

Case Study: Purchasing's Cost Savings with IntelliChief ECM



These guys are big – and growing successfully.

They're an industry leader in temporary containment tanks, pump, filtration and shoring equipment rental solutions. With operations in the United States, Canada and Europe, they provide rental solutions to a wide range of industries including Oil & Gas, Refining, Pipeline, Environmental Remediation and Construction.

Automation for Growth

With growth comes an evolution of business processes. Adaptations must be made to accommodate new product and service lines, territorial locations and ultimately, mapping for further expansion. Moving to automated documentation capture management and workflow, to assist optimization of processes, becomes a beneficial necessity embraced throughout an organization's operations.

The company is an ideal highlight of this practice. Their move to automation began in **Purchasing**, where requisition and acquisition information management became an identified automation point-of-need. "Our Purchasing department's documentation volume grew expedientially, requiring greater visibility, access and archival abilities for growth management," stated their IT Project Manager. "Realizing this need to automate these processes as a function of our Corporate Asset Management Initiative, we recognized the benefits of enterprise content management (ECM), and sought a system that would configure to our unique and changing processes, and integrate smoothly in our existing enterprise resource planning (ERP) environment," she explained. ***"Our ERP provider suggested IntelliChief ECM as an ideal fit for our expanding needs throughout the company, and an integration environment streamlining document capture, management and workflow in-tandem with our ERP, keeping information current, visible and accessible to those who count on it."***

Accounts Payable Automation

Echoing expansion, the company's next IntelliChief departmental utilization was with **Accounts Payable**. The discovered need was to further enhance invoice processing speed and accuracy as volume mounted. The automation move allowed corporate Purchase Orders to be processed in their ERP and added into IntelliChief's workflow system, with an assist from Quadrant Software's FastFax program, to automate invoice email into their ERP, and match with related transaction documentation managed within IntelliChief. Custom PO forms creation from their ERP-housed information was facilitated with Quadrant's Formtastic application, both provided and supported by IntelliChief.

Branch orders became processed and workflow facilitated with IntelliChief, expediting documentation hand-off between North American and European branches, and headquarters-based AP. ***"We've experienced process improvements and significant cost savings since adding IntelliChief,"*** noted their IT Project Manager. "The visibility gained with IntelliChief-enabled transparency of transactions has provided **Accounting** and **Finance** management's insight for strategic decisions, resulting in improved cash flow management."

Another benefit of AP with IntelliChief has been eliminating shipping of paper documents from the company's branches to the company's HQ. ***"Without producing additional paper-based documentation and incurring shipping expense, we've achieved significant cost savings; it's indicative of IntelliChief's paperless document management abilities for Accounts Payable and other departments throughout the company,"*** commented their Director of Strategic Applications.

IntelliChief is also utilized with internal auditing, providing desktop access to all transactional documentation, organized and searchable by any criteria. This capability is also beneficial with independent audits, providing rapid access by an auditor with a dedicated workstation, decreasing time required per audit, of both company staff sourcing documentation, and auditors awaiting information access for project completion.

To further ongoing cost savings, the company is considering adding IntelliChief's Capture Enterprise, to reduce time involved with manually keying of information into their systems, by automating processing of documents in all formats, facilitating information indexing of barcodes, machine-printed text (OCR), hand-printed text (ICR) and form's check boxes (OMR), with full text and zonal identification, locating and processing data on both structured and unstructured documentation.

Mobility Flexibility

As a progressive organization, they embrace mobile technology, including IntelliChief Mobile, an application facilitating rapid PO creation, requisition and approval among colleagues on-the-move locally and globally, adding convenience with time-savings of AP processes, and providing IntelliChief access to other departments utilizing the system throughout the company.



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Further Expansion Plans

Expanding the 'enterprise' of ECM, the company's **Accounts Receivable** department is reviewing IntelliChief for their contractual documentation and order management automation, further assisting company-wide cash flow. Additionally, the benefits of **Customer Service's** success via access to all client account information in real-time as it's updated in the ERP-IntelliChief integration, expediting each order's fulfillment, are viewed as notable accomplishments.

The company is also conducting discovery for IntelliChief's use in their **Environmental, Health and Safety** department. *"Our EHS operations would benefit from IntelliChief's electronic document storage capabilities,"* stated their Director of Strategic Applications. "Safety briefings and other long-term, auditable documentation is best-suited for electronic file archival and backup, reducing storage cost and increasing security and ease of access to records are needed."

Their **Legal** department also has interest in expanding the company's IntelliChief system within their department. *"Legal recognizes the benefits of automating their records for secure archival and access, as well as internal-external workflow enhancement of supplier and customer contract review and renewal processes,"* their Director of Strategic Applications commented.

To further their insight for reporting and planning, they're also reviewing IntelliChief Analytics, an integrated business intelligence platform to provide complete, real-time visibility to documentation in IntelliChief. The scalable dashboards deliver convenient self-service analytics reporting, visualizing data intuitively with drop-and-drag simplicity. All reports may be regularly scheduled, saved and shared with colleagues for convenient and timely notifications, enabling ability for exploration and action based on insights.

The IntelliChief Technical Services Impact

Implementing ECM configured to a company's specific business processes, creates the ideal automated document management and workflow environment, though it requires diligent discovery and planning to architect a system to optimization. *"IntelliChief's Implementation Team were phenomenal – they took the time to thoroughly understand our ways of conducting business, and how best to automate our processes to suit,"* stated their IT Project Manager. *"The benefits of their diligence payed off in the configuration; we have the system we need."*

Post-implementation, an ECM system's Technical Support Team is vital to maintain optimal system functionality. *"IntelliChief's Technical Support staff are consistently quickly responsive; there whenever we need them, and that's appreciated in a technology provider. They're on it."* commented their IT Project Manager. *"Their System Review Service assures we're receiving the best functionality and value from our IntelliChief system – it's a commitment they honor."*

Contact Us Today

To learn more about how this and other organizations are utilizing IntelliChief and realizing impactful benefits, contact us today:

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