

**INDUSTRY**

Natural gas transportation and storage services

**LOCATION**

Central and Eastern US

# 200% efficiency improvement in the invoice lifecycle

Insights From

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# ABOUT THE CLIENT

The Client is a limited partnership operating in the midstream portion of the natural gas and natural gas liquids industry, providing transportation and storage services for its customers. They serve the central and mideastern portions of the United States.

## SUCCESS SNAPSHOT



**+200%**  
Invoice lifecycle  
efficiency



**1-Click**  
GL coding



**Seamless**  
Switching between PO  
and Non PO Invoices

## THE CHALLENGE: AP OPTIMIZATION

oAppsNET teamed up with The Client, to bring about a substantial change in the accounts payable process by enhancing their current way of working. Together, we focused on the people and then we reviewed all the processes and finally applied new technologies to improve the overall process.

The objectives were to improve the end user experience and to allow those Users to focus more time and effort on tasks that drive down costs. Other objectives were to maximize vendor discounts, eliminate duplicate payments, process more invoices without increasing head count and finally allow the AP Team members to participate in strategic projects to maximize The Client's profits.

Duration: 4 Months

Users: 100+



# THE SOLUTION: PROCESS IMPROVEMENTS

The Client took advantage of the oAppsNET predefined process flows and customizable user screens to allow the entire company to collaborate with AP. AP Users can **seamlessly switch between PO and Non PO Invoices** using the same universal screens.

Additionally, the Non PO invoice process offers additional tools such as personalized GL allocation sets and **one-click GL coding**.

**The oAppsNET coding form allows the coder to enter or copy and paste coding directly into the form, rather than a sticky note**, and reduces the amount of effort and time needed to complete the invoice once it is returned to the AP portal queue.

## Improved tracking and monitoring of the payables processes

**The AP Dashboard** allows AP team members to monitor tasks in WebCenter Capture, WebCenter WFR, the AP Portal and the interface table between the portal and EBS on the same page. In addition, EBS holds are shown on the dashboard. Prior to the AP Portal, AP users would have to log into each application for task counts and task details in that application.

**AP Metrics** are now available on a dashboard as well. The metrics included are Discounts at Risk, Past-Due Invoices, a 12-month Invoice Trend line graph, and two bar graphs showing Invoice Count and Invoice Amount for the last 12 months. An AP user with proper security can click on the graphics of these two dashboards to view the data behind the chart. The data can be downloaded plus the user can create charts, group the data or create pivot tables within the portal.

We **identified data elements** that could be completed by both AP team and AP customers within the new coding form and this change **streamlined the review** once the invoice arrived in Oracle in EBS. We also acknowledged that some steps in the process needed to be refined after the application was released to the AP customers.

“ Several steps in the invoice process have been improved or automated to allow AP Accounting Assistants to concentrate on value-added tasks which leads to invoices being processed more efficiently.

The portal also provides visibility of in-flight and completed invoice tasks for both AP team and AP customers. In addition, the portal has metrics and reports that allow AP team members to track and monitor the progress of invoice task processing.

– AP Manager

# SUCCESSFUL OUTCOMES

## STRATEGIC TECHNOLOGICAL ENHANCEMENTS WERE IMPLEMENTED TO IMPROVE THE AP PROCESS

### People

We listened to The Client's AP Team Members' pain points and then we architected new business processes with or without technology to **reduce overall AP processing costs** and to **maximize supplier discounts**.

### Process

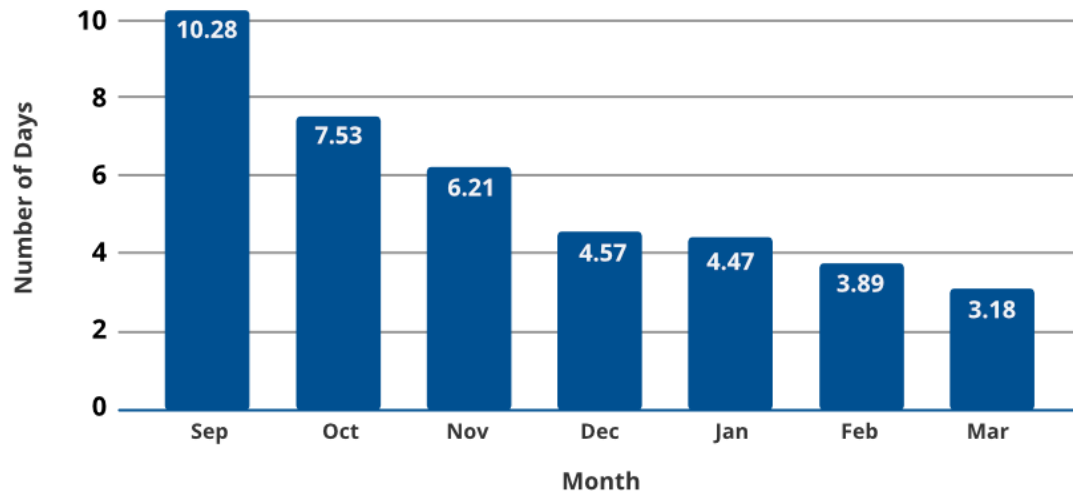
In some cases the applied technology was negatively impacting process. We **re-architected the process flows** without assuming any technology and then only applied technology when it improved the process versus forcing a technology when it was not required.

### Technology

- *Simplified AP Process Flow*
- *Inter-departmental Collaboration*
- *Advanced Invoice Routing*
- *Personalized GL Coding Templates*
- *Enhanced Duplicate Invoice Checking*
- *Improved Invoice Visibility*
- *Identified Issues Before EBS*
- *Provided Self-Service Pages To Relieve AP of Common Requests*

# SOLUTION

## Scan Date to Validation Date



*The above graph shows the average number of days between the date an invoice is scanned into WebCenter Capture and the date it is validated by an AP Accountant.*

### Activities that occurred during that time period include:

- Scanning or importing the invoice image into WebCenter
- Scraping data from the image by the OCR tool
- Verifying the scraped data (Between 50% and 60% of invoices will not require data verification because the OCR tool has 100% confidence the data was scraped correctly.)
- Assigning invoice tasks for coding
- Reviewing and correcting coding
- Exporting the invoice tasks from the AP Portal into EBS
- Attaching the invoice image and initiating the validation workflow

As you can see, the average number of days has been on a downward trend since the AP Portal and new coding form was launched in October 2020.

The addition of the AP Portal, simplified process flows, new coding form, and revisions to WebCenter and Oracle EBS have contributed to the improving metric shown above.

# ABOUT OAPPSNET

The oAppsNET Group is a US-based company specializing in the digital transformation of every facet of your organization. As an Oracle-certified partner with over 25 years of experience, we can ensure that your business' transition to a DevOps platform costs less, requires less time, and provides you with the efficiencies that will drive your company to the next level.

## Mission & Vision

Our proven and comprehensive approach to projects involves a deep dive into existing business practices to provide you with not only the most optimal solution but also the one that leverages your organization's existing strengths. We pride ourselves on ensuring that every project is successful through in-depth digital training tailored specifically for your company.



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## PEOPLE

We base all our automation implementations around the people who will be affected by them and who will be direct users by being empathetic throughout the entire process.

## PROCESS

Your team and resources will be focused on the processes that are driven by specific data gathered during all analytical stages of implementation and execution.

## TECHNOLOGY

The foundation and key components of a well-implemented ERP solution are only as valuable as the technology it revolves around.