



engage. empower. evolve.™

**OnBase**  
a Hyland Software solution



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Errors, delays, poor communication and time-consuming manual business processes create an additional layer of cost for every unit built and erode the already slim profit margins of residential and commercial builders. They also have a negative impact on a builder's most valuable asset: their reputation for quality and customer service. OnBase Construction Solutions complement existing line-of-business applications to improve efficiency, accuracy and productivity from the time a prospective home buyer is registered through post-closing customer service.

With the knowledge gained from more than 5,500 customers, Hyland Software, developer of OnBase, and its partners understand the challenges builders face on the job site as well as back at the office. This expertise makes the transition to an enterprise content management solution – which can include document and records management, automated workflow, report management and seamless integration with other systems – a smooth process for any organization.

OnBase allows you to build an electronic repository for all of the information you need to complete a job and run a business and makes it available to those who need it, regardless of their locations. Instead of searching filing cabinets, fax machines, e-mail servers, lengthy paper reports, CAD (computer-aided design) applications and desktop hard drives for the information

you need, it can all be centralized in a single source and retrieved with a few keystrokes. Documents in OnBase also can be printed, faxed, e-mailed or published to a CD or DVD and backed up to disks or tape drives to support disaster recovery.

OnBase reduces labor and improves accountability by making it possible to easily standardize and automate Accounting/Back Office, Sales, Production Management, Purchasing, Customer Service, Estimating and Land Development processes. Builders who implement OnBase can

- Improve communication with customers, vendors and coworkers to prevent costly errors or oversights
- Automate processes that divert labor and resources from higher value tasks
- Protect the documents that are critical to your business
- Avoid costly delays due to miscommunication or missing documentation
- Reduce liability by communicating appropriate installation procedures, change orders and other data
- Validate vendor contracts and proof of insurance
- Ensure timely payment to subcontractors and suppliers

Though it offers sophisticated technology that can be configured to meet the complex individual needs of any size organization and its business processes,

OnBase is recognized in the industry for rapid deployment and ease of use. As a result, your business won't be disrupted by a drawn out implementation or the need for extensive employee training. In fact, the point-and-click configurable OnBase Application Enabler™ makes it possible to retrieve documents of all types from directly within the ERP, CRM, accounting, job costing, building automation, EAM site design systems or other applications with which your employees are already proficient. These can include FAST™ Builder Management System, SiteStream™ Software, Pivotal® Homebuilder Front Office, NEWSTAR ROI Solutions, Oracle® J.D. Edwards EnterpriseOne™, SAP®, and virtually any other Windows-based, Java or host application. As a result, OnBase users achieve rapid payback and enjoy a lower total cost of ownership for their technology solutions.

OnBase is a cost effective solution for builders of all sizes, even those who don't have the IT staff (or the desire) to maintain a complex network. The same software that can be deployed at your site also can be accessed through OnBase OnLine, a fully functional and configurable alternative to a premises-based solution hosted in a world-class data center. Because of its modular design, an OnBase solution can be enhanced to add new users or functionality as needs change or budgets allow. The ability to deploy incrementally also can offset the demands of change on your employees.

## ACCOUNTING AND BACK OFFICE

Lower your cost per unit and increase profit per job with more effective financial processes, including Accounts Receivable and Accounts Payable. By managing documents related to all payments and receivables, OnBase supports accurate job costing and positive vendor relationships with less effort and greater accuracy than juggling paper files. Employees no longer have to file or hunt down invoices, bank draws, lien releases, customer paid items, 1099s, disbursements and purchase journals, customer closing reports or other documents. Cycle times are reduced and inquiries can be answered on the first call.

The Accounting Department can store scanned invoices, electronic reports from accounting or ERP systems, e-mails, faxes, correspondence, EDI transactions and more in an OnBase repository. By assigning keywords to these documents, employees can immediately access all relevant documents by performing a simple search. For instance, an employee may enter the name of a subcontractor to retrieve a list of all documents related to that partner, such as purchase orders, contracts and proof of insurance.

