

With certainty to success

Success story



windream
MANAGING DOCUMENTS

With certainty to success

Thirty years and even longer - The Swiss Niutec AG archives receipts with windream

Niutec AG in Winterthur is one of the leading private chemical analysis laboratories in Switzerland. As a flexible service laboratory, it offers chemical analysis, methodology and development in the fields of environment, industry and medical technology. The documents generated in the course of individual analysis projects - from protocols, reports, purchase records and maintenance contracts - are sometimes subject to a retention period of up to thirty years.

It is clear that archiving over this long period of time and with a constantly growing number of documents cannot be realized using a paper archive. This is why Niutec has been using the windream ECM-system as electronic storage for almost all project-related records and information which have to be kept since the beginning of 2015.

Easier than expected

The transition from paper-based filing to electronic archiving was - in retrospect - much easier than Agi Mosberger, the company's current Managing Director, initially thought. Since 2014, she has also been the project manager for the ongoing windream IT project in cooperation with the Swiss windream distributor Kinetic AG.

2014 - The initial situation

At the Winterthur location, a team of 25 experts is working, consisting of highly qualified chemists and laboratory assistants, but also of employees working in administration. As the company has grown in recent years, customers' demands on the laboratory have also increased - and in some cases are very restrictive. This has also led to the requirement to archive analysis documents in an audit-proof manner for thirty years. Agi Mosberger thus initially asked herself the question: „How can this be realised efficiently?



History and Status Quo of the windream project

Agi Mosberger has already been working for Niutec in the consulting sector since 1994. Actually, in spring 2014 she was „only“ commissioned to purchase a new multifunction printer - short MFP - for Niutec, as the existing copier was already very old and therefore not up to future requirements. The IT-company Innosys, a partner of the Swiss windream distributor Kinetic, received the order to deliver and commission the new device. On

the occasion of a consultation meeting between Ms. Mosberger and Beat Bütler, the Innosys owner, it was also mentioned that the increasing amount of paper in the context of a 30-year retention period would be a serious problem, and not only due to lack of space. Thereupon, Beat Bütler recommended the windream ECM-system as a replacement for the already existing file archive. The project was started quickly and immediately.

Key Facts

- ✓ Fast replacement of the existing file storage by an electronic archive
- ✓ Electronic implementation of a rights concept according to the specifications of the internal quality management
- ✓ Individual scalability
- ✓ Integration of an efficient scan solution into the windream ECM-system
- ✓ Rule-based and automated document storage

Autumn 2014: Kick-off in the accounts payable department

The „kick-off“ took place in October 2014, at that time the requirements, which the new windream system should fulfil in the shortest possible time had already been defined.

The top priority was to abolish the conventional „paper circulation“ with signature regulation, receipt stamp and other hand-written notes on the paper. „In the existing and well-functioning internal processes in the accounts payable department should be changed as less as possible“, emphasises Agi Mosberger. „In principle, the processes should remain the same as before.“ Subsequent to the organisational processing, the receipts should be digitised by so-called „late scanning“, captured electronically and archived in windream. A further requirement in the field of customer invoices was an automated windream storage directly after the creation of a document.



windream convinces

„windream convinced us immediately, as the system is very easy to understand“, says Agi Mosberger looking back. „The system can be scaled very nicely and also supports the wish of the Niutec-employees to continuously optimize the processes. And we could start quickly!“ In spite of the quick start, the way into the future was by no means obstructed, because the individual configurability of the windream system

allows to react to changes and to adjust the system to the increasing requirements at any time.

The start of the productive phase was announced for January 2015 - and then it was actually realised. As new servers were on the investment plan anyway, the technical windream requirements were taken into account and implemented immediately



About: The Swiss windream distributor Kinetic AG

Kinetic AG, located in Lenzburg, Switzerland, has been a windream distribution partner for many years and is specialized in the distribution and integration of windream solutions in the entire Swiss region. As a windream distributor, Kinetic looks after an extensive network of specialized partner companies and also provides 2nd level support for partners. In this way, Kinetic covers the whole range of typical ECM requirements, starting with the classic document management in medium-sized companies up to complex ECM projects in large companies.

In addition, the range of services offered by Kinetic AG also includes integration of special applications, which are completely oriented towards individual customer requirements. Such tailor-made software solutions are developed by Kinetic in its own solution distillery under the Dalvany label. In this way, Kinetic has already successfully realized a multitude of complex ECM projects for windream GmbH.



December 2014: Scan solution and project acceptance

Finally, a Kofax scanning solution for digitizing incoming paper documents, including a rule-based filing service, was integrated at the end of 2014. The service allows to save documents captured via scanner automatically in individually configurable storage pools of the windream system. The acceptance and release of the entire system for productive use also took place in December 2014.

January 2015: Final productive use

Since the beginning of 2015, windream has been used at Niutec AG in the accounts receivable and accounts payable departments, among others. There, the company's employees process both electronically created documents and digitized receipts with the new ECM-system. The types of documents archived in windream are heterogeneous. Among others, these include documents of the order system, accounts payable and receivable documents, purchase documents, investment calculations and maintenance contracts.



Rights concept according to the specifications of quality management

In this context, it is precisely regulated to which actions which employee is entitled. This is based on the instructions in the quality management manual, in which the authorizations of the individual employees are defined. The access and document administration rights configured in the rights concept of the windream ECM-system are exactly based on the instructions and

process flows defined in the quality management. They have been mapped in a 1:1 relation on the electronic level. E.g. there are exactly three defined groups of persons whose members may create new versions of documents according to the windream versioning concept.

Survey confirms positive impression

A satisfaction survey among the Niutec employees after the start of the productive phase resulted in a very good evaluation of the support provided by the windream distributor Kinetic AG. Apart from the fact that Kinetic has continuously accompanied the whole project from the beginning, Agi

Mosberger especially praises the smooth course of the individual project phases. In addition, the windream system requires very little training, is quick to install and extremely easy to handle.



Future system extensions already in planning

The windream project at Niutec AG is far from being completed. The company is currently planning further system enhancements and add-on products which will be used soon. The rule control will be implemented on the basis of the specialized Kinetic products RBIS and RBAC, where RBIS represents a rule-based import service for documents and RBAC represents a rule-based storage via client computer.

The entire document volume is then permanently stored in a common, legally compliant and audit-proof long-term archive. Precise procedural documentation should ensure that all processes are described transparently and chronologically in accordance with legal requirements.



Your contact at windream

If you are interested in more detailed information on integrations, solutions or products from the windream world, please do not hesitate to contact us.

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