



The Sunrock Group Rises to

Document- Management Challenge

Leading North Carolina supplier of construction materials relies on technology for more effective handling of work orders.



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The Sunrock Group produces and delivers thousands of yards of concrete and thousands of tons of asphalt and crushed stone to customers monthly, and in the process, generates what seems to be an equal amount of paperwork.

Before Sunrock was introduced to a document-management solution, the North Carolina company employed a paper-intensive, manual process that had the potential for error and mishandling. When truck drivers delivered product, they had to get a customer signature on their “tickets” or work orders and return them to their foremen. The foremen then delivered the tickets to headquarters via interoffice mail where the corporate office would sort and file them.

Previously, about 15 percent of the company’s 26,000 monthly tickets were unaccounted for, making it difficult to track deliveries and collect payment. When customers questioned their bill, employees could spend hours sifting through files in an attempt to locate the ticket in question, which may or may not have been returned to Sunrock.

In March, The Sunrock Group got a handle on the problem by implementing a document-management system that streamlined the process and reduced the flood of paperwork to a trickle. Today at Sunrock’s field locations, foremen use scanners to scan the signed tickets into a document-management system, allowing the firm’s staff to quickly search, find and e-mail the signed ticket image to customers as verification of the transaction. Within the first month of using the new software, the number of missing tickets decreased to less than .1 percent per month. That translates to approximately three to five tickets a month.

“When it was a manual process, it could take two to three weeks to realize a ticket was missing, and by then the chance of recovering the missing ticket was slim,” says Sunrock’s corporate secretary and project manager Katherine Pfohl.

With the new system, Sunrock employees can identify missing tickets within 24 hours of the ticket being produced. The process makes use of a custom-made application that generates missing ticket reports based on specific search criteria, such as date, customer name, job number or ticket number, Pfohl says.

“When the system identifies missing tickets within 24 hours, we have a good chance at recovering them. Because each ticket includes the assigned driver’s name, our foremen can quickly communicate with the driver that was on the job site, to gain insight on the delivery and the possible cause for the missing ticket,” says Pfohl, whose grandfather founded the company in 1957.

Why Document Management?

Late last summer, company executives decided it was time to solve their problem of missing tickets and began exploring document-management solutions.

With a document-management system, businesses can digitize their paper documents, then house and organize them on a single, centralized software platform that includes a repository for storing, sharing and accessing the documents.

After much research, The Sunrock Group decided to standardize on FileBound software by Marex Group, a Web-based content-management solution that offers unlimited user licenses. Having unlimited usage is an attractive feature because Sunrock has seen its workforce double to 215 employees in the past three years.

As part of the solution, Sunrock purchased Fujitsu scanners and Hewlett-Packard servers to power the document-management system and an HP storage system to store its data. Sunrock also purchased 100 hours of custom programming from the Marex Group that will be utilized when Sunrock implements additional components of FileBound. ▶

FileBound has given Sunrock a more efficient order-fulfillment process that improves employee productivity and customer-service response time because the firm's employees no longer spend a significant amount of their day filing and retrieving paper tickets, says Sunrock's Computer Engineer Manny Tejano.

"Our customers love FileBound and it has been a welcomed addition to our accounting department," Pfohl says. "In the past, our credit department could spend up to half a day searching for paper tickets at the customer's request. Now with a few keystrokes, they can use the software to quickly search, retrieve and e-mail tickets in question to our customers in five minutes or less."

Going High Tech

The Sunrock Group is a family-owned, private firm that manufactures construction materials, such as concrete, asphalt and crushed stone. These materials are the building blocks necessary for the construction of roads, highways, airport runways, buildings and other basic forms of infrastructure. The company has five locations that include three stone quarries, five concrete plants and four asphalt plants.

The company has invested heavily in its IT infrastructure in recent years. Five years ago, the firm began automating the ticketing process by purchasing industry-specific software that allows dispatch to enter orders and then monitor its fleet of sixty mixer trucks throughout the day to determine the best utilization of the fleet in meeting their customers' needs.

Tejano, who oversees Sunrock's IT development, purchased new servers to install FileBound on their already existing Citrix environment so that remote locations could access the software. These remote users operate thin-client computers, while more heavy-duty computer users who need access to accounting software use regular PCs, he says.

"Sunrock does not operate in an industry that has historically been on the cutting-edge of technology. But nowadays, we are becoming very dependent on it," Tejano says. "We're finding new, innovative ways to use IT to improve our productivity."

While planning the document-management project, Pfohl and Tejano defined three goals to accomplish. For phase one, they wanted a solution that could bar code and electronically image their tickets, so they could be stored and retrieved quickly and easily.

For phase two, Sunrock will look to FileBound to replace Sunrock's current manual system of generating and approving purchase-order requests. These online e-forms will allow the company to streamline the approval process, which will increase accountability, reduce clerical time and provide immediate access to historical financial data.

For phase three, Sunrock plans to implement a corporate document-retention system through FileBound. The company is digitizing various corporate files, freeing up office space that had previously been used for file cabinets.

Choosing a Vendor

Sunrock's senior team considered three document management software providers. The first software vendor was an industry-specific document imaging group, recommended by the company that designed Sunrock's ticketing and dispatching software. Sunrock also considered a second vendor's software, which was customized for the construction industry. Finally, Sunrock

evaluated the Marex Group's FileBound software, a product offered by CDW.

FileBound, a complete document-management solution, had the features Sunrock wanted. It includes software to build electronic forms and integration tools that allow FileBound to work with Sunrock's other software applications. It also includes software that can identify documents using bar-code recognition and optical-character recognition, as well as software to manage document workflow.

