professional **advantage**

SCOTT

At a glance

Industry
Transportation

Solution
Microsoft SharePoint

Challenges
Scott Corporation needed to improve their management of critical documentation relating to safety processes, procedures and forms, and to enhance team collaboration

Benefits
- Centralised document management which is highly secure
- Formalised, consistent workflows
- Enhanced collaboration and standardisation of procedures
- Audit compliance and defective vehicle management

SharePoint proves the safe choice for hazardous transport specialist

Scott Corporation is Australia's leading specialist transporter of bulk solids and hazardous materials. Operating from 20 branches across the country and offering road, rail and sea transportation, the company provides unrivalled expertise in the safe, reliable and cost-effective delivery of bulk solids and liquids.

Safety is essential

Scott Corporation freight chemicals and explosive which makes safety and proper adherence to process critical concerns. After all, in the transportation sector, safety is not only important for ensuring the well-being of staff; it is often a key differentiator for customers who require proof of transportation safety for their own compliance. Because of this Scott Corporation is audited monthly by Government agencies with regards to its safety processes and information security.

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A couple of years ago Scott Corporation embarked on a major "zero harm" safety initiative. As part of this focus, the company decided to seek a better way of managing its growing document library of procedures, safety processes and internal forms. Historically the library had been maintained in a Lotus Notes database but now the number of staff capable of performing development in that environment was dwindling. Paper files in filing cabinets, traditional computing based file shares, manual processes and ad hoc development of Lotus Notes databases across distributed geographies were simply no longer suited to the needs of the organisation. Ad hoc work over many years had led to what Information Systems Manager, Ross Pavey describes as a "clunky system" that was hard to maintain.

Pavey seized on the need to replace Lotus Notes as an opportunity to introduce a new company-wide intranet that would not only resolve the immediate document management problems, but which would also facilitate greater team collaboration for activities such as developing tender responses or quotes and marketing plans.

> *" We wanted a central means for disseminating information about the company to staff, A central point where people could log on every morning to see the latest news about the business or read tips and tricks about how to use things. "*

Familiarity helps

Once the business case had been made, Pavey barely hesitated before selecting Microsoft SharePoint as the intranet platform. "I knew SharePoint having worked with it before and I knew that it could do what we wanted In addition, being part of the Microsoft family of software it had advantages in the way that it fit with our other applications," he notes.

To help develop and implement the software Pavey turned to Professional Advantage. "We'd dealt with a number of businesses that could have done this project but we got a good feeling from Professional Advantage. They came across as believable, honest and we had open discussions." Pavey says. "They knew the product. They had the expertise we were after. They certainly gave the impression that they understood where we were coming from and they knew what we were trying to achieve."

> *" In certain areas SharePoint 2010 gave us better flexibility and some of the functionality that we wanted to achieve was now available out of the box without the need for development or third party help. "*

Build, Test and Finesse

The project kicked-off with a series of workshops that brought together key Scott Corporation internal users and the Professional Advantage development team. Sales activities, safety and training content, and business process were targeted along with further impact across areas such as HR and Finance.

Over a period of three weeks they created a definitive design that incorporated all the required functionality. Pavey says, "It was intense and great. Apart from just producing the end result of a design document, the workshops illustrated the development process to the end users which was a very positive thing. It also put the controls necessary around the development."

The next step was to test the design with a trial at three sites representing Scott Corporation's different businesses around Australia. "We went ahead and developed around 75 percent of the total intranet functionality for these sites and trialed it for six months," Pavey explains. This early user feedback helped to further finesse the design and was key to generating buy-in from the businesses. Although there were some initial pockets of resistance to the change, the overall reaction was positive. "The trial started the groundswell early on because people could see the benefits and it was whetting their appetite. It added to the project momentum," Pavey acknowledges.

To maintain enthusiasm the Information Systems began producing fortnightly internal newsletters detailing development progress and promoting the intranet capabilities. A naming competition was conducted. The winning entry – ScottPoint – helped to ease the intranet into everyday conversation among employees.

As the test phase came to an end, Pavey and Professional Advantage pondered their next move. The trial had been based on Microsoft SharePoint 2007 but by this time it was clear that the next version, Microsoft SharePoint 2010, would soon be released. The development team decided to hold off going into production to wait and review the functionality of the latest SharePoint software. "This was a great decision," Pavey smiles.

