

Serviceline

Case Study



A Document's Destiny

Founded in 1989, Serviceline works closely with the food service industry to regularly maintain kitchen/catering equipment and appliances. The catering equipment is regularly serviced and needs to undergo safety checks according to the UK Health and Safety Council requirements. Serviceline's expert engineers provide installation, warranty, and emergency service support for all major makes of commercial catering equipment found in establishments like restaurants, hospitals and stadiums.

Serviceline has won the annual International Safety Award consecutively since 2005. This may be due in part to the company's extremely well-organised documentation processes. The company has 173 employees of which 120 are engineers who are now equipped with a digital pen and pad (from Destiny Wireless Plc) to complete their Field Service Reports (FSRs).

In 2006, Steve Elliott, the company's director and founder, saw the pen at a trade show and had an epiphany: "With this digital pen we can get everything automated," he thought in excitement, "and all incoming and outgoing information can immediately be transferred to DocuWare and automatically stored."

Serviceline

Industry:
Repair/Maintenance

Location:
SG1 2DW Stevenage

Application:
Corporate-wide

Documents types:
Field Service Reports, photographs, Health and Safety records, HR files, e-mail, purchase orders, invoices

Requirements and Organisational Framework

In order to keep a simple overview of all assignments, engineers are divided into hot engineers and cold engineers, meaning they either attend to fryers/stoves or refrigeration appliances. Due to the Standard Safety Regulation, an engineer is only qualified to attend to hot or cold appliances. Two types of FSRs were therefore created to suit each type: quite simply a hot FSR and a cold FSR. Initially, the engineers sent in these FSRs by mail, each taking at least two to three days to arrive. They then landed on a Job Manager's desk who indexed the information by hand in DocuWare. Serviceline is responsible as a third-party document maintainer to retain information for its customers and suppliers. Two important factors convinced Steve Elliott and his team to originally opt for a DocuWare solution: the immediate reduction of physical storage space and options for automating the storage process. From 2004 to 2006, DocuWare was mainly used as a repository, to hold the hundreds of scanned FSRs that came in every month.

To build on their DocuWare solution, they recently integrated a Destiny digital pen and pad solution and Solarvista software, which enables correct indexing and keeps track of labour hours. Steve Elliott had been looking for a solution for years. He explains: "When we first saw it, Bluetooth was not that common, so it seemed revolutionary. But we knew that the information could somehow be transferred to a document management system by using a phone."

Solution

The expanded DocuWare solution, which includes 60 licenses with four key administrators, works in combination with a Destiny Digital Pen Solution and has completely revolutionised work processes at Serviceline. All of its engineers were outfitted by Destiny Wireless, each receiving a Destiny digital pen (created by Nokia but sold by Destiny, Nokia SU1B), a Destiny digital pad (created by Destiny), and a mobile phone (Nokia 7610/N70) which run Destiny Wireless software. The digital pen works by using so-called "Anoto" functionality, which involves an infrared camera in the digital pen, digital paper technology, and server technology. In order to use the device, Bluetooth is set up between the pen and a phone first. A tiny nib in the pen registers the pen's every movement across the grid surface on the Destiny digital pad, which actually looks like carbon paper with little dots and grids, and then stores it as a series of map coordinates. These coordinates correspond to the exact location writing on the page and subsequently records every detail. Almost daily, an engineer will fill in a FSR and then send it in via the pen. The FSR shows, for example, what was repaired, the time spent at the location and that a job is complete or non-complete (if new parts have been ordered but not delivered yet). Since spare parts are often needed, an engineer simply needs to take a photo of the old part with the mobile phone and e-mail it to the FSR.

