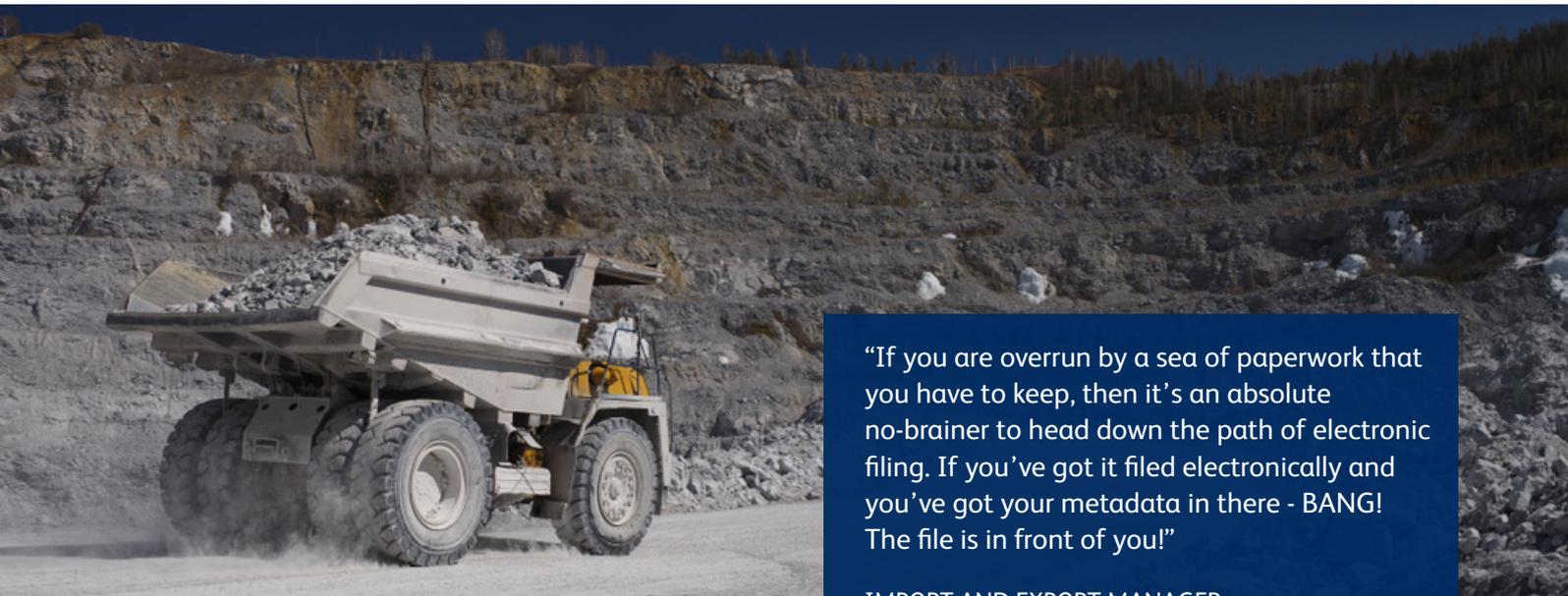


ENGINEERING COMPANY CASE STUDY

Our customer, a global engineering company, exports its products and technology for use in mining, oil and gas and general industrial markets around the world.



“If you are overrun by a sea of paperwork that you have to keep, then it’s an absolute no-brainer to head down the path of electronic filing. If you’ve got it filed electronically and you’ve got your metadata in there - BANG! The file is in front of you!”

IMPORT AND EXPORT MANAGER

ANALYSIS

The business generated huge amounts of Import and Export paperwork as part of the shipping process which it was required to keep for up to seven years. This had a serious impact on space and storage.

Within the office, the team stored 120 lever arch files, representing just two months of filing. All other paperwork and documentation had to be stored in wooden crates in a warehouse. When they needed to locate a file that was stored in the warehouse, it could take someone up to a week to find it.

They knew that they would eventually run out of space and needed to find a better option for storing and managing their documents. They also wanted to improve document access and be able to find files quickly and easily when required. All of which would help to improve accuracy and productivity too.

Another supplier recommended that they should speak to YourDMS about a Document Management system and how it could help solve their challenges.

YourDMS SOLUTION

YourDMS proposed implementing an Invu Document Management system and Abbyy FlexiCapture OCR technology.

New and existing paper files could be scanned, indexed and stored in Invu before being destroyed. Digital files could be saved straight into Invu saving time, money and resources. Storing documents securely in Invu would also help the business to comply with HMRC and other industry regulations.

The Abbyy FlexiCapture integration would extract specified references from shipping documentation and match and verify them against other related paperwork, before importing documents directly into Invu where they would automatically be filed and saved in the correct place.

Invu’s powerful search functions would also make it easy for the team to locate any documents they needed in a matter of seconds.



RESULT

All of organisation's shipping files are now digital and stored securely within their Invu Document Management system. The team can file and retrieve their documents quickly and easily, and removing the wall of lever arch files has also freed up valuable office space.

The integration of Abbyy FlexiCapture has allowed for faster, straight-through processing by intelligently automating several manual processes. Specified information is automatically extracted from shipping documents, understood, and delivered to the right place, saving time and removing the potential misfiling of documents.

Transitioning from manual to automated processes

The team found moving from manual to automated processes simple and pain free. *"It was a bit of an eye-opener, to be honest,"* says the Import and Export Manager. *"We went from a manual, cumbersome process of opening files, flicking through papers to find the right spot in a file, filing in alphanumerical order, moving things around, to moving things around or updating information on screen. It was so easy, it made perfect sense as soon as we started to use it."*

This has also helped to improve accuracy and productivity. As he explains. *"Having digital files makes it easy to manage when we have a backlog of work. If we were still dealing with paper, we would have a room full of files and we'd never recover from it. It just makes the whole process more manageable."*

Transforming the way they work

The introduction of a Document Management system has not only changed the way the team work day-to-day, it has had a positive impact on the way they approach an audit. Previously, a colleague in the

ON THE AUDIT PROCESS...

"It certainly changed the way we approached audits. Before Invu, we had guys with forklifts getting boxes full of paper off the shelves. You could spend a week wading through boxes of paper to find the one required document. Now we can just type a number into Invu, press enter, and we've got it!"

IMPORT AND EXPORT MANAGER

warehouse would have to move wooden crates full of paper down from the shelves with a forklift. Then someone would need to look through every piece of paper in the crate until they found what the auditor or customs officer wanted to see as evidence. He recalls, *"You could spend a week wading through boxes of paper to find the one required document. Now we can just type a number into Invu, press enter, and we've got it!"*

What is their advice for other companies tackling similar problems?

The company would happily recommend a Document Management system. *"If you are overrun by a sea of paperwork that you have to keep, then it's an absolute no-brainer to head down the path of electronic filing. If you've got it filed electronically and you've got your metadata in there - BANG!"*

"The file is in front of you! You don't need an army of people and a forklift truck to help you out. It's a three second job to search for any reference."

Future challenges

Invu is not currently used across the business but the Import and Export Manager is hoping to change that by demonstrating the system to his colleagues. *"We've had a really positive response,"* he says. *"They all say 'WOW! We like that!' People just need a quick demo of the system and it sells itself."*