



BEST PRACTICE

Document management reloaded

Duravit launches modern, international ECM from SER

- Central ECM platform with transparent document and record organization
- Electronic customer and supplier records with ERP connection
- Server-based and audit-proof email archiving
- Doxis4 scan function and archive connected to Lotus Notes workflow for inbound invoice processing



The company

As one of the most dynamic corporate groups of the sanitary sector, Duravit AG develops and produces sanitary ceramics, bath furniture, showers and bathtubs, whirltubs and wellness systems, shower toilets and accessories for the international market.

The company was founded by Georg Friedrich Horn in 1817 as an earthenware factory that originally specialized in tableware. When the product portfolio was expanded to include sanitary fixtures, the firm laid the foundations for its later success. Starting in 1950, the company switched from producing earthenware to porcelain. By 1960, the name Duravit was well-known.

Today, Duravit AG has its headquarters in Hornberg, Germany and the international group employs approximately 5,800 employees in over 30 subsidiaries across more than 120 countries. Production takes place in Germany, Egypt, China, France, India, Tunisia and Turkey.



Management Summary

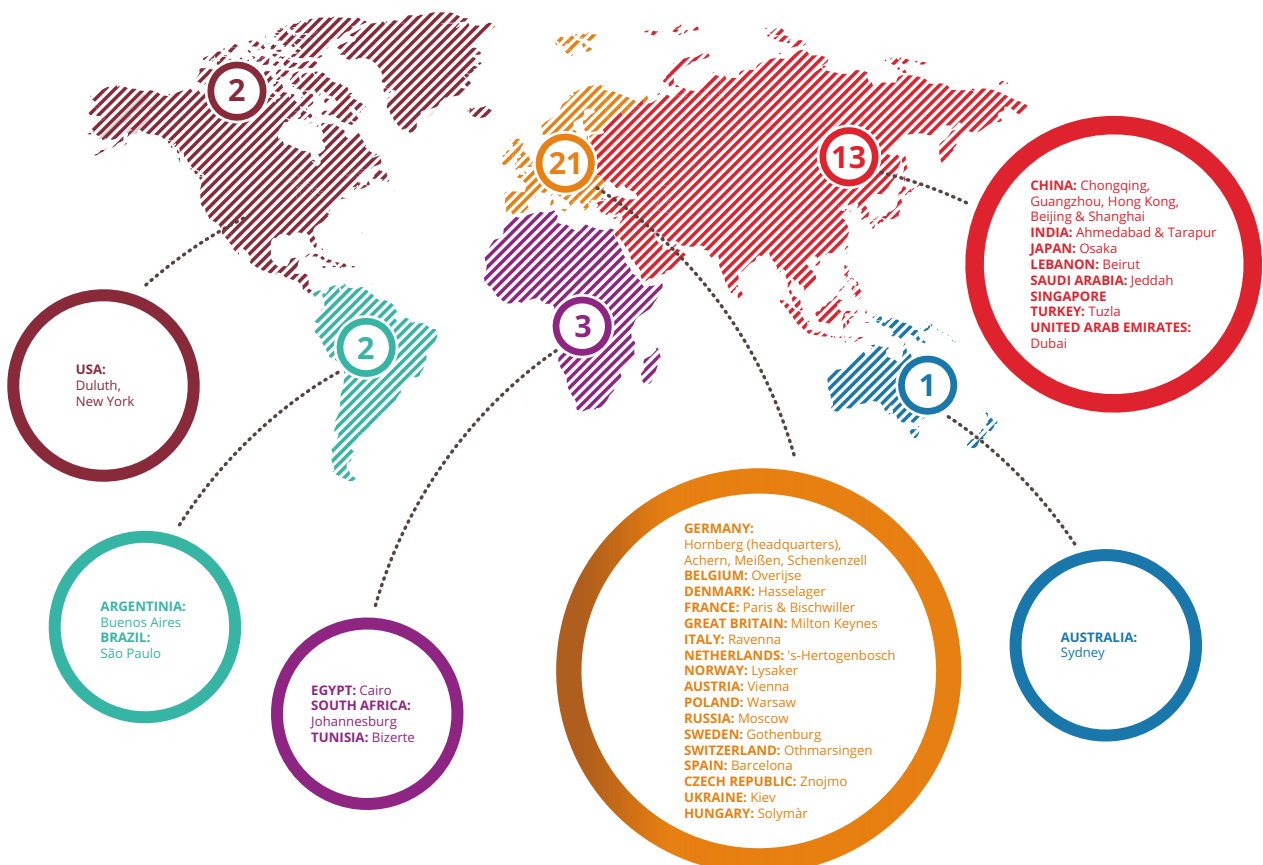
Multilingual ECM internationally deployed

