



## Case study



### The Client:

Bath Spa University offers undergraduate and postgraduate degrees within a wide range of programmes. The University places particular emphasis on high quality teaching and providing an excellent student experience. In each of their schools of study there are programmes with outstanding results in sector-wide quality assurance processes. With around 6,000 students the University is small enough for students to benefit from a supportive and friendly study environment but large enough to provide excellent facilities and resources.

### The Challenge:

The University had many paper forms and processes, which had been evolving for many years. Initial plans to convert them all to electronic eForms proved problematic so a more focused approach was required.

### The Solution:

LiquidOffice was selected to facilitate the conversion from paper to electronic forms as it provided many resource-saving benefits, such as speed-of-light form delivery and the validation of entered data at source, removing time consuming administration of correcting poorly completed forms. It is important that users and managers have complete visibility in to **their forms' location** within a process and that form authorisations are fully auditable. LiquidOffice also fully integrates with existing databases, enabling flexible onward processing of form data.

### The Processes:

#### PTHP Lecturers Contracts and Claims

The first process implemented at Bath Spa University was for processing Part Time Hourly Paid (PTHP) Lecturer Contracts and Claims. It allows for the creation, authorisation and delivery of lecturer contracts with electronic submission and authorisation of claims against those contracts.

When a new contract is initiated, the process captures and validates all the information required to pay an individual including their address, national insurance details and bank account information. An appropriate contract is then issued, with start and end dates, correct rate of pay and the number of hours to be provided. Also, the initial contract form identifies who should approve any claims made against the contract. This

**approach reduces the budget holder's time by flexibly defining which person is best suited for the approval role.** After the process is initiated and subsequently approved, a PDF of the contract is automatically sent to the lecturer either by eMail, if available, or routed back to the initiator for postal delivery.

A second stage then allows the lecturer to select a contract (they may be working several simultaneously) and enter details of the work carried out. By using automated rules, the need for manual checks by HR, to ensure the claim dates are within contract dates and that the total hours claimed is not exceeded, is removed. The claim is then routed to the appropriate approver while, at all stages, the LiquidOffice system provides the claimant visibility of how their claim is progressing – if it is held up, they can check and chase the approver themselves. This process removes the need for data re-keying, which was a major source of error, and automatically exports data directly in to the payroll system.

**“The time saved processing contracts alone is massive; it has reduced from several days to minutes. The process has been so successful we have applied it to the Casual Worker Payments in exactly the same way”**

Chris Stedham, Business Intelligence Systems Manager at Bath Spa University

#### Staff Expense Claim Forms

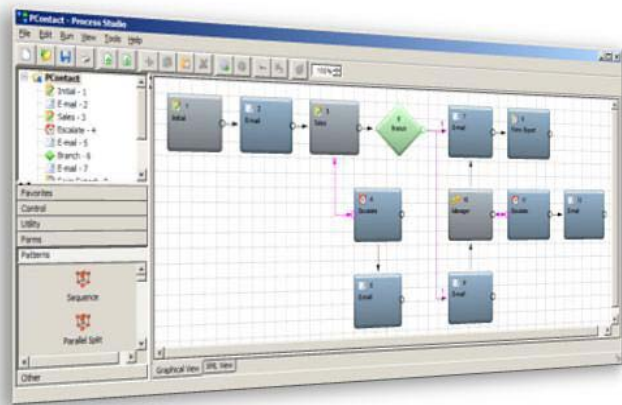
The old paper expense claim forms have now been made available on-line, with the help of LiquidOffice's strengths. Only valid finance codes are allowed on the form – this is facilitated by the use of drop down lists, automatically tailored to the claimant's department. This eliminates claim rejections by the finance system and claims being sent back to the claimant due to coding errors or incorrect data. Once approved by the line manager, the claims are exported to the existing finance system for payment.

**“Claims used to take at least a month to get paid into an employee's account but by using LiquidOffice we have enabled claims to be processed for payment by the following Friday”**

Chris Stedham, Business Intelligence Systems Manager at Bath Spa University

### Future Expansion for LiquidOffice:

In the next phase of development, the University aims to implement better process control using the LiquidOffice Process Studio and focus on streamlining further HR processes, such as recording of sickness, absence and appraisals. They are also planning to make further improvements to finance functions, by mapping out and improving processes such as sundry sales invoices, in LiquidOffice.



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