LCA AUTOMATION AG

CASE STUDY

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Bringing order to the document jungle in the plant construction industry

For a project-oriented company like LCA Automation, a specialist in plant construction, efficient document management is of critical importance. A new system brings both increased efficiency in day-to-day work and a significantly simplified working process for the customer when handling plant documentation.

Customer	– LCA Automation AG – Küssnacht am Rigi, Switzerland – International offices in China und Mexico – 100 employees
Industry	Plant construction
Project	– Plant documentation – Project binders – Corporate archive – ERP integration – Exchanging and comparing documents with the customer – Management information system

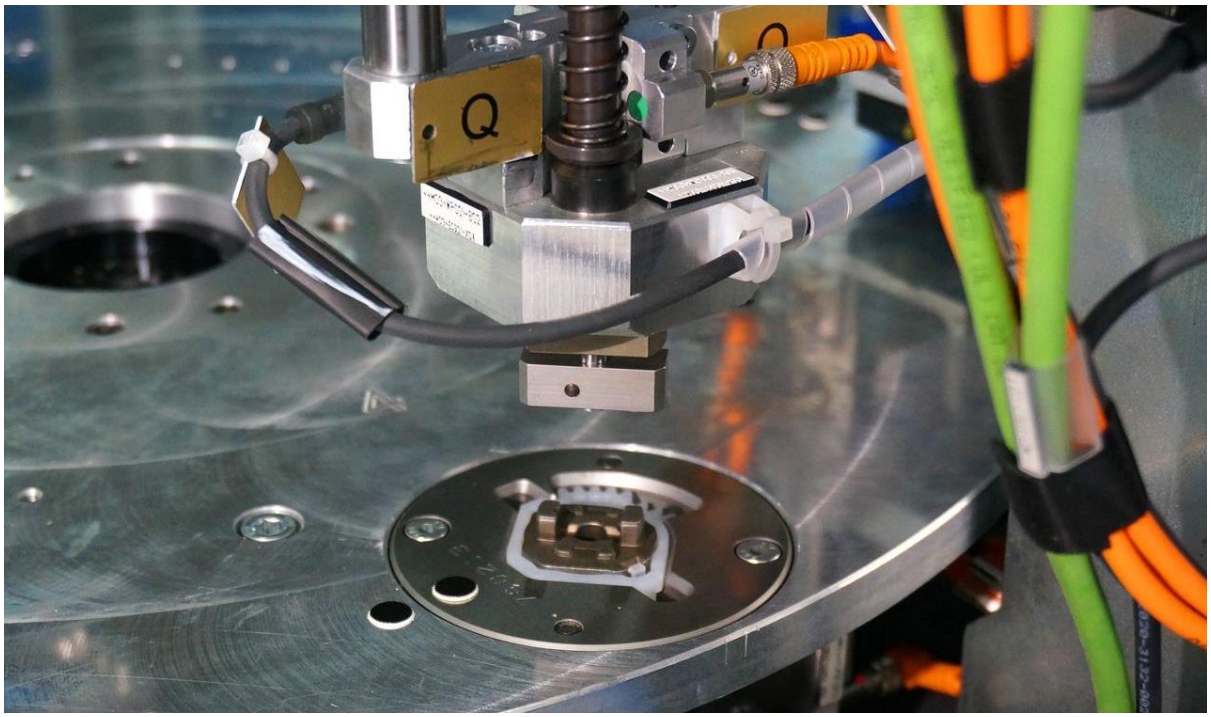
LCA Automation is an innovative specialist in the construction of specialist machinery for automation, process technology and process engineering. For almost 45 years, the company has brought automation to international customers in the automotive and transport industries, in housing technology, and in other sectors as well. LCA also develops production concepts, specific machine tools and test benches, as well as offering a range of services within the field of machinery construction. In the last few years, the company has grown significantly – partly organically, but also through a number of acquisitions. The company's IT system landscape had therefore become correspondingly difficult to manage. Ueli Imhof, Head of Administration at LCA, was ultimately given the job of consolidating the largest and most important systems. With the implementation of Microsoft Dynamics AX, a new ERP (enterprise resource planning) system first brought order to this previously impenetrable jungle of applications. Technical applications for electronic and mechanical construction then followed. Finally, in 2014, Imhof set about professionalising the company's approach to document management. At the time, internal documents were partially available within the ERP system, but as a rule document storage was still uncoordinated. On the one hand, externally-sourced documents such as invoices and delivery notes were still being stored on paper, meaning that they were only partially available or difficult to get hold of. On the other hand, having a wide range of different file systems for project data, operating information and other material led to chaos and disorder, as each employee was able to create folders and organise them at their own discretion. "Permissions were difficult to manage within the existing systems", said Imhof, describing the situation as it then was. "This meant that sometimes no rights were assigned at all, so there was insufficient guidance given to employees in the way they worked." A new document management system (DMS) needed to address this situation by automatically keywording and storing documents, as well as providing the appropriate employees with a defined role system. At the same time, it was important to account for the fact that LCA's project staff often work off-site all over the world. The new system therefore needed to be a web-based solution which would also be compatible with mobile devices.

DIVIDED INTO THREE SUB-PROJECTS

Eventually, the decision was made to use InfoShare, from the Swiss developer Kendox, based in Oberriet, St Gallen. In making this decision, Imhof followed a recommendation from a Microsoft partner whom he knew.

"Kendox was able to demonstrate many years of experience implementing its DMS system within Microsoft Dynamics AX. This meant that there was an existing interface with our ERP application. As a result, we were able to conclude that this would make it easier to implement this new, unifying DMS solution", said Imhof.

