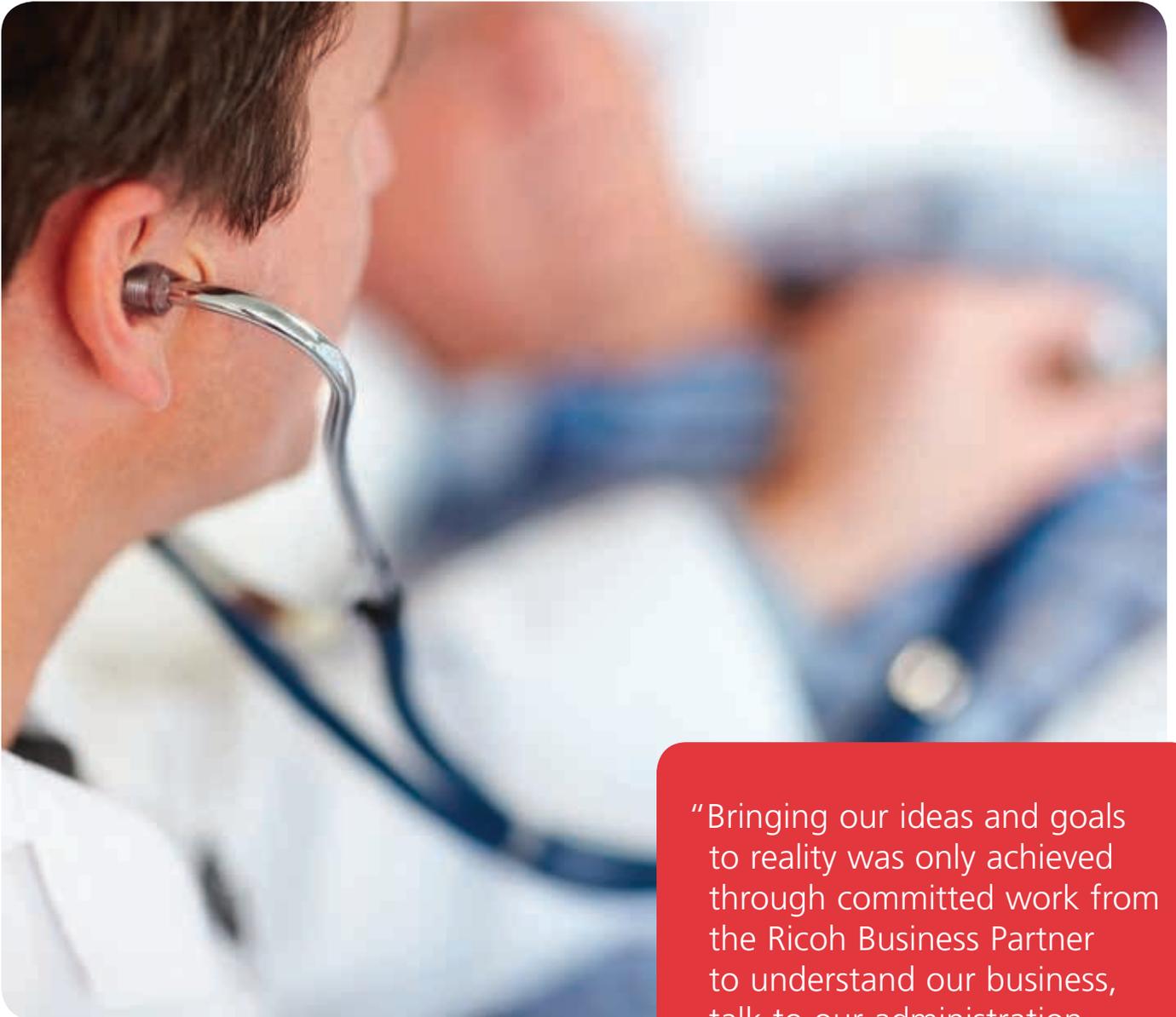


Indigo North Health and Ricoh



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While the restaurants and vineyards of the North East Victorian town of Rutherglen are key elements of the town’s economy, it’s the not-for-profit Indigo North Health organisation that promotes the community’s health and wellbeing. Servicing a population of approximately 8000, Indigo North Health provides a range of services that includes: home-based nursing, residential aged care, children’s services, retirement village living and community transport.

Challenge: Document management efficiency

Located across three campuses, Indigo North Health operates on a tight budget, balancing the provision of quality services with a streamlined yet highly adept staff and infrastructure. Not surprisingly, internal efficiencies that contribute to improved services are a top priority for the organisation’s CEO, Cameron Butler. High on the agenda in late 2009 was document and file management.

“We rely heavily on suppliers and contractors,” Cameron says. “So it’s important for everyone that the flow of information, whether in the form of general correspondence or finance-based document is incredibly efficient. Unfortunately, this wasn’t the case; and with the business having doubled over the past five years, we were in the position of having to identify and implement a more efficient means of managing our documents and files.”

