

Success Story

Industry Louis Royer



Louis Royer is a Cognac trading house established in 1853 by Louis Royer himself. With a team of around one hundred employees, the company generated a 2012 revenue of 58 million €, divided among four distinct business units:

- **Louis-Royer**, specializing in the production of Cognac, brandy, and liqueurs. This branch is the main driver of the company's business, accounting for 40 million € in revenue and with 98% of its output exported worldwide.
- **Louis-Saveur**, which focuses on producing modified spirits for industrial clients and the bakery sector. This division brings in 8 million € in sales.
- **La Carthaginoise**, dedicated to creating fruit-based products in alcohol. This division reports a turnover of 7 million €.
- **La Distillerie Aumagne**, which generates 3 million € in revenue. Its core business is distilling wine to make the brandy essential for crafting Cognac.

Case Background

The EDM project began with the construction of a second export storage facility located 3 km from the headquarters. Since shipping a single order can require anywhere from 1 to 20 documents, efficiently managing documents between the main office and this storage site became a pressing challenge. After an initial meeting with Mr. Moreau and a follow-up in Paris, a project brief was drafted to launch the EDM initiative.

Two key goals were identified:

- Implementing a Document Management System for shipping documents
- Digitizing supplier invoices

Departments Involved in the DMS

Therefore is available to all employees of Louis-Royer, but five users rely on Therefore daily:

- **Accounting Department** staffed by two people who handle supplier invoices
- **Shipping Department** responsible for processing exports
- **Purchasing Department** in charge of handling orders
- **IT Department** represented by Mr. Rousselot, the Therefore system administrator.

Needs Identified Before Installation

With the addition of a second warehouse, Louis-Royer faced the following question: *"Do we hire someone to shuttle documents between the warehouse and headquarters—which isn't practical due to safety, lost time, and transportation costs—or do we implement an Electronic Document Management system to scan, organize, and retrieve all documents in a shared filing structure for the entire company?"*

Installed Solution Therefore™

Date of Installation 2012

Client Contact

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IT Manager

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Canon

Benefits

- Eliminate constant back-and-forth trips between headquarters and the storage buildings
- Enjoy peace of mind with instant access to key information, ensuring document reliability
- Keep documents safe by minimizing the risk of loss
- Unite employees around a shared project that strengthens the company's future

Workflow Before Implementing EDM

Before the second storage building was constructed and EDM was introduced, shipments were managed out of a warehouse across from the main office. Secretaries and shipping managers had to constantly shuttle between departments. This became increasingly problematic as exports grew rapidly over the past decade, leading to a surge in the volume of paperwork.

Workflow With EDM

Now, whenever a truck arrives at the shipping dock, the secretaries connect with the Shipping Department to get essential details (container number, truck number, and so on). Using this information, they prepare an export file and, at the same time, confirm the details that have been

“I haven’t found any particular **constraints** with Therefore. **It’s really easy** for our staff to scan and use customer invoices—**it’s very user-friendly.”**

Joël Rousselot IT Manager

Barcodes were applied containing all the required fields for indexing in Therefore (customer name, destination, file number), along with all related documents. An email is automatically sent to the person in charge of shipping so they can review and print the complete export file available in Therefore.

Today, invoices are received by the Accounting Department, where they are scanned, entered, saved in Therefore, and sent to the relevant departments (IT, Purchasing, Administration, Production).

thanks to **workflow** processes. The person who receives the invoice can approve or reject it. If rejected, a comment is automatically sent to Accounting via Therefore. Additional supporting documents can also be attached to the invoice.

Therefore has made it much easier to find invoice information. Previously, the company used dot matrix printers to generate pre-printed customer invoices, resulting in high paper costs and limited capabilities. Now, a background management tool automatically creates the backgrounds, a PDF file, and an XML file that can be directly integrated into the DMS. All customer-related details are now indexed in Therefore and can be retrieved in one click. This allowed Louis-Royer to eliminate pre-printed forms and multiple paper copies, significantly cutting printing and copying costs.

Project Success

The success of Louis-Royer’s EDM project came down to strong communication and the involvement of the entire team. From the very beginning, Mr. Rousselot and Mr. Moreau made sure end users understood the purpose of the project and the changes they’d need to adapt to.

Joël Rousselot helped guide **as** **IT Manager** through these transitions. **IT** By organizing a series of demos, Louis-Royer, in partnership with Canon, was able to listen to employees’ feedback and questions, building a practical EDM project centered around their staff.

“The staff was truly committed to the project.”

Joël Rousselot IT Manager

“Setting up workflow processes is actually very straightforward.”

Joël Rousselot

IT Manager

Today, thanks to our employees' dedication and the advantages of the Therefore solution, we're now considering expanding our document management system into other departments across the company.

Introducing the document management system became a unifying project that brought all our employees together. It helped improve communication and gave us a clearer understanding of everyone's expectations.

Developments

When signing up for the Therefore solution, Mr. Rousselot was looking for a flexible document management system that could eventually allow us to digitize documents for other departments, such as Quality, where workflow implementation is coming soon. The quality of Cognac is regulated by standards that change yearly, requiring frequent updates to quality documents, especially when new labels confirm Cognac's excellence. To avoid manually updating these documents several times a year, Louis-Royer plans to handle these changes through the document management system, editing digital documents directly with Therefore Viewer. The next development underway

focuses on document indexing. Right now, supplier invoices are indexed manually by supplier number, date, and invoice number. The company aims to automate this indexing process using Iris Capture Pro.

Looking further ahead, Mr. Rousselot is open to developing a document management system for the Production department, dedicated to Cognac. This would make it possible for **IT Manager** to track and display the history of document changes with version control.

“Today, it's the employees who are driving me to expand the document management system to other departments, with the goal of digitizing the validation process in new areas.” such as production

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