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NORIS.

NORIS GROUP GMBH

CASE STUDY

NORIS Group GmbH

Increasing efficiency by linking ERP and document management systems

The NORIS Group produces over 30,000 sensors every year for the international market. To date, it has already delivered over 5,000 ship automation systems as well as 3,000 security systems and local workstations. On top of this, its subsidiary GRAW Radiosondes, which specialises in meteorological technology, produces over 50,000 radiosondes every year. With the help of Kendox, the business has now digitised its paper document workflow within its purchasing, production, sales and shipping departments. Integrating the company's ERP system has also achieved additional efficiency gains.

Customer	
	– NORIS Group GmbH
	– Nuremberg, Germany
	– 200 employees
	– 5 locations
Industry	Measurement and Automation
Project	– Incoming invoices
	– Central DMS application
	– Integration of external data sources
	– Integration with Sage b7
	– E-mail archiving
	– Digital supplier file

Since 1925, NORIS Group GmbH, based in Nuremberg with branches in Rostock, Rotterdam, Singapore and Shanghai, has been one of the leading specialists in measuring and automation technology for the shipbuilding industry, in transport technology and in machinery and plant construction. This privately owned family company develops, produces and sells custom-tailored products and solutions in both bespoke and off-the-shelf versions. From individual sensors to complete monitoring and control systems, all of it is made in Germany and comes from the same source.

A UNIFIED DMS SYSTEM TO ABOLISH PAPER MOUNTAINS

The NORIS Group needed a solution to digitise its high daily numbers of incoming documents and deal with the constantly rising tide of information. To this end, it needed an orderly, multi-dimensional and above all digital information repository for its sales, purchasing and other departmental processes. The goal of the project was to implement a unified document management system (DMS) across the entire company, to avoid a situation where documents were stored in various unstructured locations without any central control. A particularly key aspect for project head Christian Kunzmann, Manager Information Technology at NORIS, was making it as quick and easy as possible to search for information, processes and connections using documents' "properties" – their so-called metadata. The goal was to connect the various document types with their individual pieces of metadata in as many dimensions as possible, and to have the ability to enrich these connections with more data down the line. By scanning documents as early as possible – ideally as soon as the documents were received – NORIS also aimed to ensure that these documents could not be lost.

THE GOAL: A MULTI-DIMENSIONAL, SEARCHABLE DOCUMENT ARCHIVE.

Storing and managing paper documents was taking up a great deal of time and space for the NORIS Group. Emails were often simply not captured, since there was no dedicated file store for digital messages where multiple people could work together on a single process. The one-dimensional document storage folder on the file server also presented another problem: when documents were moved around, the links to the original files were often lost. Meanwhile, it was impossible to link documents together across multiple dimensions using their specific properties (their metadata). For these reasons, ERP application masks often only permitted access to individual documents and isolated pieces of information. It was often also impossible to access original versions of documents like invoices or contracts from within the ERP application – not least because some of these simply did not exist in digital format. All of this led to an incomplete overview of the business' processes.

DIGITAL DOCUMENT CAPTURE AND PROCESS CHAIN

With the help of Kendox, the NORIS Group digitised its entire document storage workflow. "Kendox Scan" was used to make incoming paper documents available in the DMS as early as possible, in particular so that incoming invoices would be guaranteed to contain top-quality information and be part of an orderly processing chain. "Kendox InfoShare" was used as the central DMS application to archive digitised incoming and outgoing documents. As a result, documents and processes can be found quickly and easily thanks to full text searching for all document types. As well as archiving ERP documents, NORIS also archives emails using "Kendox InfoShare" so that they can be preserved in the proper context. In future, the company plans to make all archived documents available as part of a "digital supplier binder".

CREATING INTERFACES WITH ERP SAGE B7

To connect to NORIS' existing ERP system, "Sage b7", in its Nuremberg office, it was first necessary to create a specialist interface. "Creating the ERP interface was a key piece of the puzzle in this project," reported Kunzmann. "With Kendox's help, we rose to the challenge." Above all else, this was essential for implementing a search that would work across multiple applications. Now, with the help of the "Kendox InfoShare XML Interface", data can be extracted from the ERP system. This data is then used to move the associated digital document from the ERP system (sometimes with modified or added keywords) to the DMS. In addition, the "Kendox InfoShare Web Data Provider" provides additional flexibility so that search and storage processes can integrate other external data sources.

