



INVU:

Cornwallis Academy

A customisable solution

A review of the market led Cornwallis Academy to choose Invu Document Management. Key areas with a high paper churn were identified for initial implementation - HR, payroll, student records and Finance departments.

"I envisage we will adopt new processes continually as we continue to use Invu more and more."

Cornwallis Academy

Document Management | Workflow



Cornwallis Academy operates two academies located within Maidstone borough, catering for 2,680 students aged 11-18.

The Challenge

Director of New Technologies, Charles Ealham, was keen to rationalise how information was held, accessed and used throughout the Trust. High on the list to be tackled was an alternative to distributed physical filing, storing hundreds of student records, HR, Finance, and Payroll documents. Records for c.2,500 students, both past and present, and 400 employees were slow to access, vulnerable to loss and disaster and taking up valuable space.

Over 80% of the school's documents are paper-based. There are 2,500 students, each with a file with an extra 500 Additional Education Needs (AEN) record files, and HR files for 400 staff. All student records need to be retained for between 6-10 years for compliance purposes. Files were stored all across the schools and typical issues of misfiling and loss occurred.

Charles outlined the main challenges at the school. *"We aimed to remove the 60 filing cabinets spread throughout the two sites. Storage space at the new site was limited to reduce new build costs so going paperless was an obvious choice, especially in departments where document levels were acute."*

"We brought a number of new technologies online around the same period and Invu was refreshingly straightforward – 9 out of 10."

Charles Ealham,
Director of New Technologies

Solution Summary

- ▶ Reduced costs
- ▶ Quick access to information
- ▶ Enhanced administration processes
- ▶ Quick adoption

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Getting Started

50 licences of Invu Document Management and Workflow were implemented, with HR, payroll, student records and Finance departments identified as the main areas for improvement. No new equipment was required as existing MFDs were capable of scanning all documents directly to Invu.

The HR department was the first off the blocks. It implemented Invu and began by scanning in all records from payslips, P45s, P60s, travel expenses, staff contracts, staff sickness, to staff ID's. Each document scanned into Invu can be indexed according to which academy it relates to or whether it needs to sit within both such as a personnel file.

Different departments can customise the indexing fields relevant to its own needs, for instance the Finance department uses information from its own systems to provide a look-up of all suppliers. This speeds up processing whilst preventing duplicates and errors. The Student records department have fixed list for all intake years with students listed in each year.

"We liked the look of Invu immediately - the layout and menus looked good and easy to use. Being able to customise the solution meant it fitted with our needs."

Efficiency Benefits

Since implementing Invu, the Future Schools Trust has fundamentally improved the efficiency of its administrative processes, achieving significant savings in time and cost throughout all departments.

An analysis of pre-existing processes showed that manual searching, retrieving, photocopying and filing a paper document took approximately six minutes a time. Where files were mislaid or lost this would rise significantly. Invu Document Management has reduced this to under a minute per document. *"With the Invu solution the speed at which we can file and retrieve documents is far quicker. This all adds up to a considerable saving in efficiency - we have reduced our manual admin process time by 19 weeks per year - a huge benefit to the Trust,"* said Charles. This improves the quality of service throughout the organisation and beyond whilst also allowing staff to focus on delivering on the school's vision.

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Improved Administration Processes

The student records department produces the highest volumes of paper with the production of student reports every six weeks. These are printed and sent via the students to all parents, whilst a file copy was also created previously. Now it's a single print only for parents with a central copy filed in Invu. For the HR department any emails or letters that are received electronically can now be filed in Invu rather than photocopying and manually filing. Charles is optimistic about further efficiency benefits using Invu. *"I envisage we will adopt new processes continually as we continue to use Invu more and more."*

Ease of Use

Charles is enthusiastic about Invu's ease of use, the straightforwardness of the deployment and the level of in-house support needed: *"Invu is very simple to use. You can customise it yourself - you don't have to be an expert to use it. We brought a number of new technologies on-line around the same period and Invu was refreshingly straightforward - I would give it 9 out of 10."*

About Invu:

Invu develops both Electronic Document Management (eDM) and Accounts Payable (AP) software solutions for a range of sectors, particularly those which are highly document dependent or where compliance is important. Invu's comprehensive product suite encompasses document and content management, workflow, document automation and collaboration solutions.