Founded as an earthenware factory in 1817 in Hornberg, Germany, Duravit has become one of the most internationally well-known manufacturers of sanitary ceramics, bath furniture, showers and bathtubs, whirltubs and wellness systems, shower toilets and accessories. Due to Duravit's continuous growth and the resulting increase in document volume, the archive system had reached its functional limits and was not coping with the internationality. For this reason, Duravit decided in 2011 to look for a more modern, sustainable enterprise content management (ECM) system.

The firm wanted a German ECM vendor with its own software development to ensure that European legal requirements would be fulfilled. Based on SER's many years of expertise in the national and international ECM sectors, Duravit chose the Doxis4 iECM suite. The comprehensive functionality and multilingual capability of Doxis4 were important factors influencing the decision.

The designer bathroom manufacturer entrusted the Bonn-based ECM vendor and its integrated migration concept with the task of replacing the old archive. Approximately 20 million documents were successfully migrated to Doxis4 during live operation. Afterwards, the ECM solution, which included electronic customer and supplier records and server-based email archiving, was successively set up in the international company network. Further eRecord solutions with integrated workflows for quality and product management are currently being implemented at Duravit.

Duravit's employees have cross-location access to all relevant customer or supplier information thanks to the central ECM system Doxis4.



Project facts and figures

TOPIC:	ECM with archive, DMS and electronic records, plus server-based email archiving
CUSTOMER:	Duravit AG
INDUSTRY:	Sanitary
EMPLOYEES:	Approximately 5,800; almost 700 of whom are Doxis4 users
CUSTOMER SINCE:	2011
SER SOLUTIONS:	Doxis4 iECM suite with an archive, DMS, workflows, eRecords, email manager, SmartOffice and SmartNotes
INTEGRATION:	ERP (Infor), Lotus Notes, Microsoft Office
DOKUMENT VOLUME:	Approx. 25m documents in the archive; 1–2m new documents per year
HIGHLIGHTS:	Electronic customer and supplier records with ERP system connection and detailed authorization structures, Doxis4 scan functions and archive connection to existing Lotus Notes workflow for invoice receipt processing, server-based email archiving



Managing international growth with an ECM strategy

Regardless of whether it's a whirltub, steam shower or exclusive bathtub with a built-in sound system – if you are looking for premium bath products with a modern design, just go to Duravit. The company based out of Hornberg, Germany in the Black Forest is not only an innovative product designer, it is also a specialist in the overall design of what it calls “living” bathrooms that elevate the customer's quality of life.

Coinciding with its successful and continual expansion into 120 countries, the number of documents in the company network rose dramatically over the years. By 2010, the former archive system had reached its limits and was no longer able to cope with the growth. “Back then, we had been using our archive system for over ten years. Both our IT team and our specialty departments felt that the system's functionality was no longer sufficient,” reflects Werner Hoeltl, Application Manager (Finances) at Duravit AG. Moreover, the existing system was not international enough, which would have eventually led to problems during the expansion period in the document-based, cross-location business processes. For these reasons, the bath ceramic specialists decided in 2011 to look for a more modern and sustainable alternative.

Wanted: ECM manufacturer with software development “Made in Germany”

Together with an independent ECM consulting firm, a catalog of requirements for the new solution was compiled. Duravit placed special value on the secure and efficient migration of the legacy archive, the set-up of a record structure with an authorization concept, and the internationality of the new ECM software for worldwide deployment. They also factored in the individual requirements of specialty departments such as purchasing, sales and inbound mail. There was a clear strategy for selecting the right vendor. “It was important to us that we chose a German vendor with strong in-house software development capabilities that would fulfill European legal requirements,” comments Hoeltl. Duravit decided in favor of SER and its Doxis4 iECM suite. The company executives were impressed with its comprehensive functionality and multilingual capability.



