

Case study: Successful DMS and Archiving for Rotronic

Founded in 1965, Rotronic AG has a workforce of over 360 employees and sells products via branches and offices in the USA, Germany, UK, France, Taiwan, Singapore and China to more than 40 countries around the world.



ro-tronic
TECHNIK FÜR PROFIS

Focal points include business with IT and industry products – like network technology, hardware and software, PC accessories, cabinet systems, etc. – and corresponding consultation services. Furthermore, temperature and moisture measurement equipment has been developed and manufactured at the Swiss headquarters in Bassersdorf since 1967.

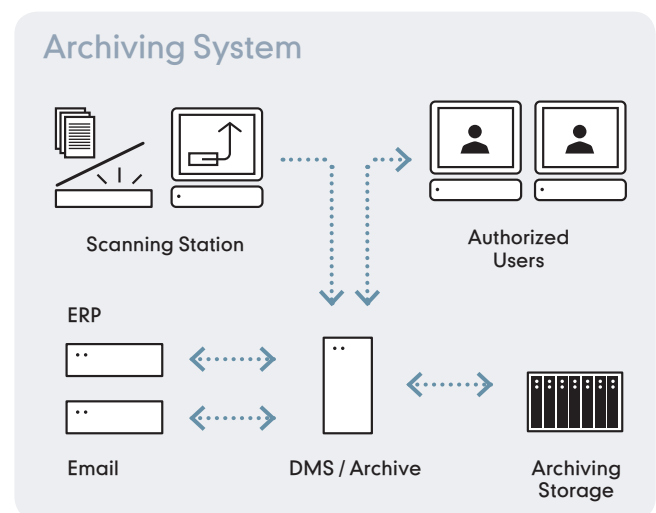
With a sales distribution of this scale, paper-based document processing becomes a logistic challenge. Up until now, Rotronic has exclusively used its ERP system for the processing of creditor invoices, goods receipt documents, orders, delivery receipts, invoices or so-called storehouse requisition documents for preparing goods for shipping. The associated paper documents – which could result in up to 1,000 different documents a day – were filed manually by the filing department. If a document was needed again, the filing department had to find it and then send it to the correct place in the company.

For this reason, in the early summer of 2008 Rotronic decided to look for a solution that would allow the company to switch to a digital archiving system that could be linked to its existing ERP system, i/2 from Polynorm. The solution would also need to archive emails. It was during this search for a new system that Rolf Böni, Head of IT Solutions at Rotronic, attended an event in Zurich on the topic of electronic archiving. Here, a presentation by Robbert Spierings, Managing Director of Arcplace, prompted his

interest in the solutions offered by the Swiss information management and archiving specialist.

At a meeting with Arcplace, Rotronic was impressed by the possibilities being offered for integration into the Windows environment as well as the solution’s user-friendliness and transparency. “The archive is displayed in Windows Explorer as an additional drive and an intuitive search field delivers targeted and fast search results,” confirms Böni. “For this reason, the staff had no reservations at all from the very outset and they were able to use the system without any problems.”

After visiting a reference customer of Arcplace, Rotronic made its decision and awarded the contract to Arcplace in September 2008. Working with the Technical Service, Bookkeeping and Sales departments, the technical consultants from Arcplace initially defined the types of documents to be managed and explained the details of the filing process. The next step was to work with the ERP specialists to define the interface between the DMS archive and the existing ERP system.



Using this as a basis, Arcplace implemented a solution for document capture, indexing and archiving, including a web interface for information searches and a solution for email archiving. The linking of all documents relating to each other is controlled by means of the order number. Once the document capture and indexing process is complete, the documents are stored on a NetApp WORM storage system (certified by KPMG) in accordance with legal requirements. With the aid of this new system, outgoing documents can also be filed after they have been generated in PDF format.

Arcplace used Kofax Capture for the document scanning and integrated the solution with the existing ERP system, i/2 from Polynorm. Correct assignment is ensured by means of a barcode on the documents. Other "index values" like the customer number and document number can be subsequently read out from the ERP system and transferred to the DMS system (Windream) together with the document.

The DMS system ensures that all documentation filed in the NetApp WORM storage system is in line with all legal requirements. The Windream archive interface Object Store controls the transfer of documents to the WORM storage system by means of the document lifecycle..

Solution components:

- Scanning Software: Kofax Capture
- DMS/Archive: Windream
- Email Archiving: Symantec Enterprise Vault
- Compliant storage: NetApp

The first implementation phase was concluded at the end of 2008 and the system was commissioned on January 2009. The second implementation phase came to an end in March 2009 with final acceptance of the entire system – the system having had already proven successful since its commissioning after Phase 1.

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At the end of January, a staff training session was held for users. "The staff were trained in no time at all, which was a major plus factor," says Rolf Böni. "After just two hours, the end users were able to use the solution without any problems. Since then, we have received very positive feedback from the staff about how quick and easy it is to scan and process the documents with the new solution. We were particularly impressed by the integration of the solution into our existing infrastructure – especially with the ERP system."

Since the 1st January 2009, 105,000 documents have already been electronically captured and archived. On average, about 18,000 documents need to be processed every month at Rotronic – which corresponds to up to 1,000 documents a day. Thanks to its open design, the system can be extended and upgraded which means that Rotronic can use the solution for other areas in the future.

"The smooth implementation of the project and the fast results are a testament to the excellent cooperation between the Rotronic and Arcplace project teams. The support by Polynorm was also a great help," says project manager Silvio Schenker from Arcplace, thanking all the participants for their cooperation.

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