



# **A Consentia Success Story**

## **Invoice & Document Processing Services**

---

## About the Client

The Corporation is a leading transportation and midstream service provider that has been serving North America's energy industry for over 60 years. They own and operate an integrated system of pipelines that transport various hydrocarbon liquids including conventional and synthetic crude oil, heavy oil and oil sands products, condensate and natural gas liquids produced in western Canada and ethane produced in North Dakota. The Company also owns and operates gas gathering and processing facilities and an oil and NGL infrastructure and logistics business.

The Corporation's long-range goal is to be the number one choice in North America's energy infrastructure sector, creating long term, sustainable value for those who've come to expect it; to help them achieve that goal, they called Consentia for help.

## The Problem

The Corporation estimated that they have almost 120,000 documents that needed to be processed annually. These documents required imaging services as they were high volume finance documents, and were being handled by staff who would be better utilized on higher value activities. This situation resulted in business inefficiency, invoice processing delays, difficulty in finding documents, making duplicate payments and wasted office space.

The Corporation searched for a partner with the capability to transform their accounts payable processes into an automated system, resulting in lower processing costs, improved controls, improved service levels and higher business intelligence. The corporation was looking for a solution which was quick to implement, dependable, flexible, and cost efficient.

After evaluating a number of data management organizations, the Corporation decided to engage Consentia based on our reputation, as well as our experience building the Corporation's own Imaging Standards and Imaging Procedures. The Corporation liked Consentia's proposed approach which consisted of providing imaging services performed on site in the Corporation's office using Consentia's personnel and hardware, along with sophisticated data management and document processing at Consentia's offices.

## Solution

The Corporation has partnered with Consentia to process their Accounts Payable, Accounts Receivable, P-Card, Vendor On-Boarding, and Journal Entries. Consentia's solution allows us to prepare, image and index all the documents, and then transfer the finalized images with the appropriate metadata to the Corporation's document management system and ERP.

Consentia's imaging activities are completed according to the Corporation's Imaging Standards and Procedures, and include the gathering of index and metadata, imaging and indexing quality control, transitional storage of the records and final verification.

The images of the Accounts Payable, Accounts Receivable, P-Card, Vendor On-Boarding, and Journal Entries documents are processed by Consentia to automatically collect metadata (where automated collection cannot be applied, due to a poor quality original document, manual intervention is provided to enter that data). The resulting images are in PDF format and the metadata (i.e. index values) is provided for input to the Corporation's FileNet and SAP systems.

At the completion of the imaging activities, the documents are boxed, logged and stored appropriately for ease of destruction. This allow for a certificate of destruction to be generated indicating exactly which documents were destroyed.

## Result

Through the implementation of this solution, the Corporation was able to:

- reduce costs,
- have better quality electronic documents,
- reduce frustration for staff members,
- eliminate duplicate invoices,
- have visibility into the number of documents being processed on a monthly (and annual) basis,
- achieve an improved ROI on their use of FileNet,
- achieve improved access to other imaging services through the local (in-office) Consentia presence.

Other business units at the Corporation are leveraging the on-site imaging services solution set-up in their office by Consentia.

Other documents such as Deal Tickets, Truck Tickets, and HR files are now easily scanned and properly indexed in the Corporation's systems using Consentia's staff and equipment.

## About Consentia

Consentia has been helping Alberta businesses and government departments go paperless since 1971. Owned and operated by Albertans, we take great pride in the quality of our work and in our ability to provide turnkey solutions for document management, scanning, data entry, and transcription.

We have provided our products and services to:

- Municipal and Provincial Governments
- Universities and Research Companies
- Energy Utility Companies
- Oilfield Supply Companies
- Oil and Gas Producers
- Pipeline Companies
- Medical Professionals
- Professional Associations
- Retail