OnBase Workflow can be implemented to impose business rules and automate specific processes, such as requisition submission, purchase order handling, invoice processing and approval and exception handling. For instance, if an invoice matches an entry in the General Ledger, that payment can be posted to the accounting system automatically. It also can be configured to audit vendor files to assure that contracts and insurance verifications are up to date.

Many OnBase customers also have reduced their cost of doing business by implementing the solution in Human Resources (HR) and Payroll. Whether automating the entire application and hiring process using workflow or simply creating an electronic file of critical employee documents, OnBase makes it easier to review, audit and limit access to HR files. OnBase data can be uploaded to payroll applications, while time cards and other documents can be scanned into OnBase and made available through the payroll application.

## CUSTOMER SALES AND SERVICE

Your company's reputation is critical to ongoing sales, and OnBase helps your employees display the highest levels of professionalism and responsiveness with minimal labor before and after a sale. An electronic record of all customer documents from the sales contract and addendums through product selection and change orders ensures that the job meets customer expectations and is billed accurately.

By entering in a customer number or other relevant keyword, a sales person can quickly confirm that s/he has gathered all of the necessary information, an onsite project manager can view a change order or accounting can verify a change to the final invoice. The customer file can include everything from service requests and orders to customer notes, product warranties and job photos. If a customer calls with a question or concern, a customer service representative can instantly access the file and answer questions or even send a copy of a document via e-mail.

Given the increasingly long warranty periods associated with many materials and services, maintaining a virtual OnBase job packet that includes everything about a home can significantly improve your ability to provide service to customers. Should a question arise years from now, the file documenting the construction is available in seconds without taking up space in a filing cabinet. Not only will this increase the probability that those customers will generate good "word-of-mouth" about your business, it could be invaluable in the event of arbitration.

Getting control of defects and issues can provide valuable insight into where products or processes are falling short. This information can be used to change policies and procedures to prevent these problems in the future. For instance, if change orders are not being communicated effectively, an OnBase Workflow or other procedure can be put in place to prevent problems.

- Locate even aged customer files without wasting floor space for filing cabinets
- Find details of active or inactive projects in seconds
- Ensure completed home meets customer expectations
- Identify patterns of defects or issues to prevent future problems
- Answer customer inquiries quickly
- Provide timely and accurate warranty information
- Maintain documentation of the construction process
- Ensure completeness of sales materials and customer orders





## PRODUCTION MANAGEMENT

Once construction is ready to begin, avoid expensive building delays and reduce risk of liability by improving communication and ensuring all contracts and permits are in place. OnBase can serve as a centralized source for accessing permits, engineering drawings, purchase orders, variance purchase orders, change orders, trade contractor agreements, and MSDS. Whether accounting personnel have to investigate cost overruns or a project manager wants to review and verify a change order or detail of an engineering drawing, the necessary documents are instantly available.

However, OnBase can serve as more than a mere electronic file. Electronic checklists can be distributed through OnBase, either as a quality assurance measure or as part of an approval process. Changes or permitting issues can be electronically communicated to the customer, vendors and the company. OnBase also provides tools for notification and escalation to ensure that digging begins as soon as possible after the sale and the sale is closed in a timely manner.

OnBase also provides builders with an unprecedented ability to identify recurring problems. For example, if a specific product is always handled in a way that results in a variance PO, you can put a process in place for notifying employees and subcontractors of how to avoid the problem. Using OnBase Image Statements, builders can print POs for subcontractors that automatically include all individual job specs, checklists, agreements and other supporting documents.

- Document and identify patterns that affect productivity
- Avoid potential liability or non-compliance
- Track quality and timeliness of work performed to avoid construction delays

## DEVELOPMENT DESIGN, LAND DEVELOPMENT AND ESTIMATING

Because many factors that affect a builder's profitability are determined long before ground is broken, getting control of planning documents and processes improves the bottom line. OnBase can be used as a central repository for managing everything from the first CAD drawings that are sent to service providers for review and plot surveys to product model sheets and cabinet selections.

