

Bluebonnet Electric Cooperative

With Perceptive Content from Lexmark, Bluebonnet was able to centralize and streamline its AP process. Electronic workflow reduced the need for paper copies; long-term storage was also reduced, as paper invoices can now be destroyed after three months. Since deployment for AP, Perceptive Content has been extended to contract management and fleet management.

Challenge

Making sure operations are as efficient as possible is especially important at Bluebonnet because, as a cooperative utility, it is owned by its members – the people it serves. The co-op had been using a document management solution in its accounts payable department. But integration with SAP, the cooperative's ERP system, proved difficult.

A reputation for excellence

"Our existing solution was cumbersome to manage and even more cumbersome to extend to other departments," explains Michael Chohrach, project manager at Bluebonnet. "When we ran into problems integrating it with our SAP applications, we decided it was time to look at other options."

After evaluating several solutions, Perceptive Content rose to the top of the list. "The folks at Lexmark gave us a live demonstration," Chohrach says. "They configured the demo to use our system, so we could see how simple it is to link documents to SAP information.

"I sat down with the engineer, who actually had me do a lot of the set up. I was impressed by the ease of use and the willingness to prove the success of their product. I also knew Lexmark's reputation for great customer support, so Perceptive Content became the obvious choice."

Solution

Taking full control of a user-friendly solution

Chohrach and a colleague attended Perceptive Content administrator training, then began the AP design phase with support by phone from Lexmark.

"There were a lot of good suggestions made – things we just hadn't thought of – based on best practices from all the AP implementations Lexmark has done over the years," notes Chohrach.

Chohrach and his team identified 10 document types, plus the indexing scheme and document keys that would be linked to the SAP system. Approval workflow was designed with 10 different routes, reflecting the needs of individual business areas.

Meet Bluebonnet Electric Cooperative

With more than 11,000 miles of line and 80,000 meters, Bluebonnet Electric Cooperative serves residents of 14 central Texas counties.

- ▶ **Counties served:** 13
- ▶ **Founded:** 1939
- ▶ **Focus:** Electricity utilities

Products in use: Perceptive Content

Integration: SAP

“Once we finalized the workflow, the consultant came on-site for two weeks. We worked together to set things up – a kind of knowledge transfer on the go. By the time he left, I knew almost as much as he did about our setup,” Chohrach comments. “We came up with a few minor tweaks to the system not long after he left. I was able to do most of those on my own without any assistance from Lexmark, which was great.”

Results

Cutting approval time from a month to one week

With Perceptive Content, Bluebonnet was able to centralize and streamline its AP process, cutting approval time from as long as 30 days to just one week. Electronic workflow reduced the need for paper copies; long-term storage was also reduced, as paper invoices can now be destroyed after three months. Check images are imported directly into Perceptive Content from the print queue, eliminating the need to photocopy checks before mailing them. There’s no longer a backlog of invoices and checks to be scanned, and documents from previous fiscal years have been migrated to the Perceptive Content repository. So authorized users throughout the cooperative have fast, easy access to any AP information they need.

Based on the success of Perceptive Content with the AP process, Bluebonnet extended the functionality to include fleet management and contract management. Using his experience with setting up accounts payable, Chohrach handled the implementation on his own.

“Fleet management and contract management were not as complex as accounts payable. You still have to go through all the steps to get the design right and identify your indexes. But once all that’s established, actually configuring the solution is pretty straightforward. It’s very intuitive once you’ve done it a couple of times.”

Reducing storage, extending efficiency

Bluebonnet is also using Perceptive Content to archive attachments from its SAP database, increasing performance. “Attachments were using between 25 and 30 gigs of storage on the SAP database. With an ERP database, that doesn’t sound like a lot, but it was about 10% of the total database size.

“Obviously, we haven’t reduced overall storage. We just redirected 25 to 30 gigs of storage to the Perceptive Content database, but it’s designed for that.”

Overall, it’s been an easy process to use Perceptive Content and extend it to other departments,” Chohrach continues. “It’s very well thought out, especially compared to other ECM products that I’ve seen and used over the years. It doesn’t require a PhD in technology to manage it and utilize it.”

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