“Thanks to SER's integrated migration concept, we were able to gradually and successfully migrate about 20 million documents during live operation.”

Werner Hötl, IT Application Manager (Finances)
at Duravit AG

First migration, then electronic records

The ECM project started at Duravit at the end of 2011 with the replacement of the legacy archive. Not only had the archive reached its functional limits, it was also no longer properly supported by the archive vendor. It had been years since the last release upgrade took place and the vendor was partially lacking the necessary know-how to effectively manage Duravit's inquiries.

When the new ECM solution was launched, Duravit started out with the migration of legacy documents, as Werner Hoeltl, Application Manager, describes: "We realized ahead of time that several million documents couldn't be migrated just like that." Which was why he was so pleased that SER had an effective and proven migration concept ready to go. About 20 million documents were successfully and securely migrated step-wise during operations. In the process, all documents from the last ten years were transferred and can now be found in Doxis4 – archived in an audit-proof way.

Electronic customer records make cross-location communication easier

In 2012, the electronic customer records connected to the ERP system Infor were launched in the international network. The goal was to significantly improve communication efficiency between the national and international departments (e.g. sales) and increase the availability of information across locations. Furthermore, the electronic records in Doxis4 were also to be given the necessary authorization structures.

// "With the launch of the electronic records connected to our ERP system Infor, every employee has access to customer or supplier information relevant to their work."

Werner Höttl, Duravit AG

2011

Start: Replaced the old archive with Doxis4 iECM suite incl. archive and DMS

2012

Migrated 20 million documents to Doxis4

2012

Introduced electronic customer records connected to the ERP system (interface from Infor to Doxis4), SmartOffice and SmartNotes

Up until then, communication processes between locations, primarily via phone and email, were manual and time-consuming. Most of all, there were a lot of requests coming from across the sales areas. For example, the contact person from a subsidiary wanted Duravit's sales team in Hornberg to send the original documents for current deliveries via email to his subsidiary. Since certain documents existed partially only in paper form, this request could only be fulfilled with a high amount of manual searching and communication. "We also had the problem that the old archive didn't have a sufficiently detailed authorization concept set up among or within the subsidiaries, e.g. in the individual sales areas," explains Hoeltl.

The electronic customer records in Doxis4 in connection with the ERP system Infor provided the necessary structure. As the documents (over 5,000 per day) and index values are transferred from the ERP system, the customer record is basically automatically filled and filed in an audit-proof manner. What's more, Duravit's employees have the practical option of manually filing selected documents, e.g. Excel tables or email correspondences, using the module SmartOffice and SmartNotes from the familiar Microsoft/Lotus Notes interface. They simply drag and drop the document into the respective customer record.

2013

Doxis4 scan function and archive connected to available Lotus Notes workflow to automate inbound invoice processing

2014

Launched server-based email archiving

2015

Introduced electronic supplier records connected to the Infor ERP system, SmartOffice and SmartNotes

2016

Implement further record solutions with Doxis4 (quality and product management records)



Electronic supplier records bundle orders and more

In addition to the electronic customer records, Duravit introduced the electronic supplier records in 2015, which are also connected to the ERP system Infor. The Doxis4 record system was rolled out worldwide at the start of 2016. The supplier record documents the entire lifecycle of a business relationship with a supplier. Orders, order changes, on-call orders or also delivery notes are bundled in a record. They are available in the ECM system at any location. Since the launch, the purchasing teams at the international Duravit locations have been working with the same up-to-date level of information.

With the two electronic records, the employees from sales and purchasing have worldwide access (if authorized) to all business documents of a customer or supplier. They can get precise information in the electronic record structure any time they need it. A clear, detailed authorization structure ensures that specific documents, e.g. those relevant for only one location, can be accessed only by certain employees. "Aside from the higher level of accountability, communication between our international locations and the headquarters in Hornberg has become considerably more efficient," remarks Werner Hoeltl positively.

