

EAGLE BURGMANN: Digitally processing incoming mail with NOVO CxP

Supplier invoices processed fully automatically
in DOCUMENTUM and SAP

AT A GLANCE

- **INDUSTRY**

Mechanical engineering – Sealing technology

- **INITIAL SITUATION**

Before the project started, it was already possible to submit emails by post. These were processed by Captiva Invoice. However, a constantly rising number of invoices resulted in a corresponding increase in the workload of all related departments.

- **THE TASK**

To reduce these departments' processing workload and the associated costs using a more efficient solution. In order to cope with the 10 % annual increase in invoices received without increasing the number of staff employed, an accounting process was needed which would process invoices fully automatically.

- **THE SOLUTION:**

Expanding the existing approach to invoice processing, making it possible for suppliers to submit invoices either by post or by email in future. The downstream process for evaluating the content of an invoice would remain the same, using the tried-and-tested OCR scanning process which had been in use for years. The extracted metadata also needed to be passed on from DOCUMENTUM to SAP to ensure efficient processing.

- **THE RESULT**

Within just a few months, more than half of all supplier invoices were being submitted digitally and processed fully automatically, meaning that departments' manual intervention rate decreased dramatically even as the number of incoming invoices continued to rise. Many suppliers were happy to submit invoices by email – a satisfying outcome.

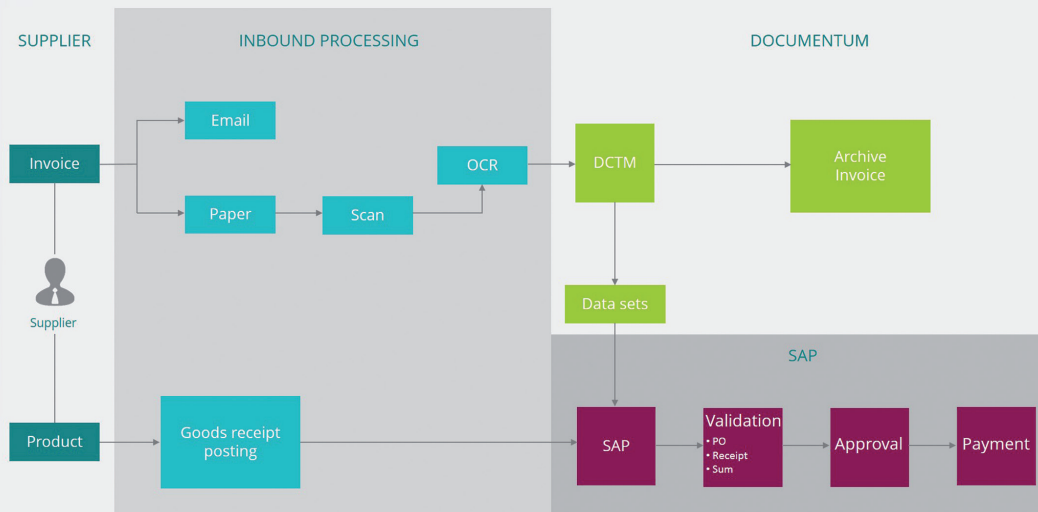
For over 10 years, EagleBurgmann Germany has scanned incoming supplier invoices in its mailroom using **Captiva** and **NOVO Invoice**. An automated workflow then hands over these digital documents to DOCUMENTUM, using a predefined ruleset to assign them to specific departments. This had already proved to be a significant improvement on the old paper-based approach, reducing employees' workloads significantly, but staff in the purchasing and accounting departments still needed to manually check these digitally-distributed invoices against the SAP data sets. This meant that invoices were only approved for payment once they had been checked by each department. Despite the use of automatic data extraction, preliminary checks and digital workflows, this remained an intensive and time-consuming process.

GOALS

Coping with the rising tide of invoices meant finding a verification and accounting system which would process them fully automatically, dramatically reducing the workload of employees within affected departments. In other words, the primary goal was to introduce a "black-box" accounting process which required no manual intervention. inovoo was able to bring to bear its extensive experience in automatically processing incoming mail in order to produce a personalized solution for EagleBurgmann.



