

# Case Study

## Housing Association: Derwent Living



Based in Derby, Derwent Living is a not-for-profit organisation providing affordable living to suit a range of lifestyles. Working with customers to build desirable, thriving communities. Derwent Living manages more than 11,000 properties in the Midlands, South Yorkshire and the South East.


Derwent Living's property portfolio includes affordable housing for those on lower incomes, student accommodation, specialist housing including accommodation for NHS staff, special need schemes for frail or elderly people and vulnerable women with children.

Derwent Living also provides retirement homes for the over 55s and easy living homes to rent or buy including "Try before you buy" schemes, and homes for outright sale, Part-buy, part-rent.

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Richard Cookson, Head of Accounting and ICT  
Derwent Living



Integrates with: 

### The Problem

Derwent Living focuses on the provision of excellent customer service and value for money. However, with off-site storage nearing its maximum and the manual processes generating greater workloads for staff, it was recognised that a change in processes was inevitable to control costs.

Derwent Living's manual paper based processing was open to error with many invoices being lost or left on employee's desks. The invoice approval process could often be long-winded with employees dispersed across different sites. In some cases, invoice approval could take days, especially where the original was not to hand. Worryingly, the current process could be open to fraud as invoices are manually authorised. This relies on the finance department checking hundreds of signatures, leaving room for error.

In January 2009, Derwent Living began a key systems review and a document management system requirement was identified. The benefits of instantly accessible and securely stored documents, and using workflows to automate an increasing number of manual processes, were clearly identified.

### The Solution

Company director Paul Wisher was aware of document management and its success for other businesses. After a review of available options, especially workflow capabilities, Derwent Living purchased 120 licences of Invu for Business, Invu Workflow and simple integration technologies to integrate to Qlx.

A series of initial consultations was undertaken, including demonstrations to a cross-section of the business. An initial priority was agreed around accelerating invoice approval and leading to a staged implementation schedule with the immediate introduction of Invu Workflow. During the implementation period the Business Systems Review Team began an awareness and end-user buy-in campaign to encourage swift adoption of the new software.

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## The Benefits

### Cost & Time Reductions

Invoice processing has been streamlined by integrating Invu Document Management and the Housing Management system QLx. QLx references are used on Invu-created invoices and these can then be distributed via email to external parties or passed to internal contacts using Invu's intrays.

The most noticeable impact has been a significant reduction in time spent looking for "lost" invoices. Previously, the five members of the Finance Department spent at least 30 minutes a day locating invoices for approval – an annual time loss of 12½ weeks looking for invoices; a cost of c.£26000.

### Improved Customer Service

Following the implementation of Invu for Business, Derwent Living's customer service has been enhanced with employee timesheets, release notes, invoices and training guides stored within Invu. Richard Cookson explained "We have a better relationship with our suppliers. The new streamlined process is extremely efficient, invoices are paid quicker and we no longer lose any!"

### Improved Communications

Richard believes his employees are now better informed with Invu Document Management. "Our Finance Department knows exactly where an invoice is in the chain and it's now impossible for anyone to authorise an invoice above their limit. Previously, the Finance department needed to check manual signatures. This saves time and we can be sure during the audit process there will be no finance regulation breaches. "Training videos are now accessible for all employees to watch at any time on Invu's Resource Portal. This also contains links to all our other major systems and staff can click on a link and access any of them. Invu has become a hub for the way we work."

### Security of Information

Security of information is paramount for Derwent. Invu for Business eliminates the anxiety of data loss. Richard continued. "We are no longer apprehensive of losing our organisation's intelligence. Even in the event of a disaster we know our documents are protected."

## The Future

Derwent Living plan to increase licence numbers to 250 within the year. There are also plans to build in workflows for expenses forms, overtime forms, new starter forms, purchase order processing and house build completion paperwork e.g. energy efficiency rating documents, gas safety certificates etc. Richard summarised "By incorporating these workflows, all documents will be available instantly via Invu Document Management. No more searching through thousands of documents on the network drives. It will also allow off-site employees to access everything remotely, saving time and travelling expenses. This has certainly been a huge step forward for us - it's hard to imagine how we dealt with a paper system."

### About Invu

Invu develops software that incorporates document management, content management, workflow, automation and collaboration specialising in solutions for the mid-market and smaller businesses.

Also known as the paperless office, Invu typically gives a return on investment in under six months, allowing companies to see efficiency savings in terms of both money and time.

Invu's Open Search integration allows SharePoint users to fully utilise the benefits of WSS or MOSS whilst retaining the functions of specialist document and content management.

Invu's solutions enable automated scan, capture and management, processing and output transformation.

Invu also integrates with all major accounting systems including Sage and IRIS, as well as ERP and CRM systems.