



## Eaton Steel Bar Company

Engineering more efficient document processes



Since 1953, Eaton Steel Bar Company has been at the forefront of cold-drawn and hot-rolled steel products. With approximately 550,000 square feet of production and warehouse facilities on 40 acres of land, Eaton Steel Bar Company has the capacity to warehouse 100,000 tons of inventory and ship up to 400,000 tons annually. Operating units include Eaton Steel Corporation, Hercules Drawn Steel Corporation, Atlas Trucking Company and Titan Metallurgy LLC.

### Highlights

- Inbound fax routing integrated with **Lotus Notes and Domino**
- Outbound email and fax delivery of purchase orders generated by **Oracle E-Business Suite** applications
- **Cisco Voice over IP** system
- **Time savings** with auto-assembly of PO documents
- **Improved quality** of supply chain communications

### Challenge: Automate inbound fax routing and outbound delivery of PO documents

While considering various options to replace its stand-alone fax machines, Eaton Steel Bar Company was prompted to act when its legacy phone system reached the point where parts were no longer available. "We decided to go from our old digital system to Voice over IP," said Larry Helwig, Business Applications Manager at Eaton. "As part of this large VoIP project we implemented Esker Fax for Notes as our solution for routing of all inbound faxes — either to a printer or to inboxes as mail attachments. With the goal of being able to send the faxes directly to email instead of having to print them off, we chose Esker Fax for Notes. We based our decision on our research into fax solutions that were compatible with Lotus Notes."

A couple of years later, Eaton's business and IT leadership converged around a need to improve delivery of outbound purchase orders and associated documents. At that time, the company's purchasing agents would print copies of purchase orders after approving them, then find corresponding product specification sheets and either re-scan and email the documents or put all of the documents into a fax machine and send them to the vendor. "We wanted to address the time it took to process and distribute a purchase order and the product specifications that go with it," said Helwig.

Although Eaton's Oracle system offered the ability to send email, the formatting of the standard reports was not acceptable. "We had formatted custom purchase orders and we wanted a way to send out that custom format along with the specification sheets — all in one package instead of having to print them out separately, bundle them and then send them out," said Helwig.

Helwig's team and the business team got together and defined their objectives, then looked for the best ways to achieve them. "Ultimately we decided to go with a more comprehensive and integrated platform type of solution rather than try to use the fax server that we had," said Helwig. "We didn't have much experience with rules-based technology, so we started looking at what was available." That search led to Esker DeliveryWare.

### Solution: Esker DeliveryWare

Since Eaton had Esker Fax for Notes already in place, the move to Esker DeliveryWare was a direct migration from the company's existing fax server solution. "Instead of just leaving us on our own with the new product, Esker helped out considerably by assisting directly in portions of our project," said Helwig. "They installed the upgrade and put the processing rules in place so we had a ready-to-go solution. Once that was done we were able to take our time in exploring Esker DeliveryWare potential applications. I went to an Esker rules training course, and we gained experience to do more things ourselves."

Now, when purchasing agents select email or fax purchase in Oracle, Esker DeliveryWare retrieves the specifications from a file server and sends the complete PO package as one email or fax.

**“We've had positive feedback from our vendors and mills. They love the new process and our new purchase order format.”**

Larry Helwig ▪ Business Applications Manager  
▪ Eaton Steel Bar Company



I've been impressed with the broad expertise of anyone I've ever talked to at Esker, and their ability and willingness to find solutions — whether the issue is specific to the Esker software or not.

Larry Helwig ■ Business Applications Manager ■ Eaton Steel Bar Company

"We modified the workflow to change what the standard Oracle forms do," said Helwig. "After a user puts in everything that needs to go into the purchase order, and then does the approval, there's a pop-up form in Oracle that has two checkboxes on it for sending by email or fax. One of the two is checked by default based on the vendor setup. Users have the option to change the delivery and contact information if they want to. Then, when they click the OK button, everything happens automatically. They no longer have to physically print off the documents, collate them and re-fax them based on which one of the boxes they've checked. Our workflow is taking over from there. If there's a failure the user gets an email notification back."

Behind the scenes, an XML file is generated and deposited on the Esker DeliveryWare server. This XML file contains all of the information to find the purchase order and the corresponding specification sheets on a Windows file server. Esker DeliveryWare will either send out an email with PDF attachments or generate a TIFF and send it out via fax. The purchase order is a PostScript file and the specifications are PDF files.

## Benefits

According to Helwig, faster delivery and increased document quality have been equally important as benefits of the Esker DeliveryWare solution.

- **Time savings** — "At best it took 10 to 15 minutes to find, print and assemble everything and send it off. Worst case, it could be half a day. Now there's essentially no time spent doing it because the attachments are going out automatically."
- **Quality** — "The quality of documents received on the other end is much higher now that they're rendered as TIFFs in the first place and sent electronically instead of being printed off and run through the fax machine. The quality with email is even better since original PDF documents are being sent."

In addition, Eaton avoids instances in which suppliers might receive POs and specifications separately.

"Now it's a single package; they get it all at once and don't have to worry about where the other pieces are," said Helwig. "We've had positive feedback from our vendors. They love the new process and our new purchase order format. Since our vendors are happy with what we're sending, our people are happy because they get what they purchased with fewer follow-up clarification calls. Having the correct information the first time and not having to re-send helps a lot with supply chain efficiency."

## Esker Professional Services

"My experience with Esker Professional Services has been excellent," said Helwig. "We don't get empty promises. If we have a question, they either give us an answer right away or research the issue and find the answer for us. I've been impressed with the broad expertise of anyone I've ever talked to at Esker, and their ability and willingness to find the solution — whether the issue is specific to the Esker software or not. We put in a whole new VoIP system and took out everything else, and we ran into some communication issues with the T1 connection between the fax server and the phone system for the inbound fax routing. The people from Esker were able to help us diagnose and solve the problem, even though it was outside the Esker software."

## Future plans

As a next phase, Eaton plans to expand the purchase order automation to several outside processors. Along with product specifications, Eaton will be sending work order sheets that provide additional details for production.

Helwig adds, "We have a lot of things that we want to do with Esker DeliveryWare. It's just a matter of prioritizing them and deciding which ones to do in what order. We want to start sending out sales order confirmations automatically, and we're also looking at invoice automation — both outbound invoicing for some smaller customers who are not on full EDI, and inbound invoicing with the data capture capabilities of Esker DeliveryWare."

© 2009 Esker S.A. All rights reserved. Esker and the Esker logo are registered trademarks of Esker S.A. in the U.S. and other countries. All other trademarks are the property of their respective owners.



### For more information:

**Americas** ■ [www.esker.com](http://www.esker.com)  
**Australia** ■ [www.esker.com.au](http://www.esker.com.au)  
**France** ■ [www.esker.fr](http://www.esker.fr)

**Germany** ■ [www.esker.de](http://www.esker.de)  
**Italy** ■ [www.esker.it](http://www.esker.it)  
**Singapore** ■ [www.esker.com.sg](http://www.esker.com.sg)

**Spain** ■ [www.esker.es](http://www.esker.es)  
**United Kingdom** ■ [www.esker.co.uk](http://www.esker.co.uk)