Upon the release of the new software, final preparations for the intranet's go live occurred quickly. The software was rolled-out in two phases – in November 2010 and January 2011.

> ❝ *We decided to phase it to better manage resources, schedule training and to gain buy in. As a result when we went live there were no issues.* ❞

The co-discovery sessions and solution design with Professional Advantage resulted in a SharePoint 2010 intranet, with document management, forms and workflow, integrated printer scanning and information rights management technologies forming the systems below the people, processes and culture adjustments.

The benefits

Strong management support helped to quickly establish ScottPoint as one of the organisation's primary communications tools, ensuring that take up was swift amongst all 150 office staff.

As planned, policies, procedures and forms are all now accessed and managed via ScottPoint. Management and board reports, training materials and news are also published on ScottPoint. If a branch buys new heavy equipment such as a truck or coal carrier, photos are loaded up on the site to keep staff informed.

ScottPoint is also being used as the document repository for signed consignment notes and legally required safety-related forms. As the paper forms are returned to the office they are scanned, automatically recognised using optical character recognition and filed in the correct document library. It's a process that removes the threat of lost paperwork and which has significantly reduced the amount of manual filing.

Given the explosive and dangerous nature of the goods Scott Corporation transports, limiting access to truck route plans & load information is extremely important in maintaining the safety record and compliance of the organisation. The Information Rights Management tool integrated with SharePoint, restricts access rights to these documents ensuring the content is secured, allowing only those with clearance to open the files. As a further safeguard, the documents are able to be secured not only within the intranet but also once they leave the intranet or even the Scott Corporation network.

Another big win was SharePoint's ability to automate tasks for users and integrate into their day to day activities seamlessly. This was especially important given the majority of Scott Corporation's user base are truck drivers, with less office and administrative experience. Using workflows, ScottPoint was configured to manage vehicle maintenance and defect reports directly from the printers, scanners and copiers. Forms can be electronically input, routed to document libraries with key classifications and electronically managed. Using soft buttons, employees are able to scan a defective vehicle report starting a SharePoint workflow which identifies the priority of the defect, flags the truck for repair, alerts various departments and sets activities for completion to predetermined timeframes. This ensures compliance is maintained and a leaking fuel tank is prioritised over a vehicle scratch and dealt with accordingly.

Emergency response site plans and contact lists, which require a 6 monthly refresh, are stored in the SharePoint document library as Content Types set with automated triggers prior to expiry. The triggers start a process to update the plans, keeping Scott Corporation compliant.

When the auditors pay their monthly visit they are now pointed in the direction of the intranet and the details held within to demonstrate their activities and audit trails. Preparation time for the audit has been reduced from one week to just minutes.

"People don't have to go through container loads of boxes of consignment notes trying to find information anymore," Pavey says. "What's more we can readily email these documents to customers if they need them. The next step is to give customers access to find this information for themselves."

The future

Pavey describes SharePoint saying, "It's a living thing." One small wiki has been developed under the ScottPoint training site and Pavey can see a number of additional opportunities for the technology as a collaboration tool on the intranet's marketing site. SharePoint's "MySite" functionality is also set to get a workout. "We put MySite aside during the design phase but I think it is something that we are likely to move onto sooner rather than later," Pavey says.

Mobility is another area that Pavey is keen to explore. He hopes to make the intranet accessible for management via their iPhones in the near future. In short Scott Corporation content is now secure, centralised, accessible and auditable; while processes are automated, consistent and compliant. The intranet is more manageable and staff are better informed. "ScottPoint is being used for all sorts of forms and workflows. Within just five months we have branch managers coming up with new ways of using ScottPoint in terms of managing their information. Every second day I'm being asked 'Can we put this up here? Can we do this? With SharePoint as the platform, the sky is the limit," Pavey concludes.

About us

Professional Advantage is one of Australia's most awarded solutions providers, with over 20 years experience in helping organisations improve their business systems through industry leading software solutions. Our 250-strong team in 6 offices across Australia and internationally has successfully worked with over 1000 organisations.

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