

## CASE STUDY

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# OVE

Contracting mit Energie

Object supply with rational energy use: in short OVE. With this company name, OVE has been successfully established as a private company in the energy services sector since 1993. A professional team of employees and competent service partners supply more than 400 properties throughout Germany.

### Project

- ▶ Introduction of the document management system M-Files incl. data transfer from CRM
- ▶ Connection of the Dynamics NAV to the DMS system
- ▶ Integration of fully automated document processing

### Products

- ▶ M-Files
- ▶ DMS Connector
- ▶ Continia Document Capture

The energy contractor OVE Objekt-Versorgung mit rationellem Energieeinsatz GmbH & Co. KG, Bad Rothenfelde, has digitalized its information management.

As a result, documents and information are stored in an audit-proof manner, can be accessed quickly and are linked to business transactions.

As a successful energy service provider, OVE, true to its motto "property supply with rational energy use", now supplies more than 400 properties throughout Germany. The aim is to relieve the customer (builder, owner and user of real estate) as far as possible of all questions in the field of energy supply in connection with the attractiveness of the price of the end product by taking over the planning and construction of energy generation and distribution plants, of systems of measurement and control technology, the financing and operation of plants as well as the delivery and billing of the finished end product heat and - if a combined heat and power plant is used - of the decentrally generated product electricity by OVE. Depending on the nature of the object and project, the information and documents involved are extremely diverse, often interlinked and must be stored in an audit-proof manner in accordance with GoBD.

The administration and organisation of the objects and projects was previously handled by the OVE employees in a CRM system (Customer Relationship Management), which, however, did not offer the possibility of storing associated documents, such as contracts or receipts. In addition, the documents and reports related to the ERP system Microsoft Dynamics NAV also played a major role. These had to be archived in connection with their respective transaction in such a way that fast and transparent access was ensured.

Together with TSO-DATA, OVE decided to take the next step in the digitalisation of the company by improving the CRM and ERP processes with a DMS or ECM system.

„Our requirements were also challenges, but ultimately unavoidable for us in order to be properly positioned for the digital future. TSO-DATA also understood our needs in detail and presented a concept that was eminently implementable together.“

**Dennis Birkenhäger (Controlling, Project management), OVE Objekt-Versorgung mit rationellem Energieeinsatz GmbH & Co. KG**

### **Faster access transparency, revision security**

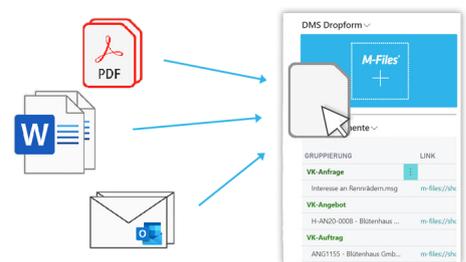
In addition to the desire for faster access to the available information, OVE's requirements also included the need for a uniform and cross-departmental file repository in order to create more transparency at the same time. Since the success of a digital transformation in a company also depends on the user of the new system, it was particularly important to OVE to use a user-friendly solution that could be adapted to the needs of the employees and their organisational structures.

Due to the nature of the documents (vouchers, contracts, etc.) and information to be filed, the solution should of course also comply with the principles for the proper keeping and storage of books, records and documents in electronic form as well as for data access (GoBD) and ensure audit-proof filing.

### **Smart and targeted concept**

In order to meet OVE's needs, a concept was developed which, in a first step, provided for the replacement of the CRM system by the document management solution M-Files, thus considerably facilitating the targeted management and filing of projects and object-relevant documents. M-Files is operated in the cloud and enables 24/7 access to all important documents from almost any location. This ensures that OVE employees work with a uniform level of information. Another advantage of the cloud solution is that there is no need to invest in a separate server infrastructure with additional maintenance and, if necessary, additional resources.

The challenge of connecting the ERP solution Microsoft Dynamics NAV used by OVE to M-Files was solved using the DMS Connector, an interface developed by TSO-DATA for exactly this process. The add-on ensures that processes such as the archiving of incoming invoices and sales documents run smoothly. At the same time, the master data of the ERP system is replicated in order to be able to store documents with reference to this master data (debtors, contracts, measuring points, etc.) in M-Files.



*The DMS Connector optimizes the workflow*

When master data and transactions are transferred, all documents from the ERP system Microsoft Dynamics NAV are automatically provided with information from NAV in M-Files. In this way, users can view scanned documents from daily incoming mail via the ERP system in M-Files and assign them to the correct transactions. The desire for an individual approval workflow in the context of invoice verification and archiving is made available here by means of M-Files and allows for a smart verification process.

