Introducing a computerized document management system

Process-oriented quality management requires the systematic and workflow-controlled management of documents and user manuals. Today's generation of document management systems can be expected to deliver a large degree of automation and simple document direction.

In order to develop a quality management system in all of its plants, Schott Lithotec AG, headquartered in Jena, decided to introduce a document management system. The company, a subsidiary of Schott Glas in Mainz, has plants in Jena, Eisenberg, Meiningen and Mainz. It produces high-performance materials and components for the semiconductor industry. From the outset, the company aimed to develop a process-oriented quality management system in line with DIN EN ISO 9001:2000 standards. Another goal was to guarantee users at all four plants access to current documents.

Finding the ideal system

During the selection phase, document management system vendors were given a number of criteria. The tool had to

- be based on Lotus Notes,
- correspond to the standards of document direction,
- provide a workflow for document approval,
- provide options for highly differentiated user rights at the document level,
- be able to process Microsoft Office documents and
- allow unrestricted configuration according to the needs of the company.

Beside these basic criteria, another requirement of the company was that the product offer good value. Of the four products it evaluated, the company decided on PLATO AG’s XERI system because it was the only program that fulfilled all of the requirements. One of the central assets of the system, in the eyes of the company, was that its structure is very flexible even without additional programming. Authors continue to use Microsoft Office to write their documents, and user rights can be regulated even at document level. Another reason to settle on XERI was the annual users meeting convened by PLATO clients, which serves to further the continuous development of the product based upon customer needs.

The first phase of implementing the document management tool on the premises of Schott Lithotec comprised its installation, administrator training and test runs. For the second phase, user training and the system launch were planned. The final step was supposed to be the creation of the documents by the users. The project plan allocated six months for these steps. However, the inadequate data line between the plants (128 kBit) meant that system performance was lower than expected, causing unacceptable delays. It was only when PLATO managed to upgrade the software at short notice and connection capacity was enhanced to 2 Mbit that system performance reached the desired level. By that time, however, the project plan had been derailed. The solution found was to upload the documents centrally. User training was postponed. Yet, despite the delays, the project was finished on time.
Targets met, sights set on upgrades

Today, Schott Lithotec uses the database software to create, maintain and manage documents and user manuals. The software is process-based and allows for electronic document release, electronic signatures and automatic distribution. Being a web-based tool, it is independent of platforms and grants users worldwide access to relevant data. The tool’s open architecture makes it easy to integrate into other company tools. What makes the system so useful is that it minimizes the administrative effort required for documents and keeps company data at the user’s fingertips. The documents are tailored to the target groups, ensuring continued processing of the information available and minimizing overlap. The system supports the work of authors, co-authors, editors and recipients. Automatic functions and monitoring mechanisms serve to keep the documents up to date.

The certification authority has confirmed that the product fulfills the required standards. The staff members responsible for quality management have familiarized themselves with the system and see its benefits for their work. They commend its functionality and approve of the system in general. Training sessions and informational meetings are held to convince the employees of the benefits of the system.

In future, the document management system will be upgraded to become the company’s central information pool. Plans are to include all manner of centrally managed documents or those requiring a signature, including maps and driving directions, letter templates and company information. In addition, there are plans to incorporate reports on indicators or projects that require approval before they are published. What is more, the workflow can be used to approve investment applications. The fact that the system can be freely structured and that its administration is very flexible opens up a wealth of options and applications.

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