

case study



Managing Costs and Improving Customer Service

Aluminum coil producer Jupiter Aluminum is utilizing DocuWare to store customer orders and accounts payable information, speeding retrieval time and strengthening business relationships. DocuWare helps Jupiter exceed its customers' expectations by providing the staff with the information they need to provide the very best service and value available in the marketplace.

Founded in 1992, Jupiter Aluminum is a privately held producer of aluminum coil, dedicated to producing quality products that exceed their customers' specifications. The company melts scrap metal and forms it into custom specified coiled sheets, which are used by Jupiter's customers to produce building materials such as gutters, down spouts, vents and siding.

As one of the low cost aluminum producers in the industry, Jupiter Aluminum differentiates itself by the quality of its product and its manufacturing flexibility. The company employs 210 people stationed between a warehouse in Southbend, a painting facility outside of Indianapolis, a mill in Hammond, Indiana, and corporate offices in Schiller Park, Illinois.

Document Situation

With about 150 active customers, the Accounting and Customer Service departments managed most of their information from paper documents. On the Customer Service side, each order was kept in a separate manila folder, which contained bills of lading, packing tickets, coil slips, order forms, purchase orders, as well as printouts from the order entry program and relevant e-mail messages. Very little of the order information was digital. On the Accounting side, the entire workflow and storage process was paper based and prone to lengthy retrieval times as a result of long hunts for misplaced documents both on and off-site.

Jupiter is required to store their Accounting and Customer Order information for seven years. Once a year the older documents are rotated to one of Jupiter's warehouses located 70 miles from the Accounting and Customer Service offices. To access a document from the long-term storage, a

staff member would have to call the warehouse and request a copy of the document via fax or FedEx. Approximately once a month the warehouse staff would be unable to find a needed document and an employee would have to drive one hour to look for the document themselves.

Work Processes

Jupiter receives 200-300 custom orders a month. Because of Jupiter's order processing workflow, the number of separate orders is closer to 600-1200. For example, if a customer ordered five coils of aluminum, each painted a different color, five separate order folders were created. An order can be in-process for just a week or up to three to four months before it is finished and closed out.

When questions or claims arose on closed customer orders, the Customer Service representatives could spend as long as an hour looking for the file. If the file was not found, Jupiter was forced to try to recreate the file by accessing what little information they had stored in the computer system.

On the Accounting side, a lot of time was spent accessing invoices and checks in order to verify payments. Additionally, finding important documents to compare costs between months or years was very time consuming. The Accounting staff constantly had to get up from their desks and hunt for information in the filing cabinets. During audits, requested information was pulled from the files and too often did not get refiled correctly.

Solution Requirements

Jupiter was looking for a solution that would securely store their documents,

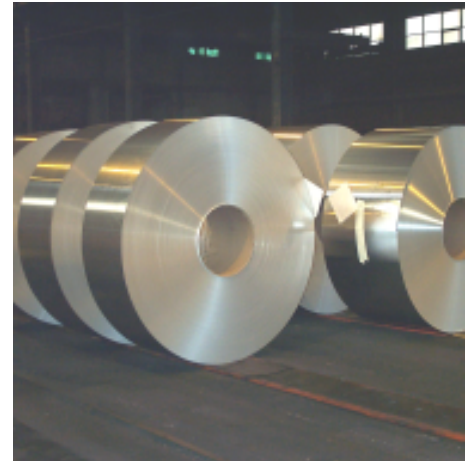
provide fast access to business critical information and increase productivity. Each department created a list of ways they wanted to be able to look up information and these lists were used in defining the index fields in the DocuWare File Cabinet.

Solution

Information & Records Associates, an Authorized DocuWare Partner, installed Jupiter's DocuWare solution, which included a DocuWare Systems License, two FULL FUNCTION licenses, 13 READ-ONLY licenses, as well as the AUTOINDEX, CDMAKER and RECOGNITION modules. Additionally, two scanners were purchased as part of the solution.

Today, the Accounting staff has instant access to detailed information from fiscal year 2001 forward. The department scans the accounts payable invoices, purchase orders, requisitions and check copies into DocuWare, where they are filed automatically. The automation of the filing process is achieved with two optional DocuWare modules. The first module, a powerful Optical Character Recognition or OCR module, reads the document number from each scanned document and fills in the corresponding index field. A second optional module, reads the value in the document number index field, then goes to the accounting database, finds a matching record and automatically fills in the remaining index fields, using the document number as a matchcode.

The Customer Service department is also using DocuWare to store and access information. Once an order is fulfilled, the file is checked for completeness and closed. The file is then scanned and indexed. The indexing



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Alex Gross
Vice President
Jupiter Aluminium



Implementing DocuWare has also increased the Customer Service department's performance. The reps spend less time on the phone per call because questions are answered immediately; needed information is available directly from the desktop. This efficiency has allowed the department to support an increased number of customers per day, without adding personnel. Furthermore, the department's phone bills have been reduced and job satisfaction has increased dramatically.

Corporate Benefits

On a corporate level, better reports and having all documentation available improves vendor relations—which in turn leads to better pricing from suppliers and better control of inventory costs.

By addressing customer order claims and vendor questions immediately, business relations are strengthened, which translates into more repeat business. DocuWare helps Jupiter live up to its mission of remaining conscious of their customers' needs in terms of products and service, and providing the very best value available in the marketplace. Jupiter Aluminium realized a return on their investment within the first year of implementing the system.

In conclusion, Alex Gross, Vice President for Jupiter Aluminium said, "Up until the last two years we have experienced 20-30% growth each year. Even though the volume of documents has accelerated, since we installed DocuWare, we haven't needed to add any administrative personnel."

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is done manually because many of the documents in the customer order file are printed on a dot matrix printer and the low quality printing does not allow for automation. Retrieval is now quick and painless and questions can be answered immediately.

User Benefits

Jupiter has seen an increase in their employees' productivity and the quality and timeliness of information has improved. For the Accounting staff, document retrieval times are much shorter, allowing the staff to spend more time focusing on their core duties. The elimination of misplaced documents has reduced job related tension and audits have become much less stressful as information is easy to access and no refiling is needed.

For Customer Service employees storing completed orders electronically means files are always found and the reps never have to try and recreate them.

Department Benefits

Going forward, the Accounting department will reduce document retrieval costs generated from faxing and shipping files from the warehouse. The company has reduced storage space needs, as 50 plus file cabinets have been removed, adding valuable office space. DocuWare has given the staff better access to month to month and year to year cost comparison data. Additionally, the department's overall performance has improved because more available time has increased efficiencies.



Benefits

- The ability to address customer order claims and vendor questions immediately strengthens business relations, which translates into more repeat business and allows Jupiter to live up to its mission of providing the very best value available in the marketplace.
- Immediate access to information allows the company to create more detailed reports and improve vendor relations, which in turn leads to more competitive pricing from suppliers and better control of inventory costs.
- Customer satisfaction has increased because customer service employees can now support an increased number of customers per day, spending less time on the phone per call because information is available directly from the desktop.
- Document retrieval time has been significantly reduced, allowing the Accounting and Customer Service staff to spend more time focusing on their core duties, improving productivity.
- Document shipping charges resulting from shipping documents from the off-site warehouse to the corporate office have been reduced and will eventually phase out.
- Eliminating misplaced documents has reduced job related tension and audits have become much less stressful as information is easy to access and no refileing is needed.

Solution Requirements

- Store documents securely
- Provide faster access to information
- Increase productivity

Solution

- DocuWare
- AUTOINDEX
- CDMAKER
- RECOGNITION