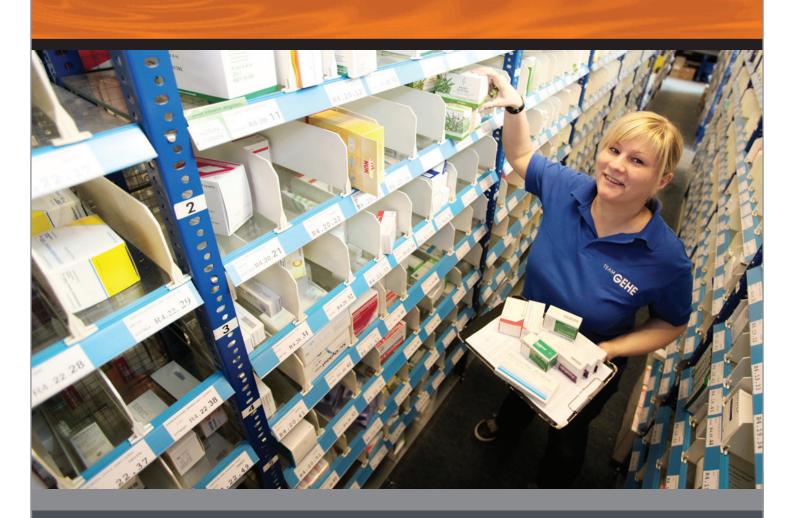**MACRO4**
A Division of UNICOM®Global

GEHE

Macro 4 drives
compliance and process improvements at GEHE

"Macro 4's solution is not just a historical archive but an important operational business system that gives many parts of our organization easier and faster access to the information they need, helping to automate many tasks so that they can be completed faster and more efficiently."

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"The extensive search facilities allow our users to easily filter and search through invoices and delivery notes to find the information they need. Despite the large volume of documents, they can quickly locate invoices and corresponding delivery notes, reducing the overall processing cost and making the task easier and more efficient. Invoicing queries can also be resolved much faster."

Volker Wenzel
Coordinator, Technical Projects, GEHE

GEHE

CUSTOMER CHALLENGE

- Eliminate manual checking of invoices and delivery notes
- Comply with regulations governing retention of company financial data
- Replace old archives from SER with one central archive solution at GEHE
- Support the archiving of SAP® documents at GEHE

SOLUTION

- Document management – archiving and automated document processing

KEY BENEFITS

- Compliance achieved with German GDPdU (principles of data access and auditing of digital documents) regulations
- End user efficiency improved following the replacement of multiple archive systems by a single, central archive solution from Macro 4
- Savings in external consultancy fees achieved as the archive has been flexible and easy to expand by GEHE's in-house IT team
- Central, accessible archive delivered, enabling GEHE to balance workload between employees at multiple sites and avoid disruption by employee absence
- Enhanced employee productivity, contributing to 30 per cent faster invoice approval and offering GEHE scope to benefit from suppliers' early payment discounts

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GEHE is one of Germany's largest wholesalers and distributors of pharmacy products, employing around 2,500 employees at twenty locations.

The company is using the Columbus document and data archiving software from Macro 4 to comply with long-term data retention regulations, as well as increasing efficiency and reducing costs by automating business processes. Over time the Macro 4 system has been expanded to support a wide variety of document types and business tasks. It now assists many parts of the organization and is used as an archiving platform to support GEHE's use of the SAP business software suite.

Fast, efficient invoice processing

Macro 4 was initially brought in to help streamline and automate GEHE's manual invoice verification process, as Mr Volker Wenzel, Coordinator, Technical Projects, explains:

"We process up to 7,000 inbound paper invoices and delivery notes, totalling 14,000 scanned pages every day at our twenty distribution centers. They were being checked manually, which was a laborious, time-consuming task. So we wanted to find a faster, more efficient process that would also allow us to take advantage of early payment discounts offered by some of our suppliers."

A key requirement for the new archiving system was compliance with Germany's strict GDPdU regulations governing data retention of company financial information.

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Macro 4's Columbus solution supports GEHE by indexing all scanned inbound invoices and delivery notes and stores them in a document archive residing on a server within the central data center at GEHE's Stuttgart head office.

The software allows the scanned digital images to be accessed and checked online by a team of approximately 35 finance staff in GEHE's distribution centers. The invoice verification task has been simplified and is estimated to be approximately 30 per cent faster, according to Mr Wenzel:

"The extensive search facilities allow our users to easily filter and search through invoices and delivery notes to find the information they need. Despite the large volume of documents, they can quickly locate invoices and corresponding delivery notes, reducing the overall processing cost and making the task easier and more efficient. Invoicing queries can also be resolved much faster.

"Unlike paper documents, scanned images can be processed remotely by staff in any location, so we're able to spread the workload between employees at different distribution centers. So the invoice processing task is no longer disrupted by staff absence or holidays within specific locations."

GEHE specified during the evaluation process that the archive should be compatible with the company's 4TB EMC Centera storage system, which provides the physical disk storage platform for the archived information. The Centera storage system has since been upgraded to 18TB in order to replace an old archive system and store an additional 125,000,000 documents, which equates to 13TB of data in Columbus.

Columbus is configured to automatically delete documents and volumes from the archive after they have passed the legal retention period, which in turn frees up disk space on the Centera system.

The processes and technologies used for document capture and storage were all approved by independent auditors, to verify compliance with GDPdU rules.

A trusted partner with a focused approach

When GEHE originally began the search for an archiving solution, the company already had a successful relationship with Macro 4, having installed Macro 4's output management solution twelve years previously.

