PJ Dick builds invoice workflow marvel with ECM Toolbox AP Workflow

CLIENT
PJ Dick

PROBLEM
Previous system no longer supported; needed new functionality and process improvements

SOLUTION
ECM Toolbox AP Workflow with ABBYY and ApplicationXtender

BENEFIT
Increased efficiency; cost savings; process control improvements

EXECUTIVE SUMMARY

PJ Dick is part of a trio of construction companies (including Trumbull Corporation and Lindy Paving) that performs contracting in a variety of markets, such as commercial, heavy/highway, government, healthcare, education, corrections, retail, infrastructure inspection, landfill management and asphalt production. As one of the region's largest construction firms, PJ Dick provides the industry's finest construction management staff to estimate, plan, and build the area's most prominent projects for major universities, hospitals, businesses and sports teams.

PJ Dick credits their success to their culture of partnership. So, when their key technology partner for AP invoice workflow was no longer available, they knew the importance of forming a new partnership right away.

They turned to CASO Document Management (CDM) for help transitioning to a new system they could rely on that could also increase efficiency, lower cost, and provide greater process control.

THE SITUATION

PJ Dick was faced with the dilemma of having an AP invoice workflow system their team members liked, but which was no longer supported by the manufacturer. Though the system was generally held in high regard, it was not without its drawbacks.

There were still some manual tasks that could be automated, such as pulling values from scanned invoices, auto-filling of invoice accounting information, automating tax calculation, applying accounting profiles to multiple invoices, and more. Also, managers were accessing job and equipment financial data on a separate system, which was both inconvenient and time consuming. Finally, the system was putting undue stress on AP Admins who were left handling errors in which invalid accounting information was entered for an invoice.

Nick Coccagna, CIO of PJ Dick, decided it was not only time to migrate to a new system, but also to find ways to improve workflow by streamlining processes.

"Most important for us was to find a solution that would require minimal labor with efficient IT interfaces, accuracy of invoice and accounting data, and rapid throughput," explains Nick.

THE SOLUTION

Caso Document Management (CDM) recommended ECM Toolbox AP Invoice Workflow with ABBYY FlexiCapture for Invoices (scanning software) and OpenText ApplicationXtender (AX) for document management.

The system has numerous advantages over their previous system, in that it requires less labor, ensures accuracy, and speeds productivity.

ABBYY FlexiCapture for Invoices recognizes invoice layout and pulls invoice index values from the image, eliminating manual entry. Invoices can also be received electronically in XML or CSV format and automatically inserted into AX. ECM Toolbox's CAT Invoice Processing module for AX eliminates labor to handle paper invoices for Caterpillar equipment, improves accuracy in invoice index details, and gets invoices ready for processing quicker. Finally, ECM Toolbox AP Invoice Workflow routes the invoices for approvals, with custom rules and Shop PO integration, and sends to their Profitool construction soft-ware within AX for final payment.

CDM also created several customizations to AX to help PJ Dick team members view documents in AX, including modules for Related Documents, Workflow History, Excel Export, Auto Annotations, Condense Multi-Index Rows to single query result row, Default Search Criterias, and Fast Searches for associated documents for Vendor or Job+Vendor.

While the upgraded system was loaded with new functionality and process improvements, there was virtually no learning curve.

"We were able to roll out ECM Toolbox with little to no training. This is because of a combination of the software being easy to use and PJ Dick's team already being familiar with ApplicationXtender from the previous system," explains Stephanie Cristophorou, Account Manager at CDM.

"We saw immediate benefits in efficiency, accuracy and process control," explains Nick. "Our team members – whether they are working from the home, office or are tablet users in the field – love the unique combination of ease of use and the power of information provided to quickly do their work."

"Once we selected ECM Toolbox we have not looked back," adds Nick. With ECM Toolbox AP Workflow, we have a solution that allows us to grow and meets our new needs.

ABOUT CASO DOCUMENT MANAGEMENT (CDM)

CDM has been an innovator in developing practical, cost-effective imaging services and document management systems since 1994. With a management team totaling more than 100 years of experience, they have a proven track record with even the largest commercial and government requirements. CDM offers a full-range of imaging services or a comprehensive custom solution tailored to each company, industry or specific project. They support hundreds of regional and national clients in retail, finance, government, healthcare, education, construction, manufacturing and other sectors. To learn more about CASO Document Management (CDM), call 888.719-0065 or go to www.caso.com.