KENDOX

«When storing documents on the file server, we were generally unable to capture any additional information about them. Now we can search for document properties across as many dimensions as we like.»

INCREASING PRODUCTIVITY, STREAMLINING PROCESSES

In implementing "Kendox InfoShare", the NORIS Group has realised a structured business-wide information and document storage solution as well as giving itself the ability to find complex connections between various processes – thanks to, among other things, the fast, effective full text search.

«Being able to archive all documents and information in the DMS – no matter how and where they were created – centrally, easily and with the greatest possible level of automation, makes Kendox's product a powerful, high-performance DMS system,» said Kunzmann.

Because additional properties can be captured for each document as early as the initial scanning or import process, the company saves significant amounts of time and the document workflow is simplified. Documents can also be automatically indexed later using the integrated OCR functionality. This enables highly efficient full text searching within documents and also forms the basis for automatically analysing documents and extracting data from them. The interface with the ERP system also makes it possible to check the logical consistency of the data, and to enrich document metadata with further data from the ERP system or other SQL databases.

FLEXIBILITY AND EASE OF CUSTOMISATION

"For us, one of the most important criteria for the new DMS system was that we had to be able to customise the solution ourselves, with as little external support as possible, at the click of a mouse – without having to invest in significant programming work. It had to be easy to ensure that the DMS could grow flexibly in line with our require-ments, and that changes to our processes would be easy to reflect in the DMS," explained Kunzmann.

In choosing a suitable provider and project partner, the NORIS Group's project team carried out an extensive evaluation of each provider and system. A comprehensive specification sheet was used to analyse and evaluate a wide range of providers in terms of the capabilities of their systems. "Kendox convinced us with their solid technological foundation and complete roadmap for planned future functions of the software. Unlike some other competitors, whose products had a much narrower range of functionality, Kendox also offers excellent value for money," said Kunzmann. "We also find it very important that we are always taken seriously as a customer. Kendox stands out here, in that our suggestions for extensions or new functions were quickly and promptly implemented into the standard product. And last but not least, the skilled, engaged and solution-oriented teams in Kendox's support, sales and development departments were also a bonus."

«The chemistry with Kendox worked perfectly. We were able to look each other in the eye as partners, right from the start. From our perspective, Kendox is the perfect DMS partner for small and medium-sized enterprises.»

RAPID IMPLEMENTATION USING SUB-PROJECTS

As an experienced IT specialist, Christian Kunzmann consciously decided to implement the project in a series of sub-projects, each one further divided into departments such as purchasing, sales and production. First, "Kendox InfoShare" was introduced in the purchasing department. "It took just a few months from the start of the project to go live in the first department," explained Kunzmann. "A particular challenge which we were able to fully master with Kendox's help was to transfer the required knowledge regarding the DMS software in the way we wanted: internally to NORIS and then, with as little external help as possible, implementing additional sub-projects. This is why we implemented Kendox's solution in the form of multiple sub-project-based workshop units. That worked really well. When we then needed external support at one point during the implementation phase, the experts at Kendox were always happy to help with advice and direct assistance."

«It was a hard road, starting from scratch and implementing a new software system, until finally we were able to customise our DMS for ourselves. But in the end, it really paid off.»

CONTINUOUS FURTHER DEVELOPMENT

For Christian Kunzmann, as head of IT, digitising the document workflow within the company is a constant, living process, since specific departments will always come up with new requirements and document types. For example, Kunzmann and his team were recently able to successfully integrate the shipping department's processes with the Kendox DMS in just two weeks, with no external support. Implementation priority goes to the most important project at the time, with the order being based on current requirements. Kunzmann can also conceive of options like CAD integration for technical illustrations, HR support with a "digital personnel binder", deeper integration with the accounting department, and much more besides. In concrete terms, though, the next plan is to integrate with "CimERP", another ERP system in use at NORIS' office in Rostock. Kendox already provides a standard interface for this product. "The DMS is a living system," Kunzmann says, "one that is constantly undergoing further development. The advantage is that the more departments we integrate, the better our overview of the processes, and the greater the benefits for individual users."

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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