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CASE STUDY

FORESTRY INDUSTRY

UK Forestry Commission

Branching out for improved productivity

CHALLENGE

- Integration between financial system and document management system required manual processing, especially for incoming documents
- Remote sites wanted to leverage new multifunction devices (MFDs) to access the document management system

STRATEGY

- eCopy ShareScan® to enable MFDs as fully functional scanning portals
- eCopy QuickConnect™ enabled Scan to Mailbox and Scan to Shared directories
- eCopy Connector for Microsoft® Exchange used to Scan to E-mail and authenticates users
- Custom eCopy Connector enables scanning and display of invoices for easy entry of reference information. An automated program retrieves metadata from financial system and allows user to verify prior to filing document in document management system
- eCopy Software Development Kit (SDK) to enable future development of Connectors internally

RESULTS

- A number of manual and semi-manual processes have now been replaced, improving accuracy and productivity; concept will be extended to other business processes that require scanning

- Incoming documents can be scanned, indexed, and checked for accuracy in one step before uploading to the document management system
- Field offices can leverage installed MFDs to access financial and document management systems; custom Connector installation accomplished remotely without need for travel

ABOUT UK FORESTRY COMMISSION

The UK Forestry Commission is the largest land manager in Britain and the largest provider of outdoor recreation areas. Their mission is to protect and expand Britain's forests and woodlands and increase their value to society and the environment. They take the lead, on behalf of all three administrations in Great Britain, in the development and promotion of sustainable forest management. They deliver the distinct forestry policies of England, Scotland and Wales through specific objectives drawn from the country forestry strategies so their mission and values may be different in each. The Forestry Commission has 3,000 employees in around 100 locations throughout Great Britain.

"With eCopy-ready MFDs, we have been able to provide a number of general scanning facilities that can be used across our business. The development of the specific Purchase Invoice connector has not only saved us time and effort but has proved a concept that we plan to adopt elsewhere as part of the rollout of general electronic document management.."

— Steve Atkins

Head of Finance, Systems Development
UK Forestry Commission

THE COMMISSION WAS SEEKING A WAY TO LEVERAGE ITS FLEET OF MFDs...

The UK Forestry Commission had engaged in a project to integrate its Oracle-based Cedar eFinancials system with its Serengeti document management system. This would allow an image of all financial documents held in Serengeti to be accessed from within

the finance system. This process required that all images in Serengeti were appropriately indexed against the relevant transaction in the financial system through pre-defined metadata. While this was achieved relatively easily for 'outgoing' documents, i.e. those created by the finance system, it was not the case for 'incoming' documents such as purchase invoices. These needed to be scanned and the appropriate financial transaction reference applied to extract the required metadata. The scanning of purchase invoices required a significant amount of manual intervention to scan the invoices and identify and extract the metadata. The original process was laborious and error-prone and checking that proper indexation had been applied could only take place after the document was actually uploaded. Furthermore, purchase invoices were still processed manually at up to 100 sites throughout the Forestry Commission.

FORESTRY COMMISSION DEPLOYED eCOPY SHARESCAN TO ITS FLEET OF MFDs...

across the organization. eCopy QuickConnect was used to develop two custom buttons on the eCopy user interface that allow users to quickly Scan to E-mail and Scan to Shared directories. In addition, a custom eCopy Connector was developed that completed the integration between Cedar eFinancials and Serengeti, with the MFD as the integration point. With this Connector, designed specifically to handle purchase invoices, the invoice is automatically scanned and displayed on the screen. The user then enters the unique accounting transaction reference number.

The system connects to Cedar eFinancials to retrieve and display appropriate metadata, which the user verifies. Upon verification, the properly annotated document is immediately uploaded to Serengeti and is available for viewing across the organization. This solution is utilized in the Edinburgh headquarters and is also being deployed to remote offices that must process these invoices and take respon-

sibility for their payment. Eight Oracle Connectors and 15 QuickConnects are available to administrators who deploy based on individual site requirements.

THE PRIMARY BENEFIT TO UK FORESTRY WAS INCREASED SIMPLICITY AND PRODUCTIVITY IN BUSINESS PROCESSES...

By using the Commission's fleet of MFDs as the integration point among eFinancials, Serengeti, and paper-based purchase invoices, the organization has been able to ensure rapid and accurate filing of incoming financial documents. With the previous process, users were required to look up and enter data when filing documents. Using the new process, they must simply view the already available reference number on the scanned invoice image, enter it into a customized field on the MFD screen, and the system does the rest. As a final check, the user verifies that the correct metadata was retrieved from Cedar and applied to the scanned document, and the document is immediately filed in Serengeti, available for viewing across the organization. This more efficient process saves significant time and money in the filing process.

In addition, filed documents are more quickly and easily retrieved not only from within the financial system, but independently within the Serengeti application itself. Furthermore, the Commission has linked the various documents allowing a complete audit trail of the process from order through to payment for Suppliers and from invoice to receipt for Customers. In the longer term the Commission intend to expand their system to incorporate the non-financial documents such as IT and Contract documentation as part of their overall document management strategy. This results in substantial business efficiencies across the organization.

From their main shared service office in Edinburgh, the Forestry Commission are able to use the eCopy ShareScan Administrative Interface to remotely install the custom connectors on the distributed MFDs in about 15 minutes each, eliminating the time and expense involved with travel to each site.

With this successful implementation under its belt, it is investigating other paper-based business processes that can benefit from the same concept, including contractual documentation and other areas where paper storage persists. The Forestry Commission has purchased the eCopy SDK to enable them to develop future connectors on their own to further improve productivity and enhance the value of the fleet of MFDs.

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