Macro 4 also stood out among the other archiving vendors GEHE evaluated to tackle the invoice processing task, as Mr Wenzel recalls:

"Macro 4 clearly demonstrated how Columbus would meet our specific archiving needs and enhance our business processes – rather than just focusing on general product features and functionality as some of the other vendors did. And of course we already had experience of Macro 4 as a reliable and trusted partner."

GEHE was impressed with the quality of support received from Macro 4 during the implementation phase. The entire project, including the workshop, analysis of requirements, implementation, testing, training, documentation and project management, was completed on time and within budget.

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Expanding the system to reap further benefits

Since the initial implementation GEHE has been able to expand the document management solution in several ways, greatly increasing its overall usefulness. In addition to invoices and delivery notes, the software is being used to archive around 85 different types of reports (a total of 1,200 reports a day for all twenty distribution centers). These reports, which include financial exception reports and goods received listings, are generated directly from the company's in-house ERP systems and distributed by the Columbus output management system.

The company's IT team has been impressed with how easy it has been to expand the Columbus document management system. They have been able to integrate it with GEHE's existing financial application to allow accounts personnel to view all archived documents related to any financial transaction at the click of a button.

Archiving of SAP documents at GEHE

Based on its successful track record, Columbus was selected by GEHE to provide archiving for its SAP applications.

"We needed an SAP document archiving capability to help meet data compliance requirements and to support the efficiency of a variety of SAP document-based business processes," said Mr Wenzel.

"We chose Macro 4 over another SAP-certified solution because we felt it was easy to install and it was a low risk solution that had already proved itself to us. We'd already experienced how easily it could be tailored to improve the performance of individual business processes. And the pricing came in as very cost effective."

The software was also viewed as a solution that could 'scale up' as GEHE's use of SAP and its requirements for document and data archiving expand over time.

Working with Macro 4's professional services team, GEHE took just ten days to integrate the existing Columbus implementation with the SAP business suite, beginning with licenses for 1,500 SAP users throughout the organization.

Initial SAP document archiving applications included the archiving of outbound orders for a GEHE subsidiary based in Austria, with up to 45,000 documents being archived every month.

Another part of the company archives SAP finance and controlling (FICO) documents, including inbound supplier invoices. These are first entered as transactions within the SAP system, before being scanned, indexed and stored within the Columbus archive.

A unique barcode and ID number are used to match the scanned image with the open SAP business transaction and they can then be accessed by authorized users throughout the organization, for swift handling of invoice-related queries.

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A separate application, implemented by GEHE itself, involves scanning and archiving signed software contracts alongside SAP-generated contract documentation within Columbus.

Because the integration of the SAP system with Columbus is achieved via a certified SAP interface, users can access archived documents immediately, directly from their SAP applications.

A 'living' archive and a vital business system

GEHE is very satisfied with the benefits Macro 4 has delivered, as Mr Wenzel explains: "Macro 4's solution is not just a historical archive but an important operational business system that gives many parts of our organization easier and faster access to the information they need, helping to automate many tasks so that they can be completed faster and more efficiently.

"End users can very quickly become productive using the Columbus software, requiring very little instruction. And because it's so easy to use and flexible to deploy we have been able to successfully adapt it to many different purposes, doing most of the configuration work ourselves."

Delivering benefits for the future

Looking to the future, GEHE plans to continue extending and developing the Macro 4 solution to support archiving within its key business processes.

Green IT is a growing concern for the computing industry and GEHE has embarked on a highly successful green IT programme that has already delivered significant benefits for the environment. A key ongoing green initiative is to enhance the paperless office at GEHE's twenty distribution centers.

The company plans to extend archiving to include even more reports and reduce printing costs still further. The archived documents will be made available for convenient 'anywhere, anytime' access by any employee, whether office based or in the field, via the Internet and mobile and tablet devices.

GEHE recognizes that in today's fast moving business environment there is an increasing demand for paperless billing. GEHE is developing strong electronic billing capabilities based on its Columbus archive and plans to exchange a range of archived documents with customers electronically, including EDI (electronic data interchange) invoices and contracts.

"Macro 4's SAP archiving capability has delivered everything we expected. It has helped us to meet our long term retention and compliance responsibilities and we can now access key documents more easily, which has delivered significant process efficiencies compared with moving paper around the company."

Volker Wenzel
Coordinator, Technical Projects, GEHE

MACRO|4

A Division of UNICOM® Global

Macro 4 Headquarters

The Orangery
Turners Hill Road
Worth, Crawley
West Sussex
RH10 4SS
United Kingdom

Tel: +44 1293 872000
Email: market@macro4.com

www.macro4.com

Belgium
Tel: +32 15 74 74 80
Email: market.be@macro4.com

France
Tel: +33 1 79 71 84 50
Email: market.fr@macro4.com

Germany
Tel: +49 89 6100970
Email: market.de@macro4.com

Italy
Tel: +39 2 213 1941
Email: market.it@macro4.com

Netherlands
Tel: +39 20 5206874
Email: market.nl@macro4.com

Spain
Tel: +34 91 443 0220
Email: market.es@macro4.com

Switzerland
Tel: +41 44 723 40 00
Email: market.ch@macro4.com

USA
Tel: +1 973 526 3900
Email: market.usa@macro4.com

About Macro 4

Macro 4, a division of UNICOM Global, develops software solutions that accelerate business transformation. Macro 4's cross-platform enterprise information management solutions make it easy for companies to go digital, personalize customer communications and unlock the value of their corporate content. Macro 4 solutions for application lifecycle management, session management and performance optimization are used by many of the world's largest enterprises to modernize their mainframe applications and development processes. UNICOM Global operates across all geographic regions and offers deep in-house resources and flexible IT solutions to customers worldwide.

For more information on Macro 4 products and services visit www.macro4.com.