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GLATZ GMBH

CASE STUDY

KENDOX

Glatz GmbH

Increasing efficiency by working with documents on the move

Glatz GmbH, a traditional Austrian business, is an international retail expert in groceries, agricultural commodities and logistics, with a stable network of suppliers based all around the world. It processes up to 18,000 receipts per year. By implementing the ECM/DMS solution Kendox InfoShare, the food broker is achieving significant cost savings by reducing its document processing, distribution and archiving workload. Location-independent access to documents and records makes it easier to validate and approve documents on the go and enables a modern self-service offering for employees.

Customer	– Glatz GmbH – 60 employees – Based in Vienna – Additional locations across Europe
Industry	Agrarian and grocery retail
Project	– Workflow-based processing of invoices received – Enterprise-wide document archive integrated into existing ERP solution – Employee document management («digital personnel binders»)

The history of Glatz GmbH is characterised by successful relationships and long-term partnerships. Since it was founded in 1892, this Austrian company has achieved historic status, living through two world wars and innumerable structural changes in the agrarian commodities and grocery retail sectors. Throughout these eventful years, the Glatz family built a traditional company and led it to become an established name within Austria. Today, the company is a leading private agrarian wholesaler of grain, fertiliser and animal feed, as well as a key retail partner for both retail and industrial grocery firms.

Multiple domestic offices, as well as subsidiaries in Hungary and Italy, all contribute to the company's collective success. Around 60 employees currently work within the Glatz Group. Another 100 people help to produce its popular Nuri sardines in Matosinhos, Portugal.

Glatz GmbH's financial department, based in its head office in Vienna, coordinates the entire invoicing workflow for the Glatz Group's four companies with an extensive network of international suppliers and sales partners. Even parts of the employee-specific management processes are controlled centrally. With the help of the document management solution Kendox InfoShare, Magister Stefan Wohlmuth, Head of Controlling and IT at Glatz GmbH, worked with the company's specialist departments to implement a set of simplified, transparent processes for processing incoming invoices. The solution will eventually be expanded to also cover contract binders and HR documents.

«Quality, customer satisfaction and sustainability are key cornerstones of our business,» said Wohlmuth. «In order to achieve these goals, we need effective internal processes that support them. It was important to our management for all relevant receipts and business documents to be accessible in a digital archive, for business processes to be made possible on the move, and to avoid duplicate archiving.»

«By making all relevant business documents available in a central digital archive, we wanted to make business processes possible on the move.»

Mag. Stefan Wohlmuth, Controlling/IT

STREAMLINING PROCESSES FOR INCREASING VARIETY

The digitisation project became necessary due to the company's numerous offices, high paper and printing costs, and the immense amount of space needed for its paper-based archive. «By digitising and optimising the approval process, particularly between different offices but also within our HQ, we wanted to simplify the various workflows we had developed over time and make them more efficient,» recalled Wohlmuth.

Before introducing the digital document management solution from Kendox, Glatz GmbH usually processed and approved documents and invoices via mail and signature folders. Individual sub-processes, like validation, posting to specific departments, checks by the accounting department and approval by management, often took a long time to complete because of delays caused by postage. These processes often resulted in documents being copied and archived multiple times over. Aside from increasing costs, this also meant huge amounts of space were required to store and archive so many copies of so many documents. With an office rebuild coming up, Glatz wanted to avoid having to plan in quite so much space for its archive.

«Some departments now post 90-95% of invoices automatically.»

SCOPE OF FUNCTIONALITY AND EASE OF INTEGRATION

The goal of the DMS project with Kendox was to digitise the existing physical process of archiving invoices and other ERP documents. Documents needed to be storable and retrievable in a way that would be familiar to employees used to working with physical files. A key aspect of the project was integrating Glatz's existing ERP software Trade Control, which was responsible for posting around 85% of invoices, as well as the financial accounting solution EuroFib. This would ensure that all documents could later be found and retrieved using any application currently in use.

«Considering the size of our business, the amount of work regularly required to distribute, process and archive incoming documents was enormous. It was important for us to find a software solution that could automatically extract header and position data from incoming invoices. It also needed to streamline and simplify the validation and approval process, allow us to archive documents according to categories like the associated customer,

supplier or contract binder, and support our planned upcoming digital personnel binders», explained Wohlmuth in his capacity as Head of Controlling.

«Kendox InfoShare convinced us with the scope of its functionality and its ease of integration.»

After studying a number of solutions in detail, Glatz decided on Kendox InfoShare. Its key persuasive qualities were the scope of its functionality, for example when extracting position data and posting incoming invoices, as well as its ease of integration with the other applications already in use.

INTEGRATION WITH ERP AND ACCOUNTING SOLUTIONS

As part of the implementation, there were two key interfaces with existing Glatz Group applications that needed to be taken into account. The interface with the ERP system would ensure documents could be seamlessly created and displayed, and the interface with the accounting solution would make sure documents were properly visible in EuroFib.

With the help of Kendox InfoShare, the redesigned process for incoming invoices first scans all incoming documents as required, archives them in InfoShare and then hands them over to Insiders smart FIX for further processing. Once data is extracted in smart FIX, the administrator handling the document determines whether it is an ERP invoice that needs to go to TradeControl or a general invoice to be sent directly to the accounting branch.

