

BECKHOFF

Digital workflow instead of paper piles

Success story



windream

MANAGING DOCUMENTS

Digital workflow instead of paper piles

Digitalization is already part of everyday life in many administrative areas at specialist Beckhoff Automation. However, this was not yet the case in accounting. Until recently, paper-based processes with printouts and folders were used there.

As a company for automation systems, Beckhoff Automation GmbH & Co. KG is a

household name in the industry. But the supplier's accounting system, of all things, lagged behind its own requirements: „Our internal workflows should no longer lag behind the technology of our products“, Albrecht Mutschler, ERP Solution Manager at Beckhoff, summarizes the requirements in one sentence. This has now been successfully achieved with windream.



BECKHOFF

Seemingly small task, but it has it in itself

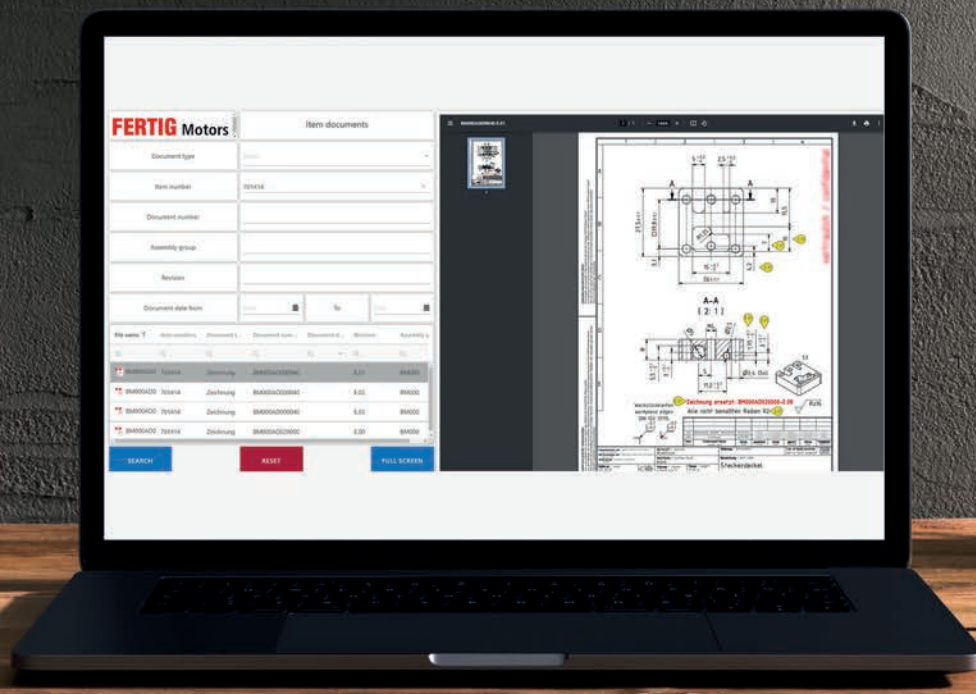
It all started with Beckhoff's desire to digitize accounting and automate processes. Initially, only a subarea was to benefit from digitalization. „The original requirement was the desire for automated processing of incoming invoices, including a workflow for approval and posting with subsequent storage in the archive,“ says Hans-Peter Jakobfeuerborn, IT Department at Beckhoff, explaining the requirements for the new document management system to be introduced. It should then be possible to display the archived invoices from Beckhoff's ERP system. The primary goal: The time-consuming filing of paper documents was to be eliminated.

However, in the course of the evaluation process of solutions from various suppliers, it quickly became apparent that Beckhoff would expand the requirements profile even further. In order to be able to transfer other documents quickly and securely into the ERP, incoming documents from suppliers, delivery bills, measurement logs and article documentation were also included in the specifications, in order to be able to display as detailed a digital image as possible for each order and the linked processes. These documents were to be stored in the ERP system with tagging so that they could be found and assigned quickly. Thus, the originally rather small task of digitizing incoming invoices quickly became a cross-departmental and cross-process project.

BECKHOFF Background: Beckhoff Automation

Beckhoff implements open automation systems based on PC-based control technology. The product range covers the main areas of Industrial PC, I/O and fieldbus components, drive technology, automation software and automation without control cabinets. Product lines are available for all areas, which function as individual components or in combination as a complete, coordinated control system. Our New Automation Technology stands for universal and industry-independent control and automation solutions that are used worldwide in a wide variety of applications - from CNC-controlled machine tools to intelligent building control systems.

With around 5,000 employees worldwide and a turnover of 1.182 billion euros (2021), as well as 40 subsidiaries and branch offices, Beckhoff Automation is one of the heavyweights in the industry.



