G&F Industries

DocStar®

Enabling Growth Through Efficient Document Management

Company Facts

Overview
▶ Location: Sturbridge, Massachusetts
▶ Industry: Manufacturing
▶ Number of Employees: 150
▶ Website: gandf.us

Success Highlights

Challenges
▶ Accessing old files was difficult
▶ Files consumed significant office space
▶ Inefficient and impractical file documentation system

Solution
▶ DocStar® Enterprise Content Management

Benefits
▶ Freed up valuable office space and considerable employee time
▶ Provided instant information retrieval
▶ Bolstered data access and file security
▶ Reduced costs associated with storing paper files

Several years ago, the "dead storage" room at G&F Industries looked like something from the TV show Hoarders. That's not the case anymore, thanks to the company's implementation of electronic document management and its relationship with DocStar.

G&F Industries is a privately owned custom plastics injection molding company located in Sturbridge, Massachusetts. The company, which has a state-of-the-art manufacturing facility, employs upwards of 150 employees at any given time in its around-the-clock operation. Customers include other businesses in the automotive, industrial, military, firearms, consumer and medical markets.

The firm also has an affiliate—G&F Medical—that is located about 80 miles away in Danvers, Massachusetts. That company is a custom silicone injection molding firm that serves customers in medical markets. The company uses a state-of-the-art clean room and employs around 25 people.

Gary DeGroat joined the company in January 2005 as their Chief Financial Officer and quickly saw opportunities to improve operational efficiency—and maybe even cut costs in the process. "When I arrived, we had numerous filing cabinets and much inefficiency in how our paper filing systems were being handled," he explains. "In addition to having an enormous amount of paper stored in the front office, everything eventually would need to be moved to a dead storage room at the end of the year to make room for next year's paper activity."

He likens the dead storage room to an overstuffed garage. "You just keep putting things into it, and before long you can't even move around," says DeGroat, "We could not fit another box of paper into the room. At one point it was very difficult to open the door, because there was so much paper."

> "This equates to more than $13,000 in annual savings, and the ability to actually locate the documents is priceless!"
>
> —Author's Quote, Title | Company Name

Something had to give. "We needed to be able to access information from those old files," he explains, "but that was virtually impossible." Even if staff members could get into the dead storage area, there was no guarantee that documents had been filed or re-filed properly, and there was a chance someone removed a file and never returned it. Worse yet, some documents didn't exist at all, because a 2001 fire destroyed them.

Need for change

The solution to the paper mess, in DeGroat's mind, was electronic document management. "There were two things we really needed to get our arms around," he recalls. "First, we needed to improve the efficiency of retrieving information when we needed it—and that called for taking our filing system digital. Second, we needed to reduce the time and effort required to store everything."

Along with that, of course, are disaster recovery issues. "If a fire occurs tomorrow, because we've scanned documents using DocStar, I can now go out and retrieve this information, because it's being backed up off site," DeGroat explains. "Those were my driving factors."

G&F assessed possible vendors and went through the proposal process during the last part of 2006, and signed on with DocStar Partner, PIF Technologies in early 2007. "We generally comparison shop for major purchases like this," he recalls. PIF was on the company's very short list of possible vendors. "We had gotten a good recommendation on the company and the products," he adds, "and when we called around to businesses that used DocStar, we got good reviews."

The system was installed, employees received training, and the company went live with the product in March of 2007. That was, as DeGroat says, "lots of paper ago. To begin with, we started to 'DocStar' a year of vendor files." Yes, the process of scanning and electronically filing documents is so engrained at G&F that "DocStar" has become a verb.

"We started with our 2005 vendor files and started sending those through the imaging system," he adds. "From that point, we just kept plugging away, one year at a time, until we finally got up to the current year."

> "We've been able to eliminate ten five-drawer filing cabinets full of paper!"
>
> —Author's Quote, Title | Company Name

Once employees became comfortable with the process and confident that documents were easily retrievable, the company made scanning and filing part of its routine. "Anytime we generate a piece of paper, whether we cut a check or process some other document, it gets scanned into the system almost on a daily basis," DeGroat notes. "So we started with a 'catch-up' process and then moved to a 'real-time' process."

He says one of the biggest struggles employees faced using the system early on was developing a discipline about getting the documents scanned. "It was new, something different," he explains, "and that's always a challenge. Part of it was workflow change—getting used to a new daily routine, and part was the logistics of how and where scanning would take place."

Another hurdle they faced was variation in documents. "They came in different sizes, and often they were stapled together before being filed," he adds. "We did end up changing some workflows to get the most out of the system. For instance, instead of stapling papers together, we started using paperclips, knowing we would scan it later."

A variety of document colors also posed challenges early on, although that problem has been resolved as employees became more familiar with the scanners and as hardware has improved over time.

Finding success

Today, a number of company departments use DocStar. "Our quality department stores production data, process sheets, first article inspections, damage material reports, inspection reports and process change history reports in the system," DeGroat says. "Before, they would have that information filed in over four filing cabinets." Every day, they bring newly created or received documents to the front office, where scanning—or "DocStar-ring," as it's called—takes place. The quality department has eliminated four filing cabinets and relies on DocStar for the information it needs.

