

*Customer focus, steady improvement and innovation are some of the core values that have helped Swagelok Manchester to become a leading provider of fluid systems solutions. Digitizing business processes has helped to increase internal productivity.*



**Sue Brennan, Information System Manager,  
Swagelok, Manchester, UK,  
on how DocuWare was integrated / was a success:  
... values the possibilities to achieve higher  
productivity levels with DocuWare:**



"Everything is now filed and easily retrievable in one document repository. Our Customer Services team achieved a time saving of approximately 15 hours of filing per week.

The system has provided greater security, retrieval is simpler and faster, with all the information accessible from any location."



**Country:** United Kingdom  
**Industry sector:** Manufacturing  
**Platform:** On-premises  
**Department:** Accounting,  
Order Processing,  
Warehouse/ ERP

**Swagelok is a leading provider of fluid systems solutions, such as tube fittings, valves, tubing, hoses and gauges - important components in several industries, like energy production, oil and gas, chemistry, biopharmaceutical markets, research and semiconductor manufacture. Swagelok has more than 150 authorised sales and service centres worldwide. The team in Manchester manages over 7.000 products and serves customers in the North-West of England for more than 40 years. With the help of an electronic document management system (DMS), many of their business operations are now completely digitized.**

Growing success also meant a huge growth in documents for all of Swagelok's paper-based administrative and logistical processes. Workflows were increasingly time and cost intensive. Managing filing was costing 30 minutes per day, per employee. When the management team realised that the company had to put in weekend hours to tackle the out-of-control paper archive every quarter, it was time to take action. Inspired by the DocuWare system used by Swagelok's sales and service center in Munich, the management decided to implement the same solution in Manchester. To ensure a seamless transition from analog to digital document management, the local DocuWare Partner prepared a detailed analysis and documentation

*"Our productivity has increased significantly. Alone in Order Processing, the six employees working there were able to recapture 15 hours of work time per week by eliminating the daily paper chase."*

of various business processes and the existing IT infrastructure. One of the goals was to make sure that during implementation there would be no interruption of daily processes. In addition, the system needed to be integrated with existing software applications like a SCALA ERP system, a SIMPLE barcoding inventory management solution, and a Crystal Reports reporting program.

#### **Four-step plan for successive, department-centric implementation**

The DMS implementation began in Accounting. Since manual workflows were already established, it offered an opportunity to gather experience with DocuWare by basically mirroring paper-based processes in a digital manner. Once the integrity of the digital processes was confirmed, the second and third project phases were started in Order Processing and Inventory Tracking. The main task was to connect DocuWare workflows with the SCALA ERP system along with barcodes to use with their SIMPLE inventory tracking application. Today, order processing is made up of four main workflow steps: offer generation, order confirmation, receipt of packing slip, and invoice generation. Integrating their inventory tracking in a DocuWare workflow has been especially rewarding. With a yes/ no stamp on each packing slip they can check the availability of ordered items in the warehouse with ease.

*"With the solution being integrated into our IT infrastructure, even collections are largely automated today, with reminders going out by email as well."*

Only records for goods which are actually delivered to customers are then automatically transferred for invoicing. In the last phase of the DMS project, the company further digitized its order processing to include incoming A/P invoices.

### **Top data security and time saving**

Swagelok Manchester is enjoying a significantly increased productivity through the use of its DMS, and paper has been radically reduced: 70 % of the approximately 100 invoices generated per day are now sent electronically by email. Also the majority of monthly invoices going to 700 established customers are now emailed. Only 270 of them receive their monthly statement by mail. Another positive is that with the help of Crystal Reports, collections are largely automated with reminders going out by email as well. In comparison with their previous paper-based system, DocuWare offers not only top data security but enormous savings in time for document searches and retrieval. Plus, documents can be accessed remotely, for example, by sales personnel working remotely. This success story has certainly piqued the interest of many other Swagelok sales and service centres across Europe and overseas.

*"With the help of the DocuWare platform, our company is well-equipped to meet future business challenges, especially because the software is constantly being further developed and offers a growing number of helpful tools and applications."*



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