

Hansen Mechanical Relies on Construction Imaging Software to Work Smarter in Tough Times

By Michael Schear, *Director of Strategic Initiatives, Construction Imaging Systems, Inc.*

Some years ago, Hansen Mechanical of Las Vegas, NV, began using Construction Imaging software for its invoice routing, approval, and indexing procedures. Streamlined processing, reduced storage needs, and faster approvals are just a few examples of how Hansen Mechanical now works “smarter.” That same approach can help your company survive, stay competitive, and turn a profit in the face of economic downturns, inefficiencies, or bad business decisions.

“We had been struggling for years with limited office space. To make matters worse, an ever-increasing amount of that limited space was being allocated to paper storage,” said Bobbi Robelen, chief financial officer of Hansen Mechanical. “We kept everything, and in most cases, multiple copies of all of it. OTIS—our pet name for the imaging system we purchased from Construction Imaging Systems—changed all that!”

Document imaging software allows you to digitally capture, store, and

Imaging software can help you:

- secure documents from job books and vendor files,
- speed invoice approval,
- take advantage of prompt payment discounts,
- free record storage space,
- enable personnel to easily access documents,
- track documents all the time,
- streamline time and materials billing process, and
- prevent filing errors.

retrieve paper documents from a computer (see the box). Once it’s digitally formatted, information is accessible to other computers, and that information can be indexed, analyzed, or retrieved as needed. Banks use imaging technology, for example, to scan check images and bank statements; manufacturers use imaging to scan their warranties and user guides, enabling you to access documents directly from a company’s website. Imaging is becoming easier to use, more robust, and less expensive. Construction companies are adopting imaging solutions at a higher rate than ever before.

Step 1: Evaluate Your Paperwork Processes

Reviewing paperwork procedures is difficult, but if you conduct your examination properly, you’ll reveal opportunities to save money, streamline procedures, please your employees, and increase efficiencies. Review your daily paperwork tasks and find process bottlenecks. An overview approach will enable you to see the “big picture” and notice identical paperwork problems across departments. Make a list of issues that negatively impact your operations and changes that would immediately improve procedures.

Research each item to see all aspects of the issues. Ask one person from each department to list difficulties in performing routine paperwork tasks. Don’t be surprised at the long lists of problems—remember, you’re looking for squeaky wheels!

Step 2: Identify Paperwork Pains

Many of your employees share the same pains. Common paperwork issues include the following:

- Lost documents from job books and vendor files
- Slow invoice approval
- Lack of storage space
- Difficulty accessing documents (e.g., appropriate personnel have trouble getting documents)
- Inability to track a document at a particular time
- Inability to access documents when an employee is unavailable
- Difficult, cumbersome time and materials billing procedures
- Misfiled or unfiled documents

Tasks can be classified differently, but frequently contain the same attributes: they’re time-sensitive and involve multiple personnel in various locations (field vs. corporate). With proper planning, an imaging system often solves issues the day it is installed simply by scanning and saving documents in a central repository. Once you identify your paperwork problems, classify and address them.

Step 3: Design Your Imaging System To Meet Your Needs

Deciding how an imaging system will help your business depends upon the procedures to improve, the solutions you implement, and your plans to grow the system as your business changes. Your imaging system should be scalable, allowing you to expand the system as your company and requirements grow. Include accounts payable, purchasing, operations, and human resources in your assessment; in larger companies, bidding, equipment, and legal document control would also benefit from a cross-departmental imaging system. Each department has a list of needs, many of which are similar; a

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Victaulic Regional Sales Manager Kevin Cahill checks out the Victaulic Style 07 Rigid Coupling, fittings, and elbows and Vic-300 MasterSeal butterfly valves installed by F.W. Sims, Inc. on the air cooled chillers at the new Yankee Stadium.

to jobsite conditions. “When there is a design change [in the field] you don’t need to cut out the pipe and re-weld; you can unbolt the coupling and put in the new pieces,” said Sand.

According to Gary Moore, executive vice president for Victaulic, “The ability to create innovative solutions for unique challenges is a cornerstone of the Victaulic approach. We firmly

believe that as the leader in grooved piping products we have an obligation to our contractors to constantly search for ways to help them install projects faster, easier, and more economically.”

For more information, visit www.victaulic.com.

Maxwell Systems Helps Renick Brothers

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matically prepare payroll reports, job cost reports, quarterly financials, and tax records—even weekly union reports

Over the years and through the projects, Renick Brothers has learned that by leveraging technology they can be more competitive, operate efficiently, and increase profit margins. Bratkovich added, “Management Suite helped us improve efficiency and increase our accuracy.”

For more information, visit www.maxwellsystems.com.

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common need is accessing documents. Accessing documents from a central repository encourages collaboration and flexibility while retrieving, revising, and sharing information during and after projects.

Automation such as pre-set routing paths, audit trails, user notifications, auto-entry (Type Once Technology), and data sharing from third-party software are key features of an imaging system. Routing paths work especially well when teams must review, code,

and approve invoices that must frequently follow specific approval paths based on the job number and dollar amount. Audit trails are important because they track the document, who worked on it, and how long each person held it during the process.

Notifications gently or firmly remind users of outstanding documents requiring attention. Notifications can be easily accessed through e-mail or a pop-up window. Type Once Technology takes the data from the imaging system (or vice versa) and inserts it into third-party accounting software. This process can be completed from screen to screen as the software robotically types the data into the accounting screen or processes the data in batch mode through a file. Data sharing ensures consistency between your imaging system and other third-party software. This data is updated regularly and maps data such as vendor information, job details, and other data to assist users during data entry.

Step 4: Plan for Future Growth

Implementing a solution for your immediate needs is important for employee buy-in and instant gratification; however, it is equally critical that you understand how imaging can work for your future needs.

Technology advances include optical character recognition, which reads printed information on the paper during scanning and submits the data to a server for searching, routing, and collaboration. This feature may not be of initial interest, but as imaging becomes more important to your operation, this option could be a great addition to your base system. Enabling your employees to work more efficiently is a huge step toward stability, increased profits, growth—and the ability to work smarter in tough times.

For more information about imaging solutions for your business, contact Construction Imaging at 252-937-2426 or visit www.construction-imaging.com.