



One-Click AP Process



Southern Cross Campus

Objective



Streamline and smooth out Southern Cross Campus' Invoice Inefficiencies.

Outcomes



Average time from invoice receipt to approval dramatically cut from 10 to just 2 days



Simplified one-click actions provide dashboard overview of invoices



DocuShare stores invoices for future reference

Southern Cross Campus steps up to the challenge of streamlining their Accounts Payable Process

Southern Cross Campus is a composite school that caters for students in Years 1-13 in the suburb of Mangere East in South Auckland.

The school's campus covers 9 hectares and has 47 departments. It currently has 190 teachers and support staff, and a roll of 1,600 students.

The Paperwork Chase

The school is made up of a number of departments, widely dispersed across their campus. Each department is its own cost centre with responsibility for approving their expenses. Protocol and best practice means all incoming invoices go through a triple signatory process before being earmarked for payment.

Southern Cross Campus were keen to improve how they were handling their incoming invoices, particularly the approval process.

Robin Staples, Principal of Southern Cross Campus, said, "For a number of reasons, we spent way too much time running around simply chasing invoices."



For Southern Cross Campus, FUJIFILM's DocuShare proved itself to be flexible, configurable and affordable. And best of all, it precisely met the school's desire to streamline and improve, rather than just replace old processes.

Judith Langley –
Financial Controller,
Southern Cross Campus

Solution

DocuShare

FUJIFILM Process Automation proposed a largely automated AP process using the inbuilt workflow in DocuShare.

Doing the leg work

Southern Cross Campus has in excess of 3,500 suppliers, who between them submit around 500 invoices every month. While the vast majority of invoices are received by email in an electronic format, they were printed out by administration staff and the information entered manually into the school's accounting system. Invoices were checked against the purchase order, and if it matched, entered and forwarded to the purchaser for verification, and then circulated to various signatories.

Every day one of the administration staff distributed hard copies of newly received invoices around the campus departments, in person and on foot. First, the invoice was handed to the staff member who had raised the original purchase order for their approval. Then it was passed on to the Head of Department for their signature. The approved invoice was collected, again in person, and returned to the School Director for approval. Finally, the invoice arrived in front of the Financial Controller, who checked the authorising signatures, coding etc. and certified the invoice for payment. This could take up to a week, and in some cases longer.

Using a process so reliant on one person's detailed, but undocumented knowledge of where each invoice was at any given time, was fraught with risk. Whilst invoices for payment were recorded in the accounting system, there was no visibility of where unpaid invoices were on campus, and the system slowed up even more if the staff member was unwell or unavailable. Add in the inevitable increase of invoices over time as the campus grows, and it became clear that the system was unsustainable.

A simple, but smart solution

To streamline and smooth out Southern Cross Campus' invoice and authorisation problems, FUJIFILM Process Automation proposed a largely (but not entirely) automated Accounts Payable (AP) process using the inbuilt workflow in DocuShare. The solution was designed to reflect many of their existing processes and utilise the knowledge of the Accounts Payable team.

Southern Cross Campus opted to retain their current data entry system. This is still a low-cost Accounts Payable administration activity because of the



relatively small volume of supplier invoices. However, the incoming electronic invoice is no longer printed out as hard copy, but is saved directly into DocuShare from the email. The few invoices arriving on paper are scanned and saved as PDFs, and they too enter the DocuShare digital work stream to join the other electronic invoices.

Every morning the AP staff member handling incoming invoices is presented with a summary list. With a single click, she opens and views each digital invoice on one screen, while she enters the data from each invoice into a filing template. The dual screen facility allows invoice details to be viewed and entered into the accounting system in one operation.

Each person in the approval chain receives an email link to the invoice when their signature is required. Once they've reviewed and digitally approved the invoice, a link is automatically sent to the next person in the approval queue, and so on.

If approval isn't given within a couple of days, an automated email reminder is sent to whoever is holding up the process. When the invoice is fully signed off, it is marked in the system for payment. The feedback from staff is very positive, and they also appreciate not having to run around signing pieces of paper.

Using DocuShare to store the invoice in its original electronic version as well as the templated version makes it easy for AP staff to find the information they need through a simple, web-style browser. In addition, a dashboard in DocuShare shows the status and position of each and every invoice in the system at any given time. Any current or outstanding tasks can be identified.

If follow up is required, it is done over the phone, rather than by visiting on foot.



The importance of a robust audit trail and a permanent document approval system was paramount in our decision to automate this critical area in accounting for public money. The audit trail within the DocuShare filing system is excellent.

Judith Langley –
Financial Controller, Southern Cross Campus

A One-Click Process

Something FUJIFILM considered carefully while developing the automated AP solution, was the need to make any manual steps very simple and intuitive. This allows users with varying degrees of computer literacy to handle the AP process with confidence.

Simplified one-click actions provide lists of invoices to be processed, open templates, set approval actions in motion and display easy-to-follow dashboard reporting.

This new approach enabled a much greater degree of efficiency and visibility, while saving a considerable amount of shoe leather.

A Process of Improvement

The average time from invoice receipt to full approval went from 10 to 2 days with the new AP solution. The time saved on low-value leg work is now used to support other functions within the busy AP team. "For Southern Cross Campus, FUJIFILM's DocuShare proved itself to be flexible, configurable and affordable. And best of all, it precisely met the school's desire to streamline and improve, rather than just replace old processes," said Judith Langley, Financial Controller for Southern Cross Campus. "The importance of a robust audit trail and a permanent document approval system was paramount in our decision to automate this critical area in accounting for public money. The audit trail within the DocuShare filing system is excellent."

Have you thought about improving your AP process?

Begin your digital transformation today with **FUJIFILM Process Automation**, your local process automation experts.

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About FUJIFILM Process Automation

The benefits of process automation are real, but it's not enough to just digitise your business. True transformation only happens when you have technology that makes sense for the way your people need to work.

FUJIFILM Process Automation are experts in creating automated document data flows that accelerate your processes and streamline your business. Our team offers a proven track record backed by leading technologies for Accounts Payable automation, Intelligent Forms, Enterprise Content Management, Robotic Process Automation and more.

Our local team have helped some of New Zealand's top companies and processes. Imagine what we can do for you. Learn more about our tailored approach and get in touch today.

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Value from Innovation

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