greenform Nova

Product brochure

BUSINESS PROCESS MANAGEMENT ON A DOCUMENT MANAGEMENT FOUNDATION

Proven process automation, built on documents you can trust.

Most workflow tools treat documents as attachments. GreenForm Nova starts with a full document and records management system, then automates the processes that run on it. Every form, approval and customer conversation is filed, versioned, searchable and audited from the moment it is captured.

HOW NOVA IS BUILT

Engage	Shared Inbox across seven channels, conversation flows, customer portals
Automate	BPMN process engine, digital forms, approvals, timers and escalations
Capture	Scanning, OCR, barcode filing and SmartSense data extraction
The foundation: document and records management	Metadata, versions, permissions, audit, file plan, retention

Documents first

Every process reads from and writes to a governed repository, so there is one version of the truth and nothing lives in email or on desktops.

Proven process engine

A standards based BPMN engine runs approvals, routing, deadlines and escalations, with full history on every case.

Compliance built in

File plans, retention, legal hold and approved disposal come standard, with no separate records licence.

Unlimited
users, with no per user fees

Included
implementation, in one monthly fee

99.98%
uptime SLA on our managed cloud

Your choice
cloud, self hosted, storage and AI

Document management at the core

A complete document management system sits underneath every form, process and conversation in Nova. Your content is controlled, findable and auditable before a single workflow is switched on.

Organise

Folder hierarchy with drag and drop, typed metadata schemas and links between documents, folders and business records.

Find

Full text and metadata search with saved views. OCR makes every scanned page searchable.

Version

Every replacement creates a new version, and earlier versions stay available.

Control

Viewer, Contributor, Editor and Admin access on folders and documents, on top of role permissions.

Audit

Every upload, view, download, change, move and restore is recorded with the user and time.

Protect

Recycle bin with restore, and exact and near duplicate detection on upload, set to warn or block.

Capture paper at the source

- Scan from TWAIN or WIA desktop scanners, or a phone or webcam
- Batches split automatically by barcode sheet, blank page or page count
- OCR with a choice of engine, including fully self hosted options
- Barcodes read on scan, and pages filed against the matching record
- SmartSense extracts fields and tables, with human review

Store it where you choose

- File stores and storage zones per tenant
- Local disk, network share, Azure Blob Storage, Amazon S3 or your own storage
- In browser preview of common document types
- Storage usage reporting
- Knowledge workspace with AI search and answers grounded in your own documents

Full records lifecycle, included as standard

No separate licence

1 File plan
Series and document types, imported from Excel and versioned.

2 Register
Unique reference numbers and printed barcode labels.

3 Track
Scan to move, box, issue and return, with a permanent log.

4 Retain
Disposal authorities, legal hold and approved disposal batches.

5 Migrate
Legacy import with dry run and checksums, and open exit export.

Records cannot be deleted. Every change is kept in a field level history, disposal certificates are issued for every batch, and records can be transferred to an archives repository.

Processes that run on your documents

Because the repository and the process engine are one platform, documents start work, travel with it and are filed when it ends. Nothing is copied between systems.

ARRIVES Upload, scan, email or form → **TRIGGERS** Folder or metadata rule starts a process → **ROUTES** Data extracted, approvals routed → **FILES** Letters generated and filed with full history

BPMN process engine

- Visual BPMN designer and execution engine
- Approvals with Approve or Reject actions that drive routing
- Exclusive, parallel and inclusive gateways and sub processes
- Timers for deadlines, reminders and escalations
- Version manager that moves running cases to a new version
- Activity history and audit trail on every case

Document driven steps

- Start a process when a document lands in a folder or matches a schema
- Email attachments saved to the repository and processed automatically
- SmartSense extraction as a native step, with review before use
- Word templates generate letters and schedules as PDF or Word
- Generated documents saved straight back to the right folder

Digital forms

- Drag and drop designer with 30+ field types, themed to your brand
- Signatures, geolocation, barcodes, tables and line items
- Rules and validation without code, plus live data lookups
- AI Form Builder turns a scanned paper form into a digital form

Inbox and customer channels

- One shared Inbox for tasks, approvals and conversations
- WhatsApp, email, web chat, Messenger, Instagram, Telegram and SMS
- Team queues with availability aware round robin
- Conversation flows that hand over to a person or start a process

AI proposes. People approve.

The Process AI Builder and Solution Builder draft processes, forms and data entities from a plain description. Nothing is built until a person reviews and accepts it.

PROCESSES CUSTOMERS RUN ON NOVA

Supplier invoice processing · Customer onboarding and KYC · Contract approvals · Claims handling · Purchase approvals · Supplier registration · Employee onboarding · Leave requests

Your platform, your rules

Managed cloud

We run it for you

- 99.98% uptime SLA
- Hourly backups replicated between Johannesburg and Cape Town
- Recovery point and time objectives of 1 hour
- Business hours support, response within 1 hour

Self hosted

On premises or private cloud

- Windows Server and IIS, or containers, on SQL Server
- Bring your own storage and your own AI, including local models
- Your identity provider through OpenID Connect
- Data stays in South Africa when hosted locally

Security and privacy

- Two factor sign in, single sign on, LDAP or Active Directory
- Audit logs, login history and per document audit trails
- HTTPS, encrypted secrets and isolated tenants
- Controls that support a POPIA or GDPR programme

Open integration

- REST API with OpenAPI, GraphQL and webhooks
- Live data from SQL Server, ODBC and REST sources
- Connectors for Microsoft 365, Azure, Amazon S3, Xero, Acumatica, Shopify, Google services and more

SIMPLIFIED MONTHLY SERVICES

One fixed monthly fee per process. Everything included.

How it works

Each active process or custom solution carries a fixed monthly fee for as long as you use it. Want another one? Simply budget the same monthly fee per process going forward.

- **No user limits:** never pay per seat
- **12 month minimum term,** billed from month 1
- **No implementation invoice:** it is in the monthly fee

All inclusive

- ✓ **Scoping and development:** we analyse your needs and design the best solution
- ✓ **Show and tells and UATs:** interactive demonstrations and user acceptance testing
- ✓ **Scope adjustments and enhancements** as your needs change
- ✓ **Implementation and training** with hands on guidance
- ✓ **Ongoing support and maintenance,** including updates

Predictable costs | No large upfront investment | Continuous improvement | Add processes any time | Hassle free maintenance

Cloud or on premises: on our managed cloud, hosting is part of the service. If you run Nova on your own servers or private cloud, a separate on premises licence applies, quoted to your needs.

Let us map your first process.

Book a demo and see your own documents and forms come to life.

Contact Meniko

info@meniko.co.za