

Document Management Software



Andrew Wright Windows



“What Concept did for us...”

Andrew Wright Windows provides custom glass, windows and conservatories to an ever-expanding client base within Scotland. They have been in business for over 70 years from their head office in Irvine.

- Site visit and detailed report examining exact requirements
- eCopy integrated with existing Canon device for integration with Invu
- Invu document management system to streamline the order process
- Installation, training and custom-build of product all by Concept Professional Services team

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“The support we received from Concept Group was invaluable. The workflow analysis gave us the confidence that Concept really had a handle on how we function on a daily basis, and what our requirements were from a document management system.”

Charlie Berry (Managing Director)
Andrew Wright Windows

The Challenge

As a highly successful organisation, Andrew Wright Windows was facing major storage problems and the sheer volume of orders and associated paperwork was becoming unmanageable. Despite the size of their Head Office site in Irvine, it was evident that as Andrew Wright expanded and secured more business, there would be no way to store further documentation without resorting to external storage, or moving premises. Neither of these options was feasible to Andrew Wright Windows due to the associated cost implications and ensuing disruption that would naturally follow such decisions.

Concept's commitment to providing customers with total solutions prompted Andrew Wright Windows to call upon the services of their dedicated software team. Created in 2001, the Concept Professional Services department pride themselves on their consultative approach and experience with all aspects of document management.

After an initial meeting with Andrew Wright Windows to discuss the underlying principles of electronic document management and to establish the primary business reasons for implementing this strategy, the Professional Services team conducted a full site survey. Focusing on order documentation as the main area of concern, this involved interviewing key members of staff to determine document flow between departments and to gain a thorough understanding of the business processes in place.

During this analysis stage, Concept was able to identify a number of issues and frustrations that could be easily remedied using a document management system. Chief amongst these were document duplication, the movement of documents between multiple staff members and the document retention period.

The Solution

The data collected from the workflow analysis was then used to establish the exact requirements of Andrew Wright Windows and a complete solution package was presented. In this case, the Professional Services team recommended the [Invu document management system](#), which would allow staff to easily save, search for and retrieve all documentation pertaining to the order process.

In addition to this, Concept advised that the accounts department would benefit from the [Advanced Codefree](#) element of Invu, which would allow them to seamlessly integrate their accounts software with the document management system. In essence, it would allow users to enter invoice information into their Sage software *and* index the document into the system in one easy step, eliminating the need for 'double-keying' that is so often cited as a drawback in other document management solutions.

Having conducted the workflow analysis, Concept was able to make practical hardware recommendations regarding the scanning equipment and where it should be placed in the office to make the new, electronic paper handling process as straightforward as possible for staff members. Here, Concept supplied 2 smaller multifunctional printers (MFPs) to supplement the existing MFP in the reception area.

Ever conscious of the need to ease the transition into any unfamiliar practice, Concept suggested that the existing MFP be enhanced by the addition of an [eCopy Scan Station](#). This cutting edge document distribution software would make scanning paper documents into the [Invu](#) system remarkably easy for Andrew Wright employees, thanks to the user-friendly, touch-screen interface.

Once the products had arrived, given their necessarily highly customisable nature, it was crucial that Concept be involved in both the installation and the training stages. As such, the Professional Services Technical team came on site to help Andrew Wright Windows determine the best structure and format for the software to take. Shortcut buttons were created from scanning devices and defaults set before all users received thorough training to ensure that they were completely comfortable using the system.



The Benefits

Charlie explains, “They [Concept] also took into account practical concerns, like how we were all going to have access to scan documents into the new system. Installing eCopy on our reception machine meant that staff adapted much faster than we had anticipated, and now that Invu is up and running, I could honestly say that I can't imagine working without it. We are much better organised and finding documents is a breeze.”

Since implementing their document management solution, Andrew Wright Windows has not only successfully addressed document storage issues within the company, but are now benefiting from a secure, reliable and efficient system that has helped boost productivity and improved customer service.

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