TK Elevator finds a more uplifting approach for managing new elevator construction documentation with M-Files

COMPANY
TK Elevator

INDUSTRY
Manufacturing

LOCATION
United States

PARTNER
Unstoppable Software, Inc

TK Elevator is one of the world's leading companies in the elevator and escalator industry, with more than 50,000 employees and customers in 100+ countries. The company manufactures and provides passenger and freight elevators, escalators and moving walks, passenger boarding bridges and more.

The process of building an elevator is document-intensive, and the company had outgrown its largely paper-based approach for managing information. This manual approach to document management made it difficult for employees to quickly find important information. Furthermore, TK Elevator was constantly shipping documents back-and-forth between its 100-plus branch and service locations, which was time-consuming and expensive.

HIGHLIGHTS

SAVED WORKTIME
Documents retrievable in seconds

TRANSPARENCY AND CONTROL
13 physical handoffs of documents eliminated, and increased project transparency

SAVINGS
TK Elevator saved equivalent of 900 trees and $1.5 million

M-Files.
The Smarter Way to Work.

KEY CHALLENGES BEFORE M-FILES

Digitizing Documents and Creating Document Tracking System Saves $25,000 Per Month

Seven hundred different documents are typically associated with an elevator project, and managing this via paper made document discovery a long and arduous journey. The company's internal "red folder" was literally the physical file folder for the hundreds of documents required for building each single elevator. Each red folder was constantly shuttled from department to department to allow members of a project team to manually add their own paper documents.

This problem was compounded by email. As the primary mode for internal communications, emails carried vital documents as attachments, but TK Elevator lacked systems for effectively managing these emails and attachments.

One project team member described the outcomes of its paper-based structure as "wasted time, lack of visibility into jobs and delays in elevator delivery."

Shipping hard copies was another limitation and a growing cost burden. Shipping copies to the company's 100-plus branches in the U.S. and Canada was costing the company $25,000 per month. This massive cost burden had a dramatic impact on the bottom line.

The way the company was using shared network folders for managing electronic documents and other information was another liability. File structures could go nine or more levels deep, folder paths often exceeded 255 characters and documents were stored with little or no consistency and with varied naming conventions. Worse yet, placing network folders on multiple servers across the network led to duplication of documents and version-control issues.

"Before M-Files, we would lose files due to deletion or because people stored different versions of documents in different folders," said Damon Rodkey, IT manager, TK Elevator. "Finding a particular document in our shared network folders could take up to

five minutes. Sometimes I'd think that finding oil in my backyard would be easier."

THE M-FILES SOLUTIONS

M-Files Makes Documents Retrievable in Seconds

Several years ago, TK Elevator built a cross-functional team of engineers, coordinators, managers and drafters to look at the document management process and explore solutions. The team mapped existing processes and then created a vision for an ideal system for finding and tracking documents across the organization.

"We chose M-Files for four reasons: the platform's configurability, scalability, ease-of-use and low implementation cost," said Mike Fuller, developer/analyst at TK Elevator.

"M-Files allows TK Elevator to create a document structure and naming conventions and to add metadata attributes to documents as they are added to the M-Files vault," said Nicole Harris, repair coordinator, regions. "Now we file documents tagged by certain names, job numbers and branches, which makes finding them a lot simpler and most importantly, faster."

Next, TK Elevator built new workflow processes to replace the "red folder" that enabled project teams to run reports and identify the status of projects at any given time. In addition, they began automating processes such as the following:

- Drawing MFDs – an automated workflow auto-creates and names standard multi-file document (MFD) containers for submittal drawings
- Creating drawing requests – once a drawing request is made, an automated workflow initiates the process of making the assignment. Deliverables and scheduling are all easily tracked within the system
- Sending documents – a workflow automates the sending of "submittal drawings," as well as other supporting documents, to internal and external customers

"M-Files is easy to configure, which allows us to save on development and integration costs," said Matthew Chelius, director, business operations. "This means we can keep our already overcrowded application portfolio from growing further. I wish all IT projects were so easy."

THE RESULTS

TK Elevator Electronically Tracks and Resolves Questions from Team Members

TK Elevator also configured M-Files to track questions and common requests from project teams. Team members can create questions within a database and import those questions as objects into the M-Files Vault. These objects synchronize with workflows to speed up the implementation of steps in TK Elevator's RFI process.

M-Files alerts users of new questions in the database and facilitates obtaining a response from the appropriate person. What's more, the person who asks a question is entitled to have it resolved or to send the question back to the person who replied to receive further clarification or a more complete answer.

TK Elevator also developed a workflow tracker that documents the flow of tasks or processes in the making of an elevator. The tracker notifies team managers, project managers and executive management of any missed deadlines, thus helping prevent project delays.

"Today, we use our analytics-based tracker, which is built on the M-Files platform, to see how we can improve our processes," said Fuller. "We accomplish that by examining the most frequently asked questions, resolving them, and eliminating them as obstacles to efficient workflows."

Fuller said that efficient workflows have "wiped out" unnecessary paper costs, solved issues relating to lost paper-based and electronic documents, eliminated more than 13 physical handoffs of documents between people and across departments, and increased project transparency.

"M-Files has become a true enterprise-class solution for us," said Fuller. "We manage almost one million documents with M-Files. We have more than 500 users across seven departments – and we're growing. We have saved the equivalent of 900 trees and $1.5 million annually." He added that next steps include integrating the company's CRM, CPQ and ERP systems with M-Files for "back-and-forth" communications.

"Eventually, we envision this system becoming the primary document management system for our jobs, from sold to shipped."

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Mike Fuller
Developer/ Analyst,
TK Elevator

PARTNER

Unstoppable Software, Inc.
A Cincinnati, Ohio based team of expert software developers and architects that creates user-friendly and high-performance custom software applications for manufacturing, healthcare, and engineering clients. Unstoppable Software drives process improvement and transformation with their team.

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WHY M-FILES?

M-Files is a global leader in information management. The M-Files metadata-driven document management platform enables knowledge workers to instantly find the right information in any context, automate business processes, and enforce information control. This provides businesses with a competitive advantage and substantial ROI as they deliver better customer experiences and higher-quality work with lower risk.

For more information, visit www.m-files.com.

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