



## Benefits

Simple, flexible integration with existing Pronto system

Documents readily available to multiple authorized employees at any location

Improved efficiency in our processes

Improved service in response to documents requests

Reduced physical storage requirements

Consistency in quote formats

Easier for Management to know at what stage a process is at

Enterprise-standard solution eliminates need for IT staff to maintain multiple solutions

## Applications

Customer Service Job Tickets

Invoice processing workflow

Quoting process

## Complimentary Integrations

Pronto

## Case Study | RCT

# Workflow is the differentiator for RCT's document management challenge

## When storage becomes cost prohibitive

One of the challenges of working in the Information Age is that documentation accumulates at an alarming rate. At RCT Remote Control Technologies, the quantity of filed supplier invoices, quotes and customer orders, project documents, technical drawings, contracts, and other documents had become so great that physical storage capacity was a real concern. The cost of storage for hard copy files was growing, as was the time required to manage archived documents. Retrieval of documents was difficult and even more time consuming. The company needed a solution.

“We decided we needed to store documents electronically and eliminate physical files,” says RCT Financial Controller Marcus Bundesen.

He began looking at document and content management software and soon realised that much of the value of such solutions was in their workflow capabilities. “Our ERP system is a transactional system with limited transactional workflows and no document workflows. A lot of document management systems included workflow, and we could see the potential, how it could be applied in many areas of our business,” he notes.

The stand-out solution, Bundesen says, was OnBase, an advanced content management solution that met all document management requirements and included exceptional workflow capabilities that could integrate neatly with RCT's ERP system.

Bundesen's only concern was that OnBase was based in Sydney – a long way from RCT's Perth head office. However, he notes, “They were very proactive in coming out here. They did a number of demonstrations and got involved. They spent quite a lot of time showing us the benefits of the product. Their effort and involvement reassured us.”

## ABOUT RCT

Remote Control Technologies Pty Ltd (RCT) is a wholly owned Australian company specialising in the manufacture and installation of safety and productivity products for the mining, mobile equipment, earthmoving, transport, construction and materials handling industries. Its products include control and automation solutions, information systems and specialised electrical equipment. Customers are supported with a comprehensive range of services including installation, repair, maintenance and training.

Headquartered in Western Australia, RCT has workshops and offices in Brisbane, Mount Isa, Melbourne, Kalgoorlie and Perth.

## Start with a high-impact project

Within a month and a half of committing to the OnBase solution, the document management system was up and running and the first workflow was released. It was designed to support the company's use of customer service job or project cards.

"We started with job cards because it involved a department that was very supportive of the document management system. We thought it would have the highest return straight away and was a fairly manageable project to implement," Bundesen explains.

The project involved developing workflows for the job cards that encompassed all the possible requirements, from initiation of a job to invoicing and completion. OnBase helped the RCT team develop queues for jobs awaiting management approval or invoicing.

"We also instituted automated calls from OnBase to other databases, easing the task of collating project costings. The workflow cut down administrative time and made it much easier for project teams to find the information they needed. It also brought consistency and greater control to customer service projects," says Bundesen.

"We used to have physical cards that were kept according to a tray system. There would be a tray for jobs waiting for parts, another for waiting for labour, or when waiting for a customer to go and install the product. Others would be used when waiting for the customer order or when waiting to be invoiced. The difference now is we can search on a customer or a customer service department and see where all the orders are up to."

Within weeks of the job cards workflow going live, the benefits were obvious. The workflow was soon deployed at four more service departments in other RCT locations.

## Bringing consistency to quotes

RCT's next workflow was designed to support the quoting system. Given the technical nature of its products and the range of options available, a typical RCT quote can take up to eight or more pages. In the past, there was little consistency from one quote to the next. Sales staff would prepare their own quotes in Word documents, often using different layouts.

Using OnBase, a standard quote template and workflow were produced. The workflow allows sales and management to track what stage a quote is up to – whether it is still being worked on, with a customer, or whether it needs to be followed up.

When the quote is accepted and a customer order comes in, OnBase automatically pulls the information from the quote and creates a new job or project card. The system streamlines administrative effort and has removed the need to re-key existing data into the system.

More workflows followed. The processing of supplier invoices, for example, was completely revamped. When an invoice is received into the organisation, it is scanned, indexed and filed in OnBase. The document management system then checks with the ERP system to see if the invoice matches an existing purchase order number or creditor number. It also checks other details, such as the goods amount received, GST code, GST amount and whether the purchase order has been received. If problems or discrepancies are noted, the invoice is shunted to the appropriate purchasing departments for investigation.

"It all happens automatically behind the scenes," Bundesen says. "The accounts payable officer can see all the problem invoices, who's holding them up and where they are up to. It stops the problem of emailing or sending invoices around the organisation. All the information is in the system."

## Developed in-house

The structure of each workflow is initially developed by Bundesen. He then hands the information to an in-house software engineer who creates the forms and any scripts required to enable OnBase to query the ERP database.

“I’m an accountant and I have no IT background,” Bundesen asserts. “But having completed the one week OnBase workflow course, I’ve found that I can still do a lot of workflows. The only thing you really need is a qualified programmer for some behind-the-scenes scripting.”

Recently RCT employed a systems accountant to focus on the development of more OnBase workflows within the company. “Anything that requires a workflow with a document, or if it’s a transactional workflow that can’t be done in our ERP system, and if there are cost benefits, it will be put into OnBase,” Bundesen adds.

Asked to sum up the benefits that document management has brought to RCT, Bundesen pauses, then says, “It brings an immense structure to the organisation, especially for a small company growing into a medium-sized one. Small companies don’t often have defined workflows. As you get larger, you need that definition. OnBase allows us to define, streamline and automate those flows. And as we grow, it ensures conformity.”

“When we went to look for document management systems, we looked at a number of packages. We saw OnBase as being right out in front. When looking back after using the package for three years, we are still absolutely sure that we made the right decision,” Bundesen concludes.

Learn more at [OnBase.com](https://www.onbase.com) »