

Customer Case Study: QinetiQ

Document management improves efficiency at QinetiQ

Introduction

QinetiQ is Europe's largest science and technology research company, a world leader in its field. Before the recent overhaul of the company, they reviewed practices and processes to ensure "best practice" throughout the organisation.



Integration of systems and instant retrieval of documents is key to improving overall efficiency within a busy finance department. Implementing the latest electronic document management technology can achieve this and become central to a "best practice" strategy as the newly formed QinetiQ discovered.

Installing a Documation Invoice Management System (IMS) has enabled QinetiQ to replace the thousands of paper invoices they handle monthly with electronic documents. This provides them within instant access to the documents from within their PeopleSoft application and over their intranet.

Retrieval improvements

"50% of all invoices had to be copied and forwarded so that people felt confident enough to authorise them. But it wasn't just one invoice, they could be asking for 50 at a time."

Trevor Braybrook, Chief Accountant at QinetiQ



Retrieval and authorisation

The finance department at QinetiQ process 6000 supplier invoices per month for 12,000 staff and these volumes were creating several problems. When people were asked to receipt the goods received they invariably asked to see the invoice, which meant phoning the accounts department to send a copy.

PeopleSoft

ORACLE CERTIFIED PARTNER

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Why Documation?

QinetiQ already had two electronic document management systems (EDMS) in place but as Trevor Braybrook discovered, the business rules within a finance department are specific and required a more sophisticated solution than merely scanning and archiving.

Documation's Invoice Management Solution (IMS) was chosen for its feature rich functionality specifically designed to meet the requirements of large finance departments. It ensures more efficient handling of invoices whilst integrating seamlessly with their PeopleSoft system and the Internet. It is built around a workflow engine and so effectively controls the workload of the entire department and provides statistical analysis of their performance.



“IMS provides a complete environment for the management of Purchase Invoices, Purchase Orders, Goods Received Notes and associated documents. It was designed in 1998 and over the past decade has been continuously enhanced to become, what we believe is the most effective solution to the problem of invoice management available today. The rapid ROI of our customers reflects this.”

Documation's CEO, John Wallace

Feasibility study

QinetiQ first commissioned a feasibility study so that they could examine whether, in reality, they would receive the returns promised by EDMS. Trevor Braybrook was highly impressed, he says: “Documation highlighted processes that could be improved and came back with a report that I could use constructively. Although I was aware of processes that needed to be changed, I wasn't aware of everything in the report”. Once completed, QinetiQ was confident that the right vendor had been chosen and began preparing for the installation. Trevor Braybrook describes the excitement for the whole team: “They were so keen that they were telling me what they wanted to do in the future before we had even rolled-out stage one of the project”.



Storage problems

They were also finding storage of the invoices increasingly difficult and costly. The original invoices had to be kept for 7 years and most of the copies sent out were simply to be put in yet another file. The storage costs associated with their supplier invoices and associated documents was also causing costs to spiral in the department. The pressure on the team was increasing and so it was necessary to find an alternative to improve overall efficiency.

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IMS provided QinetiQ with a sophisticated method of handling the invoices by allowing them to completely dispense with paper copies. Barcodes are used to eliminate any duplicate data entry and the details are automatically transferred from their PeopleSoft application to Documation's IMS. As the invoices comply with BIP0008, paper copies no longer need to be stored.



Access to the documents is instant. Answering queries no longer requires a call back to the supplier after searching through paper filing systems. If they are working within PeopleSoft a single-key click allows them to search and view documents without opening a new system.

The department can become more productive, spending more time on building relationships and working on more knowledge-based work while the system takes care of the routine tasks. The rest of QinetiQ can also access their invoices securely over their Intranet. This has completely eliminated the request for copies from the finance department which improves productivity and speeds the authorisation process considerably.

Within the department they are very pleased with the system and have been enjoying its wide range of functionality. The workflow engine provides the power and flexibility that QinetiQ requires to controls all of the tasks. Each work-item is delivered to the desktop of the relevant worker with all the information required for them to complete their work as effectively as possible. Supervisors can use the system to get an overall view of the team workload, including outstanding invoices and any queries relating to them. With full audit trails they can see how long any task is taking and also how long it takes other staff members to receipt the invoices. Over time, this will build up to give a clear view of the internal workings of the department so that any inefficiency can be eliminated further increasing productivity.

Main benefits of IMS

- Improved productivity of the accounts payable team
- Improved supplier relations
- Improved control over key business processes
- Improved level of service to internal departments
- Improved management information
- Reduced data entry costs
- Reduced cost and time in coding and authorising
- Elimination of duplication invoices
- Elimination of the "paper chase"

Future plans

In the future, QinetiQ will be examining other paper-intensive processes to see how they can eliminate them and expand the use of the system providing an even more rapid return on investment.