

## English Heritage



*English Heritage is classed as a “Non Departmental Public Body” sponsored by the Department for Culture, Media and Sport (DCMS). English Heritage exists to protect and promote England’s historic environment and ensure that its past is researched and understood. English Heritage has over 400 properties in its care and currently spends approximately £65million annually on a wide range of goods, services and works.*

<b>Customer</b> English Heritage	<b>Solutions</b> Attachment Manager	General Ledger	Workflow
<b>Market Sector</b> Public Sector	Budgeting	Invoice Approval	
<b>Country</b> United Kingdom	Cash Management	Purchase to Pay (P2P)	
	eSeries	Purchase Ledger	
	Fixed Assets	Purchase Ordering	
		Sales Ledger	

### Introduction

The Financial Information System (FIS) is English Heritage’s main tool for financial management. The main objective of the FIS upgrade was to enable the provision of information directly to budget managers and finance teams in simple formats, whilst saving time through streamlined processes.

The upgrade fully supported the modernisation agenda within the organisation.

English Heritage signed a four-year contract with Capita IB Solutions for the supply and support of the Integra suite of financial management, e-business and e-procurement solutions.

The contract included deliverables to enable implementation of streamlined business processes. The application suite supports 125 concurrent users within the English Heritage headquarters and regional offices.

### The Solution

Integra e-Series

This suite of “self-service” applications promotes devolvement of processes such as ordering, purchase and sales ledger enquiries. The application is provided across the web and is utilised to re-engineer business processes in respect of the purchase-to-pay cycle in particular.

## Integra Attachment Manager

Capita IB Solutions implemented an integrated document imaging solution to meet the specific need of the organisation. One of the main objectives of English Heritage was to replace the traditional paper chase for purchase ledger invoices.

### Workflow and Invoice Approval

To support the use of Attachment Manager, English Heritage introduced Integra Workflow and Invoice Approval. This provides increased efficiencies in business processes throughout the finance and buying community.

### Quick Address Software

Links to a third-party application to enable address and postcode validation were also included as part of the overall solution. This speeds up the process of creating new supplier and customer records, as well as providing increased accuracy of standing data.

## The Project

**Phase 1** - The first phase in the process was to upgrade to the very latest versions of Integra on an Oracle platform. In parallel with this exercise, a detailed review of existing working practices and processes took place within the organisation.

It was important to understand how things were being done, and why, before subsequent phases could be progressed.

**Phase 2** - The project was to provide a modern Finance System to improve business processes. The new Windows-based system presented a modern, friendly interface to users by employing up-to-date technologies.

In turn, this has given the organisation the opportunity to contribute to the modernisation agenda by re-engineering processes and improving the financial information available to managers. The Integra system allows English Heritage to work towards meeting nationally agreed e-Government targets and requirements.

**Phase 3** - The third phase of the project was to introduce efficiencies into the finance and buying functions, and to roll out the system to managers and buyers.

The use of the system technologies allows English Heritage to re-engineer processes and drive the business forward. This phase also included the first usage of web based finance software by the organisation and the implementation of English Heritage's first ever Management Information System.

## The Savings

English Heritage is scanning and electronically storing all its purchase ledger invoices. As well as providing an excellent information source, this allows invoices to be sent for approval electronically.

This process, known as Invoice Approval, has been the subject of a pilot with the Policy and Communication Group. This will be used throughout the organisation, with the objective of full deployment.

In a change to existing policy, buyers can now choose whether Purchase Orders under £10,000 need independent Goods Receipting. This is likely to eradicate 85% of data entry in this area and result in significant improvements in process efficiency.

During the next year, English Heritage plans to be making web-based payments and implementing its first electronic trading for orders and remittances.

Use of Visa Purchasing Cards has increased to nearly 600, with over 37% of transactions now made through the cards. Inputs of orders and payments are being consolidated into centres of excellence to improve efficiency both in real terms and as measured against industry benchmarks.



These changes are bringing efficiency and ease-of-use improvements to the Operational Managers and Finance Teams; benefits in reducing administrative time have already been realised and more will follow. Information and processes are becoming modern and free of all but essential bureaucracy.

## The Future

The latest version of Integra is in use in all Finance Departments and Regions. Forty-four brand new users have been trained to use the system for information and reconciliation purposes.

One hundred and twenty-five new users in total will be trained, all of whom are non-finance corporate managers. They will be able to get financial information in printed and Excel formats, run supplier enquiries and look at invoices online.

Key buyers are permitted to raise their own orders as a result of a pilot with Swindon IT staff and IT project managers. Once the pilot areas are completed, the functionality will be rolled out to non-IT project managers and all major buyers.

This important reform will eliminate the need to handle all orders twice once by the buyer and once by an administrative person and will thus allow buyers to place orders quickly and efficiently using e-series software.

English Heritage has successfully implemented new operating statements using Crystal Reports. They will implement a modern database system consisting of a multi-dimensional database and reporting system.

This system will be used for more flexible and timely budgeting and forecasting by managers and finance teams. It will also be used to alert managers to problems in spending or trends in data, such as visitor numbers or staffing.

The first phase, will see Finance and HR data combined for the first time along with key performance indicators. Ultimately English Heritage will have available a true, corporate management information system combining multiple databases from multiple applications.

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