

# Case Study



## Joshen Paper Improves Business Processes with Enterprise Content Management System

Joshen Paper is a packaging and chemical supplier offering the most comprehensive supplies in the United States. Serving more than 13,000 locations and customers throughout North America, the company, headquartered in Cleveland, Oh., has over 250 employees throughout 12 operating divisions to support the sales and distribution of its inventory of over 15,000 chemical and packaging items.

## Business Needs

Joshen Paper generates thousands upon thousands of paper documents per month. The supply company's process for invoicing and billing involves the production and flow of various paper documents and system generated documents to confirm orders, to verify deliveries and for billing and payments. Customer order tickets are first generated by Joshen Paper and then passed through their Accounts Receivable billing clerks to ensure accuracy. Once the order cycle is complete, proof-of-delivery tickets are created and then matched up to the appropriate invoice tickets. All of the tickets and invoices specific to each customer are then stored into the appropriate customer folders at their headquarters. For a large organization shipping hundreds of orders a day, access to these invoices and proof-of-delivery tickets are of paramount importance to the company's business operation.

However, because Joshen Paper scales across nine locations, getting immediate access to its paper-based records was challenging, to say the least. Instant access to pertinent information often depends on an individual's time and availability to locate a file and then fax it to the various distribution centers. This process can sometimes take hours, and ultimately creates inefficiencies in critical business processes.

## Solution

To tackle this problem, Joshen Paper's Doug Trisnar, Chief Information Officer, began to explore Enterprise Content Management (ECM) and Document Management systems that would provide a streamlined operational process to reduce the amount of overhead in document filing, storage and retrieval, as well as improve its accounts receivable and A/R billing processes. Trisnar was focused on finding a solution that would decrease the amount of administrative work that had been previously required to manage vendor and customer files.

**“In looking for a solution that would simplify our business processes and help us achieve a more streamlined approach to document management, I wasn't interested in a solution that would create more overhead before we'd see the benefits,” said Trisnar. “We needed to alleviate the additional recourses immediately and deploy a solution that would enable us to hit the ground running.”**

A traditional ECM solution attempts to integrate several data sources and processes of an organization into a unified system and usually uses multiple components of computer software and hardware to achieve the integration. Typically, ECM software systems are complex in nature because of their wide scope of applications within a business and usually require specialists to implement. The length of time to complete an installation can range from 3-9 months for smaller organizations and sometimes years for larger companies. This would require too much overhead for Joshen Paper, so Trisnar turned to Vanguard Systems (<http://www.vansystems.com/>), a multiplatform content and records management service provider, for help in identifying a solution that could easily scale and require minimal installation resources.

Trisnar immediately found comfort in the painless and quick installation of the Vanguard ISM/21 Enterprise Document Management system, which requires no programming efforts to link the files with Joshen Paper's applications. Coupled with 80 Fujitsu workgroup and departmental document scanners, the integration was simple and smooth, affording the packaging and supply company the ability to begin its digitization process immediately. Joshen Paper selected a mix of Fujitsu document scanners, including the fi-5120C, fi-5015C, fi-5220C, and fi-6140 models, for their ease of use, fast speeds and flexibility.

Once implemented, Joshen Paper was able to quickly scan all of its paper documents at advanced speeds and then store the digital copies in the Vanguard ISM/21 solution. All of the content, conversations and data associated with each customer file are then displayed in a single index through one interface so that access to information is as easy as one, two, three – pull up the customer file, locate the item in question and email to the interested party. The process of sharing these important files decreased from a couple of hours to only a couple of minutes at Joshen Paper.

As Joshen Paper started deploying the scanners across two of its nine operating divisions, personnel quickly realized that there was a lot more value in the devices than they initially anticipated. While the primary driver for deploying a document management solution was to reduce overhead, minimize physical storage space and ultimately increase productivity in their invoicing and billing departments, they found additional use for the scanners

in being able to record all of the conversations and discourse between Joshen Paper and its various vendors and customers. The solution also enabled Joshen Paper to create a more organized paper trail and archive history for all of the product pricing changes made by its vendors. And finally, the human resource department also benefited from the solution by creating an organized and easy-to-access repository of employment information and history. All records for new and existing employees, including employment applications, reprimands, insurance, pay increase and decrease, etc., could be captured and stored digitally, eliminating the need for storage cabinets and the fireproof safe that was once required to safeguard all paper documents.

## Benefits

As previously mentioned, prior to obtaining the Fujitsu scanners and implementing the Document Management system from Vanguard, Joshen Paper had to physically pull and re-file folders for every invoice or delivery inquiry. Needless to say, it was a labor intensive process that can waste valuable time and money. Now, they only have to scan a document once and can obtain immediate access to the digital files. In addition, the company reduced the amount of physical storage space they once needed to retain the more than 32,000 invoices that were generated each month. Once a file is scanned, employees do not have to worry about traveling to a storage facility to retrieve it, they only need to access the Vanguard ISM/21 system for instant access. The introduction of the document management system has also enabled Joshen Paper to re-allocate the time of two full-time employees, estimating a savings of over \$25,000 a year. Additionally, because only one digital copy remains, faxing and copying of the invoices and proof of purchase/delivery is no longer required and therefore preserves paper, saving the company at least \$50,000 in supplies.

**“The flexibility in the Vanguard ERP system combined with the reliability of the Fujitsu scanners has provided tremendous value to Joshen Paper,” Tisner said. “Not only have we obtained significant cost savings, increased our productivity and improved our overall business process, but we’ve also been able to better service our customers with a quicker response time to their needs, ultimately improving customer satisfaction. The relationship with Fujitsu and Vanguard has changed our day-to-day operations and positively affected our bottom line.”**

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