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DIGITALLY PROCESSING INCOMING MAIL WITH NOVO CxP

OVERVIEW OF FUNCTIONS

- **AUTOMATIC IDENTIFICATION**
of invoice, credit note, reminder, bill-to party
- **AUTOMATIC EXTRACTION**
of customer and invoice data
- **AUTOMATICALLY INITIATES INTERNAL PROCESSING**
in DOCUMENTUM and SAP
- **REVISION-SAFE ARCHIVING**
of the email and the invoice

THE PROCESS

One essential cornerstone of the solution was **NOVO CxP**, the automatic email processing system. **NOVO CxP** automatically analyzes all incoming emails, assigns them to the appropriate business process and hands them over to the existing input management solution using **Captiva** and **NOVO Invoice**.

During processing, supplier and invoice data is automatically extracted from scanned documents just as it was before – the difference is that digital information contained within email attachments is now also treated the same way. Manual post-processing work is now kept to a minimum, thanks to the system’s high recognition rate.

ACHIEVEMENTS

- Two-thirds of supplier invoices submitted by email
- Nearly 50 % of all incoming supplier invoices meet the requirements for automatic processing
- Over 90 % of these are successfully automatically processed
- Automated (and therefore much more efficient) processes, from ordering to accounting
- Clear, standardized, transparent business processes
- Less manual processing work for purchasing and accounting staff, resulting in a significant workload reduction
- Better use of, and greater synergy between, existing IT platforms
- Revision-safe long-term archiving
- Green IT: Less paper used

And it’s not just EagleBurgmann that benefits from digitized mailroom processing. Its customers now also have the opportunity to optimize their own invoice generation and submission processes.

THE RESULTS

Introducing “email invoicing” with **NOVO CxP** made it possible to process two-thirds of all invoices received each month entirely through the digital invoice workflow. The previously-established “Scan” workstep, as used for paper-based invoices, was entirely eliminated. Instead, all that was needed was to scan the last third of the paper-based invoices in the mailroom and prepare them for digital processing.

From there, the process is the same one that has been used for years, but with a number of optimizations:

NOVO Invoice works with **Captiva** and an optical character recognition (OCR) system to read out the required invoice data (metadata) and check the extracted data against the list of open SAP orders. For the rest of the process, **DOCUMENTUM** hands over the extracted invoice data,

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KLAUS PREITSCHOPF
EagleBurgmann

*"Precisely optimized processes, high flexibility and the ability to use our existing **NOVO Modules** further, combined with highly skilled consulting and implementation services – this was the only way we could have coped with the ongoing rise in the number of invoices to be captured and processed. inovoo is our long-term partner in this endeavor."*

THE CUSTOMER

EagleBurgmann Germany GmbH & Co KG
(www.eagleburgmann.com)

With over 70 international subsidiaries and joint ventures, over 6,000 employees and an annual turnover of around 766 million euros in 2014, EagleBurgmann is one of the world's leading seal manufacturers. EagleBurgmann is a joint venture between the Weinheimer Freudenberg Group and the EKK Group in Japan.

inovoo is a highly specialized partner in the fields of email management, scanning solutions, multi-channel management (customer dialog, customer correspondence), process automation and mobile solutions. We supply our customers with products and solutions covering input management, output management and everything in between – and all from one source. This way, we guarantee 100 % integrated, efficient solutions for all channels, including traditional mails and faxes, email, web and mobile end devices. The result: highly-efficient automatic processing.

including the invoice date, the sum, the invoice number and the supplier data, to SAP for further processing using the newly-introduced automatic accounting system. SAP automatically checks whether the requirements for automatic processing have been met: the order must have been generated based on a purchase order (PO) from the SAP system, and a product receipt note corresponding to the order must have been recorded. As long as both of these requirements have been met, the invoice sums are checked to ensure they match. If even one of these rules has not been met, the invoice is transferred through the workflow to the purchasing department for manual verification. The invoice is only automatically processed if it meets all requirements in full. Finally, all that remains is for the accounting department to approve the payment. All other worksteps are carried out within the system.

Finally, the workflow approves the invoices for viewing by authorized departments. These invoices already exist within DOCUMENTUM as PDF/A documents along with their associated emails. The invoice documents are stored in a revision-safe format, meeting the standards set by auditors and financial authorities.

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