

## Swagelok Manchester

### Case Study



## Fluid Integration

**Customer focus, continuous improvement and innovation are just some of the core company values that have helped Swagelok Manchester to become a leading provider of fluid system solutions to customers in the North-West of England for 35 years.**

Growing success also meant a huge growth in documents for all their paper-based administrative and logistical processes. Workflows were increasingly time and cost intensive. Managing their filing was costing them 30 minutes per day, per employee. When the management team at Swagelok Manchester realised that the company had to put in weekend hours to tackle the out-of-control paper archive every quarter, it was time to take action. Inspired by the DocuWare system used by Swagelok's sales and service center in Munich, the Swagelok Manchester team began looking at ways to incrementally digitize their operations.

### Swagelok Manchester

**Industry:**

Manufacturing (Mechanical Engineering, machine parts / accessories)

**Location:**

Manchester, United Kingdom

**Departments:**

Accounting, Order Processing, Warehouse / ERP

**Document Types:**

Bank statements, account records, offers, order confirmations, inventory lists, incoming A/P invoices, product information, warehouse inventory records

# Requirements

After seeing the benefits of the Munich operation, they decided to implement DocuWare in Manchester. To ensure a seamless transition from analog to digital document management, the local DocuWare Partner prepared a detailed analysis and documentation of various business processes as well as their existing IT infrastructure. Led by Sue Brennan, Information System Manager for Swagelok Manchester, they created a four-step plan with their Authorized DocuWare Partner which called for successive, department-centric implementation. One of the goals was to make sure that during implementation there would be no interruption of their daily processes. They also wanted to ensure rapid acceptance among users. In addition, the system needed to be integrated with existing software applications like a SCALA ERP system, SIMPLE barcoding inventory management solution, and Crystal Reports reporting program.

## The Tasks

- Analyze existing processes
- Develop successive implementation concept
- Integrate DMS in existing application landscape
- Define custom workflows

## The Solution

In April 2009, they began by implementing the DMS in their Accounting department. Since manual workflows here were already established, it offered an opportunity to gather experience with DocuWare by basically mirroring their paper-based processes in a digital manner. Once the integrity of the digital processes were confirmed, in June 2009 they started the second and third project phases, this time within Order Processing and Inventory Tracking. The main task was to connect workflows created within DocuWare with their SCALA ERP system along with barcodes to use with their SIMPLE inventory tracking system. Through the solution created by their DocuWare Partner, data is now exchanged via electronic in/out boxes. As index criteria, they are using order number, date, customer number and an additionally generated document number. Order processing is made up of four main workflow steps: offer generation, order confirmation, receipt of packing/shipping slip, and invoice generation. Integrating their inventory tracking in a digital workflow has been especially rewarding. With a yes/no stamp on each packing slip they can check the availability of ordered items in the warehouse with ease. Only records for goods which are actually delivered to customers are then automatically transferred for invoicing. In 2014, the last phase of this project, they further digitized their order processing to include incoming A/P invoices.

## Modules in use

- Autoindex
- Active Import
- Recognition
- Content Folder



# The Benefits

Swagelok Manchester are enjoying many benefits through the use of their DMS, according to project manager Sue Brennan. "Our productivity has increased significantly. Alone in Order Processing, the six employees working there were able to recapture 15 hours of work time per week by eliminating the daily paper chase." Paper was also significantly reduced for invoicing: 70 percent of the approximately 100 invoices generated per day are now sent electronically by email. Also the majority of monthly invoices going to 700 established customers are now emailed. Only 270 of them receive their monthly statement by mail. "Another positive is that with the help of Crystal Reports, collections are largely automated with reminders going out by email as well," adds Sue Brennan.

## The Benefits

- Reduced paper
- Higher productivity
- Central document pool
- Improved data security
- Access for employees working remotely
- Improved customer service through quicker response



## Summary

In comparison with their previous paper-based system, according to Sue Brennan, DocuWare offers not only top data security but enormous savings in time for document searches and retrieval. Plus, documents can be accessed remotely, for example, by sales personnel working remotely.

To meet future business challenges Sue Brennan feels the company is well-equipped with the help of the DocuWare platform, especially because the software is constantly being further developed and offers a growing number of helpful tools and applications.

This success story has certainly piqued the interest of many other Swagelok sales and service centers across Europe and overseas.



“Everything is now filed and is easily retrievable in one document repository. Our Customer Services team achieved a time saving of approximately 15 hours of filing per week – i.e. ½ hour per person x 5 days. The system has provided greater security, retrieval is simpler and faster, with all the information accessible from any location. We are continuing to work closely with our Authorized DocuWare Partner on future enhancements with other teams within our business.”

*Sue Brennan, Information System Manager, Swagelok Manchester, Manchester, UK*



Document Management Technology Ltd

1 Knowsley Park Way  
Haslingden  
BB4 4RS  
Lancashire

+44(0)161 667 3390  
+44(0)161 667 3399  
<http://www.doctech.co.uk>

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