

Irwin M&E Limited

Case Study

Electrical, Mechanical & Integrated FM

Client Profile

Irwin M&E provides mechanical & electrical installation services, ranging from small one off projects to large multi million pound projects.

- **Industry:** Construction (Electrical, Mechanical & Integrated Facilities Management)
- Est 1995, branches throughout the UK
- 105 staff managing a portfolio of around 30 clients
- **Department:** Finance



electrical—
installation
testing
maintenance

Irwin M&E's Process

With an average of 2,500 purchase orders flowing through the business each month, Irwin M&E required better control of their data as information was often mislaid and duplicates made. It was largely paper based and the digital information they had was not dealt with in a standardised way. There were no links to historic information and time was wasted by the accounts department looking for backdated information to resolve queries raised.

A clear audit trail was of high importance to the project for financial audits as well as for ease of tracing the history of documents. Paper documents were stored in filing cabinets onsite and the need for storage was increasing, leading Irwin M&E to consider costly offsite storage.

Background

Irwin M&E is accredited by NICEIC, The IET, GasSafe, SNIPEF, OFTEC, Electrical Training Trust, Safe T Cert and Spark Safe LTP. In a heavily regulated industry, compliance is essential and being able to demonstrate this easily is crucial. According to the IET, documents must be held for a minimum of 5 years. Irwin M&E's paper based system thus meant the cataloguing and storage of huge amounts of paperwork with significant retrieval times and little ability to analyse their data. The DocTech Solution resolves this through digital cabinets that allow instant retrieval of all client and supplier documents using any piece of indexed data.

DocTech and Irwin M&E's Financial Controller identified the benefits and Return on Investment that a digital document management solution brings. In addition to reducing the amount of paper documents being handled, the time spent on authorising invoices and finding old documents, they also wanted to add new features so they were not just emulating their paper processes, but improving them.

Objectives

- Access for all staff with varying permissions
- An easy to use, fully secure system
- Certain users to be able to authorise and amend documents using digital stamps
- Ability to view documents such as invoices and purchase orders with quick document search and retrieval times
- Ability to assign a different workflow process to invoices depending on value
- Workflow automation - eg automatic rejection of an invoice if it does not match the purchase order

