



# YORK International

Manufacturer streamlines global business processes with Adobe® Intelligent Document Platform and the EMC Documentum Enterprise Content Management platform

## YORK INTERNATIONAL

- A Fortune 500 company and one of the world's leading suppliers of heating, ventilation, air-conditioning, and refrigeration (HVAC&R) solutions
  - Revenues: \$4.5 billion
  - Size: 22,300 employees
  - Headquarters: York, Pennsylvania
  - Founded: 1874
- [www.york.com](http://www.york.com)

## INDUSTRY

Manufacturing

## SOLUTION

- Automated Forms Processing
- Business Process Management
- Integration with EMC
- Compliance Reporting

## PRODUCTS USED

Adobe Form Server for EMC Documentum

## IN PARTNERSHIP WITH

EMC Corporation

- The world leader in information storage and management
  - Revenues: 2003 revenues of \$6.24 billion
  - Size: more than 20,000 employees
  - Headquarters: Hopkinton, Massachusetts
  - Founded: 1979
- [www.emc.com](http://www.emc.com)



BearingPoint, Inc.

- A leading global business advisor, systems integrator and managed services provider
  - Revenues: 2003 revenues of \$3.1 billion
  - Size: 15,000 employees
  - Headquarters: McLean, Virginia
  - Founded: 2002
- [www.bearingpoint.com](http://www.bearingpoint.com)



## Company Profile

YORK International manufactures many of the leading heating, ventilation, air-conditioning, and refrigeration (HVAC&R) systems sold worldwide. Given the company's large, dispersed operations, IT staff at YORK headquarters often struggled with the problem of regional technology groups continually creating custom applications. As a result, the company had thousands of costly, incompatible applications that could not be leveraged across the enterprise, substantially increasing YORK's operating costs and making it difficult to track business processes.

To address the problem, YORK is working with systems integrator BearingPoint, Inc. to implement a broad business transformation initiative called VISTA. The initiative includes standardizing on solutions from SAP and EMC to manage core transaction processing and document management. An important component of the solution is integrating the Adobe Intelligent Document Platform with the EMC Documentum Enterprise Content Management platform.

## Challenges Faced

- Gain efficiencies in everyday operations
- Adopt efficient, repeatable digital processes for handling new hire information
- Improve completion of authorization for expenditure (AFE) forms

For YORK, standardizing on enterprise technologies such as the EMC Documentum platform is critical for gaining efficiency in its operations. However, information managed by Documentum is useful only if YORK can enable employees worldwide to easily enter information into the system. "We wanted to standardize on a document services platform that enabled staff to reliably and accurately enter data into the Documentum platform," says Tim Fives, manager of content services at YORK.

YORK offices worldwide use a variety of workflows to process information on new employees. Many departments simply fill out paper forms, which vary from location to location, and route them internally for manual processing by managers and regional human resource (HR) groups. Other departments use custom-built intranet applications with online forms. The lack of standards for completing forms for new employees is problematic for many reasons, including the high costs of managing disparate processes and employees' failing to adhere to protocols for new-hire paperwork.

In addition, authorizing expenditures is a complex process at YORK, involving approval from several managers as well as final processing and tracking by multiple finance groups. Traditionally, the inefficient paper-based AFE process could take weeks or even months to complete, driving up administrative costs and hindering expenditure tracking. The manual workflow also increased the likelihood that information could be misplaced or incorrectly recorded as documents moved across groups and content was keyed into systems. With employees submitting thousands of AFEs annually, YORK wanted to automate form completion, approval, and tracking.

**“With the integrated solution from Adobe and EMC, we can reduce our costs and ensure more consistent business processes worldwide.”**

Tim Fives,  
Manager of content services,  
YORK International

#### RESULTS

- Improved processing and tracking of business documents
- Reduced IT costs by standardizing on an easily managed document services platform for entering information into core systems
- Improved accuracy of information in enterprise applications by eliminating manual data entry and processing
- Adopted more consistent, repeatable business processes worldwide

## Success Strategy

YORK is adopting the Adobe Intelligent Document Platform as a corporate standard for developing online forms for entering information into the EMC Documentum platform. Phase one of the implementation focuses on creating electronic forms to support HR and IT management processes, including those involving the Employee New Hire form and the AFE form. Future document services will support YORK’s manufacturing, product development, and field organization activities.

The intuitive Adobe forms contain built-in calculation and validation features to help ensure that employees enter accurate information. Once completed, forms are saved to Documentum and automatically converted by the system into virtual documents with underlying XML data. The virtual documents are routed to the appropriate managers and departments for processing, with materials tracked every step of the way. “The combined solutions from Adobe and EMC enable us to quickly enter and process HR and finance information in our core systems, and then retrieve it as needed,” says Fives.

## Results

Incorporating the Adobe Intelligent Document Platform into its business transformation initiative gives YORK more control over its global business processes. “The Adobe solutions replace inefficient paper workflows and ad-hoc HTML forms applications with automated, intelligent forms integrated with Documentum,” says Fives. “This aids our compliance efforts because we have more reliable, consistent processes for entering and accessing information about employees and expenditures.”

The Adobe solutions also help YORK consolidate application development onto an easily managed platform. The company’s central IT department can now help regional offices develop intelligent electronic forms processes to streamline business operations in their areas. Previously, remote offices often created their own solutions, making it difficult to ensure corporate IT standards were followed by locations worldwide. By developing applications on the Adobe platform, YORK headquarters staff helps regional offices achieve their goals faster and more efficiently.

Additional benefits of the automated process include reducing costs and errors by eliminating the manual handling of paper and the need to rekey data into systems. The overall reliability of information is further enhanced because the online workflow replaces paper documents that previously could be misplaced or sit idle on employee desktops.

“Streamlining our information and business processes is vital to improving our efficiency,” says Fives. “With the integrated solution from Adobe and EMC, we can reduce our costs and ensure more consistent business processes worldwide.”

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