DocuClass ™
Manufacturing

VENTANA

Customer Profile

Ventana USA® is a market-leading expert in the art and engineering of custom vinyl profile bending and fabricating of architectural shapes for window manufacturers, in traditional or special geometric shapes, styled to fit any design concept. As its markets expanded, so did the company. In 1993, it moved into its current manufacturing plant in Export, PA. Since then, it has enlarged that facility and acquired another in the same industrial park for a combined total of 70,000 square feet. In 2000 it expanded into the rapidly-growing Fence, Deck and Railing (FDR) market, offering a wide array of bent and routed shapes.

Business Situation

The first problem Ventana USA encountered with respect to managing documents was insufficient storage space. It maintained a whole mezzanine floor full of boxed documents for servicing customers, verifying warranties, and saving invoices for the IRS. Whenever a Ventana employee needed a particular document, they would climb to the documents floor and dig through dusty boxes until they found it. Eventually Ventana simply ran out of document storage space.

Searching manually for orders and instructions also resulted in slower customer response times. Documents were sometimes lost or misfiled, and there was an increased chance of errors in ordering, payment, manufacturing, shipping and billing.

Ventana also hired some consultants to analyze and improve the efficiency of their business processes. One of the most important conclusions they made was with respect to the amount of time wasted by handling paper. The same documents were being walked through many offices and passed through many hands.

Solution

Ventana decided to improve their business processes, beginning with the way they handled and processed documents. Their initial objectives were:
• Increase customer satisfaction by reducing the time it takes to find their files
• Make documents accessible from multiple locations
• Keep all related documents together
• Reduce costs by moving documents to electronic format
• Ensure document security
• Track changes, updates, and status

Initially Ventana's document management system consisted solely of scanning, archiving and retrieval. They scanned all of their paperwork into the system and began handling their documents electronically.
After receiving the study results from their efficiency consultants, they decided to implement automated document workflows.

Benefits in Customer Service

In the past, the fax machine would print the orders and someone would pick them up and walk them to the appropriate persons in the Customer Service Department. Customer Service Representatives (CSRs) would enter the orders, print them, and manually fax individual order acknowledgements back to the customers. Now DocuClass is directly integrated with the fax system, pulling them in, and routing them to a workflow queue for the CSRs. DocuClass also automatically faxes order acknowledgements to customers as the CSRs process them.

Benefits in Fabrication

In their original paper-based system, the CSRs walked the printed orders to the various departments for fabrication, often with verbal instructions or handwritten notes that were sometimes overlooked, misplaced, lost, or misunderstood. The Fabrication Departments had to dig through piles of paperwork to decide which ones they needed. DocuClass is now integrated with the orders system, capturing the orders through its COLD/ERM Module. Using the order numbers as keywords, DocuClass links the orders to their corresponding original faxes, along with any notes or special instructions, and routes them to Fabrication. Fabrication no longer searches through stacks of paper to decide which pages they need, and special customer instructions are permanently documented in the system for future reference and always remain attached to their respective orders.

Benefits in Shipping & Invoicing

Ventana used DocuClass to automate the Shipping and Invoicing Departments. In the past, someone had to manually walk the orders to shipping, write tracking numbers and shipping information on them, perhaps give some verbal instructions, and walk the order back to someone in the Invoicing Department, who would enter it into the invoicing system. Now, once fabrication is completed, DocuClass routes the order to someone in the Shipping Department who pulls it from the queue, examines the order, and enters the shipping information. DocuClass then automatically routes the appropriate completed documents to the Invoicing Department's queue. The DocuClass Workflow module also handles the tracking and routing of partial shipment orders back through the shipping and invoicing phases, as many times as necessary, until the orders are complete.

Benefits in Human Resources

In Human Resources, DocuClass is implemented DocuClass in Human Resources to keep track of employee information. It handles the scanning, classifying, automatic indexing and validating of employee data files. Human Resources now can easily access employee information by keywords, while keeping that information secure from unauthorized users.

Benefits in Communication

Ventana improved the coordination between its two facilities by using DocuClass. In the past, the Accounting Department was in a different building and could not access all of the paperwork they needed. The Fence/Deck/
Railing Department was also split between two buildings but employees of both needed access to many of the same documents. Now, any DocuClass user, in any building is able to instantly access any other document in the system for which they have authorization.

Summary

Using DocuClass, Ventana has been able to reduce costs and increase customer satisfaction by:
• Regaining the substantial amount of office space formerly used for paper documents
• Increasing the efficiency of their business processes by using the Workflow module
• Increasing the efficiency of existing personnel by eliminating manual paperwork
• Improving customer response times
• Reducing errors in dealing with customers by preserving all communications with them
• Accessing documentation from multiple locations
• Keeping all related documentation together

"Once we saw what DocuClass' workflows could do, we wanted to spread them to all our departments. Docu-Class has helped us to grow our business and improve customer satisfaction."

Dana Hawkins
IT Director

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