"However, in order to avoid the risk of overloading ourselves, we decided to divide the work into three sub-projects." The first item on the agenda involved the most critical component of the system: introducing a project binder, integrating it into the ERP application, and transferring existing documents from the file system to the new solution. The second sub-project then involved introducing HR binders, integrating incoming invoices and organising all non-project-related documents from the ERP system, such as those from the purchasing department which could not be assigned to any given project. Finally, the third sub-project required LCA to implement external access for customers and to ensure that plant documentation in particular could be easily exchanged between LCA and the customer. At LCA, each customer order for a new plant is its own project. The project binder within the first step therefore received the lion's share of the attention; Imhof wanted the new system to bring the maximum possible benefit to the company in the fastest possible time. It was particularly important to him to prevent anyone else from storing ERP documents in one of the old file systems. For this reason, once the sub-projects got going, it was no longer possible to store or save documents on the file system. This meant that the old systems were effectively closed off, with the old archive only available in exceptional circumstances, and even then only by going through the IT department. "This was intended to indicate to staff that they needed to get used to the new system and start using it as quickly as possible." Looking back now, it is clear that this measure was one of the decisive factors in the successful implementation of the new solution.



TEST ENVIRONMENT AND BASIC INSTALLATION

A test environment was installed for the tiered implementation across the three sub-projects. The initial goal here was to carry out system, backup and database tests and to validate a potentially necessary data restoration process. In parallel with this process, administrators were trained on the new solution “on the job”. “By the end of the training and testing process, we expected our system administrators to be able to restore the basic installation in an emergency situation”, said Imhof, explaining the approach. Following successful system tests, operational tests and training, the application was configured for the numerous different document types and properties, access rights, integration with Microsoft Office and Outlook, the Dynamics AX connector, and so on. The key users were then trained on the application using the fully configured and prepared test environment. It is worth noting here that, during this time, the company moved its headquarters. Thanks to effective organisation on the part of the IT department, and in collaboration with Kendox, this presented no serious challenges to the project itself. Following the move, things kicked off in earnest in late June, 2015: the application went live, project binders were created based on the existing Dynamics AX source data, and project-related documents were imported from Dynamics AX. The latter meant in particular that a great deal of manual work was required to clean out the previously used file system, in order to be able to transfer the assigned documents over to the project binders. The new DMS for the project binders finally went live on 1 June.

SERVICE FOR THE CUSTOMER

Next, sub-project 2 followed a similar process for all non-project-related documents held within the ERP system, including HR binders and incoming invoices. To achieve this, an analytical workshop was first set up. The HR binders, incoming invoices and ERP application integration were configured within the test environment, a test load was processed, and key users were then trained. Finally, all elements were rolled out to the live system and the documents were imported from the ERP system and from the active drive within the new DMS environment. On 1 October, 2015, the system then finally came online for additional documents and binders. Similarly, the third sub-project (portal-based access for customers and supply of plant documentation) began with detailed analytical workshops where the rights plan to allow external customer access through the web portal was specified. In August 2016, this area also went live within the new DMS system.

SIGNIFICANTLY IMPROVED QUALITY AND INCREASED EFFICIENCY

“As a project-oriented organisation, implementing the project binders was of particular importance to us”, said Imhof, reflecting on the process. “A project involves all steps from development and construction to maintenance and documentation of a plant.” As LCA is also legally required to produce documentation for each plant constructed and to retain this documentation for long periods of time, the DMS application also contributed towards regulatory considerations. “With the new system, we can now guarantee revision-safe storage of documents in line with compliance and security requirements”, said Imhof. The plant documentation, which can contain up to 3,000 documents, is now itself a part of the project binder. Customers can automatically transfer it to their own system. Alternatively, the customer can also use a web portal to access the documents – even before the plant is delivered, if necessary. In particular, the automated supply and transfer of the documentation make life significantly easier and work much more efficient for both the customer and LCA.

“Previously, in cases such as these, we had to produce many different drafts, send them to the customer, then carry out the laborious process of transferring them back. Now, the customer can access the documentation directly. They can view change logs, for example, and we can transfer the binders for import into the customer’s system at the click of a mouse.” He indicated that the DMS system therefore provides a significant boost in quality while also improving working efficiency: “The documents can be found much more quickly than in the old system. Naturally, order and discipline are still required when storing them in this new system, but now when we search for invoices, delivery notes, timetables and more, we get results within seconds – as if we were using Google.”

Documents are available to all users, anywhere, on any device, making everyone’s work much easier than ever before.

ABOUT KENDOX

Kendox are the experts in digital document management and process automation for offices and administrative bureaus. With years of experience providing solutions using its own in-house technology, Kendox works in particular with customers in industry and manufacturing, trade and e-commerce, services, and logistics as well as with public institutions, schools and universities.

Kendox's applications are supplied and operated in the cloud from the company's own virtual data centres in Germany and Switzerland. Its software solutions are based on forward-looking technologies and meet today's security and data protection requirements.

Kendox's document and process automation solutions integrate with Microsoft 365, leading ERP solutions and many other specialist applications. Thanks to Kendox's collaboration with other solution providers and integration partners, the Kendox software platform works in any number of diverse use cases.

Kendox AG is based in Oberriet, Switzerland. Branch offices, as well as sales and consultancy offices, are located in Oberhausen, Germany; Vienna, Austria; and other locations in Germany, Austria and Switzerland. Together with its partner network, Kendox provides ongoing support to over one thousand customers.

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