



## CASE STUDY: Document Manager™ – Pensworth



# Pensworth reduce overheads by removing paper from the office



**Company:** Pensworth  
**Country:** United Kingdom  
**Industry:** Dairy  
**Profile:** Milk and dairy product distributor operating across Central and Southern England.  
**Key Drivers:** To have a paperless office and reduce storage of paper in the office. Tight integration with IRIS Exchequer.

Pensworth was started as a local dairy in South Wiltshire in 1975 by two traditional farming families. The business has expanded rapidly from its humble origins and now supplies dairy products to a much greater geographical area covering a significant section of Central and Southern England.

The company has grown steadily throughout the new millennium and now distributes 85 million pints annually to the semi-retail sector within its catchment area. Pensworth has the objective of becoming the clear market leader in the supply of milk and milk-related products to the semi-retail sector throughout Central and Southern England.

### Too much paper and not enough space

Pensworth's staff worked with an ever expanding, paper-based, records management system, which employed a large number of filing cabinets, and occupied a lot of office space. Filing and retrieving documents from this system was time-consuming, and it was impacting staff performance. Staff found the system particularly frustrating when dealing with telephone enquiries.

The paper system also provided no backup of the information it contained, and was therefore dangerously exposed to the risk of disaster.

Pensworth's management decided that an automated document management system was required to support the continued expansion of the business.

### Choosing Document Manager

Pensworth knew better document storage was urgently required, "We searched the Internet and had several demonstrations from competitors of Document Logistix but selected Document Manager because it worked well with our business processes," says Terry Angell, Management Accountant.

Pensworth chose the Document Manager solution due to its tight integration with their existing accounting system, IRIS Exchequer.

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“Document Manager significantly reduces invoice approval time. Staff can sign off invoices more quickly because they have instant access to surrounding information and they no longer need to make paper copies for departmental filing”

**Terry Angell**  
Management Accountant

### Benefits of Document Manager

- Improved staff efficiency
- Secure retrieval of information from remote locations
- Virtual elimination of paper in the office
- Enquiries can be dealt with more quickly
- Dramatic saving in document storage overheads
- Reduction of filing cabinets, allowing more staff to be accommodated in the office

### The Document Manager Solution

Document Manager is a powerful document management solution that centrally manages the flow and storage of information throughout an organization. There is tight control of access and editing, with online access for authorized users.

Document Manager provides Pensworth with a powerful storage facility for its documents and information. The system captures and indexes incoming documents, enabling staff to retrieve them quickly.

Prior to the deployment of Document Manager, the desks at Pensworth were routinely under large piles of post and paperwork. Document management software has meant that storage space requirements have been virtually eliminated, and stationery costs have been dramatically reduced as links to relevant documents can now be emailed between staff.

Document Manager provides smooth, predictable invoice approval from scanning to payment. The system automatically alerts users to relevant invoices requiring their attention or approval.

“Document Manager significantly reduces invoice approval time. Staff can sign off invoices more quickly because they have instant access to surrounding information and they no longer need to make paper copies for departmental filing” says Pensworth Management Accountant, Terry Angell.

Document Manager requires little training. The intuitive Drawer/Folder/Document structure and standard Windows interface makes operation easy for new and infrequent users.

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