



Manufacturing Company Unifies Workflow Processes

Industry

- Manufacturing

Company

- 9000 employees
- Over 30 facilities
- Over 1 billion revenues in 2007
- 15 countries

Challenge

- Simplify paperwork of multiple formats without compromising security.

Return On Investment

- Faster document transfers between departments
- Uniform system in place
- Improved approval system
- Regulation compliance



Workflow Process Simplified with Brava!® for EMC Documentum

Organizational Overview

A successful manufacturing company has over 9,000 employees in 30 facilities located in 15 countries. The workflow processes were overwhelming in the Accounting and Service departments, including management of purchase orders, service requests, invoices, and a host of other incoming documents.

A great deal of documentation is stored and managed within the EMC Documentum system so much of the paperwork was already digital. However, hard copies of some documentation were still manually circulated, such as faxed-in purchase and service orders. Employees would make notes and mark-ups on these documents with a pen based on customer or internal comments. Of course, hard copies can and do get misplaced or become hard to decipher because of the handwritten notations—which are permanently on the document once written.

Other factors also came into play. Numerous applications, such as Captiva, Faxination and Acartus, generated the company's orders and invoices in different file and image formats—most notably, TIFF and PDF. What's more, not every employee who viewed a document had authorization to add comments, but in many cases their annotations were required. Finally, approved personnel needed easier access to, and management of, documents that fell under Sarbanes-Oxley compliance without compromising security.

Brava! for Documentum Puts Paperwork In Order

The company's Senior Business & Process Analyst was tasked with finding a more efficient way to handle critical documentation. "Simply put, we needed to simplify our paperwork. So, Informative Graphics' Brava!® was a pleasant discovery for us," he recalls. "In fact, it provided a very easy transition for our employees from paper to digital, and once in place, eliminated our paper-based problems."

Expedited Workflow

He describes the role Brava! plays in accelerating document transfers between Customer Service and Accounting: "Now both departments have a uniform system in place to view and annotate purchase and service orders, invoices and other documents. Customer Service receives almost all of their orders via fax, which Documentum then stores as a TIFF. Invoices are converted to PDFs. Using Brava, Customer Service can easily view either, make annotations based on customer calls or internal comments, and then transfer to Accounting for processing."

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The analyst also found Brava's stamp feature useful. While it comes with stock stamps like "Approved" and "Cancelled," it also allows for custom stamp libraries of simple JPEG files. He created three JPEG stamps to work with their specific processes.

"The Accounting department uses Brava's stamping feature to indicate approved invoices and confirmed purchase orders. Now at any time, an AP or customer service clerk can pull up a document and immediately see its most current status. Considering that we have at least eight people in our AP department and 35 customer service reps in the HVAC department alone, you can imagine how much time is saved by no longer having to hunt people down to make sure they know of an important change or edit."

Compliance & Security

In addition, the company's Audit department uses Brava to securely view and make notes on confidential documents, such as text descriptions of processes, risk control matrices and workflow diagrams. Because Brava's annotations are stored in a separate layer on the source document, users can make notations and markups without needing write-access to the file. This allowed the Tax department to add annotation about incorrect tax status and Accounts Payable clerks to add notes about payment status or to indicate a return. The XML format allowed the analyst to create an automated annotation indicating the current tax status as part of the purchase order workflow.

"Brava's XML annotation layer is a very key feature for us, especially from a compliance perspective. We can secure any document as Read-Only and still allow the user to annotate. This way we can assure auditors that the document of record is unalterable. For example, with faxed orders, the originals are saved as is and Brava saves any annotations in a separate dm_note object. The same goes for the purchase orders, receivers and invoices we archive into Documentum via Captiva and Acartus for Accounts Payable."

Results

With Brava, Customer Service and Accounting employees have significantly shortened lead times to process orders and invoices. As a document viewing and annotation solution, Brava helps the company view and mark-up business-critical documentation and address important compliance regulations. Having recognized that Brava noticeably streamlines daily operations for the Customer Service and Accounting departments, the company's next steps include using Brava as an enterprise-wide solution throughout the company's global offices.