Datalytyx
Making Information Work

VolkerRail:

Leading edge document management solution enables rail services provider to improve access, governance and security – while reducing storage and costs

Leading rail industry services provider VolkerRail was experiencing issues related to invoice storage, retrieval and approval. For example, staff wasted time travelling to a central storage location each month to reconcile expenditure against live projects, with manual invoice retrieval and sign-off taking up more time, and lost documents causing a problem. In response, Datalytyx proposed and implemented a new solution including Fujitsu workgroup scanning facilities that enables the Purchase Ledger team to scan, index and release invoices into the company's Microsoft SharePoint platform using KnowledgeLake software.

VolkerRail

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Client

Successful provider of multi-faceted rail infrastructure services.

Challenge

Inflexible, costly and time-consuming process for invoices, prone to delays and error.

Solution

A secure and scalable scanning and document management solution using Fujitsu, KnowledgeLake and Microsoft.

Benefits

Reduced costs, improved governance, enhanced accuracy, flexibility and visibility, with reduced storage and faster filing.

Challenge

Part of the VolkerWessels Group, VolkerRail Ltd provides a wide range of multi-disciplinary infrastructure contracting services to the UK rail industry: from major projects to track renewals and specialist operations including signalling, overhead line equipment, power distribution, plant and specialist rail coatings. "Our Commercial teams faced continual problems supporting claims made to our main customers," says Matthew Booth, Business Analyst. "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

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Matthew Booth, Business Analyst Manager VolkerRail

but also led to senior members of our commercial teams not adding value to the contracts they were working on." With invoices not easily available and visits to the storage facility happening on an *ad hoc* basis, invoices could age and project cost reconciliations become out of date - compromising financial control on accruals and project budgeting processes.

Why Datalytyx?

The solution proposed was highly cost effective, enabling VolkerRail to leverage investments already made as well as staff familiarity with Microsoft productivity applications. The solution was also considered easy to use and maintain, underpinned by Fujitsu Workgroup Scanners that required little training. Business Analyst Matthew Booth describes Datalytyx as "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 the Datalytyx team] to deliver a product that was suitable for VolkerRail that made the partnership the obvious choice."

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The solution

After extensive evaluation, VolkerRail selected a combination of Fujitsu scanners, KnowledgeLake Imaging and Microsoft SharePoint. Datalytyx hosted a problem identification workshop, worked to gain stakeholder buy-in, and held a detailed implementation workshop to elaborate the content taxonomy for SharePoint and establish other critical issues, such as auto-indexing via KnowledgeLake. The next step was a process workshop to inform a robust project plan plus baseline requirements for proof-of-concept. A prototype application was then developed to inform full implementation, with staff training taking place in parallel.

Michelle Walters, Purchase Ledger Supervisor, described implementation as "quick and easy. We found staff required minimal amounts of training before being confident on using the software." The Datalytyx solution enables 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 per team. The speed and ease-of-use of the scanner means they can process up to 300 invoices per day using KnowledgeLake Capture. Scanning rules in KnowledgeLake include barcode recognition, page separation, blank page detection and imaging enhancements. During indexing, users can see the image and relevant properties side-by-side and only the coded

reference number of the invoice needs to be entered. Other properties are loaded and validated automatically from the accounting system. On average, it takes users just 25 seconds to process an invoice from paper to SharePoint.

Benefits

Matthew Booth says, "By using Fujitsu, SharePoint and KnowledgeLake we are now able to view 100% of all purchase ledger invoices instantly across all of our UK based sites." VolkerRail has far greater visibility of invoices in query having a positive impact on payment cycles by ensuring our suppliers are paid in a more timely manner. Key benefits achieved include: enhanced document visibility, no matter where the content user is based; greater security, with access and authorisation limited to authorised stakeholders; better document governance, including fewer documents lost in transit; reduced storage with documents being stored more cost effectively off-site and for shorter periods; instant document retrieval for improved business efficiency, with no need for manual searching; reduced filing time reduced through automated indexing; and seamless integration with VolkerRail's enterprise resource planning (ERP) system in terms of indexing the invoices and viewing invoices within various Accounts Payable enquiry screens.

Michelle Walters adds, "Scanning has reduced the amount of time staff had previously spent copying filed invoices [and] the system means any member of staff can have access to electronic copies of documents anywhere in the country. We are now solely storing our invoices electronically, and this again has saved the department valuable time." These benefits led to other areas of the business becoming interested in improved document management, with VolkerRail moving to scan all cash book payments along with staff time sheets, sub contract invoices, employee records and transmittal forms.

About Datalytyx

Datalytyx is a leading UK provider of big data, digital transformation, governance and analytics solutions, all delivered as a service from the cloud. Our client-focused approach delivers rapid gains and sustained ROI, meets requirements to store and manage huge data volumes, deploys powerful business-focused analytics, and digitises essential business content and processes. The trusted management information that results enables more effective and more profitable decision-making. Our diverse client base includes AstraZeneca, Nissan, ABN AMRO, Surrey County Council, EasyJet, Allianz, Unisys, Capita, Eversheds, Veolia Environment and UK local government. We also partner with other leading providers to deliver best-of-breed solutions, including Microsoft, K2, Talend, Tableau, HP Vertica, KnowledgeLake and Hortonworks.