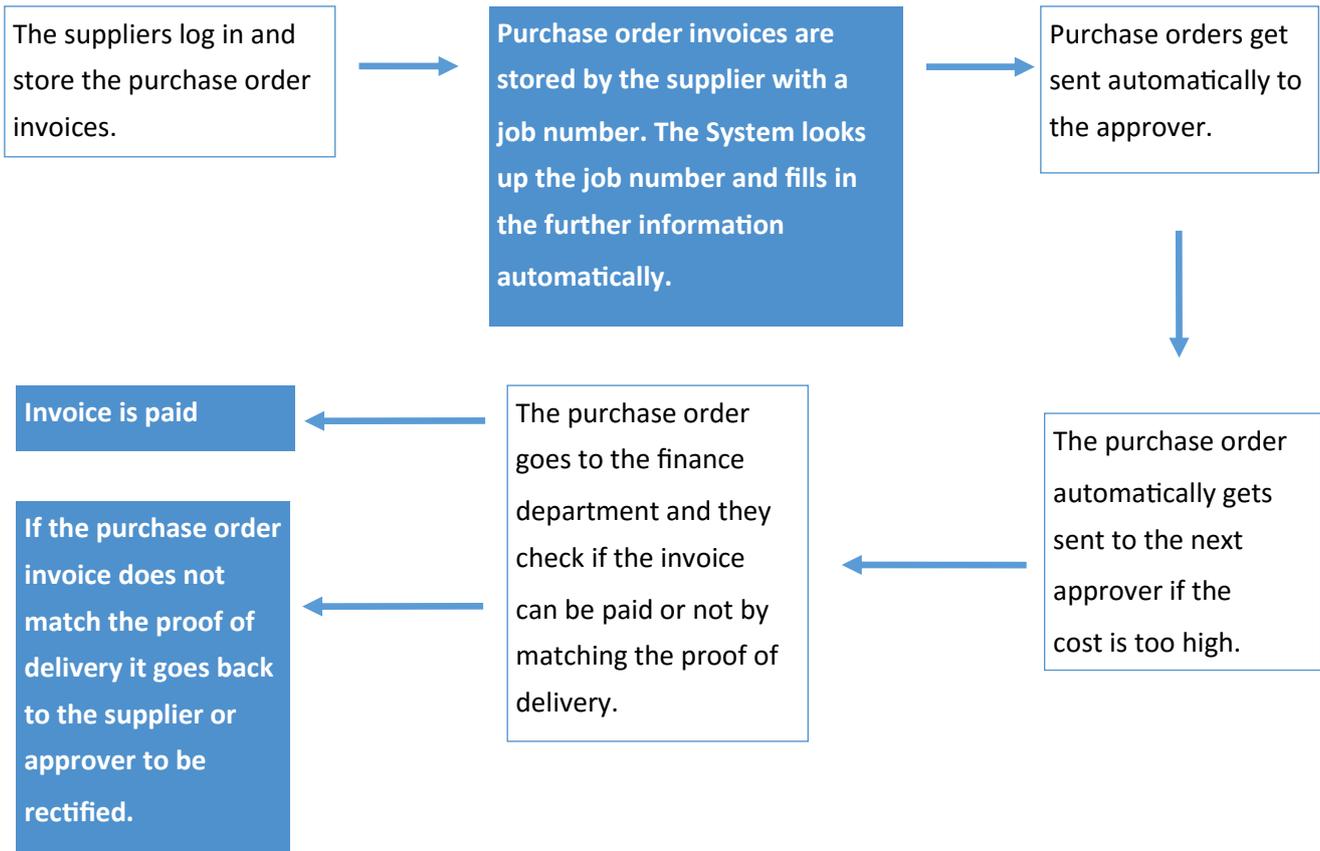
Solution

DocTech worked with Irwin M&E Ltd for two days scoping and drawing up bespoke workflows to streamline their accounting processes, where targets were set for the installation.

Irwin M&E required all paper documents in accounts to be scanned into the system from implementation of the software and now all paper documents are destroyed as soon as they have been scanned. With over 2,500 documents scanned and indexed per month, Irwin M&E now have over 15,000 documents stored. The implementation of this system has dramatically reduced storage space and costs. Documents are quickly scanned directly into pre-specified folders and are automatically indexed.

Having real time access to these documents means they can be automatically assigned to the correct person and approved or rejected using digital stamps and built in workflow processes.

Process



DocTech Solution

Irwin M&E allocated two members of staff to take responsibility during the roll out. They were able to manage this alongside their normal work so there was no disruption to standard work processes. They appointed the Financial Controller as the Project Lead. Targets were set for the installation following a roadmap and planning session. Staff were shown how to use the software during the training sessions and all new members of staff are now trained as part of their induction.

"Staff are now able to process information faster and more efficiently, our control over invoices has significantly improved and suppliers are paid on time. Searching for invoices has become a thing of the past and the mood in the office has greatly improved".

Financial Controller, Irwin M&E Ltd

Benefits

Irwin M&E have seen a significant improvement in staff morale since implementing The DocTech Solution, particularly in those who need to look up copy invoices. They say 'the blame culture' has gone. Searching for invoices is redundant and they are no longer required to file paper copies. The purchasing department are now meeting their month end deadlines which has eased the pressure on them and allowed them to focus on other supplier tasks rather than just processing invoices. They are fully compliant and comfortable with their audits.

Irwin M&E now handle larger volumes of information with a smaller team having reassigned a staff member to another department. Since implementing the The DocTech Solution, processes have significantly changed with a more structured transparent workflow and with greater control over documentation before invoices are paid.

Irwin M&E can now keep complete track of all invoices and purchase orders. The DocTech Solution has created a seamless and clear business process, saving the company innumerable work hours. Irwin M&E has seen a huge increase in productivity and cashflow and are looking at rolling out the software into other departments in the near future.

ROI

Irwin M&E have realised an immediate ROI on the savings made by not recruiting for an additional accounts position.

Although it is difficult to quantify the return on the diminished storage space, The DocTech Solution has helped Irwin M&E to achieve their business goals.

Irwin M&E is a forward thinking company and The DocTech Solution fitted in well with their future business growth plan. They were very keen to embrace the latest technology while meeting their environmental requirements for paper reduction and business efficiency.

About DocTech

DocTech is a leading provider of document management technologies and services, with clients throughout the UK and Ireland, varying in industry type, size and requirements. The system we provide allows you to store, share and manage all of your documents from one central location, speeding up retrieval times whilst maintaining high levels of security - ensuring maximum compliance with industry and government regulations. Our Solution has enabled hundreds of companies to improve their business process performance, saving valuable time, money and staff costs.

DocTech can help you evaluate your current document management situation and related costs, assess your needs and develop managed solutions that support your goals.

Our solutions involve qualified IT Engineers and System Architects, all at hand to offer a technical consultancy to assist with your specific system operation. We offer consultancy on all matters relating to the implementation of your document management solution.

For further information on how DocTech can add value to your business, please contact a member of the sales team on [0161 667 3390](tel:01616673390) or email sales@doctech.co.uk.

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