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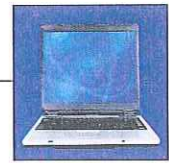
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The Life of a Construction Document Using ECM

Over the past few years, contractors have focused on increasing productivity and improving efficiencies. They have implemented both major and minor changes in order to reduce expenses or increase the value of their investments. Many have reduced staff; others have adopted aggressive bidding; and still others have expanded into new business areas.

Some contractors have also evaluated the technologies that support and drive their businesses to find opportunities for improvement. These companies have focused on enterprise resource planning (ERP) and project management solutions. In some cases, consideration has been given to solutions that support and streamline common processes, such as remote data entry solutions.

However, one area that most contractors overlook is the management and use of documents and the benefits of an Enterprise Content Management (ECM) solution.

Enterprise Content Management Solutions

ECM solutions can significantly impact the process of digitizing documents, their storage, and routing. Digital documents reduce waste paper, eliminate space-consuming file cabinets, and are easy to access now and in the future. ECM also helps increase efficiency by supporting digital workflow, automated routing, and collaboration.

With an ECM solution in place, once documents are received, they are scanned into a digital storage solution. They can then be attached to e-mails or database records for visibility and simplified access. In addition, these documents can be used to ensure proper routing and collection of approvals prior to final processing and storage. Finally, digital documents can be stored as part of historical records that are easily referenced and conveniently archived.

This article will dive deeper into the life cycle of a construction document in an environment where ECM has been implemented. We will focus on key stages that documents pass through and provide insight into how ECM can impact a contractor's processes and procedures.

Digitizing a Document

At ACME Construction, an A/P clerk picked up the mail and quickly sorted out the invoices that needed to be processed. At the central copier, each document was scanned into the new ECM system.

One of the most common documents encountered in construction is an invoice. Each invoice from subcontractors, suppliers, or other vendors must be reviewed for accuracy and verified for work performed or materials delivered. Once approved, the invoice must be entered into an accounting solution and payments must be processed.

Documents are the core of all ECM solutions and can be related to the industry, company, or project. This includes contracts, invoices, RFIs, drawings, change orders, purchase orders, project communications, etc., and can be obtained in several ways.

Many construction documents are created in custom software solution packages and output into such file formats as PDFs or image files before distribution. Flexible ECM solutions can import these files so that they are available throughout the company.

In many cases, contractors create electronic files and then distribute them as hard copy documents to obtain approvals and signatures. Once finalized, these documents are scanned and uploaded into the ECM solution. Likewise, documents received from vendors, subcontractors, architects, design firms, and other third-party vendors can be uploaded (if received digitally) or scanned (if received as a hard copy). Once the digital documents are received, they are stored electronically in a central repository or database where they can be integrated with other applications or retrieved manually.

In many companies where ECM has been implemented, dedicated staff ensure that each document received is scanned, available as part of the electronic record, and clear and legible. These individuals enable other team members to concentrate on their primary responsibilities. For example, this allows A/R personnel to concentrate on processing invoices rather than scanning them.