Efficient Document Management at Swiss Subcontracting Company

During the past few years Bomatec's continual growth has been generating an increasing number of documents. In order to continue providing its customers with optimal service despite the increasing data volume the Swiss subcontractor relies on an archiving, document management and workflow system: ArcFlow.

Bomatec AG is a trading, consulting and engineering company focused on magnetic, sensor and propulsion technology. The Swiss trading company has around 1,100 customers from the automotive, industrial electronic, equipment and mechanical engineering, medical, propulsion technology and wind turbine sectors. The company works closely with renowned manufacturers from Asia, the US and Germany, such as Tamagawa Seiki and BEI Duncan Electronics/BEI Kimco Magnetics. Alongside its headquarters in Höri (Switzerland) Bomatec also operates a further location in China dedicated to evaluating and auditing suppliers and also operating its own quality laboratory.

Overview Deficiency caused by Increasing Data Volumes

The ability to react quickly and flexibly to the market at all times is of vital importance to a service-orientated company such as Bomatec. In order to be able to process enquiries fast having constant insight into all the various customer projects is an absolute must. As little as two years ago Bomatec was still storing all its documents in traditional dispatch folders - quickly pushing the Swiss company to the edge. This is not least due to Bomatec's expansion - with the company recording a 30 % increase in turnover in 2006 - which has led to a continual rise in the number of documents. "Quite often these dispatch folders could not be located when they were most urgently needed – for example, when we wanted to let the customer know the latest project status over the phone," Markus Bolliger, CEO of Bomatec AG, said when describing the situation. "The dispatch folders were a constraint to our workflow and did not provide the required overview. The ongoing search for information consumed a lot of time, we were not particularly flexible on the phone and could not answer questions competently. We were in need of a solution to get us out of this situation."

"ArcFlow's benefits include a considerably more flexible method of working with regard to data management coupled with increased transparency. The information is available to all Bomatec staff - it can be retrieved at any time and from anywhere. This substantially improves both the information flow and workflow within the company. The workflow components also allow us to be in better control of our deadlines.

Markus Bolliger, Director Bomatec AG

It was in 2004 that the Swiss trading company first heard from an ArcFlow sales partner, BEL Büro Elektronik AG, of a supplier called ArcFlow and the document management system (DMS) named after it. During 2005 the need for a document management solution became ever more apparent. "We agreed with ArcFlow on





a date to present our demands on a document management system", the CEO reports. "Our wishes were so openly welcomed that we agreed on a future cooperation with the manufacturer only a couple of days after the meeting."

That was in August 2005. The system installation took place a short time after the decision was made. ArcFlow was integrated into the existing IT infrastructure without much effort in only two days. Employee training was equally fast. The initial objective was to fully adapt the system to Bomatec's requirements and wishes. These expectations were realized step-by-step in close cooperation with the DMS supplier. The workfolder structure, for example, was aligned to the existing filing structure, thus enabling the employees to continue processing their documents using Office. However, whilst implementing the modifications importance was given to not impacting any of those elements essential to fulfilling legal regulations. "Our requests were realized within the framework of a very pleasant and intensive collaboration with ArcFlow", Markus Bolliger reports. "The DMS supplier recorded and realized all our requirements within a very short period of time. Such excellent and enjoyable liaisons are very rare in the IT area."

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Slow Transition towards the Paperless Office

The employees were also given sufficient time to say goodbye to traditional paper documents and to switch over to ArcFlow. The deadline for the final transition was roughly one year after the initial introduction on September 1, 2006. The transition was not easy for all the employees. "It is easy to operate", explains Markus Bolliger, "but, of course, it was a very noticeable change for the employees to no longer work with paper documents and instead only work with the system. And some found it difficult because they were no longer able to physically hold the paper in their hands."

Order Processing was the first area to switch over. First of all, all the quotations and supplier enquiries are logged and calculated in the OPACC One ERP System. If, for example, Bomatec starts up a new customer project this is initially logged in the ERP system. At the same time ArcFlow generates a workfolder for the

Branch: industry

Requirements:
- → Comprehensive insight into customer projects
- → Fast availability of important information
- → Transparent order processing and continuous work flow
- → Efficient document administration

Benefits:
- → Flexible data administration
- → Revision-safe archiving of all documents
- → Fast access to important information
- → Efficient und transparent business processes
- → Optimized scheduling and task management thanks to the workflow function
- → Security and high-availability due to the hot standby solution
- → Fast installation

management and storage of all documents related to this project. Keywords are used to retrieve information quickly. Furthermore, all documents are stored in an audit-compliant way.

"Using ArcFlow means we have all our documents under control", says Markus Bolliger. "When we receive a call requiring information we can use ArcFlow to access the data at any time which allows us to make competent statements. The system enables a much more flexible work process with regard to the data that needs to be managed. In addition to this ArcFlow provides us with a better overview. The information is provided to each employee – and can be retrieved at any time and from anywhere. This represents a significant improvement in our information flow and our workflows."

