

CASE STUDY 7: Growing Manufacturing Company Automates On-Demand Output, Reducing Staff Tasks and Departmental Costs for Pre-Printed Forms

Background

A manufacturer of specialized scientific devices and consumable supplies for the bio-engineering industry relied on MANMAN on the OpenVMS. It faced some challenges in moving a growing volume of sales through the warehouse and into a variety of delivery services to a global group of distributors and customers.

How Workflow Was Processed Before OctoTools – Costly Challenges:

Shipping Department clerical personnel manually typed each Sales Order Number into either the “UPS WorldShip®” or “FedEx Ship Manager®” software; those applications would retrieve Address shipping data from a file created by MANMAN on the OpenVMS system. There was no system for creating a Pick List for the warehouse staff since multiple signatures were required to authorize removal from Parts Inventory Warehouse into the Shipping area and then onto the Delivery services. The bottom copy of NCR form was barely legible.

Each Part often needed specific labels with the Requirements & Safety Statements required by specialized distributors, forcing the Purchasing Agents to order another specific Part for warehousing with various labels for each Vendor Brand. No barcodes were in use at that time.

The majority of the forms printed in batches by an IT Night Operator using pre-printed pin-feed forms on line-printers in the IT Department. This schedule placed a growing burden on the IT Department to manage staffing schedules as well as each of the printers using unique forms for all corporate departments. Staff had to monitor each of the line-printers for jams and mis-feeds. They then sorted each batch run to distribute the forms to the appropriate departments.

The Customer Service, Purchasing, Planning, Product Sales, and Shipping Departments each used uniquely pre-printed forms on pedestal-type dot-matrix printers, on-demand during the workday. The Customer Service Department employees had to constantly change forms such as Sales Orders and Invoices on their local printers. They also experienced occasional jams and mis-feeds, requiring help from the IT Department. The Purchasing Department only printed standardized

Purchase Orders, so they did not have to change forms on their printers but faced challenges as a second subsidiary corporation launched.

The IT Department handled the pre-printed Check forms for the Accounts Payable Department. They had to stop the print queue and change the MANMAN logical form, then change the computer paper to the Check form on the line printer, and load the special magnetic ink ribbons. They created a new print job, started the queue, ensured the forms were aligned properly and closely monitored, so each Check printed correctly. When the print job finished, they had to change the physical paper and logical forms. It created a very hectic work environment for the IT staff.

After OctoTools – SEVERAL Solutions:

Installed as middleware between MANMAN (on OpenVMS) for variable data printing, OctoTools, the JBM Systems software, performs the following tasks:

- Reformats the text files automatically from the OpenVMS print queues, by processing the forms accurately linked to design templates;
- OctoTools creates archival copies as PDF files stored on network drives for future reference.
- Without IT supervision, the software queries specified files for any changes, triggered to launch OctoWATCH procedures for updated print-outs.

The Sales Order and Shipping Document are used now by Parts Inventory Warehouse employees to pick orders for transfer to the Shipping Department. A barcode procedure added to the Shipping Document from OctoTools, designed, so each Shipping Station uses a barcode reader, to now scan the Sales Order ID instead of typing it every time. This one simple change increased data accuracy with measurable savings in both labor costs and satisfied customers through reduced shipping error rates.

Check forms are now processed by the Accounts Payable Department via OctoTools to a laser printer loaded with pre-printed check stock, without staff monitoring for alignment. They no longer require the help of the IT Department for the changing of pre-printed forms.

There are many laser printers throughout the company, allowing more people to print the form they need without having to change physical forms or to go to a specific dot-matrix printer. The ability to print forms on local printers added convenience for many employees, and also saved money because they can use a printer near their workstation.

The company grew quickly with a second corporate subsidiary and had to print specific forms for two companies. The elimination of physical forms by OctoTools made that process much easier with the rapid reformatting of standard templates into logo-specific unique forms.

Before OctoTools, there were five pedestal printers and two line printers using the pin-feed forms. The company now has 28 laser printers spread throughout five buildings.

OctoTools is also used to print the various forms to a PDF file stored in a specified archive on a network drive. There is a folder for each of the separated forms. The filenames contain a code for the form type, such as "CM" for Credit Memo, and the assigned ID of the document, such as the actual Credit Memo number. Users can easily print a form to a PDF file to send an email to a customer.

Here is a list of some of the 47 electronic forms (including variations) created by the IT staff with End User input plus hands-on training from JBM Systems. Many features include each of the company logos: Sales Orders, Invoices, Credit Memos, Pick List & Shipping Documents, Statements, Purchase Requisitions, Purchase Orders, Accounts/Payable Checks

For more information about productivity enhancements for manufacturing with OctoTools, request a demo or a 21-Day FREE Trial: www.octotools.com or call: (978) 535-7676.