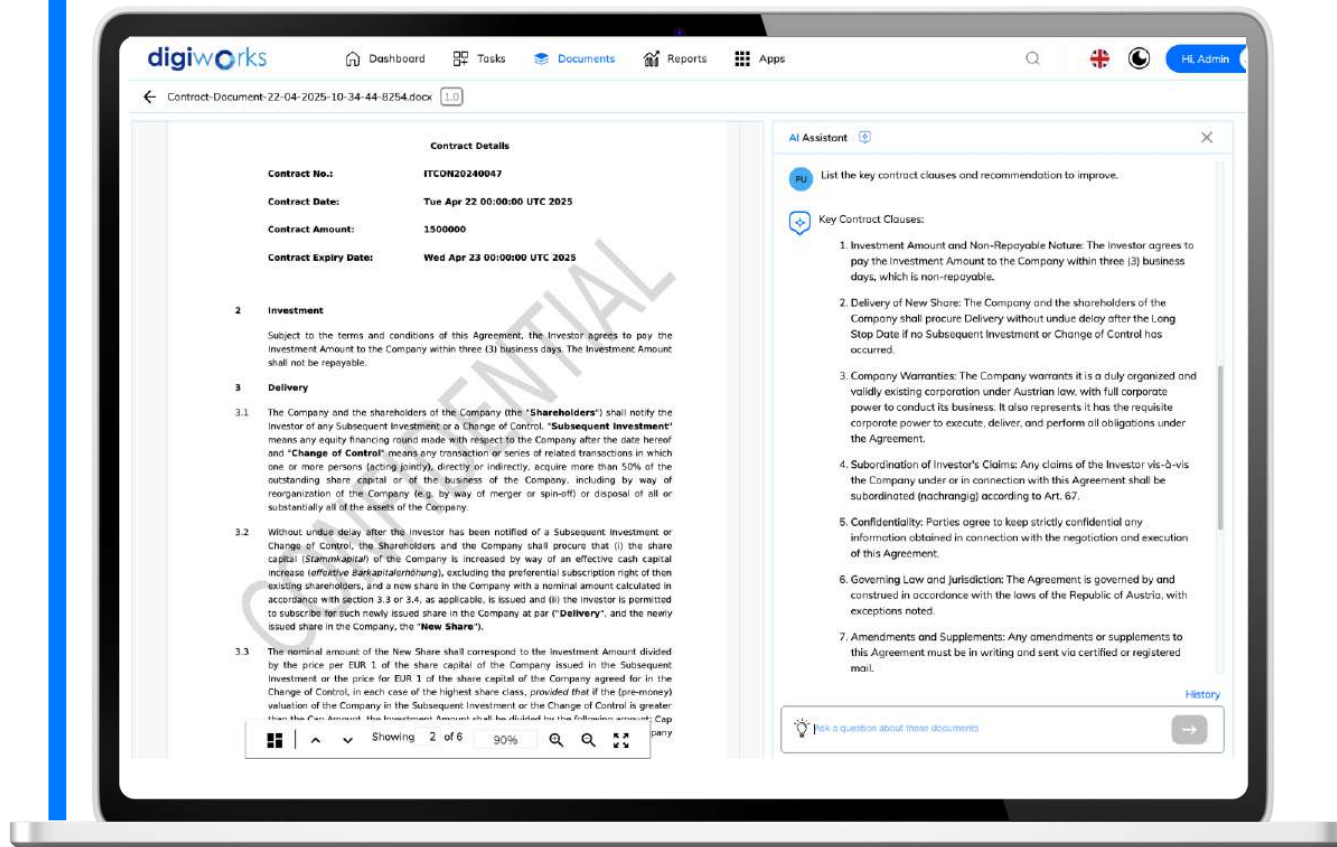
GENERATIVE AI FOR INNOVATION

GenAI add-on for Alfresco Document Management

AI Chat / Q & A

The built in AI Chat module allows business users to retrieve information from the documents and reports stored in Alfresco.

