



BURKHALTER GROUP  
EFFICIENT PROTECTION  
AND ARCHIVING OF  
BUSINESS DATA

TODAY INVOICES AND TOMORROW PROJECT DATA:  
BURKHALTER TECHNICS AG AIMS TO INCREASE THE  
DEPLOYMENT OF ICAS

*"At the beginning of the electronic invoice processing project, I was hoping that the archiving of documents would draw wider interests. That's why I really wanted to have iCAS as it is a flexible and scalable archiving solution. Simply expand the capacity of the storage system and things run."*

Roger Bösch, Finance Director at Burkhalter Management AG



# BURKHALTER GROUP

*The Burkhalter Group is Switzerland's leading one-stop provider of electrical engineering services to the construction sector.*

## BURKHALTER GROUP

**Industry:**

Electrical engineering

**Background:**

Burkhalter Technics AG initially wanted to archive incoming invoices in a legally compliant manner. In the next step, all documents from business projects shall be archived digitally. The whole companies in Burkhalter Group receive around 250,000 invoices from suppliers and partners each year. Until a few years ago, these were processed in a paper form – checked, accounted, booked, authorized the payment - and then archived in folders.

**Challenge:**

Seamless integration into the existing IT infrastructure and flexible expansion if necessary.

**Solution:**

iTernity iCAS, Kendox InfoShare, HP EVA 6400 Storage

## THE SUCCESS AT A GLANCE:



Certificate from auditing company for the legally compliant archiving of all invoices with iCAS



Quick retrieval and provision of original invoices through accounts payable and other departments



iCAS can be expanded flexibly, e.g. for the next big project - the archiving of all project data

## MUCH EFFORT IN THE PAST

"The workflows and searching for invoices in folders caused a lot of effort in Accounts Payable. If a bill had been filed incorrectly, you might have to search it like a needle in a haystack. There was therefore a wish to make these workflows more efficient; especially at our largest company in the Burkhalter Group, the Burkhalter Technics AG," recalls Roger Bösch, Finance Director at Burkhalter Management AG.

*"In this respect, it was clear to us that we wanted to introduce an electronic archive that was also audit-proof. Because this lightens the work of the auditors."*

That's why Bösch, together with Burkhalter Group's central IT department, decided to search a solution for electronic invoice processing, from recording to workflow, and up to document management and legally compliant archiving.

*"The IT requirement was that we should be able to store all data on our recently introduced Storage Area Network of the HP EVA 6400. We did not want to purchase additional hardware – not least also because interface problems during backup need to be avoided",*

says Bösch.



## THE SOLUTION FOR SECURE AND LONG-TERM ARCHIVING

The solution that Burkhalter finally decided upon consists of the main applications AnyDocINVOICE for the collection of paper invoices, Basware Invoice Processing for the workflow, and Kendox InfoShare as document management system. For the revision-proof and long-term archiving of the invoices, iTernity iCAS on the HP EVA 6400 is chosen. The solution concept was created by an IT service provider which specializes in archiving projects.

Now, incoming invoices are scanned using AnyDoc INVOICE. The scanned invoices are then forwarded to the Basware Invoice Processing. This ensures that the invoices are automatically accounted for, sent to the relevant departments and project managers for approval, and then sent back to the accounts payable department. When the invoices have been booked, then they are archived with Kendox InfoShare and iTernity iCAS.

## IMPORTANT: CERTIFICATE FROM THE AUDITOR

*"The efficiency advantages of the whole solution are enormous. In accounts payable accounting, the solution saves immense time when processing invoices. But the bigger advantage is the time reduction in searching for invoices. Within seconds, the employees have an invoice from the archive on the screen," shares Bösch. For this, all incoming paper invoices at the Burkhalter Group are fully indexed. This is also very important for him: "The auditors have certified the archive solution."*

The fact that it is now possible to comfortably and quickly search for information relating to invoices by keyword in the archive has spread quickly within the corporate group - to the point of purchase, for example. In this way, he uses random samples to negotiate with suppliers about the prices at which certain products were purchased in the past year. No wonder that the electronic invoice processing and archiving did not stop at Burkhalter Technics: Currently, 75 percent of all companies in the Group use the system. The rest, if necessary, should follow, according to Bösch.