After filling out the form and marking a "send" box on the pad, the pen is instructed to send the stored sequence of map coordinates. These are then translated into an image that results in an exact copy of the handwriting displayed. These images and metadata are sent to a Destiny Wireless server via the Internet to Destiny, where they are processed and forwarded to Serviceline. This data is then automatically imported into a DocuWare file cabinet. At the same time employees are notified via email that the jobs are outstanding and they are completed in the company's internal system SolarVista. Documents are managed in a file cabinet indexed by job number, name of an engineer, date received, etc. In Solarvista, the Job Manager can also indicate whether a job is completed or if further work is required. Once it is registered complete, the accounting department can see it after entering "jobs completed" into the DocuWare Search Dialog, where all the jobs that are completed will appear in a Result List. Once indexing is finished or checked off as "not complete" at the end of the day, the accounting department can also do a search to see which FSRs are in progress to see which jobs will still need attending to. Now about 150 -250 FSRs a week (1000 sheets a week) and several hundred invoices and purchase orders a month from suppliers including at least 10 photos a day are all stored in DocuWare.

The Task

- Reduce the time to send in orders
- Lower the risk of incorrect orders
- Improve the speed of customer service service
- Eliminate physical storage of paper documents
- Interface with Destiny Digital Pen

Implemented Modules

- Active Import
- Internet Server
- Recognition

DocuWare is also being used in HR, because of the many certifications an engineer has to attain, such as assessment reports. Engineers are tested every six months and these assessment reports are stored in DocuWare so that they may be checked on at any time.

Benefits

“Several real time advantages have proven themselves over and over again since we implemented this solution,” says Steve Elliott, adding “Everything comes in and goes straight into the system for anyone to see it within seconds. With a few more seconds, we can attach it to an e-mail to send to someone else – it’s great.” Now, when Serviceline asks for payments and a customer claims not to have a copy of the job sheet, the employees in credit control are able to e-mail a copy while still on the phone with them. This has improved their debt collection and funds management within the company. Similarly, if an engineer has already left a site but the customer calls and does not agree with the work completed, Serviceline employees can immediately look up what the engineer has done. Having immediate access and a copy straight away eliminates any doubt and enhances customer relations. As an intensively paper-based company due to the nature of its work, Serviceline needed a lot of storage space. Now, that space is used for other purposes. Today, the endless stream of health and safety records and compliances, required by law, are instantly filed in DocuWare and only take seconds to retrieve whenever necessary.

Another key benefit is invoice control: when invoices arrive by mail, employees mass scan them right away and everyone in the operation can access them instead of e-mailing them back and forth. The Urgent Technical Department has also enjoyed the benefits of the new installation. Most jobs are handled the same day or the next day now, whereas in the past the job would take considerably longer. The Job Manager can immediately see what is urgent, get an overview of what happened that day, and instantly share information.

Customer service has also improved considerably. A customer can call up on any given day and ask about a specific job. A Job Manager can then easily see the identification number for the parts or appliances that correspond to the information in the DocuWare Document Pool and therefore can advise the customer on the estimated time of arrival of the parts or when an engineer is able to complete the job. Some customers can also log onto the system themselves by using a special password. The engineers also take photos of the old parts and send them in by MMS to be filed and ordered. Having a photo of the old part gives everyone a great advantage, ensuring that an exact replacement part can be purchased right away. Moreover, in DocuWare, any photo can be retrieved with just one click.

The Benefits

- Streamlined processes enable faster access to documents
- Efficient document control and management provides quicker invoice collection
- Secure document storage
- Health and Safety records available any time anywhere.



Summary

The DocuWare Solution has become the main focal point of the business; everything works interdependently with DocuWare. Information runs seamlessly through the Destiny digital pen to a mobile phone, then to DocuWare. The process has been perfected. No one misses an invoice. All information is readily available.

Upgrading to DocuWare 5.1 has allowed even more capabilities. such as more indexing capabilities. The ultimate goal, however, is to have all documents in the system, so that everyone at Serviceline - and even their customers - have direct access to them at anytime. Every single engineer will be able to complete his or her work in an absolutely paperless manner. A pilot program is presently being tested.



"DocuWare has become the centre of all activity - we use the documents to centralise our activities. And while the initial Cost of Entry for the solution was rather high - not DocuWare, but the other solutions – it was well worth it."

Steve Elliott, Chief Executive Officer, Serviceline



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