



KnowledgeLake Customer Solution Case Study



Customer: VolkerRail

Web Site: <http://www.volkerrail.co.uk>

Customer Size: 1000

Country or Region: UK

Industry: Railway

Customer Profile

VolkerRail Ltd is a UK-based group of companies who are part of the larger VolkerWessels Group, providing a wide range of contracting services to the railway industry - from major projects to track renewals and specialized operations including signaling, OHLE, power distribution, plant, welding and coated rails.

Partners

KnowledgeLake-

KnowledgeLake extends the Electronic Content Management (ECM) capabilities of SharePoint, enabling businesses to reduce shipping costs, streamline operations, and achieve regulatory compliance using familiar Microsoft products that most businesses already own and use.

www.knowledgelake.com

Dynamyx-

Dynamyx has assembled a product portfolio specifically within the .NET space for document management, process automation, scanning and imaging and we are able to assist with rapid deployment if applicable. If you have invested, or are indeed about to invest in SharePoint, we are able to leverage your core solution environment with closely integrated, Gold Partner tools and applications.

www.dynamyx.com

Fujitsu Europe Ltd.-

Established in the United Kingdom in 1981, Fujitsu Europe Limited (FEL) is a wholly owned subsidiary of Fujitsu Limited. As an established player in the UK computer sub-system market, FEL is a major distributor of a range of products including scanners, printers, magneto-optical disk drives and hard drives.

www.fujitsu.com/emea/products/

Railway contracting services gains greater visibility into invoices while improving payment cycles.

“By using Fujitsu, Microsoft SharePoint® and KnowledgeLake we are now able to view 100% of all purchase ledger invoices instantly across all of our UK based sites.” *Matthew Booth - Business Analyst*

Invoices used to be stored in one physical location where site representatives from across the UK sites had to travel to a single location once a month to reconcile expenditure against live projects. This led to a very time consuming process involving travel and manual paper invoice retrieval and sign off. By setting up Fujitsu workgroup scanning facilities for the purchase ledger team, team members are able to scan, index and release invoices into Microsoft® SharePoint using KnowledgeLake.

Challenge

VolkerRail experienced challenges in the areas of invoice storage, retrieval and approval. Unnecessary time was spent to travel to a central location as well as manually finding and filing invoices. At the same time the manual nature of filling and finding invoices lead to lost invoices. Since invoices were not immediately and easily available and visits to the invoice storage facility was done on an ad hoc basis invoices could age and project cost reconciliations could become out of date compromising financial control on accruals as well as project budgeting processes.

Solution

After evaluating various document imaging solutions, including a native adapter for the incumbent financial system, VolkerRail selected a combination of Fujitsu workgroup scanners, KnowledgeLake Imaging and Microsoft SharePoint. The priority project

was to deliver a solution to scan and host purchase ledger invoices online for a geographically dispersed audience. On successful roll-out of a group wide purchase ledger imaging solution, other processes within the accounting and human resources departments are planned to be automated as well. Matthew Booth comments, “We selected Microsoft SharePoint as the base platform for our solution because of its ease of use and compatibility with other applications within the Microsoft Office suite. VolkerRails internal Intranet uses Microsoft SharePoint and we wanted a consistent look and feel for our scanning solution.” The solution allows the purchase ledger team to code invoices in the accounting system and then scan and index them into SharePoint. Users work in teams of two sharing a small footprint Fujitsu workgroup scanner (fi-6140) per team. The speed and ease-of-use of the scanner (that supports automatic duplex scanning at up to 80 sides per minute) allow users to process up to 300 invoices per day using KnowledgeLake Capture. Scanning



