



A Case for UnForm Automation Solutions

Company: **The EWIE Group of Companies**

EWIE Group of Companies and its subsidiaries are global leaders in commodity management services spanning cutting tools, abrasives, special tools, industrial supplies and chemical management services with over 40 years of experience. With a global presence in 12 countries, our services help customers with green field projects to spend and utilization standardization.



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Project Lead: Linda Wright, ERP Manager
ERP: Infor Distribution SX.e

The EWIE Group of Companies and UnForm's Accounts Payable Automation Solution

The EWIE Group of Companies had previously implemented an AP Automation solution with the goal of processing more transactions without having to increase staff. After becoming dissatisfied with the product and support, they began a search for an alternative solution. The EWIE Group of Companies' positive experience with UnForm Print Management lead them to review and ultimately purchase additional UnForm components for both Data Entry Automation and Document Archiving and Management. Per Linda Wright: "We based our decision on the affordable price as well as our prior good experience with Unform for printing. We implemented Archiving and Image Manager in the same project."

When asked to describe the implementation process, Linda shared the following:

We had some initial challenges with the software configuration because of a decision to locate the solution in the Azure cloud site with the UnForm components split across multiple servers. Unform was very good at helping us get through the issues and get the site up and running. As part of the implementation process, we converted around 5 million documents from 2 legacy document archives, which took about 1 month to complete. Unform helped us create the conversion process that we executed to move the documents into UnForm.

Training on Image Manager Job Definitions for AP invoices was slow going at first. There was a steep learning curve on creating job definitions and fine tuning them for the variations encountered in individual documents received. It took a long time to learn all the little nuances to really make the jobs



work smoothly. After several weeks, we finally got to the point where we could create job definitions on our own. We now have 3 people with experience and can now add a new job definition in under 15 minutes. We have had consistently good response from UnForm Support whenever we enter a ticket for help when we encounter a new challenge with the invoices.

How have you measured success?

We currently have 145 vendor job definitions for AP Invoices, which comprises all vendors who send over 200 invoices a year. We are now processing 40% of our AP invoices through the automated process totaling approximately 10,000 invoices a month. We also track how many documents go through Image Manager touchless, meaning the job processed with no human intervention. Our AP invoices are about 65% touchless. The most common cause for invoice documents to fail touchless processing is part/product number validation failure. To simplify the correction process, we added product number validation during Image Manager processing. This prevents invoices from failing to load in Infor Distribution SX.e because of an invalid product number which takes many more steps to correct vs. correcting it in Image Manager prior to submitting through APEGE.

Additionally, we have created queries to monitor Image Manager Processing. The following chart shows the results for the month of January. We are currently working on a project to export our activity from Unform Archiving and Image Manager to an SQL database to provide a dashboard of analytics for other departments to track activity.

| Row Labels | Sum of Touchless | Sum of Touched | Sum of Total | % Touchless |
|---------------------|------------------|----------------|--------------|-------------|
| Checks Remittances | 3352 | 0 | 3352 | 100% |
| Cust Shipping Doc | 5457 | 1357 | 6814 | 80% |
| Customer PO EDI | 7272 | 2 | 7274 | 100% |
| Customer Remittance | 9 | 2 | 11 | 82% |
| Trade Invoice | 6424 | 3389 | 9813 | 65% |
| Vendor Ack | 1842 | 152 | 1994 | 92% |
| Vendor Shipping Doc | 1728 | 6567 | 8295 | 21% |
| Vendor Statement | 40 | 43 | 83 | 48% |
| WT Shipping Doc | 362 | 54 | 416 | 87% |
| Grand Total | 26486 | 11566 | 38052 | 70% |

Have you utilized the data capture and data entry automation functionality for other business purposes?

Yes. We currently use Image Manager for the following:

Outbound AP Check Remittances are generated as PDF's and emailed to vendors, and auto archived through Image Manager.



Inbound AP Invoices are auto archived and converted to EDI810 for entry in Infor Distribution SX.e using Image Manager. Our jobs also validate the PO, the vendor number, and the product numbers on the line items.

Inbound AP Vendor Statements are auto archived in Image Manager with an email alert sent to AP clerk to let them know there is a new statement to review.

Mexican Government issued XML invoices from vendors are auto archived using Image Manager.

Inbound Customer Remittances are auto archived and converted into EDI820 lock box files and processed via Infor Distribution SX.e ARELI cash application functionality.

Customer Proof of Delivery documents are auto archived via Image Manager.

Inbound Customer Purchase Order PDF files are auto archived and converted via Image Manager into order XML files which are then processed using the Infor Distribution SX.e order create API to automate entry as new orders/quotes.

Inbound Vendor Order Acknowledgement PDF files are auto archived and converted into EDI855 files and processed via Infor Distribution SX.e EDEPA to automate entry.

Vendor Proof of Delivery documents are auto archived in Image Manager.

Warehouse Transfer Proof of Delivery documents are auto archived in Image Manager.

EDI Human Readable PDF copies for inbound documents are auto archived in Image Manager.

Infor Distribution SX.e Daily, Monthly and Year End Trial Balance reports are auto archived in Image Manager.

The ability to create Custom Web Forms has also proven particularly useful. We have created our own Document Query form to simplify how users search for documents in the archive. This includes the ability to look up vendor and customer numbers in Infor Distribution SX.e using API calls. We've also created our own Document Upload Webform to simplify how users add individual documents to the archive. The Webform includes validation of key data in Infor Distribution SX.e such as customer/vendor number, order/PO number. This also standardizes the document features such as ID, Title, Categories.

Would you recommend and endorse the UnForm solution?

Yes, we would recommend and endorse Unform printing, archiving and image manager.