

TRANSFORM OFFICE OPERATIONS

How Content Management Solutions Accelerated Transactions for Buxton USA

CHALLENGE

It didn't take John Newman long to identify his first major challenge when he joined his father's company, Buxton USA, as vice president in 2013. It was the 40 filing cabinets stuffed with paper – lots of it. About 35 years' worth of project folders, invoices, service manuals, services contracts, etc., that the company, which builds washing and sterilizing equipment for the healthcare and research industries, had accumulated.

"It hit me in the first couple days after I arrived. Here I am, the vice president of the company, and I'm flipping through folders looking for a document," Newman recalled. "Some of these project folders contain hundreds of pages. It was the most inefficient thing I could be doing with my time. It doesn't get us our next sale, it doesn't improve our products. It's just a waste of time."

Newman knew he had to implement a digital workflow to address the inefficiencies associated with finding and storing hard-copy information along with the space issues due to the many filing cabinets that cluttered the Lindenhurst, NY, office. In fact, the office housed more filing cabinets than employees. "When my dad was running the company, he ran it like a mom-and-pop shop. He was afraid of technology," said Newman, who is now the President/CEO of Buxton USA.

One big reason Newman knew he had to go digital is the FDA regulations. By law, the company must retain all of the documentation for all of the machines it builds – including drawings, schematics, etc. – essentially forever. Because the FDA conducts random inspections, the agency may ask for the documentation related to one of the machines and it must produce it for them. He noted that the company has 15 filing cabinets filled with such documents and they refer to them often. "So what happens should we experience a flood or fire? We only have them on paper."

In the first year using the solution, its accounts payable process alone generated more than 8,000 PDF documents! That are now all easily searchable, portable, and accessible.

SOLUTION

Newman began addressing the issues by looking at content management software. "I asked others from larger companies if they had a content management system and they all said, "Yes, but it's awful." So I got a lot of recommendations of what not to use."

Newman has met Mike Thomas, a BlueIrisIQ™ regional sales director, before, and so at their next meeting, explained his content management challenge. In response, Thomas pitched him the Square 9 GlobalSearch solution, and was invited to Buxton USA to demonstrate it.

The demonstration impressed Newman, so he purchased Square 9 GlobalSearch in December 2015, and remains happy with the solution to this day. He noted that the installation and creating the workflows that now run Buxton USA's operations was very simple. "The implementation of the software instantly addressed all of our objectives," he said.

He explained that most employees have two monitors, one of which has GlobalSearch opened all the time. So instead of them having a stack of papers in front of them, they have the monitor on which they move documents to appropriate folders.

RESULTS

GlobalSearch has cleaned out Buxton USA's office operations and it now processes transactions with greater ease in much less time.



BENEFITS

The benefits Buxton USA has realized with the Square 9 GlobalSearch software include:

- Its Human Resources Department has found Global Search's multiple security levels to be very effective. Confidential documents can only be accessed by those who are required to do so. By default, only the system administrator has access to new inboxes and archives.

This means each section of GlobalSearch must be built up by adding users, versus breaking down and removing user access. The indexing feature also allows staff to easily filter for a particular group of records.

- The time savings thanks to Square 9 GlobalSearch's ability to quickly find a document with a simple keyword or phrase. Now, searching through those large project files for one document is no longer a daunting, time-consuming task.
- Its service department creates a digital service call report (SCR) with each inspection or repair. Information pertaining to the equipment, the issue experienced, the resolution and any parts used to make the repair are detailed on this report. At the completion of a call, the SCR is emailed (in PDF) to the client and simultaneously sent to a dedicated email address, linked to a GlobalSearch inbox. After review, the SCR is indexed and archived, allowing any users to access this information at any time, including our field technicians (via an internet connection and mobile devices). For subsequent visits related to the same piece of equipment, a technician can retrieve all previous SCRs by searching the serial number of the machine. This is a valuable tool for field technicians and a huge value-add for Buxton USA's customers.
- A considerable paper-related cost savings due to the light amount of paper-based data now being generated.

And as far as the past 35 years of existing documentation goes, Newman noted that they are scanning just the FDA-needed documentation and service manuals. Everything else is being held in storage for seven years, and then it will be shredded.



NEXT STEPS

Newman said that he is considering acquiring more modules for GlobalSearch to take advantage of some of its other features, and additional user licenses. He also mentioned that the company will probably upgrade to an all-in-one scanner/printer.

"As far as my document needs, BlueirisIQ gets the first phone call. They have been very responsive and supportive through this entire process." Buxton has remained a satisfied BlueirisIQ Business Solutions customer for over a decade.

"Going forward, everything is digital. All documents are in PDF format, so we can go through many processes of a workflow and there is physically no piece of paper. In fact, even in our accounts payable process, the only physical paper we have are packing slips that come in the box with the item. We do have about 50% of our vendors who are still sending paper invoices, but we're trying to get them to convert to digital."

— JOHN NEWMAN
President/CEO, Buxton USA

