

Customer Success Story: Washington University

Washington University is an independent research university located in St. Louis, MO. Recognized worldwide as a leader in teaching and research, Washington University offers more than 90 programs and 1500 courses in traditional and interdisciplinary studies. Washington University enrolls approximately 6500 undergraduate and 6900 graduate and part-time students.

The Challenge

The Accounts Payable department at Washington University faced a familiar challenge of managing an immense volume of documents with limited resources. Serving over 500 departments across the 5-mile campus, the department needed a solution for effectively processing the 1200 invoices and other documents that are received daily.

The previous method of processing, routing, and archiving documents required significant time and resources. As invoices were received in Accounts Payable, the documents were manually sorted, microfilmed and keyed into the accounting system. The documents that did not require approval were coded onto microfilm prior to being entered into the accounting system. The invoices that required additional approval were sent (after being keyed into the accounting system) to one of 500 remote campus departments via interoffice mail. Once the appropriate department received the paper-based invoice, which was usually 2-5 days later, they reviewed the document and indicated approval within the accounting system.

The process was lengthy, manually intensive, and reliant on paper-based documents. Indexing, routing, processing, and storing the documents required 12 full-time staff members, and the invoice delivery process took an average of 2-5 days. In addition to the time required to route the paper documents, other efficiency gaps and bottlenecks were identified:

- Documents could get stalled at the approval point and sit idle on a desk if the person was unavailable or out of the office.
- Documents could be misfiled or lost in the mail.

The DataFlow Solution

The department needed a solution that would fill these gaps and streamline the process of delivering and archiving these documents. As Robin Williams, Supervisor of Accounts Payable Service Representatives/Special Project Manager, explained, “We wanted to improve this process by better coordinating our resources and by eliminating some of the manual activities involved.”

The shift to a paperless environment was a natural step, and this move prompted the department to consider an imaging and workflow automation software. After reviewing several software packages, the department chose DataFlow™, a leading process automation solution from NuParadigm.

“DataFlow offered the best solution for the best price. Other systems required software installation on each computer,” reports Williams. “With DataFlow, we could provide document access to each desktop with a single solution and a reasonable investment.”

The Bottom Line

Within 5 months of what was deemed a notably smooth implementation, DataFlow was seamlessly connecting hundreds of desktops and radically improving the invoice approval process.

An invoice delivery process that once took 2-5 days is now complete in a matter of seconds. The number of staff required to complete the process was dramatically reduced from 12 full-time staff members to 3. And because the Accounts Payable staff now works with scanned image files instead of paper documents, lost papers are a thing of the past.

The new process saves time, reduces errors, and promotes better use of resources. When invoices are received in the Accounts Payable department, they are sorted and scanned into a work queue using DataFlow Scan™. DataFlow’s IViewer™ simplifies the indexing process by displaying the scanned invoices on screen, side-by-side with the mainframe system. Information is keyed into the accounting system directly from the scanned image displayed next to it (“heads-up indexing”), versus the paper document. The indexing information is then automatically captured in the existing accounting system.

Using the indexed information and the rules built into the accounting system, the documents are automatically routed as needed. If the system indicates approval is required, a pointer is placed on the appropriate department’s webpage. The employees simply click on the pointer to retrieve the scanned invoice image in their web browsers. After a review of the electronic file, employees can indicate approval within the accounting system. In a matter of a few clicks and keystrokes, the invoice delivery and approval process is completed.

DataFlow’s seamless integration with the legacy accounting system allowed the Accounts Payable department to automate their process and connect hundreds of departments.

As Williams noted, “We were not going to change or eliminate our existing accounting system. DataFlow needed to integrate, and it did... perfectly! It takes information from the system and displays it to the various departments in a familiar, common format.”

DataFlow enabled the Accounts Payable Department to achieve a paperless environment, while automating and simplifying a time and labor intensive process. But the benefits are not confined to this process. Because DataFlow eliminates the duplication of indexing efforts, the department now needs only 3 full-time keyers to handle the documents, versus the 12 individuals previously required. The department has devoted the remaining staff members to other projects, better utilizing employee skills and department resources.

The results of DataFlow - a 75% increase in productivity and an automated approval process that is completed in minutes – are gratifying to the Accounts Payable department and to NuParadigm alike.

“DataFlow has given the department such a significant boost in confidence and productivity; it is truly a paradigm shift,” said Williams. “We are managing a volume of documents that was previously overwhelming. And most importantly, we’re providing better service to over 500 departments. That’s a reward in itself.”

The DataFlow installation was Washington University’s first major university-wide software implementation. The Accounts Payable department had such success with implementing DataFlow that word spread to another university department. Student Financial Services now uses DataFlow to manage their documents.

“Working with DataFlow and NuParadigm has been a terrific experience. Deployment was remarkably smooth, and we have had exceptional customer service,” Williams concludes. “DataFlow’s technology continues to progress, and we are always anxious to see how it can improve our operations even more.”