SER GROUP

BEST PRACTICE



> *„Doxis4 has a high integration capability and flexibility for creating efficient processes."*
>
> Dirk Kuhlmann,
> Informatics & Organization – Demand Management,
> Phoenix Contact GmbH & Co. KG

COMPANY	Phoenix Contact GmbH & Co. KG
TOPIC	ECM platform with archive, DMS, eRecords, inbound mail
INDUSTRY	Electrical engineering and automation
EMPLOYEES	14,500
REVENUE	1.91bn euros (2015)
HEADQUARTERS IN	Blomberg, Germany
INTEGRATION	SAP
PROJECT ROOM	Worldwide

PHOENIX CONTACT

CHALLENGES

- No easy way of filing documents/data from SAP in audit-proof way
- No functions/tools available that offer DMS
- Diverse demands from specialized areas for an internationally deployable document management system
- High volume legacy archive

TARGETS

- Create a uniform, joint DMS platform that fulfills the demands
- Fulfill legal requirements for retaining business documents (emails, invoices, business correspondence...) and ensure traceability in decision-making

SOLUTIONS

- Electronic process and order records
- An "invoice post office"
- Electronic contract management
- Facility management
- Email archiving for Lotus Notes with journal archiving

PROJECT OVERVIEW

STARTING POINT

Founded in 1923, the German family business Phoenix Contact currently produces and sells electrical engineering and automation products and solutions around the world. Before Doxis4 was launched, Phoenix only used a simple audit-proof filing system for documents and SAP data. There were no DMS functions. The specialty areas, however, required an internationally deployable document management system that effectively and quickly connects structured and unstructured data from various perspectives. Phoenix needed a DMS system that could be integrated into the technical and software-technical environment and that captured legacy data.

WHY SER

- SER's stability, its strong support in international projects in the Phoenix group, market presence and references
- Doxis4 scored points for its high scalability, large functional scope, complete standard interfaces for research, records, and workbasket/workflow, and for its alternative uses in rich content and browser content with nearly the same functional scope

SOLUTIONS

Doxis4: archive, DMS, contract management, invoice and order management, diverse eRecords

INTEGRATION

SAP, ERP at Phoenix Contact; specialized procedures PTLIMS at the Phoenix test lab

DOCUMENT VOLUME

45m existing documents; growing annually by ca. 4m

USERS

Currently 570 users – 1,200 users in the expansion stage in June 2016

IMPLEMENTATION

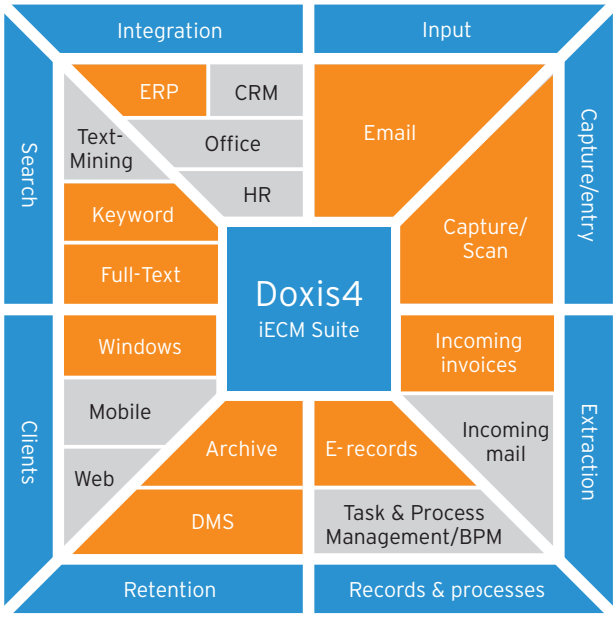
Project start July 2011. Since then, roll-out in various areas:

- **Digital post office for automated processing of all inbound invoices**
- **Contract records:** managing contracts and contract documents in the legal department and in PowerSupplies
- **Facility management:** archiving all documents to manage facilities
- **Production orders are scanned, archived and linked with SAP**
- **Workers' council:** maintaining and managing all documents relevant to the workers' council and displaying them via a structured document search
- **Process and order records** in the Pheonix test lab. Managing all order and process-related documents in dynamic records in Germany and Asia
- **Email archiving:** journal archiving, all emails saved in Lotus Notes
- **2016:** Doxis4 BPM to support processes, further SAP and DMS roll-out

BENEFIT

- **For the company:** standardized IT architecture, synergy and cost saving effects, standardized formats, filing structures and client environments
- **For the user:** efficient access and search mechanisms for unstructured content; better accountability

Doxis4 MODULES



Doxis4 modules used by the Phoenix Contact GmbH & Co. KG are highlighted in orange