When CDW Account Manager Gianni Russo and CDW Document Management Software Specialist Steve Crump showed Sunrock's management team a demo of FileBound's software, the group liked what they saw. But they were concerned about the Marex Group's lack of experience working with customers from the construction industry. To put their minds at ease, Pfohl, Tejano and three other managers traveled to Marex's Lincoln, Neb. headquarters for a site visit.

Marex executives promised they could customize a solution to fit Sunrock's needs and offered toll-free, unlimited phone support with technicians that could remotely troubleshoot should problems occur, recalls Brad Moncur, a Marex sales manager that works exclusively with CDW customers.

"Marex had not done a lot of work with construction companies, so we wanted to be sure they could customize the software to create a solution that would meet Sunrock's individual needs," Pfohl recalls. "For every question we threw at them, they had a reasonable, common-sense answer. For Sunrock, it was important to meet the people behind the software we would ultimately select. After meeting their software technicians, who would be our point of contact for tech support, and talking with Marex's senior management team, our group felt that partnering with Marex would offer Sunrock the best total solution."

FileBound was selected because of several key reasons: Compared with other alternatives, it's affordable in part because it offers unlimited user licenses. As Web-based software, FileBound is accessible on any platform, and its user-friendly interface has a look-and-feel that employees are comfortable with, Pfohl says.

"Most companies of their size are looking for an affordable, enterprise-level solution that can handle all their document-management needs, including e-mail and scanned documents," Moncur says. "They also want a solution that can scale up to handle electronic forms and workflow and can seamlessly integrate to their existing applications."

The Marex Group offers FileBound as a hosted service, but The Sunrock Group chose to buy the software and install it on their own servers.

To round out its document-management solution, Sunrock purchased an HP ProLiant DL380 server to house the document-management software and an HP ProLiant DL360 to house an SQL Server database. CDW configured the servers in a rack and delivered it to Sunrock ready to use, Tejano says.

Sunrock also purchased an HP StorageWorks Modular Smart Array 50 storage device featuring 400 gigabytes (GB) of storage. Today, the scanned tickets take up only 2.4GB of storage. Even when the second and third phases of the project are complete, Sunrock will have enough storage space to last approximately seven years, Pfohl says.

The company also purchased Fujitsu scanners: five fi-5120C sheet-fed scanners for the remote locations and two higher-end fi-4340C flatbed scanners for the corporate office.

How to choose the right document-management system

Businesses can turn to CDW as a one-stop shop for all their document-management needs, from scanners and document-management software to servers and networked-storage hardware.

"We represent dozens of products and solutions, so by calling CDW, you essentially get a free consultant who understands the landscape," says Steve Crump, CDW's document management software specialist. "I take a very deliberate approach and understand what your needs are first, and then based on your budget, give you recommendations."

For example, when The Sunrock Group was seeking a document-management solution, Crump educated company executives through conference calls and Webinars that demonstrated the technology — and also got executives from vendors involved in the process.

Installation Process

The software installation process was straightforward, Tejano says. A Marex Group employee spent four days onsite at Sunrock installing the software and scanners and training users at each location.

"The software installation was the easiest I've seen because it's Web-based. That makes it simple. I don't have to install it on every machine," Tejano says.

Here's how it works: When new orders are entered, the ticketing software assigns a unique bar code to each ticket. Once product deliveries are completed, the tickets are returned to Sunrock and plant foremen scan the signed tickets into FileBound. At this point, FileBound's Importer Pro software ties Sunrock's ticketing and dispatch software back to FileBound.

During the installation, Marex's technician spent time training more than 30 employees on FileBound. "Our employees quickly learned how to use the new software," Pfohl says. "While change is something that doesn't always come easily, they realized the value FileBound would bring to the company. They saw how it was going to simplify their day-to-day work."

CDW's Role

Pfohl and Tejano say the expertise that CDW brought to Sunrock's project contributed to the overall success of the FileBound installation. When Sunrock told CDW they were seeking a document-management system, Crump informed Pfohl and Tejano on their options and introduced them to FileBound. CDW offers document-management software from multiple vendors, but when Crump heard about Sunrock's requirements, he knew FileBound would meet the company's needs.

"They have multiple sites and more than one business process they wanted to phase in, so FileBound was the best investment they could make," Crump says.

In addition, CDW's Russo helped Sunrock with the HP equipment, making sure the servers were properly configured in a rack, with the necessary cabling and components already installed, when it arrived at the firm's headquarters.

"They were happy it was all preconfigured," Russo says.

"They used me as a consultant throughout the product evaluation process," he says.

Crump says document-management adoption is on the rise as companies see the benefits of the technology. Archiving paper as digital images aids in business-continuity and disaster-recovery planning while making business processes more efficient.

"The No. 1 driver is it makes businesses more competitive because personnel can complete their business processes faster, they can respond to customers faster, and ultimately, make more money," he says.

Russo also introduced Sunrock to Fujitsu representatives, who tested the company's tickets on various scanners to determine which models would best fit the firm's needs.

"I was impressed with the whole process," Tejano says in regard to CDW.

Future Plans

Sunrock has completed phase one of the project, but hopes to add more functionality by giving customers Web-based access to their signed tickets, which would further increase efficiencies and save Sunrock employees' time.

Company executives are currently working on the second phase of the project by defining various business practices to determine the company's document workflow for purchasing. Pfohl hopes to finish the second phase by early 2008 and then invest some time in developing an electronic corporate document retention system, which is phase three of the project. In the meantime, the return-on-investment from phase one alone has been worth the investment in FileBound, she says.

"We've gone from losing 15 percent of our tickets to accounting for 99.9 percent of them, and that's huge," she says. ■



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