



Engineering Firm Automates Transmittal Processes to Reduce Risk, Gain Efficiency

GBM Minerals Engineering Consultants Limited designs and manages the construction of minerals extraction plants. This business requires strict attention to document management for proper project execution. The firm worked with PointBeyond to deploy Nintex Workflow 2010 for customizable, automated document tracking and approval. As a result, GBM has boosted engineering productivity and quality, minimized the chances of sending incorrect or obsolete documents to clients, and improved transparency for greater client satisfaction.

BUSINESS NEEDS

Any engineering project benefits from efficient processes, but that's particularly true for a minerals processing plant and infrastructure project, which involves complex integration of expensive equipment that is frequently deployed in remote locations. The wrong specifications can result in incorrect materials and equipment being shipped to site, construction delays, and budget blowouts.

That's why GBM Minerals Engineering Consultants Limited needs to keep careful track of its documentation and closely manage transmittals—specific sets of version-controlled documents—sent to clients. “We wanted to make it easier to interact with clients and for our engineers to incorporate best practices into their work,” recalls Joe Russell, Engineering Manager at GBM Minerals Engineering Consultants Limited.

GBM had been using a legacy system to handle its document management, but the firm had grown beyond the system's capacity. Plus, GBM's engineers and document controllers had to take cumbersome steps to enter their drawings, specifications, spreadsheets, and other important documents into the system. Those extra steps took time away from more productive work and were easy to complete incorrectly, which increased the possibility of human error when compiling transmittals.

Sharing transmittals with clients posed problems, too. GBM project staff were sending the transmittals via email, but often the sizeable attachments caused problems. Email also did not always provide the level of security that both GBM and its clients required for certain sensitive projects.

Company: GBM Minerals Engineering Consultants Limited

Website: www.gbmmec.com

Country: United Kingdom

Industry: Engineering

Business Situation: GBM used a legacy system to manage its complex project documentation processes, but the system lacked functionality, was slow to use and hard to scale.

Solution: The firm worked with partner PointBeyond to implement Nintex Workflow 2010, which streamlines and automates its document numbering, metadata assignment, approval, and transmittal processes.

Benefits:

- Reduced risk
- Enhanced customer satisfaction
- Increased employee efficiency
- Flexibility for future modifications
- Lower total costs

APPLYING THE RIGHT SOLUTION

When GBM decided to replace its legacy system, the firm turned to its long-time partner PointBeyond, a London-based technology company that delivers business applications based on Microsoft SharePoint technologies. GBM needed a new document management system that could support a sophisticated approval process, a complex and flexible numbering scheme for document tracking, and an easy way to create accurate transmittals.

PointBeyond identified several options for GBM, including an off-the-shelf engineering transmittal management system, a custom-developed system, and Nintex Workflow 2010, which could be integrated into the firm's existing Microsoft SharePoint Server 2010 system. The first two options were expensive, relatively inflexible, and would lead to future integration issues. Using Nintex Workflow and SharePoint Server 2010, however, would enable GBM to modify its document management processes through configuration—rather than coding—to easily accommodate changes in its business practices.

In January 2012, GBM asked PointBeyond to implement Nintex Workflow. "When we installed and integrated Nintex Workflow with SharePoint, the GBM project staff quickly realized the value," says Ian Woodgate, Managing Director at PointBeyond. "The project teams learned rapidly—with our guidance, they were able to use it to support their specific processes."

As of July 2012, the majority of GBM employees rely on Nintex Workflow to streamline document approval, document management, and transmittal processes. The firm especially appreciates the LazyApproval feature, which makes it possible for managers to approve or decline requests by replying to the notification email with permitted words or phrases, even without being logged into the system.

For transmittals, Nintex Workflow automatically assigns a document number to any new drawing or specification, which is updated with each revision. When a document is completed, it enters an automated, staged approval process. Once approved, Nintex Workflow publishes the files selected for transmittal to the firm's

SharePoint extranet and sends the client an email containing links.

GBM has been so satisfied with Nintex Workflow that the firm plans to expand its use and automate processes in areas such as human resources and finance.

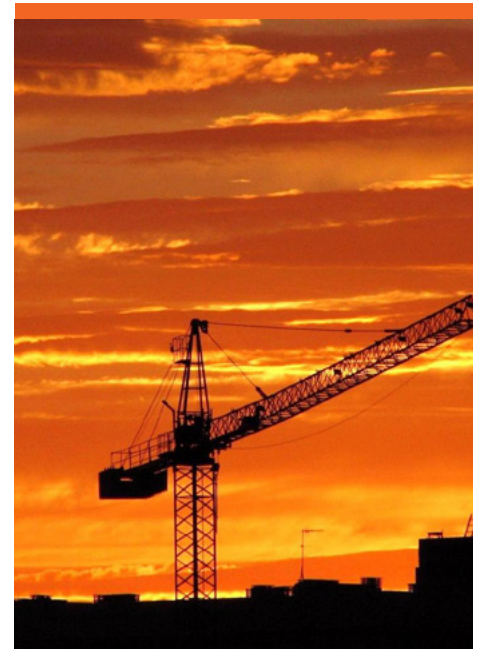
"We must have complete certainty that our transmittals are appropriately controlled and issued, and using Nintex Workflow gives us that confidence."

**Joe Russell, Engineering Manager,
GBM Minerals Engineering**

WHAT WE GAINED

By implementing Nintex Workflow, GBM has increased engineering productivity while minimizing risk. "With Nintex Workflow, we've reduced our workload, improved our accuracy around document control, and increased our clients' satisfaction," says Russell. "The document control process is now part of the way that we work, rather than an additional overhead." Benefits include:

- **Risk Reduction** – GBM has decreased the risk of transmitting the wrong information, and it now has a more complete audit trail of documents sent to clients. "The impact and cost of sending the wrong version of a document could be significant," says Russell. "We must have complete certainty that our transmittals are appropriately controlled and issued, and using Nintex Workflow gives us that confidence."
- **Enhanced Service to Clients** – The firm has received positive feedback from clients. "Our clients are happy to avoid dealing with huge emails, and they like logging on to the extranet to securely access their information immediately," says Russell. "Our use of Nintex Workflow gives us a significant competitive advantage when it comes to client satisfaction."



- **Easy Customization** – GBM appreciates that its engineering project staff can modify Nintex Workflow to match evolving processes. "With the combination of SharePoint and Nintex Workflow, we rapidly deliver and support our business applications through configuration, without having to get custom code written," says Russell. "That cuts our costs considerably and empowers us to quickly make the business process changes that we need."
- **Excellent Value** – For GBM, adopting Nintex Workflow made the most of its resources. "We're not only improving the way we run our business, we're doing it while getting great value for our investment," says Russell.