## Proof of Concept

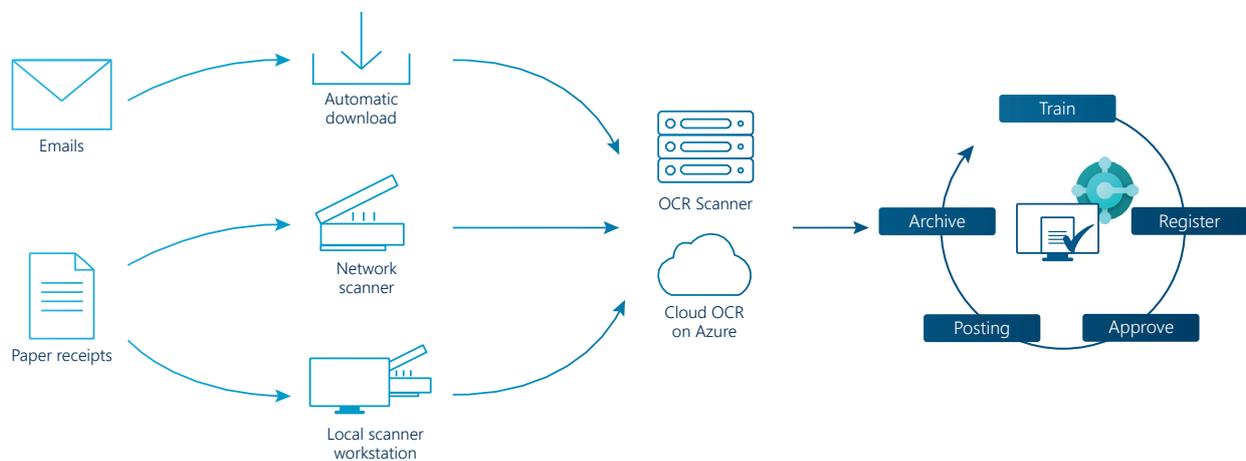
In order to ensure that the concept developed is also the right path into the digital future for OVE, TSO-DATA uses a proof of concept methodology developed in-house, which runs through important steps before the actual start of the project and tests the interaction and resilience of the systems. And so, of course, also serves as a basis for the later investment decision, because in this phase licence fees for software and, if applicable, hardware are taken over by TSO-DATA. Since target requirements were already implemented in a test environment, OVE quickly gained a clear picture that the proposed concept fully met the needs and the implementation was initiated.

*„The large number of documents requires clean organisation and management from us. We were able to organise this efficiently with the solutions offered by TSO-DATA around the document management system M-Files.“*

**Christoph Baumann (IT-Management), OVE Objekt-Versorgung mit rationellem Energieeinsatz GmbH & Co. KG**

## Digital transformation - DMS at the centre

In order to be able to transfer the data available in the CRM system, such as projects, objects, contacts, notes, etc., cleanly to the document management system M-Files, TSO-DATA relied on the interface of its partner KingswaySoft. The connection of M-Files to the existing ERP system was then carried out as planned using the TSO-DATA add-on DMS Connector. It made sense to integrate fully automatic document processing into this process. Here, the solution Document Capture from Continia was used, which provides an efficient process for invoice processing and fully utilises the advantages of ERP and DMS in parallel.



*Simplified TARGET process for document processing with Continia Document Capture*

The mapping of the desired multi-level approval workflow for invoices and credit notes could be perfectly represented in M-Files and was configured by TSO-DATA with the metadata structure defined by OVE in M-Files.

Thanks to the structured conceptual steps, a cooperative partnership and mutual active support, the project duration for the overall implementation was less than half a year.

The intensive use of M-Files in a central position, such as at OVE, shows that an intelligent document management system can also be used as a special corporate solution with added value.

„The partnership-based cooperation at eye level, mutual respect and clear communication made the project process much easier. We were thus able to constructively master special challenges together and quickly find solutions.“

**Johanna Wiltmann**  
Project management and consulting, TSO-DATA



**Further information  
about M-Files:**



**Contact us!**



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TSO-DATA GmbH is part of the TSO-DATA Group, which comprises more than 200 employees at the company locations in Osnabrück, Nuremberg and Bremen. As an IT specialist and Microsoft Dynamics partner, the experts develop, implement and realize innovative IT solutions and offer individual service concepts - nationally and internationally. In doing so, TSO-DATA relies on modern and future-oriented technologies that can be adapted specifically to the needs of medium-sized companies.

The focus of the solution portfolio is on the ERP solution Microsoft Dynamics 365 Business Central / NAV, the industry solutions KatarGo and LS Central for mail order and retail, Dynamics 365 - CRM, document management with M-Files and Microsoft SharePoint, business intelligence with Microsoft Power BI and TARGIT as well as IT infrastructure and cloud services.



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