

# OnBase continues to deliver at Clicks Group

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## The Customer

Clicks Group is one of South Africa’s leading pharmaceutical retail groups. The company provides medical care through market-leading retail brands including Clicks, Musica and The Body Shop. Established in 1968, Clicks Group now has over 575 pharmacy outlets and approximately 260 in-store dispensaries, making the company one of the leading pharmaceutical employers in the region.

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## The Journey

Clicks Group is already a prolific user of Hyland Software’s OnBase Electronic Content Management solution (ECM) within the Accounts Payable department. They first bought the licenses more than two years ago to address the growing work load of a rapidly expanding business and the resultant paper mountain.

Paul Niemantinga, Head of Payroll, explains, “When we were evaluating ECM solutions for Clicks Group, we compared several of the leading vendors in this space. OnBase won us over with its flexibility. It can do almost anything and you get a phenomenal return on your investment.”

Having deployed OnBase successfully throughout the Accounts Payable department, Niemantinga knew exactly what it could do in turning around processes, improving efficiency and accuracy within a paper based department. It was when he was asked to take on the Payroll department that he decided to deploy OnBase to 50 per cent of the staff.

“We knew the product was good and the relationship we have with Hyland Software is excellent. I understood how we could use the solution within the Accounts Payable department, so when I moved to become Head of Payroll, I knew I would deploy the same system. In Payroll, the processes are the similar to those in Accounts Payable, The obvious difference being that you need to be a little more sensitive to the fact that you are and paying people rather than suppliers. But, the basic process is the same. The document comes in – it’s processed – and it’s paid. Another key differences is that within the Payroll department there can be many financial communications during the life of the employee, such as annual reviews, pay increases, bonus and commission payments. All of those need to be linked together. The Payroll department also needs to be a lot more secure than Accounts Payable, so it’s important that appropriate access control for those working in the department is included in the solution deployed.”

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### **The Challenges**

Prior to deploying OnBase, the Payroll department at Clicks Group had a very manual way of processing employee paperwork.

“Previously, we used to be the blame department. Paperwork might just make it to us and it was very easy to accuse the Payroll department if something went wrong even if it wasn’t down to us.” explained Niemantinga. “Paperwork had to go through multiple hands to be processed and actioned. By implementing OnBase we now have a stream-lined, traceable system making us accountable to the business for our processes and actions. Today when an employee emails us a document, we use OnBase to immediately scan it in and we complete three proactive actions: we inform the employee that we have received their communication, we tell them where it is in the payroll process, and finally, we tell them when the required action is complete.

“This communication is done via email in real-time so at every step of the process the employee knows what’s happening and as department we have control. The same process happens with paperwork that comes to us via physical mail. The document is immediately scanned and indexed using OnBase and we deploy the same communication process with the employee.”

Niemantinga has also been able to embrace a green strategy within the office supporting the company’s corporate responsibility and sustainability programmes.

“Once we’ve completed the payroll change request, we shred any relevant paperwork (if it has come into the office that way), the shredded paper is then given to a charity that sells it for recycling.”

### **Ease of use promotes user adoption**

Niemantinga has phased in the deployment of OnBase to the Payroll department. In the first phase OnBase was given to 50 per cent of the team. “The team has taken to using OnBase so well. It’s very quick and easy to use. By using the workflow elements within OnBase, they are now prioritising their work and have become much more efficient and accurate. We’re getting through a higher volume of work than ever before. Those using OnBase are picking up work from those people not using OnBase as yet, and communication within the team has improved tremendously.

The Payroll department now operate a clean desk policy. Niemantinga explains, “When we started using OnBase, I put a counter on the printer to record how much paper was being printed on a daily basis. Previously, an email would come in, it and any attachments would be printed, and then the request actioned. That paperwork then had to be filed and archived. Now with OnBase, the need to print the email and or its attachments is gone, the team is no longer swamped in paper and our printing costs have been reduced by over 50 per cent. By freeing the desks and surrounding areas, I have put a number of second monitors on some desks to further help those using OnBase, which in turn has improved efficiency.

“Information security is also much better than it used to be. In Payroll, we deal with sensitive documentation and it’s essential that privacy and personal security issues are kept private. With OnBase we automatically achieve this through the use of role-based access control mechanisms.”

As a result of losing the paper and having everything scanned into OnBase, the office no longer has a requirement for physical storage to hold archived materials.

