

BSA Streamlines Invoice Processing with Zia Consulting, Alfresco and Ephesoft

Customer

BSA Limited

<http://www.bsa.com.au/>

Technologies

- Alfresco Enterprise 3.4
- Ephesoft
- Redhat
- MySQL
- Pronto ERP

Solution

- Document Management
- Enterprise Content Management
- Content Capture

Background

BSA Limited (ASX code: BSA) is Australia's pre-eminent domestic satellite and free to air installation company to the broadcast industry and provides high volume technical services to the telecommunications industry, nation-wide. With 1,000 employees and over 1,400 contractors, BSA needed an easy way to maintain and control documentation across its eight national branches.

BSA was looking to implement a document management system to address their immediate needs but also wanted a system that could achieve its longer term goal of delivering a comprehensive enterprise content management (ECM) to help manage document-based business processes within the company.

After evaluating Microsoft SharePoint and other proprietary systems, BSA selected and implemented Alfresco Enterprise because it offered greater usability, scalability, interoperability, and flexibility. With Alfresco, BSA was able to quickly deliver document management capabilities and develop a company intranet at a very low entry cost. More importantly, Alfresco offers rich functionality that allowed BSA to begin developing a broader ECM strategy and create an accounts payable invoice approval solution.

Solution

BSA selected ZIA Consulting, a platinum Alfresco and Ephesoft partner, to develop, pilot, test and implement an integrated Alfresco and Ephesoft solution for its accounts payable department. Zia consultants worked with BSA to understand their accounts payable process and develop automated workflows to speed up approvals and processing. Using the out of the box features in Alfresco and Ephesoft, Zia was able to quickly build a solution that leverages rules capabilities and custom workflows.

Results

- Automated the accounts payable invoice approval process
- Developed flexible workflows
- Integrated Alfresco, Ephesoft, Pronto ERP
- Incorporated OCR extraction of invoice data
- Reduced invoice processing time
- Improved employee productivity

Zia worked with BSA to implement Ephesoft to manage invoice capture and create searchable PDFs with metadata tags. To do this, invoices are scanned, emailed or uploaded into the Ephesoft system which performs OCR extraction of the invoice data. Using the CMIS standard, the data and all metadata tags are exported to an Alfresco repository. Once in the Alfresco system, a workflow begins by triggering an email in Microsoft Outlook with the document URL to the accounts payable department. The invoice is then reviewed; commented on; and additional information can be added as appropriate before final approval.

ZIA helped integrate Alfresco with BSA's ERP system from Pronto via Web-scripts. Once an invoice is approved it is turned into a Pronto record and moved into the final invoice folder. The invoices can be easily searched using the metadata and stored according to predefined retention policies.

BSA rolled out the new accounts payable invoice solution to over 100 users in the summer of 2011. The current Alfresco repository has over 55 gigabytes of data with approximately 50,000 documents. BSA anticipates the Alfresco and Ephesoft solution will grow as additional modules are developed to automate other document-centric business processes.

Decision Factors

According to BSA, Zia Consulting demonstrated unparalleled knowledge in both Alfresco and Ephesoft. From the beginning BSA felt confident in Zia's ability to deliver a working solution that would meet all its requirements. Zia consultants provided the technical capability to ensure that the implementation would be painless.

With the new solution in place, BSA has automated the capture of accounts payable invoices and associated data to reduce processing times across the entire business. The new system allows invoices to be made available to authorizers with minimal delay speeding up the approval process.

BSA plans to continue expanding its ECM solution to ensure that all enterprise content is managed within the Alfresco repository. The company will be focusing efforts on incorporating Engineering Drawings and eMail management into the Alfresco repository. BSA is also in the process of identifying other areas where Ephesoft can help automate the ingestion of documentation into its ECM system.

"Zia Consulting has been an excellent partner. They understood our needs and provided technical resources to implement our Alfresco and Ephesoft solution. Zia helped ensure that our implementation was a success and we look forward to working with them again on future projects."

Karl Nixon, CFO, BSA Limited

"Zia Consulting has strong expertise in enterprise content management and open source technologies. The great work they have done with BSA demonstrates the value Ephesoft can provide by helping to automate document-centric business processes, improve productivity and reduce costs. With Ephesoft a company can reduce document capture costs by up to 90% compared to proprietary systems and it does not lock you into a proprietary technology stack."

Don Field, CEO of Ephesoft