Alongside document management and archiving Bomatec also deploys the workflow function. The workflow for a customer quotation, for example, comprises the following process steps: Logging the product and the customer in the ERP system, sending an enquiry to the factory, potentially following up on the enquiry, calculating the quotation, presenting the quotation to the customer as well as further following up if there is no reaction. These individual steps are scheduled accordingly. Should a task not be completed the system automatically sends out a notification to the person responsible or his representative. In addition, each person receives an individual daily schedule showing which projects still require completion. For a company such as Bomatec, which is reliant on fast and controlled order processing, the workflow function is the ideal tool. "The workflow function keeps us informed on the current order and project status at all times", explains Markus Bolliger. "There are no bottlenecks and delivery deadlines and other information are no longer forgotten as the responsible employee is sent a friendly reminder if he has failed to complete his tasks. Our experience so far has been excellent. The workflow function also provides a certain motivation for our employees. Additionally, it facilitates our work and ensures that the workflow remains steady."

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Security and High Availability Provided by the Hot-Standby Solution

Much of the data saved in ArcFlow is crucial to Bomatec's business. A loss of data might entail serious consequences for the company. This is why ArcFlow has integrated a Hot-Stand-





by solution, based on the CONZEPT 16 database system. The solution comprises two self-supporting computers - both serving as database servers and each holding copies of the original database. Transactions completed in the primary database are automatically transferred to the secondary database. Should one of the computers fail the second computer immediately assumes its tasks and Bomatec's employees can carry on working with no delays. This system also allows server maintenance to be carried out during normal working hours without affecting the users. "There is so much data flowing into ArcFlow that we cannot afford to lose any", Markus Bolliger goes on to explain. "For us it was a never a question of whether we should implement a Hot-Standby solution or not. It was a must-have right from the very beginning - being the only way to ensure that we do not lose our data."

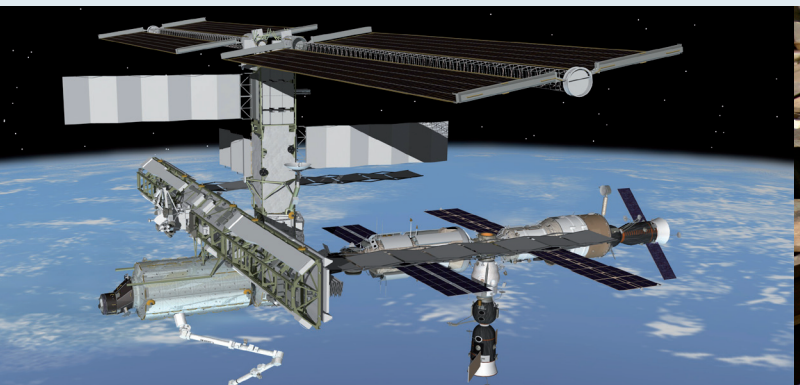
CRM System Replacement

Almost all the employees are now using the system. For the 25 employees in Switzerland ArcFlow has already become part of their daily working routine. Alongside Order Processing the Sales and Project Department has also switched over to using ArcFlow. General Administration and Accounting are soon to follow. Furthermore, Bomatec has started running all its laboratory data into the system.

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"We operate laboratories in Switzerland and China to guarantee the quality of our magnets", Bolliger explains. "This data also needs to be archived. Fully implementing this data into ArcFlow represents one of the next challenges to be faced. Up to now we have only been integrating test reports which are being saved to the respective workfolders and can be accessed at any time. What is still missing, for example, are the test plans."

At the moment ArcFlow is being used exclusively by the Swiss employees. In future, however, the Chinese employees are also to be given access to the DMS. Furthermore, Bomatec is planning to replace the current CRM system, ACT!, with ArcFlow as the old CRM system does not meet Bomatec's compatibility requirements. Currently two address databases have to be maintained – which reside in the CRM and ERP systems. In future ArcFlow shall automatically adopt all customer and supplier data and in doing so shall always manage and archive all the documents - for example, e-mail and telephone call correspondence as well as manual notes - with respect to the company





concerned and/or respective contacts. The ERP system shall continue to act as the foundation on which everything else is built. “This is a brilliant enhancement”, Markus Bolliger declares. “This allows us to achieve almost complete transparency within the company. All our employees can view past events and which agreements have been made. Watching this DMS development is highly interesting and most enjoyable. We put forward our proposals and ideas – and the people at ArcFlow do everything in their power to ensure that these are implemented.”

Markus Bolliger is convinced that the system will pay itself off in the short-term. “We have not been using ArcFlow long enough to be able to estimate exactly how long the amortization period will be. However, it definitely has its benefits.”

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Conclusion

ArcFlow lets Bomatec flexibly manage all its documents. Centrally stored data can be retrieved quickly so that the company is able to react to customer enquiries fast. Furthermore, the subcontractor is kept up-to-date on both the current project status and order situation at all times. A steady workflow is also guaranteed. The company benefits from its efficient and transparent business processes – a decisive competitive advantage for Bomatec.

About ArcFlow

Knowledge forms the basis for strategic decision-making and is, therefore, a key factor in determining the success of a business. This means that companies are now facing the challenge of managing their increasing data volumes in such a way that they can be readily accessed at any desired point in time. ArcFlow develops and distributes a correspondent document management system (DMS) which enables a structured filing and revision-safe archiving of documents of any format. Therefore, ArcFlow makes sure that important information is available fast and easy – no matter if it’s about traditional paper documents or digital media. Connecting documents with workflows ArcFlow makes business processes more efficient and transparent. ArcFlow’s most important features are that it is easy to use and install irrespective of the number of users. ArcFlow has offices in Germany, Switzerland and Philippines. For more information please visit www.arcflow.eu.



