



## CRM

Construction Resources Management Inc.  
A WALBEC GROUP COMPANY

### Industry

Heavy and Highway Construction

### Size

Family of Construction Companies

### Location

Headquartered in Waukesha, WI

### OnBase Integrations

Oracle JD Edwards EnterpriseOne

Android

iPhone

iPad

### Departments Utilizing OnBase

Accounts Payable

Human Resources

## OnBase adds visibility, speed and control to AP and HR processes

### The Challenge

Manually processing invoices created a lack of visibility and coding errors for AP staff at Construction Resources Management (CRM). With offices scattered across the Midwest, the company acts as a shared services center for its other construction companies, processing over 90,000 invoices annually.

The approval process often kicked off with CRM's Waukesha, Wisconsin, office mailing invoices to each branch for project managers to code and approve. They would then mail them back to the main office for additional processing.

"There wasn't a good way to know where things were in the process and things got lost in the mix," said Linda Pawlak, Vice President of HR at CRM. "We weren't tracking how long it took for invoices to get back to the main office, and we didn't have visibility into whether or not they came back except if a vendor let us know that our invoice was past due."

Everything changed with OnBase by Hyland.

"OnBase affords us the opportunity to understand due dates. With those due dates, we ensure invoices are paid in a timely manner and avoid late fees. It's improved the service we provide and our payment times to vendors."

*– Bill ZumMallen, IT manager, Construction Resource Management*

### The Solution

Working with Naviant, an authorized OnBase solution provider, CRM implemented OnBase to improve invoice processing.

Soon afterward, because of its success in AP, the company leveraged OnBase in HR to reduce paper handling.

#### **Eliminates manual invoice processing with integration, adding speed and control:**

Prior to OnBase, CRM experienced coding errors on its invoices as a result of employees manually writing incorrect accounting codes on them.

Now, by integrating with its ERP, Oracle JD Edwards EnterpriseOne (JDE), staff pick the appropriate code from a pull-down list and send the invoice to JDE for payment.

"OnBase removed the ability for staff to choose codes that don't exist," Pawlak said. "And, because the codes have already been validated, they now can simply upload the invoice into JD Edwards and eliminate all of the data entry that had to be done."



**“We now have one location for all our documents. Even with a broad geography, you don’t have to ask someone to pull a copy, scan it and send it to you. If you are allowed to see information, then you have access to it from wherever you are.”**

**Linda Pawlak**  
Vice President of HR,  
Construction Resources Management

**Speeds payments with automated approval notifications and escalations:**

Using OnBase, CRM implemented a hierarchical approval process based on an employee’s department, approver level and invoice amount. That way, the company quickly escalates invoices that need additional levels of approval based on their size and type as well as how long they have been in an employee’s queue.

“OnBase affords us the opportunity to understand due dates,” said Bill ZumMallen, IT manager at CRM. “With those due dates, we ensure invoices are paid in a timely manner and avoid late fees. It’s improved the service we provide and our payment to vendors.”

**Eliminates paper in HR, provides instant information access:** With all HR files, including personnel, driver, workers’ compensation and benefits documentation, stored on paper, it was difficult for CRM’s staff to access required content. OnBase acts as a central repository for this information, allowing staff to instantly access it when needed.

“We now have one spot for all of our documents,” Pawlak said. “Even with a broad geography, you don’t have to ask someone to pull a copy, scan it and send it to you. If you are allowed to see information, then you have access to it from wherever you are.”

**The Difference**

**Reduces AP costs:** “We no longer employ seasonal data entry to help with summer processing of invoices,” Pawlak said. “We were able to eliminate at least one seasonal position because of OnBase.”

**Increases visibility:** “Implementing OnBase in accounts payable provided us with greater visibility into outstanding invoices that needed to be paid,” Pawlak said. “And it saved us all of the mailing costs and time associated with sending invoices back and forth.”

**Speeds approvals with mobile support:** CRM utilizes OnBase integrations for Android, iPhone and iPad devices so managers can approve invoices from the field. This allows invoice processing to move faster without having to wait for managers to return to the office to continue the approval process.

**Learn more at [naviant.com/solutions/commercial](http://naviant.com/solutions/commercial)**



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