As the Development Design team revises a new home plan, OnBase provides a central location to store CAD files and document the changes recommended by electricians, plumbers, framers and other partners as well as the anticipated costs. This helps support quality initiatives and accurate pricing. Once completed, these files can be accessed by Marketing as that group creates advertising, product spec sheets and other collateral used to support sales efforts. As field issues or other variances arise, modified plans can be stored in OnBase and made available to everyone who needs them.

These files can be utilized by estimators as they customize the base plans for specific customers. By using a centralized electronic file to gather product model sheets, job prints, site plans, cabinet selection, carpet seam layouts and other specific information about the individual unit, estimators can more easily track and verify cost adjustments. As a result, the final sales contract – which also can be stored in OnBase – is more accurate.

If a change order is received after an estimate has been generated, estimators can be notified and prompted to amend the estimate. Centralizing this information in an electronic file and automating notifications makes it more likely that the customer's wishes will be fulfilled, the subcontractors will have the necessary material and that the final sale is billed correctly.

OnBase also can be used to store and cross reference documents that are crucial in effective, profitable Land Development. Documents such as plot surveys, lot layouts, watershed control, sewer and water taps, utility locations, compaction testing and permits can be centralized and protected in the OnBase repository. Process automation also can be configured

for review and approval and/or to audit files for missing documents.

Information housed in OnBase also can be accessed through a builder's geospatial information system (GIS). For instance, all of the permitting, utility, surveying and other documents associated with a specific parcel can be associated with that location on a map. A user can double click on a location to retrieve the documents without leaving the GIS application.

- Avoid unnecessary construction delays due to lack of communication, preparation or missing permits
- Provide oversight to assure development provides best possible return on investment for the real estate
- Support accurate job costing by assuring that consistent, timely and correct data is communicated to those who need it
- Reduce cycle times by automating review and approval processes
- Document field issues, variances or other modifications



## PURCHASING

Reduce the complexity and risk associated with manually managing subcontractor and supply house contracts and documents by using OnBase. Proof of liability and worker's compensation coverage, statement/scope of work agreements, negotiated price contracts, rebate agreements, bid requests, product documentation and any other information necessary to operate profitably and according to legal requirements can be stored electronically in OnBase.

To ensure that required documents are on file and renewed as needed, OnBase tools are available to generate automatic notifications, such as alerting a user when a subcontractor's proof of liability insurance is missing. Contract administration can be simplified by using process automation to prompt managers when a contract is about to expire. The contract can be retrieved from OnBase to allow any modifications. If multiple people must review a contract, OnBase Workflow can be used to route it to those individuals, either sequentially or concurrently for approval.

Gaining control of these critical purchasing documents helps builders process bid requests faster to assure that the most timely and accurate information is available at the time a PO is generated. Should questions or issues arise in the future, documentation is immediately available, reducing labor, risk of non-compliance and potential delays in collecting rebates.

- Assure that most recent prices and specifications are reflected on POs
- Reduce the complexity of negotiating, maintaining and approving contracts
- Verify compliance with legal requirements for liability and other coverage
- Improve responsiveness to inquiries from subcontractors and supply houses

## ABOUT HYLAND SOFTWARE

Hyland Software, established in 1991, is a leading provider of rapidly deployable enterprise content management software. Hyland develops OnBase, enterprise-class software that combines integrated document management, business process management and records management in a single application. OnBase allows organizations to manage digital content, including scanned paper documents, faxes, print streams, application files, electronic forms, web content, multi-media files and emails. OnBase also authorizes organizations to automate business processes, reduce the time and cost of performing important business functions, improve organizational efficiency and address the need for regulatory compliance through the management, control and sharing of digital content with employees, business partners, customers and other constituencies. Visit [www.onbase.com](http://www.onbase.com) for more information.





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