## MORE TERABYTE OF DATA FOR THE ICAS ARCHIVE

Other departments within the Burkhalter Groups were quickly interested in the archiving project. Bösch:

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The investment could pay off soon. Next, it would be checked at the Burkhalter Technics whether everybody wants to store in Kendox all the data generated in the customer projects and to archive it with iCAS in a legally secure manner: Real estate-related documents for 40 years, other documents for ten years. If it happens, several terabytes of data can quickly come together in the archive. Because this is about all project data – consisting offers and correspondences by post, e-mail or fax, plans, as well as photos that are taken at the customers' sites.

So far, these documents are kept in file systems without a dedicated protection of an archive solution. For archiving, they must be printed out and filed in folders. This has many disadvantages, just like in the invoice processing – it is difficult to edit and search the documents in the archive.



"The electronic invoice processing and archiving was in this respect just a warmup for this large project which affects our core business processes," says Bösch. He is certain: "iCAS is well prepared for this." Not only the archiving solution can be expanded flexibly, it is also highly available at Burkhalter. iCAS runs on a virtual machine under VMware. The company uses vSphere vMotion to ensure the high availability of iCAS, allowing virtual machines to migrate from one physical server to another without downtime during operation.

*"For the invoice archive, this functionality is not that necessary in my opinion. But when it comes to archiving the project data, it is absolutely important that the data is highly available,"*

says Bösch.

## ICAS OFFERS RELIABILITY AND COST-EFFECTIVENESS

From the IT, Bösch only hears positive comments about iCAS. Once implemented, the system only requires minimal administration efforts. It has been running very reliable as well since the beginning. Moreover, iCAS integrates seamlessly into the backup processes of the Burkhalter Group. All directories and files from the iCAS archive are backed up daily by means of incremental backup via Asigra software and replicated again. So far, all backups are kept at the same location. For the future, however, another data center is planned.

An important advantage of iCAS comes into play here: The license costs are based on the net data volume of the output data. There is no additional license cost if the data are replicated on another storage system or backed up. In addition, the existing backup solution can also be used for the archive data, which would not have been possible with other alternative solutions. After all, iCAS has proven to be the most economical solution, not only because of its needs-based licensing model, but also due to its uncomplicated integration into the company's existing IT infrastructure.

## DATA ARCHIVING MADE SIMPLE

iCAS is a flexible middleware for retention management & WORM storage. The solution integrates perfectly into heterogeneous infrastructure landscapes. While you take care of your core business, iCAS reliably protects the integrity and availability of your data in the background.



### HARDWARE INDEPENDENT

The archive intelligence is tied to the software-layer, not to the hardware



### COMPLIANT

iCAS assures regulatory and compliance requirements



### FLEXIBLE

Middleware between your business application and the storage infrastructure



### TAMPER-PROOF

iCAS provides WORM storage, encryption and retention management

## THE CENTRAL PLATFORM FOR YOUR DATA MANAGEMENT



iCAS protects data integrity and availability, even if the underlying storage technology and hardware changes in the future. As a software-defined solution, iCAS lays the foundation for audit-proof data archiving and protects your investments in hardware, software and services.

iCAS adapts to your IT infrastructure and adds compliance, data integrity protection and WORM storage (Write Once Read Many) to your existing systems.



iTernity

WE TAKE YOUR  
DATA SECURELY  
INTO THE FUTURE

We protect your business-critical data. The trust you place in us is our motivation and an investment in the future. The result: more security, less effort, no worries.

Our DNA is archiving, our mission the long-term availability and integrity of all types of corporate data. Our focus is on your challenges, whether data protection, cost pressure, data growth, cyber attacks, lack of time, or complexity – we take your data securely into the future.



## CONTACT OUR EXPERTS

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