Answer: A Laserfiche solution

In partnership with a Ricoh Business Partner, Indigo North Health sought to evaluate the suitability of a Laserfiche and Ricoh MFD (multifunction device) solution. Following an extensive evaluation process, Cameron gained approval from the organisation’s board to work with the Ricoh Business Partner on the solution’s implementation.

“The first and most important aspect of our document management on which we worked with the Ricoh Business Partner was our accounts

payable invoice approval process,” Cameron says. “And by the first of July 2010, we had a streamlined workflow that’s nothing short of fantastic.”

Saving a day every fortnight

Streamlining the accounts payable workflow for invoice distribution and approval has delivered an immediate saving of eight-to-ten hours every fortnight. On that alone, it’s a saving that represents a near full return on investment in barely 12 months.

So where does that saving come from? Firstly, as invoices are received – either electronically or in hard copy – from suppliers and contractors, they are immediately transferred to the organisation’s Laserfiche system where they are assigned to a particular cost centre. At this point, the customised workflow developed by the Ricoh Business Partner kicks in and an email is automatically sent through to the cost centre’s manager.

The savings realised up to then are through:

- Eliminating the manual distribution of invoices
- Reducing the instances of having to request misplaced invoices from suppliers
- Removing the need to manage a large number of paper-based accounts payable files

Next, it’s the Laserfiche-based approval process that adds even greater efficiency and savings. With the email received, cost centre managers are sent an embedded link to the invoice, which, when clicked, displays the invoice on their screen along with the ability to approve or deny the payment, specify an expense code and add notes for the accounts payable team if required.

Once closed, the approved or denied invoice is sent immediately through to the accounts payable team who then take the appropriate follow-up action. Again, the savings accumulate. This time, through:

- Streamlining the invoice approval process
- Achieving instant transmission of approvals from the cost centre manager to accounts payable
- Fully eliminating instances of invoices lost in transit
- Dramatically reducing the “chasing up of approvals” by accounts payable

“The Ricoh solution has delivered even more in cost and time savings than we initially expected when it comes to the accounts payable workflow,” Cameron states. “For cost centre managers, invoice management has become a simple and straightforward process, and for the accounts payable department, there are now high levels of accuracy, accountability and time efficiency.”

A well-defined audit trail

What then of purchase orders that relate to the invoices? “Quite simply, we have a Laserfiche folder containing invoices and another for purchase orders,” Cameron explains. “When the invoice is filed, it’s matched with any corresponding purchase orders so when the invoice is sent through, the cost centre managers are immediately able to verify its details against those stipulated in the purchase order.”



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A key enabling factor in the matching of invoices to purchase orders are the advanced and highly accurate OCR (Optical Character Recognition) capabilities of the solution. Whether invoices are scanned in at the MFD or received by fax, the solution automatically scans and translates each word on the document, then updates an integrated index database.

“When we need to locate any document, whether it’s an invoice, purchase order or anything else that we’ve filed in the system, it’s a simple case of entering a supplier’s name or any other search criteria into the search field, and it’s there immediately,” Cameron says. “The time this is saving everyone is definitely one of the key reasons the Ricoh solution is being so well accepted and utilised by our organisation.”

An extended application

Having recognised the document and file management benefits of the solution, Cameron was quick to take the lead within Indigo North Health and initiate Laserfiche filing of business correspondence, patient records, and board documents and meeting minutes.

“We’re a relatively small organisation, and even as the CEO I don’t have the luxury of a personal assistant,” Cameron states. “For my correspondence, one of the admin team uses the Ricoh MFD to scan in everything and drop it into my correspondence folder. From there, I’m able to browse through it all, search for any related documents and file it into my own Laserfiche file folders.

“For the admin team, all that’s required is to stack the correspondence into the MFD’s document feeder, press a couple of buttons and that’s it,”

Cameron continues. “In a matter of a minute or so, all my daily correspondence is scanned, filed and available online.”

Understanding the business

It’s well worth noting that while the Ricoh MFD and Laserfiche are the two core elements that have supported achieving those early savings, the equation is significantly more than being simply the sum of the two. It is the tight integration existing between the two technologies, along with the high levels of customisation and integration that enabled the Ricoh Business Partner team to create workflows that have proven to be precise matches for Indigo North Health’s business needs.

“When the project commenced, we had in our mind what we wanted to achieve,” Cameron explains. “But then, there are workflow requirements that are specific to our business and to the industry in which we operate. Bringing our ideas and goals to reality was only achieved through committed work from the Ricoh Business Partner team to understand our business, talk to our administration staff members, thoroughly document the manual processes, and then apply that knowledge to the solution.

“It’s that same commitment and expertise that we fully expect will underpin the growing range of applications we have in mind for the solution. For us, the Ricoh MFDs, Laserfiche, support and expertise are fundamental to our ability to improve efficiencies and deliver even better services to our community.”

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