

MEETING DEADLINES IN THE FINANCE DEPARTMENT WITH GDOC FUSION™

INDUSTRY SECTOR

Finance

PRECONDITIONS

Finance teams have to pull together a variety of reports, many of which contain sensitive information, often under immense time pressure. They need to focus on producing accurate content and not spend a disproportionate amount of time compiling their documents.

GLOBAL GRAPHICS' PRODUCT

gDoc Fusion

APPLICATION

gDoc Fusion is a multi-format edocument builder application. It's the most user-friendly way to create documents from information in a range of formats by dragging and dropping pages into a single view without prior conversion to PDF. You can have all the documents open at the same time in one view and double-check the content prior to saving your report.

The Finance Director of any organization plays a crucial part in ensuring that all budgetary requirements are met and in contributing towards future strategy. A large portion of the workload is creating reports such as monthly management reports, reports for the sales team, quarterly reviews and strategy documents. At certain points in the year, such as fiscal year end, many staff in the finance team are engaged in this activity. Documents have to be converted into a common format such as PDF so that they can be accessed by other members of staff, distributed easily and archived successfully.

▶ Ian Watt is the Finance Director of Corporation X, a global professional services firm. Part of Ian's role is to regularly produce reports to be presented at board level for use in strategic planning. Some reports are generated directly from the corporate ERP system and many are created using Microsoft Office Excel, Word or PowerPoint or other company specific applications. Other documents he prepares every month are reports for the senior management team and the sales team. These comprise summarised financial statements, revenue analysis reports, resource allocation charts and other non-financial information all from separate source documents.

Increasing productivity

In recent years, as working practices have been tightened by new regulations, the level of reporting has increased. The compilation of these reports is often time consuming and puts the finance team under intense pressure at a time when accuracy of document content is paramount.

Upon completion of an internal audit Ian was tasked with looking at overall efficiency and staff productivity levels. After having completed his report Ian found that one re-occurring problem across the organization was time lost whilst creating reports, particularly when trying to pull together documents from multiple sources in different file formats.

Ian realised that if this type of task could be completed in a more efficient way the productivity of the whole organization could be increased.

Ian keeps an eye on the financial press and he noticed an article in the Financial Times discussing the number of hours in a week wasted in offices by difficult to use software. In this article they compared the ease of use of mainstream consumer products to difficult to use professional products. One particular product that was mentioned caught his eye; gDoc Fusion.

Compiling reports now takes seconds

He downloaded an evaluation copy from the Global Graphics website. Ian found he could use the product very quickly, with no training because the user interface was self-explanatory.

The finance team now use gDoc Fusion for the collation of all their reports. Using a simple drag and drop feature within gDoc Fusion they can view multiple documents in one window pane. Combining the pages from the multiple documents into one master document is similarly an easy drag and drop action so they can merge together pages



in different formats in seconds without prior conversion to PDF. This has increased their efficiency substantially. Reviewing large documents has also become much more efficient using the FlickView to flick through and check electronic pages like the pages of a printed document. Tasks that had previously been very time-consuming and admin intensive were taking only minutes to create, check and circulate.

Internal review and collaboration

When Ian and his team circulate a document for internal review they use the context sensitive text selection feature in gDoc Fusion to highlight text when they want to draw attention to a particular part of their report. They also often add sticky notes to comment on aspects of the document, particularly useful when circulating information to colleagues who may require terms to be explained. At the end of the internal review edits can be made to the text of reports using gDoc Fusion and there is the option to convert the whole document to Word if further edits or rewrites are needed.

Conclusion

Within the finance sector, given the substantial amount of reporting required, the ability to improve productivity gives teams more time to research and prepare report content. gDoc Fusion provided Ian and his team with a quick return on investment and a reliable and efficient way to manage documents. □

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