Metal Technology Solutions Uses PPM with Infor XA ERP To Save Time, Money, & Eliminate Pre-Printed Forms

complementary partner

Metal Technology Solutions leads the marketplace in the design and manufacture of precision-oriented metal components and assemblies for markets including agriculture, automotive, ground transportation, medical, nuclear, plumbing, rail, recreational vehicles, and small gasoline engines, among others. They run a high-demand, high-output, manufacturing and engineering operation where improving workflow and shortening business and technology processes translates directly into a competitive advantage.

Like many manufacturing companies using Infor XA ERP (formerly MAPICS) , Metal Technology Solutions also runs a document-heavy operation with five plants sending 150-200 mission-critical documents per day including sales orders, shop orders, and purchase orders.

In early summer 2003, Gary A. Baker (Director of Information Technology) was approached by a group of frustrated users who needed a better way to deliver important business documents.

"The users basically asked 'How can we reduce the number of manual faxes we send?'", recalls Baker, adding that one of the plants actually had a person who spent 3-4 hours a day sending manual faxes. "This person would just get the PO's off the printer, decide who it needed to go to, create a cover page, and then stand at the fax machine." Faced with unhappy users bogged down with hours of manual processes per day, Baker and his team started researching a variety of automatic fax and electronic forms solution providers.

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While primarily interested in recovering lost work hours, Baker also wanted solutions that would add value through other cost-cutting benefits including the elimination of pre-printed forms, printing AP MICR checks in-house, and have it all wrapped up in a package that was easy for the users and hassle-free for the administrators. It was a tall order.
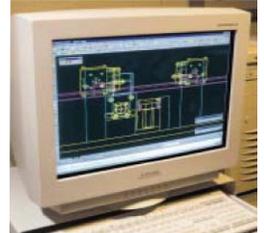
"The main thing was ease-of-use," says Baker on the subject of buying criteria. "But we also wanted to know how many installations were out there, how many industry awards did the company have, how long had the company been in business, and then, of course, how was technical support. After that, it came down to price, but the main thing was the viability of the company itself."

So, after much research, many demos, and lots of negotiations, Metal Technology Solutions decided to purchase Quadrant Software's Paperless Process Management (PPM) solutions including the FastFax / Enterprise fax server and Formtastic Forms document design solution. "Quadrant Software's sales staff bent over backwards to make sure we had all of our I's dotted and T's crossed,"

says Baker. "The demo was very thorough. They answered all the questions we had and delivered on everything they promised. It wasn't a painful sales process...believe me I've been through those before."

Once purchased and shipped, Metal Technology Solutions took on the task of installing and implementing both solutions on their own. "We just looked through the documentation to see what was required of us, made one phone call to tech support, and it was up and running", recalls Baker. "It was basically a plug-and-play application.

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The only thing that was required with Infor XA ERP was a database link with Formtastic that puts the correct fax number on the correct form for each recipient. FastFax automatically knows what to do with it from there."

While discussing the installation and implementation, Baker also notes how happy he was with Quadrant Software's tech support team. "If I didn't get a tech support rep right away, then I usually got a call back within 1-4 hours," says Baker. "Most of the time we had a solution to the issue within 15 minutes."

All in all, it took about two days for Metal Technology Solutions to get both FastFax and Formtastic installed, completely tested, and made ready for introduction to the users. At this point, Metal Technology Solutions took advantage of PPM's scaleable, modular architecture. The company had the ability to gradually implement PPM on a document-by-document or plant-by-plant basis depending on their schedule and budget.

"Well, basically, we rolled it out one plant at a time," explains Baker. "And it took all of about five minutes of training for the user. All they do is print the document. Then the spool file gets merged with the Formtastic form and it goes to the FastFax queue and faxes. That's it. They don't touch it and I receive very few calls from the users."

As many IT professionals have discovered, finding the perfect solution and then convincing the users to take advantage of it are two separate battles. Not so with PPM at Metal Technology Solutions. "It wasn't very hard to get users involved," states Baker. "They've told me numerous times, 'This is awesome!' They've said it just saves them so much time." In addition to saving valuable time when delivering documents, the company's users can also check on the status of their faxes right from the desktop.

The benefits of PPM were realized quickly according to Baker. "Using Formtastic, we are our own forms designer," he says. "Using the old way, we designed documents in Microsoft Word, and then had to transfer them over to the iSeries 400 via advance

function printing (AFP). Then we had to go into Infor XA ERP and define the overlays. That was cumbersome to say the least."

It was so cumbersome that Metal Technology Solutions relied on an outside consulting firm to work with the Word documents and AFP at $80/hour for a four-hour minimum visit. This expense occurred 2-4 times per month for tasks as minor as changing a company address on a form.
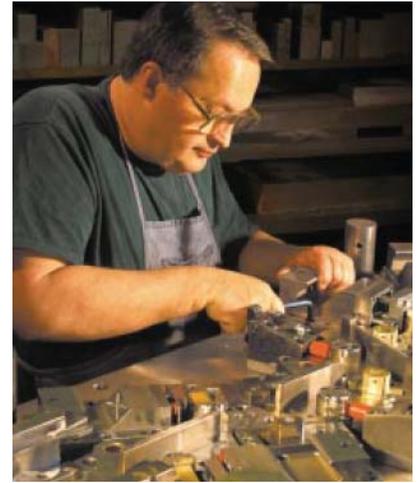
In comparison, Baker now uses Formtastic to make major and minor modifications to his forms as often as required without paying or waiting for outside consultants. "Formtastic is a lot simpler and quicker because we have the control here," says Baker. "I'm actually doing less maintenance on the forms compared to doing it the old way. Formtastic is definitely feature-function rich."

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Of course, Metal Technology Solutions' primary motivation for purchasing PPM was recovering lost work hours. "We not only saved on pre-printed forms, but we cut 15-20 hours of manual faxing a week," Baker says with great satisfaction. "So, in some instances we saved thousands of dollars a week in time, pre-printed forms, printers, ribbons. I mean everything. You just add it up. I think that people who have lived through that understand those dollars."

Executive management also understood those dollars when Baker approached them with the prospect of implementing a PPM solution. "We just knew that it made good business sense," says Baker. "If you can automate, streamline, save money, be more productive, and efficient, then it's a no-brainer. That's how we approached it when we presented Quadrant Software at the executive level. They just said, 'Hey, it makes sense to us.'"

Metal Technology Solutions has been so happy with Quadrant Software's PPM solutions that they have decided to implement yet another component. "We've eliminated all of the pre-printed forms coming out of Infor XA ERP," says Baker. "The only thing that we have left to do is AP checks. We are in the process now of buying Formtastic Checks."

While Metal Technology Solutions initially wanted a solution to relieve their manual faxing woes, in Quadrant Software they found a suite of PPM solutions that saved, solved, and simplified a wide range of document management issues. "It hit on all the cylinders," states Baker. "And it exceeded my expectations on the Formtastic side because of the flexibility of the software."

In the coming months, Gary Baker looks forward to further developing and streamlining his PPM installation. He's especially eager to delve further into Formtastic's many features and benefits to save even more time and money while improving response time to customer requests, efficiency, and security.

The fact that Quadrant Software's PPM solutions integrate with Infor XA ERP further leverages their investment into that ERP, making the interface between Quadrant Software's PPM solutions and the Infor XA ERP a powerful combination.

Quadrant Software is an Infor Complementary Partner.