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# CUWCD Cleans Up its Document Processing with OnBase

Central Utah Water Conservancy District (CUWCD), located in Orem, UT, are dedicated to delivering clean, useable water to customers and storing water for future generations by developing and efficiently using limited water resources.

## OBJECTIVES

- Tighten Document Security
- Accelerate Processing
- Eliminate Manual Processing
- Lower Risk
- Improved Transparency

## RESULTS

- Excellent Security Protocol for All Documents
- System Streamlines Document Processing
- Central System to Automate Manual Tasks
- Improved Accuracy and Decreased Risk of Duplication
- Robust Audit Trail for Greater Transparency and Tracking
- Ability to Approve Documents 24/7 From Any Location

## The Client

Central Utah Water Conservancy District (CUWCD) is responsible for delivering clean water to customers in eight counties by managing the Central Utah Project (CUP) and District network of water facilities. In order to provide this service seamlessly, CUWCD works hard to monitor precipitation levels. It also collaborates with large water users to help them find ways to most efficiently use their water, and involves the greater Central Utah community in educational programming and events that promote water conservation.

CUWCD is powered by technology. It operates three water treatment facilities, two hydroelectric plants, and nine reservoirs. But behind the scenes, technology is just as important to keep CUWCD afloat. It relies on document management technology that operates seamlessly and keeps them organized and as efficient as possible. But there was a time when CUWCD was boggled down by slow processing.

## Slow Processing

Slow is typically not a good indicator of success in business. The Central Utah Water Conservancy District (CUWCD) faced an invoice approval process that took several days to complete. But it wasn't simply their processing speed that was hurting. Their processes also lacked a central document management system, which meant invoices had to be processed manually. To complicate matters even further, the accounting staff had to wait for supervisors in remote locations to receive the invoices by courier to review and approve or deny the charges. Only after this review would a courier return the invoice to the accounting staff. If remote workers needed additional documentation to know whether to approve an invoice, an urgent request was sent back to the main office. Consequently, these requests meant they spent more time locating and sending the information back to the field office.

When it came to approval, matters didn't get any simpler. An invoice had to make its way through a multiple-tiered approval process. The CUWCD accounting team often experienced painful wait times

on approval from supervisors. It was during this back-and-forth part of the invoice cycle that invoices often got lost or buried in other paperwork. And when the invoice was finally received, information was sometimes indexed multiple times. As a result, CUWCD faced the real possibility that multiple entries might be floating around in the internal tracking systems. In short, invoice processing had become a living nightmare for CUWCD.

CUWCD knew that they needed a more streamlined system. They determined that they needed a system where documents could be stored securely and be accessible through a single repository. This new system had to be able to integrate seamlessly with their current organization-wide accounting and repository systems. Of course, access would still need to be provided to both internal and remote employees, regardless of location. They ultimately decided to team up with Naviant to see to it that this dream became a reality.

## OnBase Makes Waves for CUWCD

The Naviant team devised a plan for CUWCD to handle invoices and all the supporting documents. First, it would scan the documents using Optical Character Recognition (OCR) technology capture software. This capture would allow the documents' data to be auto populated (indexed) into the accounting software. Once scanned and indexed, the newly digitized invoice would be sent through the approval process via OnBase's automated notification system. It would then finally find its home in storage in its secure repository.

The team is now able to make document approvals 24/7 from any location, whether in or out of the offices using a smartphone, laptop, tablet, or desktop computer. The accounting team shares invoices, checks, and payment information in real-time. Approved users can view, re-route, and manage the invoices as necessary. Once each individual has approved the invoice, OnBase notifies the accounting system that the invoice is ready for payment. Finally, it cuts the check through the accounting system and a copy of the check and related payment information is stored in OnBase and cross-referenced to all related invoices.

## The OnBase Impact

Thanks to Naviant's OnBase systems integration, CUWCD employees now access projects supporting documentation for more than simply invoices. The system also handles compliance reports, engineering documents, and even maintenance information.

CUWCD now has a more secure and efficient digitized process that allows for better administrative capabilities, including an audit trail to track the viewing and editing history of each document. For Naviant, it's not just about meeting the needs of the client- It's about exceeding their expectations.

**KEY BENEFITS**

- Exceptional security protocols
- Enhanced transparency through audit trails which track the viewing and editing history
- Accelerated invoice processing that is finally under control

"Naviant exceeded our expectations in their ability to deliver an integrated solution that improved our overall operational efficiency."

*- CUWCD Controller*