

Managing the Manufacturing Paper Trail

A Manufacturing Industry Case Study focusing on Invoice Documents.

Customer Overview

Premium Uniforms www.premiumuniforms.com based in Ontario, Canada are a leading manufacturer of the very best quality and value workplace uniforms and servicewear. Premium Uniforms has become a leading resource for those seeking innovative materials to create comfortable yet durable clothing custom-designed for highly specific workplaces. Their goal continues to be one of delivering products that offer excellent quality, innovative thinking and market-leading value to customers; year-after-year.



The Business Challenge

Premium Uniforms, like all manufactures, generate a lot of paper that is used to track goods from manufacture to final delivery. This paper documentation must be preserved to prove that the right product was manufactured and delivered to the correct customer. By converting these paper documents to electronic form they would be able to organize, manage, and most importantly find the documents if they were ever needed and realize their vision of the “Paperless Office” .

Premium Uniform’s team consulted with FileHold Systems to determine how a Document Management System could improve the flow of documents within their organization. FileHold identified the immediate need was in the accounting department specifically moving the mass of paper documents within the Invoicing function into a secure and controlled environment.

The Solution - Convert invoice documents to electronic form

Invoices were identified as one of the largest document challenges within the company. Invoice packages consist of the page(s) that make up the typical forms that clients and the company use to refer to all deliveries and pick-ups of their product. It is the receipt of record for each business transaction.

Conversion of the invoice package from paper to electronic form presented an opportunity for Premium Uniforms to realize immediate benefits from the use of the FileHold software. The automation of the process is as follows:

- To start; invoice batch scan profiles were established, this was followed by configuring the scanning software and then setting the FileHold auto filing system to automatically scan and file the documents.
- Invoice related documents were separated into packages. Patch codes (bar codes that change the scanner settings) were used as separator sheets to create a batch of Invoice files. Separation by patchcode was selected because individual invoice packages could vary in length from one page to three or more pages.
- Metadata (sometimes called “tags”) is automatically grabbed by the system from the front page of each invoice package. Using one of the invoices as a reference file the following fields are created to capture this metadata automatically: Customer Name, Customer Order Number, Invoice Number, Date, and Pick Ticket Number.

FileHold trained the users of the system how to set up other profiles using the Invoice template and supplied the team with screenshots and other documentation that they can refer back to.

Akber Khimani the President of Premium commented on the design of the solution, “*A batch profile was created that managed the scanning of the Invoice documents allowing us to simply scan batches of Invoices and have them auto-tagged and exported to a folder in the FileHold Document Management System.*”

Now when batches of Invoices are scanned into the system the patchcode separator sheets automatically trigger the beginning of a new file, metadata is automatically set for each file and the file is exported to the FileHold Document Management System. The implementation work took about two days spread over a week and automated the conversion of the paper documents to electronic form from beginning to end.

A Fujitsu Scanner was chosen based on the required demands of the business.

Fi-6140 Specifications

- High-speed A3 Duplex Colour Scanner
- Color / Binary Scanning Speed: 40 ppm / 60 ppm
- True 600 dpi optical resolution
- 50-sheet automatic document feeder
- Enhanced double feed detection (Ultra Sonic detection)
- Dual interface (SCSI and USB 2.0)
- Imprinter Option



“The increasing volume of paper required us to choose between two recommended dedicated scanners, we chose the Fujitsu Fi-6140. It is an incredible little machine. Looks can be deceiving. It is very fast, easy to operate and we haven’t had a page get stuck yet.”

Akber Khimani

The Solution Payback

This means that the users of the system at Premium Uniforms will not have to manually enter customer information, invoice numbers, etc saving both time and mistakes. The invoices will be searchable immediately based on the value of any one of the metadata fields that have been set which means employees will now be able to search for a specific invoice based on one or more of the several pieces of captured metadata without having to know how the files are organized or all the specifics again saving company time and resources. Metadata search is especially important for organizations that use a mixed approach when constructing their file structure. The correct information will be found no matter if the files are organized by customer or by date or location.

Conclusion

This one application had a clear Return on Investment and now Premium is looking forward to expanding the use of FileHold into other areas of the business that have intense paper requirements, like Human Resources and Manufacturing. Adding additional users has already been done twice as the scalable nature of FileHold makes it perfect for this type of expansion. Premium may also blend the use of Dedicated Scanners with Network Scanners and MFP’s to create a complete workplace.

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