

Xerox Workcentre 7228 and DocuWare



BUTEC GmbH was founded in 1995 and has since established itself as a leading consulting firm in the areas of environmental protection, quality management and workplace safety. They help their clients maintain legal compliance, such as by providing experts who provide advice regarding the regulation of such areas as workplace safety. "We don't provide standard, 'off-the-rack' concepts; instead, our focus is on finding custom solutions for our clients," which is how the company's president, Dr. Thorsten Heinze, describes the company's philosophy. BUTEC supports customers of all shapes and sizes across Europe, including manufacturers and service companies. www.butec.net



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Challenge

- Replace paper archive
- Eliminate redundant filing
- Create central knowledge pool
- Set up accounts payable workflow

Solution

Knowledge Pool for Consultants

Staying on top of the latest legal guidelines and pairing the right highly-qualified specialists with a client's needs – that's the recipe for this consulting firm's success. By using a powerful knowledge pool based on DocuWare, BUTEC consultants are able to maximize their time and the quality of information stored in their extensive archive. The result: their customers enjoy top service.

Preparing, organizing and coordinating tasks – such as filing for permits regarding emission protection or recycling standards – can be quite demanding on the internal organizational structures of a company. "Correspondence with government agencies, in particular, requires extreme efficiency in managing paper-based documents," explains Heinze. A growing number of clients meant that BUTEC had to handle a large volume of documents starting at the end of the 90's. A trend towards providing long-term consulting for their clients further added to the mountains of information.

Tedious searches in their paper archive became an increasing problem for the consultants. Even creating a central filing process was not enough to prevent duplicate efforts and long retrieval times. It became clear: they needed to implement a Document Management System (DMS). Heinze wanted to set up a DMS to create a flexible knowledge pool. "Most of the systems out there were set up to manage standardized document types such as invoices, delivery slips, etc.," complains this PhD in Chemistry and passionate IT specialist. The criteria he set for DocuWare was a high level of openness (in order to be able make adaptations in file cabinet structures independently), simple administration and fulltext search capabilities.

DocuWare was implemented in 2003. In addition to file cabinets set up for company-internal documents such as accounting and HR files, rental agreements and car insurance paperwork, they also set up a number of customer-specific file cabinets and one central file cabinet for "Knowledge & Law". All of the documents stored in this broad document pool are quickly indexed and organized using a pre-defined structure configured by Heinze.

The IT specialist describes the basic approach: "On one hand, we identify general document types, such as those of a certain character, information material, correspondence, reports, etc., as well as more specific descriptors, such as authorizations, invoices, contracts." With only two fields in their search menu, users can still quickly hone in on the document they are looking for via well-structured search lists.

Today, the DMS has become an essential tool for their ten employees. Right from the beginning, all newly created electronic or incoming documents have been stored in the archive. All paper-based documents are captured using a Xerox Workcentre 7228 scanner and then passed along to the electronic baskets of the appropriate colleague. Only about five percent – authorization documents that are very important legally – are now stored at the same time in a paper archive. Faxes received are converted into graphic files using DocuWare TIFFMAKER and then placed in their own basket where they are further processed in a digital form.

Incoming invoices (A/P) or other important documents that need to be authorized by management before being sent to a customer are handled with a workflow process. Dr. Heinze: "The workflow module InnoFlow helped us create an uncomplicated exchange of information. This was due to its ability to show a wide variety of documents that are part of different workflows in one window, so that any colleague can immediately see everything in one spot and initiate the next step in a process with one mouse click."



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After a user creates and archives a document, it is opened in the viewer and given a stamp that contains the initials of the user, the date/time, and the status of the document, such as "For Authorization." Management can track all of the documents in a workflow and, with the help of indexing, can immediately see which ones they need to have a look at and which need to be approved. At this point, the President of the company, for example, can open a document, check its contents, make any necessary changes and re-save it. The status then changes in the document depending on what happened – it might now show as "corrected", "approved" or "locked". The next employee in the chain can see all the documents and their current status. Documents which are "corrected" or "approved" can be sent on to a customer (at which point the status will say "sent"). Invoice authorizations are handled in much the same way, with payment initiated as the ultimate result of the workflow.

A reporting tool was also set up via access rights as a special feature for management. With a click of a button, the entire chronological history of a document can be viewed – from its creation to mailing – in order to gauge efficiency during the authorization process.

Even when traveling, BUTEC consultants can tap into the latest information in the central knowledge pool using a Notebook and internet connection. If a particular consultant can't be reached, information remains available for customers and government agencies. Heinze emphasizes that the clear organizational structures of the knowledge pool make it simple for colleagues who aren't involved in a project every day to still be able to find information and easily respond to inquiries.

Benefits at a glance

Dr. Thorsten Heinze, President of BUTEC: "Thanks to DocuWare, we could significantly enhance our customer service spectrum. If one of our customers, for example, needs proof of a granted permission and can't locate it in their materials, they'll receive it in an e-mail from us within five minutes." This is the kind of customer service that is appreciated by their 140 clients, and certainly a big part of why many of them opted for long-term consulting with BUTEC.

Heinze reports that their overall implementation experience was very positive: "With DocuWare, we not only have a way to secure and quickly access project-related documents, the system also helps us to manage our other knowledge sources such as laws, regulations, standards and publications. Although the classic calculation for TCO doesn't necessarily apply when taking all this into consideration, we know that our investment was quickly amortized."

- Less storage space
- Improved efficiencies
- Better customer service
- Broad access via Internet

According to Dr. Thorsten Heinze, the company now only needs to access paper documents in three percent of all cases. If they need an older document out of their paper archive, it's immediately scanned and then stamped as "digitally captured".

BUTEC is now planning a project with which their consultants will be equipped with Tablet PCs running DocuWare to help them register information at a client's office in the form of interactive checklists. "Our goal is to set up a database system that is created with the help of the checklists – these documents will then also be stored in our central archive," reveals Heinze.