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“When I joined the Payroll department, there was a room approximately 3x6 metres which was full of archived paperwork. By deploying OnBase, we’ve been able to scan all those documents, index them accurately and efficiently, and then shred the originals. We were able to repurpose the freed space into a meeting and training room, which has boosted the morale of the department.”

By freeing space from scanning and shredding of paper-based products, the office has been redesigned to enable better efficiencies when communications come in. “We have rearranged the office to act more like a post room. This has helped us formulate workflow processes, which ensure we’re efficient, cost effective and proactive,” continued Niemantinga.

#### **Easy retrieval helps meet changing regulatory compliance**

The pharmaceutical industry is no stranger to the rigors of regulatory compliance and the ability to retrieve historical documentation is a major element of that. Niemantinga explains, “Recently the South Africa government changed the legislation around the length of time an organisation has to keep documentation. Previously, it was five years but has now been increased to seven. You can imagine the impact this will have in a paper-based environment and the associated costs that would bring to a business.”

“With OnBase retrieval is real-time. I don’t have to worry about whether or not a document can be found as part of a compliance audit. I know once it’s scanned and in OnBase it will be there. One of the great elements of OnBase is that we’re able to implement legislative and regulatory changes at a click of a button. In minutes, Clicks Group was immediately compatible with the legislation and could not only prove its compliance but also retrieve any relevant documentation to prove that fact in real time.”

#### **Friendly work environment increases morale**

Eighteen months ago the Clicks Group Payroll department was untidy and full of paper boxes causing a fire hazard. With 32 people in the department, the storage required for all the paperwork spanned the walls. By deploying OnBase they have freed space, redesigned the department to be bright and airy and removed all except five of the filing cupboards which had been dividing people both physically and mentally.

“Desks were full of wire filing trays and we’ve now had those removed from the office. The office is a clean spacious tidy environment that is a safe place to work. Morale and motivation has improved tremendously and the reputation of the department within the business is now second to none,” continued Niemantinga.

#### **Clicks Group realizes return on investment and continues to save**

In the first deployment of OnBase within Clicks Group, the software paid for itself within the first eighteen months (see the earlier case study entitled “Leading retail group doubles document retrieval rates and improves compliance,”). Today Niemantinga is saving approximately close to 60K Rand per month on storage costs associated with archiving paperwork. Over the next seven years, in line with the new South African legislation, that would equate to a saving of over 5 Million Rand. Deploying OnBase to the Payroll department cost half as much as within the Accounts Payable department as the infrastructure was already there.

#### **Improving businesses processes and increasing morale lowers turnover**

“The benefits of using OnBase within the Payroll department have been multiple,” explains Niemantinga. “Firstly there are the business benefits. The department is now open and transparent to the business. It adds value by being efficient, accurate and proactive, and stress levels have rapidly reduced. As a result, we have less turnover of staff. Secondly, the physical benefits. The redesign of the office and the transformation of a storage room into a dedicated Payroll meeting and training room has been a major motivational benefit for the team. If we removed OnBase from within the Payroll department it would be like going back into the dark ages.”

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### What's Next

OnBase is currently being used in one fifth of the Clicks Group business, including the following departments;

- Insurance
- Legal
- Accounts Payable
- Payroll department

Niemantinga outlines his plans for the future. "I'm trying to open up OnBase to the HR Managers to get contracts signed via secure access. This will empower them to make their own decisions and hopefully the HR and Payroll teams will become more integrated. I would also like to deliver Chronic Medication direct to homes and gain authorised and secure signatures which are then feed directly into the OnBase system."

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### Why OnBase

Niemantinga believes that OnBase is perfect for an environment with a lot of paper and workflow processes. "It makes sense for large business units such as Legal, Accounts Payable and Payroll to use an enterprise content management system. OnBase is a robust solution that suits our needs and is very scalable. You can start small and ramp up very easily and quickly," commented Niemantinga.

"At Clicks Group we really believe in the OnBase technology. We can see the cost savings, the benefits and we use the technology to our advantage. For me it has been a personal journey. OnBase has a lot more uses than even we've thought and that's what makes the software unique."

Niemantinga concludes, "If there were four key things that the Payroll department has benefited from by using OnBase they are: firstly, that it develops an environment of accountability; secondly that there is no longer a blame mentality towards the department; thirdly, we have real time access to information; and finally, the ease and speed at which we can adhere to legislation and compliance and answer any queries regarding these factors."

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