rules in KnowledgeLake include bar code recognition, page separation, blank page detection and various imaging enhancements. During indexing, KnowledgeLake allow users to see the image and relevant properties side by side and require that only the coded reference number of the invoice be entered. Other properties are loaded and validated automatically from the backend accounting system. On average it takes users 25 seconds to process an invoice from paper to SharePoint. 'The implementation of the scanning system in our department has been quick and easy, we found staff required minimal amounts of training before being confident on using the software. Scanning has reduced the amount of time staff had previously spent copying filed invoices for commercial staff, the system means any member of staff can have access to electronic copies of documents anywhere in the country. More recently the AP team has stopped filing invoices away, we are now solely storing our invoices electronically, and this again has saved the department valuable time. The scanning system has proved a valuable tool which has saved our busy department valuable man hours; I would recommend this software to any AP department without a scanning solution'. Michelle Walters – Purchase Ledger Supervisor. By selecting Fujitsu scanners and using KnowledgeLake Document Imaging for SharePoint, VolkerRail ensured that a generic and scalable platform for document imaging is available to the whole group while at the same time leveraging their investment in Microsoft technologies.

Benefits

- Enhanced document visibility – it was not previously possible for stakeholders to access invoices from remote locations. Users of the solution can now simply log into SharePoint to

confirm that an invoice has arrived, check the invoice status and update the invoice properties without leaving their desk.

- Reduced paper storage requirement – because invoices are scanned into SharePoint the paper copies can now be moved to more cost effective storage as they are no longer required as part of the invoice approval lifecycle.
- Instant document retrieval – invoices can be found instantly by running a search on invoice properties or sorted using the SharePoint views functionality. Time is saved in comparison to manual searching.
- Filing time reduced – automated filling can be done faster than manual filing with the use of drop down selection boxes, automatically populating fields from the accounting system and indexing invoices directly into the system.
- Improved security – only staff with the appropriate access levels in SharePoint are able to view and change the properties of invoices.
- Better document governance – by scanning invoices straight into SharePoint on arrival the risk of misplacing invoices are reduced. It is also possible to immediately check invoice status rather than invoking a manual search process.
- Opportunities for re-use and extension – the solution is not limited to a specific functional area in VolkerRail and can be used as a basis for future solutions across the group.

'Our Commercial teams faced continual problems supporting claims made to our main customers, these claims need to be backed up with hard copies of all expenditure included in the claim leading to site based commercial teams spending time in our head office photocopying

invoices. This was both an unwanted overhead on our contracts but also led to senior members of our commercial teams not adding value to the contracts they were working on. The business now has greater visibility of invoices in query which should lead to an improved payment cycle ensuring our suppliers are paid in a timelier manner. The obvious benefits of the implementation of KnowledgeLake has led to other areas of the business showing an interest in improved document management. VolkerRail is now scanning all Cash Book payments and are planning to scan staff timesheets, sub contract invoices, employee records and transmittal forms.' Matthew Booth – Business Analyst

The solution that Dynamyx proposed was cost effective and allows VolkerRail to leverage investments already made as well as staff familiarity with existing Microsoft productivity applications. Furthermore the Dynamyx solution was considered to be easy to use and maintain - underpinned by the Fujitsu Workgroup Scanners that required very little training.

'Dynamyx were the shining light during the review stage of the project, VolkerRail held meetings with various suppliers of five products and it was not only the benefits of KnowledgeLake and the Cost Effectiveness but it was also the willingness and determination of Dynamyx to deliver a product that was suitable for VolkerRail that made the partnership of KnowledgeLake, Dynamyx and Fujitsu the obvious choice'.

Matthew Booth – Business Analyst

KnowledgeLake, Inc. develops document imaging related products and solutions for Microsoft SharePoint. KnowledgeLake extends the ECM capabilities of SharePoint, enabling businesses to reduce shipping costs, streamline operations, and achieve regulatory compliance using familiar Microsoft products that most businesses already own and use. KnowledgeLake products and solutions are deployed globally in thousands of organizations in many different horizontal and vertical industry sectors including public sector, healthcare, financial services, transportation and more. For more information visit www.knowledgelake.com.