"In manufacturing, they had several file drawers of paper," DeGroat notes. "They get daily shipments of product coming in the door. All of those shipments have packing slips, which used to accumulate in a file drawer. You may or may not have been able to find something back there; now all of that is stored electronically." Today, packing slips and other

papers are scanned and tracked, and can be retrieved with a couple of clicks, if needed.

Scanning and storing packing slips from the shipping area is particularly beneficial. "Those are critical documents, because it's not unusual to get a call from a vendor with some sort of discrepancy," DeGroat says. "We can pull up the packing slip and immediately have a copy of the signed-off slip that proves what was actually delivered."

Human resources and accounting are also actively using DocStar. "Vendor checks, customer checks and other documents are scanned in, as are invoices and other documents," DeGroat explains. "We work the documents, get them approved and processed, and then scan them in."

In addition to invoices and other documents, the company scans and electronically files a number of other customer documents. In addition, DocStar is supporting the company's security system. "When someone visits our firm, they must sign a non-disclosure form that says they won't take any trade secrets," DeGroat says. "Those forms are now stored in DocStar, which means repeat visitors don't need to complete a form every time they enter."

G&F Industries acquired what is now G&F Medical at around the same time it went live with DocStar, and has been scanning and electronically filing documents from that firm, in addition to its own.

Achieving results

Going with DocStar has led to a number of positive results. "The first thing that comes to mind is just the additional space," DeGroat explains. "We've been able to eliminate ten five-drawer filing cabinets full of paper in our accounting

office, manufacturing area and quality area. Freeing up space in the office has been valuable."

Second, he says, is ease of retrieval. "No longer do we need to take the time to walk to a file cabinet, try and determine whether the person filed it under A or B or wherever, and hope it's there," he says. "Being able to find something—and find it quickly—is huge. Now we simply pull something up on the system, flip to the page we want to see and then print or email the information. That's been a real workflow benefit."

As the company has grown, it's been able to do so without some of the costs normally associated with that. "We haven't had to add more people to process more paper," DeGroat says. "We can use our people for other things." The company also has been able to forego adding storage space as its business increased.

Another benefit of using DocStar is remote access, provided you can access your network remotely via a secure VPN. "The system allows us to work at home and, for example, access and verify information for a report," DeGroat explains. "If I'm writing commentary on our financial statements and I want to pull up a particular invoice to check something, I can do that. I can even email it to myself or print it out if I need to."

The system also bolsters company data security. "It's an important part of our disaster recovery plan," he adds. "If any paper documents we have scanned were to be destroyed, we could replace them. And

the electronic files are backed up, so they're accessible in the event of a catastrophe, as well."

Cost savings comes into play, as well. "We have seen significant cost reduction in terms of storing paper, in both day-to-day use, as well as the dead storage costs," DeGroat notes. "We estimated more than 7,500 documents are now stored in DocStar with an average cost savings of $1.75 per document, when you factor the labor costs in filing the documents originally, retrieving them, moving them to dead storage, 10 filing cabinets originally used to store them, and the additional costs of purchasing hanging folders files and dead storage boxes. This equates to more than $13,000 in annual savings, and the ability to actually locate the documents is priceless!"

Even the dead storage area is being cleaned up. "We have a shredding service that comes in once a month and we have a directory of the files we want to delete," he explains. "We just go down there, pull the boxes and they shred them right on site." This provides certain legal benefits, as well. "We can manage documents better and keep them only for as long as we are required to by law."

Dead storage is not empty, though. "Massachusetts state government officials require us to have a written information security plan that includes a number of controls for securing documents," DeGroat explains. "For instance, we need to keep terminated employee personnel files containing social security numbers and other personnel information in a physically secure

> ## "It's an important part of our disaster recovery plan. If any paper documents we have scanned were to be destroyed, we could replace them."
>
> —Author's Quote, Title | Company Name

location, which this dead storage area can now provide.

"Still, it's half empty, which is a good thing," he adds. "And my goal is to reduce it even more. The best part is I can actually go down there and find something I need. And then I can get back out again!"

Going forward

G&F Industries recently made changes that will heighten the functionality—and benefits—of its DocStar technology. "With the most recent changes in our copier/scanner machines, we can actually scan from those machines directly into DocStar," DeGroat adds. "This means people don't have to go to the DocStar station and physically scan the items in. That will be an added time savings. When things are easier people use them more."

As regulations allow, G&F also plans to expand its use of DocStar for human resources files. "To the extent we can get rid of paper documents and store information electronically, we'll do that," he notes.

Experienced counsel

As one who's used DocStar for a number of years, DeGroat has advice for others: "It really comes down to figuring out the best process for filing data so you can retrieve it," he says. "Knowing how you want to get data out of the system will drive implementation."

He adds, "Once you start down this path and people become accustomed to it, you start getting even greater benefits. You find other applications—or other people see what you're doing—and then you can expand the process to other applications and it just spreads."

"Once you start down this path and people become accustomed to it, you start getting even greater benefits… you can expand the process to other applications and it just spreads."

—Author's Quote, Title | Company Name

About DocStar

Helping businesses translate vision into action for more than 20 years, DocStar delivers a flexible and innovative enterprise content management and process automation platform. Easy to implement and use—both in the cloud and on premises—DocStar proven technology and global process expertise empowers organizations to operate at peak performance, navigate change, and grow.

DocStar®

Contact us for more information on DocStar products and services

📞 +1.888.362.7827 x2735   ✉ info@docstar.com   🌐 www.docstar.com