

DocSavi™ Solutions & Usage

Case Studies

CM Mitchell Consulting currently has several customers who are at various stages of the implementation process. Outlined below are two case studies that show the numerous advantages and benefits of implementing DocSavi™, and how this process works.

Case Study #1

Mid-Size Financial Institution

Status: Fully Implemented

Goals:

1. Improve the service provided to its credit union partners by providing real time access to their loan documentation, reducing the likelihood of losing them as a funding source.
2. Provide timely access to supporting documentation of servicing financial transactions.
3. Simplify the management process of loan applications, and those in its current portfolio.

Issue: Oracle eBusiness Suite contains attachment functionality, which supports the storage and retrieval of images from within the Oracle forms. Typically, these images are uploaded into the Oracle database. However, storing the images in the Oracle Applications database creates a silo of information that is not accessible from other applications and significantly increases the size of the database and reduces performance.

Solution: This issue was resolved by implementing the FileNet P8 ECM Solution, while providing seamless integration and access from Oracle Applications using supported methods. The DocSavi™ Solution automatically identifies the images and attaches these to the appropriate transactions in Oracle. This allows not only the accounting user to view the images from within Oracle Applications, but supports the appropriate usage of these documents throughout the company.

"I am impressed with the efficiencies gained by the workflows provided by CM Mitchell Consulting using the FileNet P8 platform. The new ECM solution coupled with the new Web application has dramatically improved the quality and timeliness of the service we provide to our financial institution partners."

*- Stephen R. D. Thompson, Chief Technology Officer - EVP Support Services,
Centrix Financial, LLC*

Implementation Benefits

1. **Access Images without leaving application:** All Oracle authorized users see images of supporting documents without ever leaving the Oracle Applications systems.
2. **Availability of Supporting Documents:** The ease of availability of supporting documents is crucial to support compliance with Sarbanes-Oxley requirements to provide adequate support for accounting transactions.
3. **Upgradeable System:** The system is designed to be upgradeable as Oracle or FileNet P8 upgrades independent of each other.
4. **Image Link:** Additional images can be easily linked using the framework via configuration changes for any of the Oracle application modules.

Implementation Experience: DocSavi™ was implemented on time and under budget as part of the initial rollout. The user requirements were simple – make images appear in Oracle Applications using attachments functionality! The innovation was the understanding of both Oracle & FileNet P8, to support the development of the infrastructure to deliver this solution. *This customer was spending nearly \$2 million a year on shipping costs. By implementing the DocSavi™ Solution and utilizing the FileNet P8 Platform, they were able to cut the shipping costs to virtually zero, while improving productivity.*



DocSavi™ Benefits:

- No required customizations for Oracle forms for ease of support & upgradeability.
- Automated use of Oracle native attachment functionality (the Paperclip) requiring no additional end-user training.
- Works with all Oracle line-of-business modules including Finance, HR, Manufacturing and Projects.
- Integrated with leading document capture solutions such as Kofax & AnyDoc Software.
- Integrated with leading Enterprise Content Management solutions, such as IBM FileNet, Oracle ECM, & Hyland OnBase.



This CMMC implementation
won the
2004
FileNet
Innovation

Case Study #2

Documents at the touch of the "paperclip" for Oracle E-Business Suite users.



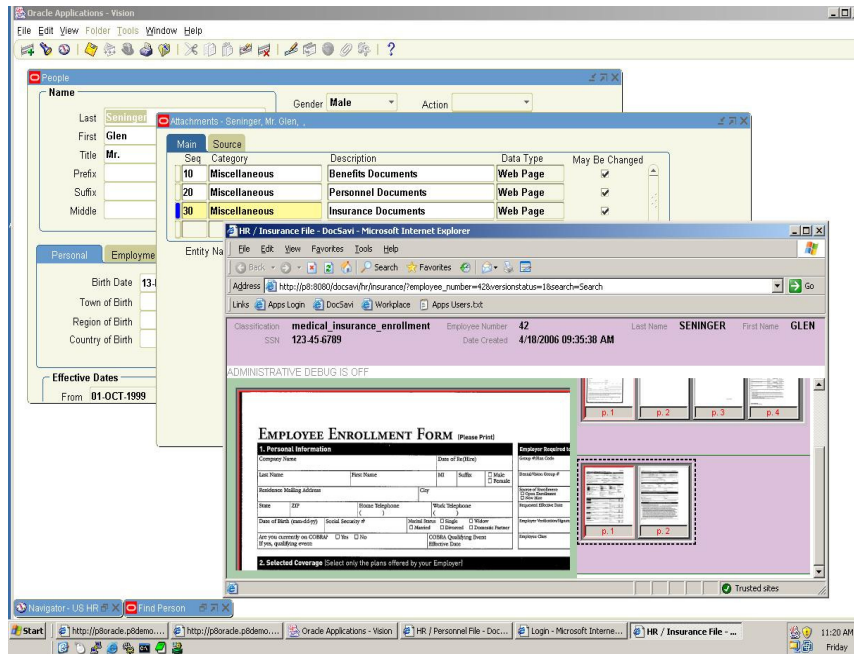
Large Copier Company

Status: Implementation Underway

Goals:

1. Centralize the Invoice processing throughout various geographical locations to reduce intercompany mail & loss of invoice documents.
2. Automate the entry of Invoices by utilizing Optical Character Recognition.
3. Automate the approval process of the invoices.
4. Access invoices from within Oracle E-Business suite.

Issue: Significant time is spent receiving, approving and entering invoices from the various locations. This also results in invoices being lost, mis-filed, etc. during the various processing stages.



"CM Mitchell Consulting utilizing File-Net P8 gave us a solution that really extended our Oracle E-Business Suite capabilities and also met our enterprise needs for information management."

- Mark Oleksik, EVP & Chief Financial Officer, **Flatiron Financial Services Inc**

Solution: Use the DocSavi™ Solution in conjunction with AnyDoc™ CaptureIt & AnyDoc™ Invoice to support the centralized processing of invoices, and the automatic matching to purchase orders. Auto-load the invoices into the Oracle E-Business Suite using a standard Oracle API, allowing the ERP software to follow standard processing rules. Utilize Oracle Content DB & the above listed integrations to automatically link the images to the Oracle transactions for easy access.

Implementation Benefits

Streamline Automated Invoice Processing

1. Use multifunctional devices at remote locations & centralize data at the corporate office.
2. Eliminate manual invoice entry.
3. Automate Invoice approval process using Oracles' Approval manager.
4. Allow access of images within applications using standard Oracle security structure.

Implementation Experience: DocSavi™ expanded upon the AnyDoc software capabilities to support auto-matching to purchase orders. Additional modules of the DocSavi™ Solution were used to auto-create invoices within the Oracle E-Business suite. This solution utilized the Approval Management Engine, a new functionality of the Oracle E-Business Suite. From within the invoice approval email messages, links to the images were provided to support their approval. Additionally, month-end reports were able to be sent from Oracle EBS to Oracle Content DB.

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ORACLE CERTIFIED PARTNER

OnBase

FILENET

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