

## HB Munters Group

### Case Study



## Turbo-Charged with Integrated DMS

**Even before the end of the last century, the Dutch part of the international Munters Group started digitizing all their order documents to ensure quick and secure access. By expanding into fully automated document workflows, the company was able to take a second step and further increase the efficiency of their internal business processes.**

The international HB Munters Group, a Munters company in Almelo in the Netherlands, specializes in temperature, humidity and climate control systems.

Their focus is on individualized customer solutions – from the conceptual design of complete air conditioning systems for large companies to deep-freeze systems for work spaces running below minus 70 degrees Celsius or ultra-modern systems for dehumidifying air in test laboratories.

### HB Munters Group

**Location:**  
Almelo, The Netherlands

**Industry:**  
Manufacturing

**Department:** Company-wide

**Application Areas:**  
Administration (general), Order Processing, Purchasing, Procurement, Customer Service, Personnel Management, Payroll Accounting, Accounting, Controlling, Transportation, Logistics, Sales

# Requirements and General Environment

HB already began with its Document Management System (DMS) project in 1999. Initially they used the DMS purely as an archiving solution. "Before setting up our digital document pool, we only worked with paper-based processes, so we encountered the typical disadvantages of paper," says Bert van Os, Operations Manager of the HB Munters Group. For example, the company simply ran out of storage space for all their documents. Plus, they increasingly lost track of documents. Some were simply never returned after being checked out of the archive by a colleague. "This was a main reason why we were scanning all our order documents including proposals, corresponding customer correspondence, and technical drawings in the old millennium," confirms Bert van Os. Digitizing the documents brought the organization some hoped-for relief: additional space for workstations was freed up and everyone had simultaneous access to important documents. It also saved valuable time when searching and forwarding documents. "Our employees were now able to display any document on their screens and forward it directly to customers or suppliers via email. This was of course a great thing, but had one drawback. We had to manually index hundreds of documents each month, to ensure we had the right search criteria in place to find them later. At that time, we didn't yet know of all the possibilities that our DMS had to offer," explains van Os.

In 2009, their ERP system was expanded, which was the perfect time to review how they were using their document pool. "In a review workshop with our new DocuWare Partner, we suddenly realized what other functionalities were actually available with our document management solution, such as fully automatic indexing or workflows controlled with electronic stamps," the Operations Manager recalls. "During a visit to our implementation partner, we saw what a fully digital office can look like when using DocuWare. We were made aware that the broader use of a DMS would significantly improve our efficiency." Bert van Os did not hesitate for long and set up a meeting with all parties involved. "The feedback from as many people as possible was important to us. That is why we decided to start with the general order process," van Os explains.

## The Task

- Central document pool
- Fully automated document storage
- Digitization of various business processes



# The Solution

Changing from a pure archive solution to an integrated workflow-based document management system was initiated. The order process at HB includes, in addition to various documents, different release processes that are now completely controlled by DocuWare. After receiving and checking the purchase order, a corresponding data record is created in the ERP system, which DocuWare prints and stores as an internal order document right into their file cabinet. The solution takes over the fully automated indexing of each document. An integrated workflow passes documents on to the purchasing department, where they are released with digital stamps; purchase orders are then sent directly to their vendors. These are also stored in their central document pool. After receipt of the goods, the ordering process moves into the Logistics Department, where shipping documents are created and automatically added to the order as a copy by the DocuWare system.

Finally, corresponding invoices are checked and paid for using the digitized order documents. In a second step they are scanned in batches, assigned to the corresponding orders by means of unique numbers and stored automatically. This way approximately 2,500 paper documents are processed every month – fully automatically. "Compared to how we once used the system purely for archiving purposes, this was a small revolution indeed for our company," proudly reports Bert van Os. Over time, they expanded the process and applications into other areas; for example, project engineers, Human Resource staffers and management are now also integrated.

## Modules in Use

- [Autoindex](#)
- [Barcode & Forms](#)
- [Connect to Outlook](#)
- [DocuWare Import](#)
- [DocuWare Mobile](#)
- [Task Manager](#)

# The Benefits

Documents such as purchase orders, invoices and shipping documents, are available to employees not only at the push of a button – now all associated processes are equally accessible and transparent. Inquiries can be answered quickly and directly, so the quality of their customer service has improved overall. "This is a huge time-relief," confirms van Os. Approval processes are also many times faster. Documents are no longer lost on the way through the departments and are immediately available to all employees involved in the process. The Operations Manager remembers: "When I was away from the building, a customer order could lay on my desk and the entire order process was delayed – often for several days. Thanks to DocuWare, we can access the documents from anywhere and even authorize them via smartphone. If several colleagues are traveling at the same time, we can still complete a process within a few minutes." Transparency is also guaranteed because only authorized users can use digital stamps. Unauthorized access to documents is blocked and quality guidelines are automatically adhered to. The company has already benefited from simple document handling and increased security during tax or internal audits.

## The Benefits

- Document workflows with multi-level authorizations
- Significantly reduced processing times
- Improved service for both customers and vendors



Thanks to the very positive experiences with the DMS, the HB Munters Group is planning to expand. They are planning a switch to a new ERP system by the company IFS. This will, of course, be integrated with their central document pool.

# Conclusion



"Moving from a pure archive solution to an integrated workflow-based document management system has been an incredible improvement for our organization. As a result, we have significantly improved processing times and the quality of service provided by our group."

*Bert van Os, Operations Manager, HB Munters Group*



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