Focus on People

Helping people is the highest priority for the Red Cross – and they accomplish this with a broad spectrum of services. A central document pool lets the organization to provide a quick and coordinated response to the region’s needs.

For decades, helping people has been at the heart of the many different tasks handled by this well-known charitable organization: the German Red Cross, based in Ulm, operates emergency medical services (including emergency rescue and medical/blood transport), first aid training and disaster protection along with ambulatory home care services, transportation for the disabled, a homeless shelter, food pantries and second-hand shops. Next to hundreds of volunteers, there are over 200 employees working on site at its headquarters. 17,500 members support them in their work through donations. To organize and administer all this, employees are aided by a modern IT infrastructure. Next to Secure Office, a system solution for fire and rescue services, and accounting programs which support their different service areas, beginning in October 2012 they opted for a DocuWare document management system.
Requirements

Document volume for each service area is quite high. When you add up documents which track rescues, home care or transportation services; others for monitoring meals on wheels or house calls; and still others for donation receipts, journal postings and other records...it’s no wonder that about 65,000 documents need to be securely stored every year.

By fall of 2012, their records had been collected in binders and placed on shelves in the offices of various employees. Older documents headed to fireproof cabinets in the basement. But space was becoming increasingly tight: the Red Cross had nearly doubled its revenue in the past five years so the number of records taking up space were increasing at the same pace. “Our archive was bursting at the seams. We were close to renting additional space to accommodate it,” says Bernd Thierer, IT/HR Director for the Red Cross in Ulm. Searching for older documents was particularly problematic – employees had to dig through the cellar and even climb up ladders to reach certain records.

In switching to document management they also sought to simplify the process for handling invoices. For every invoice, multiple copies were printed and filed separately. With nearly 35,000 invoices every year for their rescue services alone, it was clear that this was a big time-waste for employees.

In the summer of 2012, the German Red Cross opted for a central digital archive. “Why should we rent new rooms, when we can digitize all of this,” is how Bernd Thierer, their IT expert, describes the decision. After the application was demonstrated by a reference customer who had similar challenges, they chose DocuWare. Says Thierer: “The presentation made it clear that they understood our issues and had experience with our accounting system.”
Solution

The document management system was implemented at the German Red Cross in two phases. Since October 2012, twelve employees in their accounting, rescue and home care divisions as well as HR department began working with the solution. “We were able to integrate DocuWare without any additions into our existing system landscape” states their satisfied IT Director, Thierer. They also had the necessary storage media in place, but decided to add a new scanner. With the help of DocuWare Printer, all the other applications used by the staff – such as Secure Office, Swing, Apetito, Fedas and Microsoft Office – are working seamlessly with DocuWare. The documents created with these programs are automatically indexed and stored in DocuWare at the same time they are printed. Authorized employees access the central document pool. “The staff didn’t need to change their familiar work processes,” says the IT specialist. “The system worked immediately, seamlessly.”

Benefits

Proven work processes were consciously left intact, though all were accelerated by their new system, according to Bernd Thierer. By eliminating the additional copying and paper filing, employees and the supervisor of the first responder team (and their devices) now have more time for their actual, far more critical tasks. A further advantage of digitization is physically manifested in their offices: in 2013, they needed 80 fewer binders than the year before, so that means more space for staff and additional tasks for the Red Cross in the future. It takes no time to search for documents. When members need to document their donations for their tax returns, everything is available with a few mouse clicks and can be forwarded immediately by email.
Summary

“I especially like the very easy, intuitive operation of DocuWare,” says Bernd Thierer. Accessing documents via the web client was immediately understandable for employees - no need for extra training. The Red Cross in Ulm implemented the next steps for a DocuWare project: All mailed incoming A/P invoices are centrally scanned in the mailroom where they are automatically indexed using the Intelligent Indexing Service and then integrated into an invoice authorization workflow. Invoices coming in by email are also added to the process, stored in their original format. Management, various departments and the accounting staff will be embedded in a workflow for authorizing invoices accelerating the payment and make it more transparent. This will be able to track where an invoice is in the chain making sure authorizations happen in a timely manner so they can take advantage of early payment discounts. At the same time, all invoices are archived in an audit-proof manner.

“By introducing a DMS, we've improved the quality of service for our clients and members. In addition, our employees benefit from much easier access to existing documents and the whole organization profits from increased efficiencies.”

Bernd Thierer, IT/HR Director, German Red Cross, Ulm

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