In the making: eRecords for quality and product management

After its positive experience with the electronic customer and supplier records, Duravit is now planning this year to launch further Doxis4 record solutions in the areas of quality management (QM) and product management (PM). While both of these departments have had other systems in past years, e.g. with production-specific detailed information (e.g. CAD drawings), this information is now supposed to be enriched with further documents from the ECM system.

It's crucial for these departments that exactly the same technical descriptions, e.g. installation and assembly instructions, are used at every international Duravit location. "It shouldn't matter if a sink is being produced in Germany, France or Egypt – every location must have unlimited access to the assembly details, e.g. the space between two holes including the allowed tolerance value," says Werner Hoeltl, IT Application Manager (Finances). Up until now, the documents were accessible via Explorer drives or time-consuming email correspondences, which was extremely inefficient. The electronic QM and PM system will allow cross-location view and access to all relevant documents.

// "Supported by server-based, audit-proof email archiving, we now always fulfill the legal requirements for handling revenue-related documents."

Werner Höltl, Duravit AG

Authorized employees can edit and update documents directly in Doxis4. For instance, if the Duravit logo imprint on a sink changes, then the PM employee adjusts the product description in Doxis4 and files the new, updated version. This integrated versioning ensures that the current product information for the sink in question can be viewed worldwide in a central

ECM system, thereby also deterring production mistakes. "We are also thinking about assigning the foreign locations further authorization for certain document classes that they can manage themselves," adds Hoeltl. This would allow the teams at the international Duravit locations to directly supplement and file country-specific documents themselves.

Digital and audit-proof invoice archiving

In 2013, Doxis4 was connected to the Lotus Notes workflow for electronic inbound invoice processing. Using the Doxis4 scanning function, paper invoices are digitized, given a barcode and filed in an audit-proof way. Next, Duravit's accounting department parks the invoice in the Infor system, where it is automatically supplemented in the workflow and ECM system with parameters such as supplier, invoice number or invoice date.

After that, the invoice is run through the Lotus Notes workflow. Here, it is classified, checked in several steps, granted approval for payment and booked in invoice clearing. Once the payment is made, Doxis4 re-enters the picture: A separate document about the invoice history (a pdf document containing the verification steps such as account assignment and payment approval) is linked to the archived invoice document and archived in Doxis4 in an audit-proof way. The entire invoice process is therefore 100% transparent and traceable at any time in the central ECM system.

Server-based email archiving fulfills legal requirements

Due to the legal requirements for retaining revenue-related documents, Duravit decided in 2014 to implement server-based email archiving at the locations in Germany using Doxis4, which is certified to fulfill compliance rules. "Doxis4 gives us the peace of mind that all revenue-related documents – which also includes emails – fulfill the legal requirements for audit-proof archiving," comments Werner Hoeltl. The Doxis4 connection to Lotus Notes inboxes is managed by the Doxis4 Email Manager, which makes sure that all emails of employees at locations in Germany are automatically archived (audit-proof) every day.

There are a few exceptions to the rule, though. As Duravit does not officially forbid its employees from writing private emails, an agreement was made ahead of time with the workers' council. According to this agreement, employees have three days to delete emails with private content or to move them into a private folder that is not archived.

EDI archiving: Gold-plated handles or faucets don't get lost

In the future, Duravit plans to launch audit-proof archiving of EDI data in Doxis4. Up until now, this has taken place on one server, visible only to the IT department. EDI archiving will be achieved by connecting Doxis4 to the Seeburger BIS system currently in use.

Special requests – e.g. gold-plated handles or faucets – can be noted in EDI orders, but they are sometimes missing from order confirmations. Consequently, customers ask their service supporter what happened, who then asks the IT if the special request was documented in the original EDI or if there was a mistake in the data transfer. It's a complex and time-consuming process.

By setting up EDI data archiving in the central ECM system, however, the service supporter can directly access the archived EDI document and verify the special request. This ultimately improves accountability and customers receive better service. "We are very well equipped to handle what the future holds – especially when it comes to our international, document-based business processes," Werner Hoeltl concludes.

➤➤ Duravit also plans to launch automated inbound mail processing in Doxis4. In coordination with the eRecord solutions, documents (aside from EDI) that go through various channels can be assigned to a customer or supplier record and made available throughout the company.



