

User Story : DUNDEE COLLEGE



“The adoption of Compleat Spend Control from Compleat Software is a key strategy in Dundee College’s commitment to meeting the Scottish Executive’s efficiency targets. Improved financial control, significant cost reductions and tight integration with supplier purchasing processes are demonstrating the value of Purchase to Pay systems to public sector organisations throughout Scotland.”

David Hawney, Manager – Finance and systems, Dundee College

Dundee College At Forefront Of National E-procurement Initiative

Since the Scottish Executive presented its Efficient Government initiative towards the end of 2004, public sector organisations across Scotland have been working to meet targets set to reduce waste, bureaucracy and duplication. A key component of that strategy is the adoption of a Purchase to Pay (P2P) solution.

As some organisations have discovered, however, achieving the e-procurement P2P goal is not always straightforward. In 2003/4 a consortium of four further education establishments, including Dundee College, embarked upon a year-long pilot P2P project supported by the Scottish Funding Council. Although this project did not result in the adoption of a software solution at that time, it provided a useful implementation and evaluation framework, and reinforced the view that the concept of web based requisitioning and purchasing offers clear benefits, in particular the ease of access and ease of use via a browser interface.

"Purchase to Pay provides real opportunities to reduce costs, improve efficiency and impose purchasing rules. By reducing paper and using a web based solution, the college has transform the time consuming manual requisition processes that typify complex, multisite organisations," says Hawney.

Financial Control

Dundee College was incorporated in 1993 and is an important part of the local community, delivering a broad range of full and part time courses to students of any age. The college has multiple departments across several sites, creating highly diverse procurement requirements. Hawney explains, "Dundee College's annual budgeted supplier spend is around £6 million. Almost 50% is spent with only 20 suppliers – but we have over 2,000 suppliers in the system to meet the needs of departments as diverse as horticulture and engineering". In common with many educational establishments, the college's primary suppliers are wholesale book and publication providers, stationers and IT organisations. The college also spends an average £1 million per annum on property development/maintenance projects.

At a Glance

COMPANY: DUNDEE COLLEGE

CHALLENGE:

Despite the college's flat authorisation structure and low levels of maverick spend, the cost of purchasing with a manual process is high. Each requisition costs over £25 to process over the complete cycle

SOLUTION:

Combining the implementation of Compleat with the adoption of automatic supplier payment and remittance transmission via BACS completely removes the college's reliance on paper and using email to send pdf invoices to suppliers reduces the college's stationery, print and postage bill.

SPEND CONTROL

Despite the college's flat authorisation structure and low levels of maverick spend, the cost of purchase using the manual process is high. "Each requisition costs, on average, over £25 to process over the complete cycle," he says. "The process is time consuming and individuals are not able to monitor the progress of a requisition through the process without making telephone or e-mail enquiries."

Integrated Solution

Having assessed a number of P2P solutions on the market, Dundee College opted for Compleat Purchase to Pay from Compleat Software. Compleat was installed in less than a month and used in a pilot project by 20 staff, including requisitioners, authorisers and senior management, to assess its potential.

Hawney says, "Compleat met all the key criteria for e-procurement, including excellent integration with the SunSystems financial software used by Dundee College. The product's real differentiator, however, is its ease of use. New users, even non IT literate users, can be up and running within a couple of hours".

Following the successful four week pilot, the college opted to go live with Compleat, quickly completing rolling the solution out to 90 users. Compleat Software and Dundee College worked together to create the appropriate workflows to support specific user requirements.

"Underpinning the success of the Compleat deployment has been the ease of use and rapid user acceptance. Hawney confirms, "The web pages are laid out very well. This provides complete visibility of an order throughout the process – from initial requisition to final invoice matching. Furthermore, it is very easy for an administrator to amend workflows to meet the bespoke requirements of a department."

Ease of Use

Supplier lists (provided directly out of the accounting system in real time), are provided in drop down menus and can be restricted at an individual level to impose further purchasing control. Requisitioners can also use the system to add attachments to an order, or make comments for internal or external use. And, once a requisition has become an order, the requisitioner can view or print a pdf copy and automatically email it to the supplier.

The tight integration between Compleat and SunSystems has also improved real time financial information. "As soon as an order is authorised it is automatically entered into the commitments ledger within SunAccounts," he says. "Once the goods or service has been delivered, and the order matched to an invoice, the supplier entry is posted". All commitment and accrual accounting is fully automated for current and future periods.

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SPEND CONTROL

Dundee College plans to use the inherent budget checking facility within Compleat to further improve budgetary control. Any requisition that could result in overspend prompts a warning to the requisitioner, the budget holder and the central finance team. The requisition will also automatically be referred to a senior manager, even if it is within standard value guidelines. "Budgetary control is essential within further education. Over the next 12 months, Dundee College will further refine the use of Compleat to support the government's drive towards efficiency," says Hawney.

Financial Return

Indeed, the College is gaining immediate financial benefits from the adoption of e-procurement. Combining the implementation of Compleat with the adoption of automatic supplier payment and remittance transmission via BACS will completely remove the college's reliance on paper. Using email to send pdf invoices to suppliers will dramatically reduce the college's stationery, print and postage bill. It will also reduce the administrative requirement within finance.

The time required for the requisition process has been dramatically reduced. The anticipated cost per transaction has more than halved. Further benefits will be attained by improving processes with suppliers. This includes working with a higher education buying consortium to exploit economies of scale and forging tighter links with the college's primary suppliers.

Compleat has met and exceeded our expectations. The finance department and the users now question how we managed before Compleat was implemented – which is probably the best recommendation I can make.

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