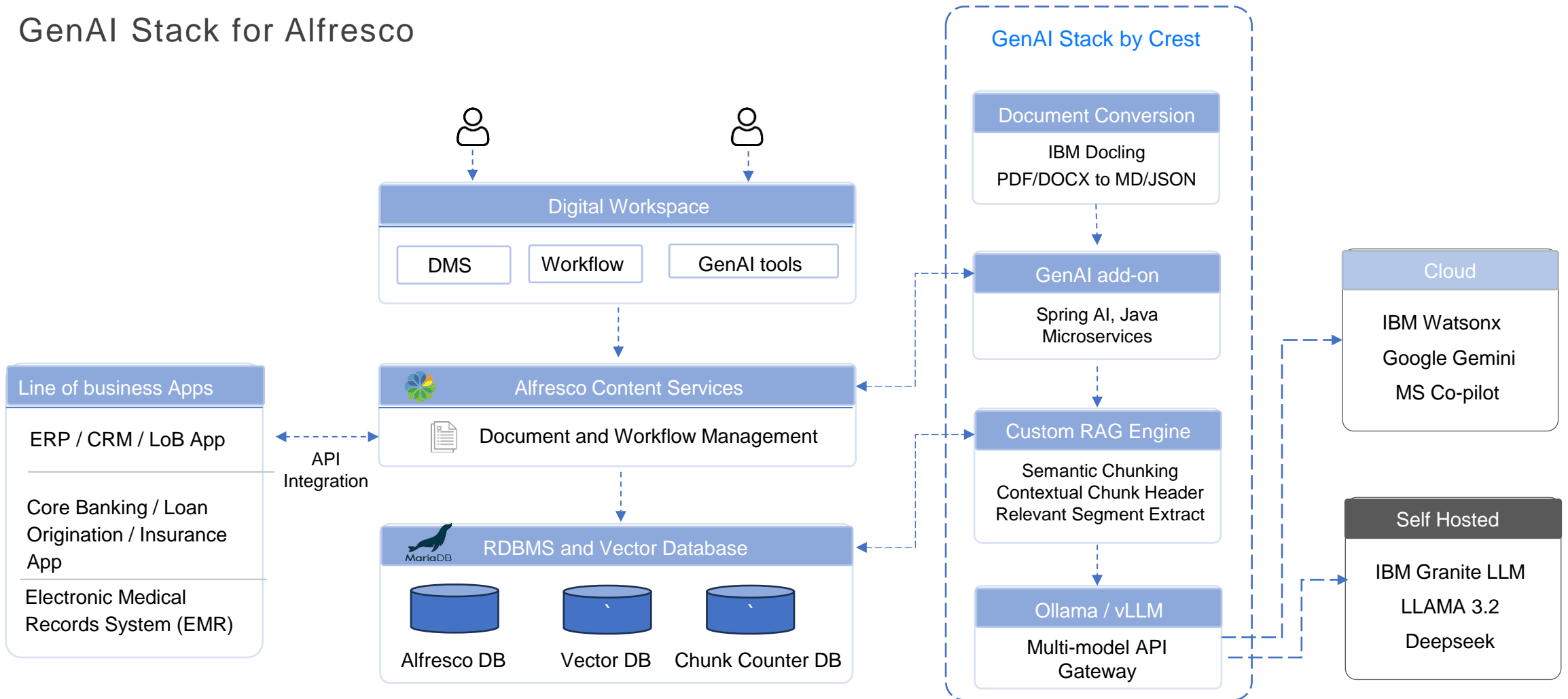
The intuitive Chat / Q&A modules enhances user experience by retrieving information using natural query and by providing recommendation and suggestions based on the response, to augment effective decision making.