Display of an incoming document with preview

Flexible, open and connectable

The requirements were not limited to suitability for mapping the various processes. Background: At Beckhoff Automation, the primary management systems - the ERP and the CRM - run as cloud applications. Combined with the functional requirements specification, project manager Hans-Peter Jakobfeuerborn came across windream when evaluating possible document management systems. During his visits at trade fairs and in windream forums, it became obvious that the windream Dynamic Workspace fulfills important points for the integration of a DMS at the automation specialist: An easy integration into the existing Microsoft system environment is possible without any problems, and the Microsoft Dynamics interface, which has been programmed especially for Beckhoff by the AX-Solution partner KCS, is fully supported.

Beckhoff also had the requirement to make as few adjustments as possible to the existing system landscape when intro-

ducing document management. The acquisition of additional hardware or software should also not be necessary. „We have a reliable infrastructure, which we would like to expand with DMS functions without having to adapt the existing systems or even completely turn them upside down,“ state Mutschler and Jakobfeuerborn. For example, archiving in the form of audit-proof storage in the company's own block-based storage without third-party extensions should be required in any case. The core of the backup process is a backup system that could be easily integrated with the new document management system.

In addition, both vertical and horizontal scalability was important for Beckhoff Automation. With positive experience in the area of invoice receipt, the solution was then to be extended to the entire accounting system and later cover other areas in the company.

Problem-free implementation and optimal integration

When integrating new solutions into existing systems, it is important to implement them smoothly. Workflows must not be interrupted for long periods of time. A lengthy troubleshooting process with the interruption of entire process chains is also not sustainable for a company. Albrecht Mutschler had a clear idea of how the implementation process should proceed: „In addition to the technical key data, we also attached great importance to ‚soft

facts‘. This involved how well a provider can integrate a DMS during ongoing operations and whether the implementation runs silently, so to speak, so that employees experience a smooth transition.“

Therefore, the technical support provided by the windream team was a decisive factor in designing the implementation of the new DMS solution according to Beckhoff's requirements.

Search view with various selection options

The screenshot displays the 'windream Dynamic Workspace' interface for 'BECKHOFF' HR document retrieval. The search criteria are as follows:

Field	Value	Additional Info
Document type	Abwesenheiten	×
Staff number		
Document date from	10/1/2021	× 📅
To	10/31/2021	× 📅
Staff first name		
Staff last name		
Department	Select	▼
Area	Select	▼
Fulltext	<ul style="list-style-type: none"> No selection FM_Administration FM_Applikation FM_Einkauf FM_Elektromagnetisches Design FM_Finanzbuchhaltung FM_Geschäftsführung FM_Gewerbliche Ausbildung 	

A blue 'SEARCH' button is located at the bottom right of the search criteria section.

Large-scale use with measurable success

Currently, about 800 users (90 concurrent licenses) at Beckhoff Automation use the windream DMS instead of working in paper-based processes as before. Besides accounting, modules for a vehicle management, an electronic personnel file and a contract management are used. All modules are connected to the ERP and CRM. Company-specific adaptations were carried out in close cooperation between windream specialists and Beckhoff employees.

The result is impressive: „Due to the high integration, mainly into the ERP, the process speed in the areas covered by the digitalization has increased significantly. We avoid media breaks because we do not have to switch between different systems, which has significantly improved the overall performance,“ Albrecht Mutschler sums up.

This is because windream 7 with the Dynamic Workspace provides an integrated frontend for the entire Enterprise Content Management, which completely integra-

tes document management as a sub-area. The windream Dynamic Workspace allows Beckhoff Automation to display document management, workflows or electronically modeled business processes and even third-party applications under a common and flexibly adaptable web interface. And all this not only on the desktop, but also on any mobile devices, such as tablets and smartphones.

For the automation specialist from Verl, this means that use from the approximately 40 worldwide branches is completely secured without additional requirements for the existing systems. The modular structure leaves plenty of scope for extensions that may arise, for example, as a result of future business activities. And last but not least, the intuitive user interface ensures short training times and a quick introduction to the new system for employees who were previously primarily involved with paper-based processes.

Key facts

- ✓ Automated processing of incoming invoices with audit-proof storage in the company's own storage facility
- ✓ Process speed significantly increased due to high degree of integration in associated software systems
- ✓ Document management, workflows, and even third-party applications under a common and flexibly customizable web interface
- ✓ On all devices: on desktop and mobile on tablet and smartphone
- ✓ Usage from around 40 branches fully secured without additional requirements on existing systems

Rely on the Technological Market Leader

If you plan to invest in an innovative, efficient and easy to handle ECM-system, or if you need further information on how to optimize your business processes concretely, we should get to know each other.

In the market sector of ECM-software suppliers, windream GmbH is the technologically leading manufacturer. With the windream ECM-system based on the patented Virtual File System technology (VFS), we have created an unrivaled tool for administering your complete company knowledge. Our software is easy to handle, effective, and future-proof. We have 20 years experience in successful software solutions development for enterprises of any size. Medium-sized companies and multinational corporations as well rely on our top quality products and on our technological know-how.

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