



➤ CASE STUDY: The Cruden Group

## ➤ Cruden Build Workflow Processes with a ProcessFlows solution

The Cruden Group have over 40 years' experience in the provision of building solutions. ProcessFlows built them a document management solution using OpenText Alchemy, with the Alchemy Datagrabber Input Module to facilitate centralised scanning and availability of all inbound documents.

### **Building and developing houses, offices and schools**

The Cruden Group is an established and dedicated provider of building, property and development solutions, bringing consistent and long-term commitment to the construction and development requirements of the construction industry.

Whether contracted in the build of domestic housing, commercial projects such as offices and schools or as a property services provider, Cruden Group is able to offer clients over 40 years of experience in management expertise, design and technical skills, financial strength, stability, quality control, a skilled trades workforce and supply chain knowledge to deliver an affordable solution to each unique requirement.

### **A need to provide remote access to company information**

Cruden's offices are located in several disparate locations. The Company employs over 300 permanent staff, out of which 150 need access to Company and IT processes on a daily basis, at remote sites. Cruden's head office is located in Warrington and the offices for Cruden Property Services are in Salford. At any one time there will also be 12 or more temporary cabin site offices, all fully facilitated with IT hardware and high speed internet access.

Contract Managers, Quantity Surveyors and Site Managers all needed to be able to access documents more efficiently and also be able to exchange documents in a timelier manner. At Cruden Property Services, the gathering of files for client reporting also needed to be addressed.

These files took a lot of time to prepare, occupying 3-4 full time staff every week, who regularly had to trawl through paper-based files in traditional filing cabinets.

A solution was sought that would integrate with Cruden's existing process management software (Metastorm), to streamline the business processes, facilitate the exchange of documents, store documents and standardise systems throughout the multiple sites.

Records must be maintained for 7 years and this was also causing a problem. Storing this mass of paper was costly and manually finding an old document was just getting harder and took longer as the paper mountain grew. The company needed to centrally manage documents, reduce the volume of paper and improve both the efficiency and the security of documents.

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Improving Business by Transforming Process





### Electronic document management and storage

ProcessFlows deployed Alchemy, with the Alchemy Datagrabber Input Module, on the main office server in Warrington to facilitate the centralised scanning of all inbound documents. Alchemy integrates with Metastorm, which automates, manages and controls processes, providing the additional facilities to enhance workflow, which enables Cruden to share and store documents in all locations.

Before finally choosing the solution from ProcessFlows, Cruden evaluated 15 different systems, narrowing the decision down to two solutions. Alan Sanderson, ICT Manager at Cruden says the decision to deploy Alchemy was because *“The other short listed competitor was too complicated, Alchemy had a better ‘pedigree’ and its functionality met our existing company procedures.”*

Both solutions were trialed and users also reported a preference for Alchemy because it *“Was very straightforward and user friendly.”*

He goes on to say, *“The integration of Alchemy was not a problem because the code structure within Metastorm is very good. ProcessFlows was able to automate Alchemy within our existing processes to create folder structures, workflow elements and an audit trail.”*

Alchemy creates, processes and files all documents, creating a digital filing

cabinet with secure storage. Documents of any type can be found within seconds, even years later. The whole document process is automated, from scanning, through imaging to archiving, providing a back-up for compliance problems and disaster recovery should it be needed. *“I am absolutely convinced Alchemy is the right system for us and I can’t fault it”* said Alan Sanderson.

**“The business benefits and advantage we obtain from the Alchemy and Workflow system have enabled us to improve our total workflow, record accurately all site documentation and facilitate remote access to documents. Plus, it enables us deliver an even higher level of service to our clients. Together with the fact that within two to three years we will have paid for the system through the saving of paper, printing costs and physical storage of documents, Alchemy has proved a sound investment for the Company.”**

Alan Sanderson  
ICT Manager, Cruden Group

Documents scanned at head office are quickly imported as text data into the Alchemy repository creating large image archives on the fly. This parsed data is automatically filed and indexed and new

folders created when necessary. Documents are centrally managed and distributed, allowing secure control and access from all locations to the necessary ‘paper work’ – from job sheets, supplier invoices, surveys etc. The security of the system means that Cruden are able, without further investment, to progress to obtaining BS7799 certification for Information Security Management Systems, as all security issues set out are satisfied.

### Easy remote access to information

All historic documents have been scanned by Micrographics Ltd, a specialist scanning bureau based in Mirfield, West Yorkshire, so are now easily accessible. Cruden reports the closure of storage sites to date have saved at least £10,000.

*“Alchemy has made a huge difference to Cruden Property Services”* says Alan. *“Preparing the job packs, which would include copies of documents such as survey reports, site plans etc employed several people. We have developed unique forms: the information is now captured from specific fields in these forms and quickly collated and distributed. This, plus the people time saved in the preparation of client reports means that we are able to use our human resources to better advantage in other areas of the business.”*