As well as digitising documents and automatically extracting data from them, InfoShare also handles the approval process. This enables efficient and – most importantly – transparent approval processes for incoming invoices. This process also enables invoices to be digitally assigned to specific accounts before handing them over to the existing ERP system.

«An especially important factor in the success of this project was the solution-oriented approach to communication across interfaces.»

SHORT TIMEFRAME, DIVERSE DEPARTMENTAL REQUIREMENTS

Glatz GmbH had only a narrow window of time to introduce the DMS. Once the project started in January, the company had until its new financial year started on 1 July to fully digitise all of its documents. A particular hurdle proved to be the highly complex process of capturing position data, as did the general handover of data to the ERP system, since different departments in the company had very different ways of working.

«Since they were all working with paper up to this point, there were no standardised processes. Each department had its own quirks. Some primarily buy according to regular contracts, while others work directly with farmers and producers, who generally work on an order-by-order basis. All of this meant that as part of the project, we had to make sure that all data and documents were handed over to the ERP system in the right way.»

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Alexander Suppan, Project Manager, Kendox AG

THE CRITICAL FACTOR: SOLUTION-ORIENTED TEAMWORK

For Stefan Wohlmuth, Head of Controlling at Glatz, a particularly important factor in the project's success was the Kendox project team's solution-oriented approach to integrating the DMS solution with both the ERP and accounting solutions. He recalled: «Kendox worked closely with PCS, the manufacturer of the ERP system TradeControl, to develop an additional interface.»

«It was a major challenge and very interesting to realise and implement,» said Kendox Project Manager Alexander Suppan. «It really helped to work so closely in a spirit of collaboration with the process owners at our project partner PCS. As a result, we were able to design a seamless interface with TradeControl for the customer. Meanwhile Mr Wohlmuth, our expert point of contact at Glatz, worked within the company to survey its processes. On both a technical and professional level, the teamwork between all parties was outstanding.»

FUTURE PLANS FOR DIGITAL PERSONNEL AND CONTRACT BINDERS

Immediately after digitising its invoices-received processes, Glatz GmbH took another step towards modern administrative processing. Together with Kendox, Stefan Wohlmuth began introducing a system for digital personnel and contract binders. As with the previous project, a specialist solution is being developed for the HR department. Employees now have access to modern, digitised self-service processes for requesting holidays, applying for comp time and more. All of these workflows are supported by strict approval processes controlled by the department head or another relevant figure. Once the process is complete, the documents are handed over to HR.

In the purchasing department, digital contract binders ensure greater transparency and faster working. Each contract binder contains purchase and sales contracts, including framework orders with suppliers of specific raw materials. They are stored centrally within the DMS. All employees involved in the process have access to all documents and files relating to a contract wherever they are. This ensures legally compliant, secure document storage and streamlines downstream processes.

«All information is now available at all times in a revision-safe format within the digital archive.»

TRACK RECORD OF SUCCESS AFTER 12 MONTHS

Project leader Stefan Wohlmuth is delighted with the benefits of the DMS that have been realised to date: «One of the key milestones we've reached by adopting Kendox InfoShare is in increasing efficiency when processing incoming invoices.»

As soon as the data from incoming documents is extracted within smart FIX, item and position data is read by the DMS, some of it automatically. This eliminates the need for employees to manually assign it. The entire process of extraction, assignment and approval is now much more efficient than before. Numerous departments within the company now benefit from the standardised processes and location-independent access to documents.

For Glatz GmbH, digitising the invoices-received process was an important developmental step. In this challenging time as COVID-19 continues to sweep across the world, it has allowed employees to process documents in their home offices, keeping business operations going even during the lockdown of early 2020.

«Digitising invoice processing let us remain fully operational even during the COVID lockdown.»

«Particularly when working from home due to the coronavirus», Wohlmuth said, «our employees were able to get the information they need from the archive despite not being physically present. They can check contracts, view the documents within a binder and understand their status. Previously, contracts were sorted into mail and signature folders and handed over to specialist administrators. Notes on their current processing status were generally written on page one by hand. Our goal was to map all of this information digitally instead. Now, all information is

saved to the digital archive in a revision-safe format, and it's available round-the-clock. We can create reports direct from TradeControl. There, we can see details like the extent to which the contracts have been fulfilled so far. In many departments, we have already managed to reach a very high level of automation when posting invoices. Several of them have reached a consistent ratio of 90-95% of incoming documents being captured in smart FIX and InfoShare, then automatically posted in full in TradeControl.»

NEXT STEP: ADDING MORE INTERFACES AND DIGITAL CONTRACT BINDERS

Wohlmuth foresees a number of possible additions to the existing solution. As well as adding more interfaces for the accounting solution, there are also plans to integrate other workflows, including for approving and signing contracts. Glatz would also like to establish more self-service options within HR, such as a "digital timesheet". Employees would be able to easily upload documents like receipts for travel expenses, which would be automatically extracted at the end of each month. The next project planned will also expand the system to include binders covering insurance, rental and other contracts.

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. It has branches and sales and consulting offices in Oberhausen (Germany), Puchheim (Germany), Vienna (Austria), and Serbia, as well as 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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