

Brava![®] Helps Manufacturer Improve Accounting Processes and Sarbanes-Oxley Compliance

Vertical Industry

- Manufacturing

Functional Areas

- Accounting
- Customer Service
- Auditing Department

Company Facts

- 9,000 employees
- Over 30 facilities
- Over \$1 billion in revenue in 2007
- 15 countries

Challenge

- Simplify paperwork, in multiple formats, without compromising security

Brava Solution

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

Throughout a myriad of industries, Customer Service and Accounting departments share and collaborate on critical documents, including service requests, purchase orders and invoices. An efficient workflow between the two departments results in shortened lead times to process orders and invoices.

But for one manufacturer, workflow processes and document management were overwhelming its Customer Service and Accounting departments. While a great deal of the manufacturer's documentation was stored and managed within the EMC[®] Documentum[®] system, service orders and faxed-in purchase orders were still being passed around for manual annotation.

Using pen and marker, employees would make notes on documents as they were routed through Customer Service and Accounting. Of course, problems would arise when hard copies got misplaced or handwritten notations became hard to decipher. Also, documents would end up with permanent notations on them—making it difficult to keep original documents unaltered.

Brava for EMC[®] Documentum[®] Puts Paperwork in Order

According to the manufacturer's Senior Business & Process Analyst, "Simply put, we needed to simplify our paperwork. So, Informative Graphics' Brava![®] was a pleasant discovery for us. It provided a very easy transition for our employees to go from paper to digital, and once in place, eliminated our paper-based problems."

Expedited Workflow

Brava provides an easy way to securely share content across the enterprise. Brava can view virtually any format, including office documents, PDFs, image formats (like TIFFs and JPGs) and even CAD drawings. Users can add annotations and stamps to any document, so it is perfect for review and approval cycles. With Brava, Customer Service and Accounting employees have significantly shortened the time it takes to process invoices and orders.

Customer Service can now easily view documents, make annotations and then transfer them to Accounting for processing. The manufacturer's analyst explained, "Customer Service receives almost all of their orders via fax, which Documentum then stores as a TIFF. And invoices are converted to PDFs. Now both departments have a uniform system in place to view and annotate purchase orders, service orders, invoices and other documents."

Using Brava's stamp feature, the Accounting department can indicate "approved" invoices and "confirmed" purchase orders. Now a clerk in accounts payable or customer service can pull up a document and immediately see its most current status. "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," said the senior analyst.

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(Cont.)

Compliance & Security

“Brava’s XML annotation layer is a 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, receivables and invoices we archive into Documentum.”

Ultimately, the manufacturer has a strong commitment to meet Sarbanes-Oxley (SOX) mandates and requirements for financial reporting. Toward that effort, Brava gives approved personnel an easy way to access and manage documents that fall under SOX compliance—without compromising data security.

Results

Brava helped this manufacturing organization eliminate paper-based processes by providing the ability to view and annotate virtually any file type, thus enabling customer service and accounting to work more efficiently and to provide a higher level of service to the end customers. Brava has helped the manufacturer with the processing of business-critical documentation and address important compliance regulations.