

Document Capture for Infor M3 Users

In an idyllic parkland on the banks of Munich's River Isar, the occupants of 30 or more condominiums are delighted with the consistently good air quality without having to cross the room to open the window. Instead, ventilation equipment in each apartment provides air flow at any level or temperature which can be individually controlled.

The system, with its controlled ventilation for each apartment and efficient heat recovery, was manufactured by Systemair, a leading manufacturer of ventilation and air-conditioning equipment which has branches in more than 50 countries across the world. Approximately 5,500 employees generate sales of EUR 720 million (fiscal year 2016/17) with the Systemair, Frico, Fantech and Menerga brands. These products are responsible for an agreeable indoor climate not only in apartments but also in schools and offices, as well as ventilating tunnels or metro stations where they also guarantee smoke-free escape routes in the event of a fire.

The Group, which is headquartered in Sweden, is on a continuous growth trajectory and includes over 70 companies (as of summer 2018), of which about 46 use Infor M3 – an ERP system designed specifically for manufacturing companies. The Central IT Department which is based at the Group's largest site in Germany in Boxberg, Baden, is responsible for the the maintenance and development of the system. Daniel Kranz, also based in Boxberg, is accountable for the document management aspects of the application. "We are constantly on the lookout for efficient solutions," explained the application developer.

He found Ephesoft Transact to be the solution he was looking for. It is a modern platform for document capture and data extraction; it reads invoice data and barcodes, transmitting them to the ERP system after validation. After the successful completion of trials in 2017, the smart capturing platform was rolled out gradually beginning in March 2018. In its final stage, the purely web-based solution will be available as a Group-wide standard for all Infor M3 users.



Sector

Industrial Plant and Equipment

End-users

The Systemair Group

Results

- Reliable capture of over 40,000 barcodes and 7,000 invoice data per month
- Central application with multitenant capability for decentralised and geographically separate divisions
- Economic solution with low administrative cost
- Implementation using an agile development approach



The Challenge

Many documents accumulate during the order process, all of which must be filed in a specific structure in the central archive. In an attempt to achieve this, Systemair developed and used its own barcode solution, but the solution failed to satisfy the IT Department. “An error rate was not evident in the old tool. In most cases the error was only picked up too late or not at all,” Daniel confided. The result was that the application developer often had to intervene - and in emergencies, they even had to manually pick out the barcode documents.

The causes for these errors were many and varied, as was also the range of the document types which varied from the order along with the email correspondence with suppliers through to signed delivery notes from the logistics providers. Also, the software sometimes read the barcodes incorrectly, especially as the layouts varied enormously depending on the document’s purpose.

Their existing software for invoice capture was also on trial as the licence fees and operating costs were proving to be excessive. Some Accounting Departments maintained separate workstations just for document capture. In addition, the application developer had to configure a unique template for each new supplier and program the system.

“Ephesoft Transact offers an interesting price/performance ratio and fits ideally into our IT strategy.”

— Daniel Kranz, Application Developer at Systemair GmbH

The Strategy

When the Infor Ephesoft account manager made his presentation as part of the selection process for the new strategic partner for smart document capture, Daniel Kranz liked what he heard and gathered more information from the software developer’s team responsible for the German-speaking markets. “Ephesoft Transact’s open architecture opened the door to completely new opportunities for us as it could be easily integrated into our IT infrastructure and extended via web services,” stated the IT specialist. “The web-based approach was an ideal fit with our IT strategy.”

The licence model without a click price worked out to be much more attractive, particularly as the capture solution processed the incoming invoices and barcode documents automatically. Plus, knowing that the new document capture could potentially be extended to other departments was attractive. “We already have a few ideas about this but we must first complete the rollout for the two application scenarios,” the software developer continued.



The Solution

Daniel Kranz set up a pilot in the summer of 2017 to gain some experience with the system. An Ephesoft staff member supported the implementation which was run as an agile development project. The successful test impressed the management back in Sweden. Ephesoft Transact moved on to be the Group-wide solution for smart document capture for Infor M3. The result was that the in-house barcode reading facility and the existing capture product were abandoned.

Application developer Daniel Kranz rolled out the new solution in four German divisions as the first step. No great effort was needed for this as the configuration could just be copied from the pilot. “It was a matter of just a few minutes” was how this IT specialist summarized the rollout. As an example, he cited the email address for the central mailbox from which Ephesoft Transact collects and automatically processes incoming invoices.

Two further subsidiaries in Sweden and Italy followed in the early summer of 2018; Switzerland and Austria are next on the list. The intention is that all divisions with Infor M3 users will have converted by the middle of 2019.

They will be managed on the Ephesoft server as different tenants. Each Division is allocated its own batch class so that the users can only see and process their own documents.

Experience to date is very promising for the application developer. “The recognition rate is extremely good.” This is due to the new validation concept for the barcode documents. Each page contains a 1D or 2D barcode consisting of a defined sequence of numbers and letters. The system reads this figure, reconciles it and passes it to the ERP system. If a barcode is not recognized, the next step is an additional check on the internal or external order number, which is then extracted. In practice, this means a hit rate of almost 100%. In addition, the assembly of individual documents is simplified into one business process.

Daniel Kranz is able to access important performance indicators in what is called the “Report Monitor”, a capability which increases transparency. “We now know precisely how many barcode documents accumulate. It’s almost 40,000 pages every month just in the four German divisions. Suppliers’ invoices total about 7,000 per month. Ephesoft reads the information in the headers and footers and reconciles it with the master file data.

Ephesoft is open to modification which is achieved by scripts. “This offers us no end of potential for future enhancements,” remarked the application developer, with a smile on his face. And finally, the time spent on administration is reduced, which leaves him more time for strategic projects.

“Ephesoft is an important part of entering incoming invoices into the system and efficiently filing barcoded documents on all processes.”

— Daniel Kranz, Application Developer at Systemair GmbH

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