Imagine Service

The Imagine service provides business analysis, design, configuration, hosting and support for a document imaging system that enables customers to reduce their paper-based workflows and to replace them with cost-saving custom electronic workflows. The service uses the ImageNow product.

Challenge

Disbursements was often unable to find invoices in a timely manner; some were lost or never received. Hard copies of invoices had a tortuous path through the system, going from mailroom to Disbursements, then to individual departments for approval, and back to Disbursements for payment. In some cases, payment was overdue but departments had not received the invoice paperwork needed for approval.

As a result, invoice processing took an average of two weeks with some taking several months. Vendors were displeased because they were frequently paid late. Given these challenges, departments were driven to create their own duplicative shadow systems.

Solution

Imagine implemented an elegant two-part solution:

1. an invoice intake and management system
2. a way to integrate that system with the existing campus voucher system

First, invoices are added to the ImageNow system upon receipt, creating a reliable workflow so that invoices are no longer lost and can be easily identified and tracked. Hard-copy invoices are scanned immediately upon receipt. Vendors can also send invoices directly to the ImageNow system via email and fax. Capture profiles automatically direct the invoices for appropriate processing.

ImageNow assigns invoices to processors as a group via document management queues. This avoids the delays that occurred when invoices were assigned to individual processors who were unavailable, and results in invoices being handled in the order received. ImageNow also has separate queues to deal with invoices that need specialized handling.

The second part of the solution was to integrate the Accounts Payable invoice management system with the Berkeley Financial System (BFS) by adding a simple link within BFS that brings up the associated documentation within ImageNow.

With this solution, the campus has been able to provide more timely payments to vendors, saving UC money in late fees as well as staff time resources.