GENAI DEMO

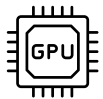
SOLUTION ARCHITECTURE

GenAI Stack for Alfresco

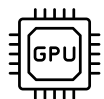


SUPPORTED DEPLOYMENT OPTIONS

ON-PREMISE / AIR-GAPPED ENVIRONMENTS



IBM Granite 3.2,
LLAMA 3.2



IBM Granite 3.2,
LLAMA 3.2

PRIVATE / COMMERCIAL CLOUDS



IBM Cloud



Google Cloud



watsonx

Gemini



Copilot

GenAI DMS-as-a-Service

GENAI ENABLED DOCUMENT AND RECORDS MANAGEMENT PLATFORM



The screenshot displays the digiworks platform interface. The top navigation bar includes links for Dashboard, Tasks, Documents, Reports, and Apps. The main content area shows a contract document titled "Contract-Document-22-04-2025-10-34-44-8254.docx" with a version number of 1.0. The document content is divided into sections: Contract Details, Investment, and Delivery. The Contract Details section includes fields for Contract No., Contract Date, Contract Amount, and Contract Expiry Date. The Investment section contains a paragraph about the terms and conditions of the agreement. The Delivery section contains three numbered items (3.1, 3.2, 3.3) detailing the process of delivering new shares. On the right side, there is an AI Assistant sidebar with a search icon and a list of key contract clauses, including Investment Amount and Non-Repayable Nature, Delivery of New Share, Company Warranties, Subordination of Investor's Claims, Confidentiality, Governing Law and Jurisdiction, and Amendments and Supplements.

digiworks Dashboard Tasks Documents Reports Apps

Contract-Document-22-04-2025-10-34-44-8254.docx 1.0

Contract Details

Contract No.: ITCON20240047

Contract Date: Tue Apr 22 00:00:00 UTC 2025

Contract Amount: 1500000

Contract Expiry Date: Wed Apr 23 00:00:00 UTC 2025

2 Investment

Subject to the terms and conditions of this Agreement, the Investor agrees to pay the Investment Amount to the Company within three (3) business days. The Investment Amount shall not be repayable.

3 Delivery

3.1 The Company and the shareholders of the Company (the "Shareholders") shall notify the Investor of any Subsequent Investment or a Change of Control. "Subsequent investment" means any equity financing round made with respect to the Company after the date hereof and "Change of Control" means any transaction or series of related transactions in which one or more persons (acting jointly), directly or indirectly, acquire more than 50% of the outstanding share capital or of the business of the Company, including by way of reorganization of the Company (e.g. by way of merger or spin-off) or disposal of all or substantially all of the assets of the Company.

3.2 Without undue delay after the Investor has been notified of a Subsequent Investment or Change of Control, the Shareholders and the Company shall procure that (i) the share capital (Stammkapital) of the Company is increased by way of an effective cash capital increase (effektive Barkapitalerhöhung), excluding the preferential subscription right of then existing shareholders, and a new share in the Company with a nominal amount calculated in accordance with section 3.3 or 3.4, as applicable, is issued and (ii) the investor is permitted to subscribe for such newly issued share in the Company at par ("Delivery"), and the newly issued share in the Company, the "New Share".

3.3 The nominal amount of the New Share shall correspond to the Investment Amount divided by the price per EUR 1 of the share capital of the Company issued in the Subsequent Investment or the price for EUR 1 of the share capital of the Company agreed for in the Change of Control, in each case of the highest share class, provided that if the (pre-money) valuation of the Company in the Subsequent Investment or the Change of Control is greater than the Par Amount, the Investment Amount shall be divided by the following amount: Cap

AI Assistant

List the key contract clauses and recommendation to

Key Contract Clauses:

1. Investment Amount and Non-Repayable Nature: The Investor shall pay the Investment Amount to the Company within three (3) business days, which is non-repayable.
2. Delivery of New Share: The Company and the Shareholders shall procure Delivery without undue delay if no Subsequent Investment or Change of Control has occurred.
3. Company Warranties: The Company warrants that it is a validly existing corporation under Austrian law, has the power to conduct its business, and also represents and warrants that it has the corporate power to execute, deliver, and perform its obligations under the Agreement.
4. Subordination of Investor's Claims: Any claims or demands of the Investor under or in connection with this Agreement shall be subordinated (nachrangig) according to Art. 67 of the Austrian Commercial Code.
5. Confidentiality: Parties agree to keep strictly confidential all information obtained in connection with the negotiation and execution of this Agreement.
6. Governing Law and Jurisdiction: The Agreement shall be construed in accordance with the laws of the Republic of Austria, except as otherwise noted.
7. Amendments and Supplements: Any amendments or supplements to this Agreement must be in writing and sent via email.

Ask a question about these documents



Thank you
from Crest Infosolutions LLC

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www.crestsolution.com

