



When an organization has the reputation of successfully being owned and operated by its founding family for the past 115 years, it's understandable that tradition is important. Wagman's homegrown tradition is utilizing its own and other industry-standard best practices to deliver quality work with the best people and tools at the helm.

The construction company isn't new to digital transformation. It has long ago utilized software to build efficient processes that translate to optimization throughout worksites. However, with digital transformation comes process review and evolution of needs, which is why it made the switch to Viewpoint, an enterprise construction management software tool, in 2014.

During that time, Wagman established a clear mandate: Provide internal support for company growth. To accomplish this goal, the firm needed to revamp its software portfolio.

During the discovery stage of switching ERP systems, it was apparent they needed a more robust imaging system that would meet all their needs.

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Case Study

How Wagman found the right tool for the job in OnBase

"We were using Laserfiche primarily as a flat file storage with folders," says Robert Moyer, Wagman's Director of IT. "In order for us to scale as an organization, we needed to recognize the efficiencies that come with integrating images with the data within our ERP."

OnBase was the natural choice to complete the technology portfolio. Not only does it provide a robust document storage solution, it optimizes the entire process with automated workflows and advanced optical character recognition features. This helps employees work smartly so their bandwidth is freed up to complete other business-critical tasks.

"What we liked about OnBase was the feature set that it offered, especially around workflow in unity forms," he says. "We found those to be the real differentiators. Unity forms allow us to pull information into the business. Couple that with workflow and we can quickly route this data to end users. Additionally, what stood out to Wagman was the direct integration between Viewpoint and OnBase. Requordit developed its own integration module that created a seamless API to API connection, allowing users of all types to work as efficiently as possible.

"With the direct integration, many of our users don't realize that OnBase is a separate product", says Moyer. "At the end of the day, they know that when they go into Viewpoint to manage data the associated documents are right there."

This saves the organization on OnBase costs, because only a select group of users need direct access to OnBase.

The Value of OnBase

"The biggest value is we have a full picture of where invoices are," says Moyer.

Visibility into documents, and invoices specifically, is an issue plaguing many construction firms. Wagman was no different. A question as simple as, "Where is the invoice?" elicited a multiple-person hunt to find the document in order to submit payment on time.

"Previously, it could take a couple days to track down where an invoice was," he says. "It could be sitting on somebody's desk in a manila envelope and you wouldn't know it. Now that we have OnBase, we can quickly query the document type and see where in the workflow it is. We can also get notifications through our tattletale report if invoices have been sitting in people's queues for too long."

Wagman has also been able to transform manual work into data analysis. "Then there is a cost savings," says Moyer. "We've been able to allow people in the AP department to focus on higher value work instead of spending most of their time tracking down invoices."

The OnBase Evolution

Since the organization has been using OnBase for multiple years, their usage of the system has evolved. "We're going to start doing performance reviews through OnBase unity forms and having that communicating back into Viewpoint," says Moyer.

Additionally, Wagman is soon launching employee sign-off tracking, which triggers a unity form to be sent to employees, so they can read policy documents and sign off on them. At the end of the workflow, the information is updated in Viewpoint.

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"Currently, we're paying somebody to not only send the policies out, but also to track the returns in a spreadsheet," he says. "This person also has to track down people who do not send the policies back. Once all of the data is collected, they go into Viewpoint and do the update."

With OnBase, employees get auto-alerted through email when their compliance authorization has expired so we're only tracking down exceptions, not the entire workforce.

Why Requordit is the Ideal Integration Partner

"Requordit, as a company, you can trust the people," he says. "They're going to do what they say they're going to do."

Company Spotlight

Wagman is a multi-faceted construction firm with major operations in heavy civil, general construction, and geotechnical construction services. Founded in 1902, Wagman is a fourth generation, family-owned company with offices in Pennsylvania and Virginia and is headquartered in York, Pa.

About Requordit

For 20 years, Requordit's ECM technology has delivered a variety of business solutions to organizations worldwide, including: business process automation, software development and integration, and implementation and support solutions. Requordit specializes in construction, manufacturing, education, financial services and the government sector.