

Enterprise Content Management



Company: EE Cruz Co., Inc.

Industry: Heavy Highway / Civil

Construction Services: A heavy civil construction contractor with utility and highway, transportation, infrastructure, deep foundation, and bridge and geotechnical projects.

Corporate Headquarters:

New York, NY

Territory / Locations: offices in New York, New Jersey and Maryland

Client Information: EE Cruz is a heavy highway and union contractor which self-performs the majority of the work on its projects. Over the course of two decades the company has broadened its focus from tunnel and transportation to foundation and water treatment projects.

- Founded in 1984
- 500 employees
- 400-500 payroll checks per week
- 1,500 invoices per month

Software Applications: eCMS, Accounts Payable, Accounts Receivable, General Ledger, Purchasing, Equipment Accounting, Job Cost, Human Resources, Payroll, eForms, Business Intelligence and Analytics, Enterprise Content Management, Human Resources Self Service, User Defined Columns, Integration Suite and HRSS Integration

Technology Environment:

Cloud-based, Hosted eCMS

"After seeing the amount of time and costs being saved, we looked into other ways to utilize eCMS and its ECM applications in addition to A/P Invoice Processing. We automated auditing, used electronic filing for payroll, human resources, POs, CORs, subcontracts, insurance and more. The benefits have been tremendous and rewarding."

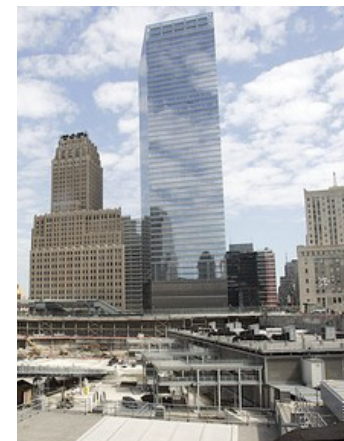
— Lisa August, Accounts Payable Manager/ERP Administrator, EE Cruz Co., Inc.

Challenge: EE Cruz efficiency and growth was being stymied by its employees' inability to access critical information. Data was trapped on paper, making it difficult to share, easy to lose and bogged down in a myriad of manual processes. Perhaps the organization's greatest set of challenges was the automation, standardization and streamlining of its A/P invoice processing workflow. As it stood, Project Managers would have to come into the main office from the field to sign A/P invoices and the distance between job sites and the main office often was significant. Attempts to streamline the process included the main office staff sending original invoices to job sites through carrier services and mail. Although this reduced the driving time and the time out of the field for the Project Managers, it did not solve the problem. Packages were lost, timely delivery was difficult to achieve, tracking of what was sent and what was yet to be done created frustrations, incorrect or inaccurate documents were sent and signed, and so on. The original paperwork was bad enough, but EE Cruz's new workflow created more documentation and the nightmare began as copies of copies were made to keep track what was sent to the job site and what was to come back. The only thing that was clear was that EE Cruz had to do something in order to improve operations, financials, customer satisfaction and employee productivity.

Solution: EE Cruz implemented eCMS v.4.0 ERP solution to automate key business areas, allowing more users with system access to take advantage of the functionality and data that reside within. EE Cruz's objectives were to connect field operations with the office, and integrate departments and key stakeholders with automated workflows and seamless data exchange. They used the eCMS Imaging Application to capture and store electronic documents, then archive and assign them to specific business processes within the ERP. EE Cruz also leveraged the Workflow Application to streamline the A/P invoice approval process. Through tests, training and business process re-engineering, EE Cruz implemented the full suite of eCMS Enterprise Content Management. Documents were imaged by the A/P department with available backup documentation and the office administrator at the job site could review codes, missing documents, POs, etc. Then, PMs approved or declined entire A/P batches, while their signatures were added and hardcoded in the system upon approval before images were sent back through the ECM system to the main office. The new system showed immediate benefits but more could still be done. Filters were added so PMs could sort by vendor, date, invoice number, etc. Codes and field access to the eCMS ERP also enabled invoices to be sent back and forth internally and with outside parties. Additional functionality such as the ability to add notes, place images or invoices on hold, lookup approvals, monitor invoice status, and set up timeout notifications and reminders were included for incremental improvements and gains.

Results:

- Automated manual, labor-intensive processes with Imaging and Workflow applications, including AP invoice processing, auditing, billing, reconciliation, vendor information management, employee records management, payroll processing, HR information, subcontractor management, equipment files and purchasing
- Decreased turnaround in approval processing so that vendors get paid in a more timely fashion
- Increased productivity and freed up time for employees to take on additional projects and tasks
- Created much more efficient flow of information so that things are not lost or delayed
- Reduced paperwork by 20% (even more with the auditors pulling their own image)
- Processed 30% more transactions monthly (from 300 to 500 invoices/month)
- Saved money in travel, postage, storage space (up to \$4,000 annually)



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