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Saving time and costs

Tailor-made industry solution

With *ELOenterprise*, MERLO GmbH Deutschland has opted for electronic document management and is creating a tailor-made solution with the ELO business partner. The company is now benefiting from fast and central information availability. In addition to the saving in terms of time and, in particular, costs, the processes have been optimised by the solution and customer service has been further improved.

“I would do it exactly the same again and I would also advise other companies to think about using an ECM system as soon as possible. Once it is installed, you basically can’t think how you did the work before, without a system such as ELO.”

Heinz Morawietz,
Head of Office Sales and ELO Project Manager,
Merlo Deutschland GmbH

MERLO Deutschland GmbH is a supplier of telescopic machines. Throughout 15 years of partnership with MERLO SpA, the leading Italian manufacturer, one of the company’s achievements has been to gain the position of undisputed market leader in Germany. Merlo now supports a comprehensive network of dealers for the agricultural and construction machinery sector in the German and Austrian market. Its customers honour the company’s specialisation and the attention it pays to them by placing enormous confidence in the MERLO brand.

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Seamless IT integration

Overview

Country: Germany
Industry: Industry, telescopic machines

The company

MERLO Deutschland GmbH is a supplier of telescopic machines. Throughout 15 years of partnership with MERLO SpA, the leading Italian manufacturer, one of the company's achievements has been to gain the position of undisputed market leader in Germany.

Challenge

Overcrowded filing cabinets make the search for information difficult. No central information access, lack of transparency in the business processes. Employees need to be able to find their information centrally at the click of a mouse. Link to the TopLog materials management system and the David (Tobit) e-mail and fax program.

Solution

ELOenterprise. - old documents are transferred to the ECM archive; new documents are automatically archived from TopLog and David in **ELO**. An electronic machine record is created, which can be viewed immediately depending on permissions. Field staff are also connected to **ELO** over the Internet.

Benefits

Huge time saving, central information availability and as a result information can also be provided quickly "on demand". Optimised and faster work processes and reduction in the volume of paper.

The work of Merlo Deutschland GmbH is characterised by high standards of customer service. Over the years, evidence of this success could be seen in the pages of the paper-based document management system: the archive was almost bursting at the seams and made employees' day-to-day work with one another rather difficult. For example, if one employee had taken a document out of a folder then it was no longer available to another employee. The search for information was also becoming increasingly time-consuming. Merlo acted in good time and evaluated several Enterprise Content Management (ECM) systems. Very soon **ELOenterprise** emerged as the right solution for Merlo, as Heinz Morawietz, Head of Office Sales and **ELO** Project Manager at Merlo Deutschland GmbH, confirms: "Our path led us to **ELO** extremely quickly. A key criterion for this choice was the existing interfaces to our materials management system TopLog and our e-mail and fax management program David from Tobit. Another aspect was the knowledge of the industry held by the **ELO** business partner."

Thorough preparation for a successful project

Once **ELO** had been chosen, Merlo thought intensively about the implementation together with the **ELO** business partner. The initial focus was on the design of the archive structures and the specifications for keywording in particular. This was important preparatory work for the project which had to be carried out, as Heinz Morawietz explains: "Right at the beginning it is essential to prepare everything thoroughly and carefully so that the solution functions properly. Purely from the point of view of finding documents again, it is important that all employees carry out keywording in a consistent way."



The mandatory fields and keyword lists in the **ELO** index forms are an excellent tool here. For that reason, we gave careful consideration to what mandatory fields we needed and what terms should be included in the keyword lists. In this way we ensured that keywording is consistent and documents can be found again very quickly and easily. Thorough preparation also has an impact on implementation costs, as Heinz Morawietz adds: "Our business partner also provided industry templates with ready-structured archives and keywording forms. This enabled us to gain a considerable time advantage. This of course had a positive impact on the implementation costs."

The machine record goes electronic

The **ELO** system has been in live operation since the end of September 2007. In the space of two years, approx. 210,000 documents, some consisting of multiple pages, have already been archived. In the first step the existing machine records from the previous year were digitised. The machine record is an important tool in the day-to-day work process at Merlo. In this record, employees find all the documents relating to the machine in question (such as purchase orders, delivery notes, invoices, warranty settlements, repairs, correspondence etc.). The existing folders were therefore scanned in completely as a record and manually keyworded.

Each record was provided with an internal equipment number that employees can use to find it again. In future dynamic machine records will be created, which will be automatically completed over the course of their lifecycle.

Integration of the Merlo IT environment

In addition to the e-mail and fax management program David, the TopLog materials management system was also connected to **ELOenterprise**. All the documents that leave the company (outgoing invoices, delivery notes, order confirmations) automatically go to the **ELO** archive. For example, if an employee prints out a delivery note for a piece of equipment from the materials management system, a Tiff file is created straightaway when it is printed out. The Tiff file is then provided with the keywording information from TopLog and automatically filed in **ELO** in the correct structure. Important keywording parameters here are the job number and the customer order number, the customer number or the customer code.

