

MANUAL PROCESSES TO STREAMLINED DIGITIZATION

LEARN HOW WITHUM DIGITALIZED KE`AKI TECHNOLOGIES' INVOICE PROCESS.

EXECUTIVE SUMMARY

Ke`aki Technologies contacted Withum for help with digitalizing their accounts payable (AP) invoice approval process and legacy invoices. Current processes were inefficient and also at risk of losing data. We worked with GSCAN, an Artificial Intelligence (AI)-powered and cloud-based document scanning and capturing solution that integrates with SharePoint Online, to improve the process and go paperless.

THE CLIENT

Ke`aki Technologies is a Native Hawaiian Organization-Owned (NHO) Small Business (SB) non-personal services provider. They perform a range of contractor and delivery solutions for their federal clients' mission support requirements. Timely invoice processing and payment is crucial to ensure compliance with customers' federal contracts.

THE CHALLENGE

Ke`aki wanted to automate their existing AP invoice approval process to create a more efficient way of receiving and processing invoices. Their AP team needed a technology solution that could help define their current paper-based accounts payable process and standardize the way they handled invoices. Things were so disconnected that it was a common practice for paper invoices to be walked around the office to receive handwritten signatures and codes. This process often led to lost invoices, late payments or missed payments altogether.

Ke`aki was also desperate to digitize its legacy invoices, which were housed in filing cabinets. Headquartered in Hawaii, they are susceptible to damage from natural disasters, and not having any electronic versions of their accounts payable financials put them at risk for potential data loss.



CASE BRIEF

CLIENT: Ke`aki Technologies, a non-personal services provider

STRENGTH: Management hungry to adopt new technology

CHALLENGE: Inefficient system for approving invoices and filing legacy invoices

OPPORTUNITY: Create a digital system that improves efficiency and creates a paperless environment





Withum subsequently designed the platform to be able to automatically process invoices for approval, once in SharePoint, using the Nintex Workflow for Office 365. Now, when the Ke`aki AP team processes any invoice for approval, Nintex starts the workflow approval process.

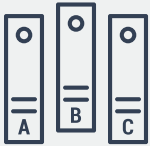
THE APPROACH AND SOLUTION



Withum worked with Ke`aki to define and document their AP procedures. Withum's Digital Team identified gaps in their invoice process and re-engineered it to be more efficient. Withum also defined roles for all parties involved in the process so they could be active in the receipt, processing and approval of invoices. Documenting the AP procedure included:

- Defining the appropriate metadata needed to process and approve an invoice.
- Defining who received an invoice, based on invoice type.
- Defining who could approve an invoice based on the invoice amount.
- Defining who could supply final invoice approval.
- Defining what would happen if someone rejected an invoice.

THE UNDERLYING TECHNOLOGY



Withum partnered with GSCAN, an AI-powered and cloud-based document scanning and capture solution that integrates with SharePoint Online. GSCAN provided the ability for Ke`aki to:

- Receive and scan paper invoices.
- Collect invoices via email to an accounts payable email address.

With the optical character recognition (OCR) capabilities of GSCAN coupled with SharePoint Online, invoice details can now be read directly from the scanned receipt. Once the invoice is in GSCAN, Ke`aki can index and tag their invoices with important metadata that is pushed directly into their accounts payable SharePoint site, and straight into the document library. Withum subsequently designed the platform to be able to automatically process invoices for approval, once in SharePoint, using the Nintex Workflow for Office 365. Now, when the Ke`aki AP team processes any invoice for approval, Nintex starts the workflow approval process. All billable, project-based invoices route to the appropriate project manager for processing and validation. All overhead and corporate invoices route to the department director for acceptance, and if necessary, may route to the Chief Financial Officer or Chief Executive Officer, based on the amount, for additional review.



There are no longer any single points of failure from when an invoice is received, coded or approved. Since everything is digitized, in the event of a hurricane or other natural disaster, Ke`aki will still be able to access the AP financial data.

THE RESULTS

The Ke`aki Technologies' AP department is now paperless. All of its AP invoices are digitized and the new automated invoice approval process allows for transparency across all parties and departments involved. There are no longer any single points of failure from when an invoice is received, coded or approved. Since everything is digitized, in the event of a hurricane or other natural disaster, Ke`aki will still be able to access the AP financial data.

Since the success of this project was so impactful, Ke`aki engaged with Withum to automate additional departmental processes to become a completely paperless organization.