In practice, employees can then view documents in **ELO** from TopLog, depending on permissions. To do this, they simply use the **ELO** button in the materials management system. In this way, employees can select the search in TopLog, for example, and then view all the documents relating to a piece of equipment or a customer/supplier in **ELO**. The exchange of information between TopLog and **ELO** is seamless in both directions.



Fast provision of information improves customer service

As a result of the centrally available machine record in **ELO**, the employees at Merlo now work much more quickly and the customers benefit from the provision of information "on demand" as Heinz Morawietz confirms: "The employees quickly have the documents and information that they need on the screen and can provide information to customers immediately. Field staff are also connected to **ELO** over the Internet and can access the required information immediately, depending on permissions of course. Work has become faster and thus much more efficient."

In addition, order confirmations, delivery notes (basically all documents) can be sent directly from **ELO** by fax or as e-mail attachments. If a customer is missing certain documents, for example, these no longer have to be printed out or photocopied; it just takes two clicks of the mouse and the document is on its way to the customer.

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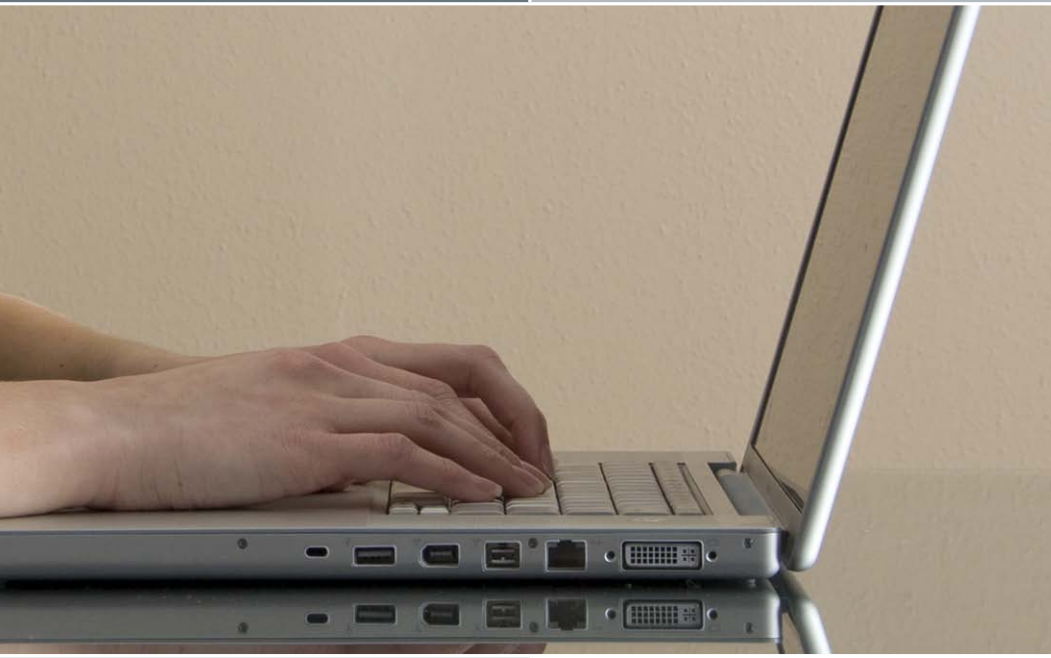
Familiar work

“The ELO interface is very intuitive because it simply maps the physical work structure to the electronic structure. Everyone is familiar with the principle of cabinet, folder and index from the paper-based way of working, it is just that in ELO it works much more quickly and better electronically.”

Heinz Morawietz,
Head of Office Sales and ELO Project Manager,
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Staff acceptance: scepticism turns into enthusiasm

The employees were trained within the departments in just 2 days. “The ELO interface is very intuitive because it simply maps the physical work structure to the electronic structure. Everyone is familiar with the principle of cabinet, folder and index from the paper-based way of working, it is just that in ELO it works much more quickly and better electronically,” explains Heinz Morawietz. Nevertheless, the employees were initially sceptical about the new system as Mr. Morawietz goes on to say: “In the first few months the employees retained the paper copy for a time after scanning it in; they did not trust the whole thing properly at the beginning. Now no one can imagine working without ELO any more, nobody would want to be without ELO in the day-to-day work process.”



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Outlook

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Next steps: connection to DATEV

In the next step, ELO is now to be connected to DATEV in order to be able to archive the incoming invoices automatically as well and process them through the ELO workflow. Heinz Morawietz sees there being a great deal of potential here, which needs to be exploited: “Through the Datev link we hope to achieve further improvements in the processes. By simply having a workflow that controls the release of the incoming invoices, we can save a great deal of time and money, particularly if you think about adherence to discount terms, for example.”

For Merlo, the choice of ELO has already paid off and Heinz Morawietz is pleased: “I would do it exactly the same again and I would also advise other companies to think about using an ECM system as soon as possible. Once it is installed, you basically can’t think how you did the work before, without a system such as ELO.”