

# SharePoint Customer Solution Case Study



## Hertz Australia Drives Accounting Efficiency with New Data Capture System

**Company:** The Hertz Corporation

**Size:** 41,000 employees

**Website:**

<https://www.hertz.com/rentacar/reservation/>

**Country or Region:** Australia

**Industry:** Professional Services

**Partner:**

Kofax

Data Capture Experts

**Partner Websites:**

<http://www.kofax.com>

<http://www.datacaptureexperts.com.au>

**Company Profile:** Hertz is the largest worldwide airport general use car rental brand, operating from more than 8,800 locations in 150 countries. In Australia, Hertz has more than 230 locations including all major airports, cities and a large number of regional towns. The fleet includes a range of well-maintained vehicles encompassing economy, intermediate and full-size cars as well as the Prestige, Fun, Adrenaline and Green Collections.

**Software and Services**

Microsoft® SharePoint® 2010

Kofax Capture™ and Kofax

Transformation Modules™

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*"We've reduced the time we spend manually validating new car data from a full-time job to an average of only three hours a day."*

Anne Kavanagh, Fleet Accounting Manager, Hertz Australia

Despite having Oracle Financials in place, Hertz Australia was overrun by paper, having to process 5,000 invoices a month. Microsoft partners, Kofax and Data Capture Experts implemented a Business-Critical SharePoint solution with Kofax Capture and Kofax Transformation Modules where information from paper is delivered into Hertz Australia's core business applications and Oracle Financials data is surfaced through SharePoint. The company saved \$70,000 in its first 10 months of live operation by reducing the time and labor to process accounting documents and by improving cross-departmental collaboration.

### Business Needs

Hertz Australia is headquartered in Melbourne, Victoria, Australia, with more than 230 locations across all the country's states and territories. Its accounting department manages the financial processes for many Hertz locations and franchises across Australia and New Zealand.

The accounts payable and fleet accounting departments previously used manual systems to process hundreds of thousands

of accounting-related documents – such as invoices and new vehicle purchase paperwork – annually. By early 2012, both departments were overrun by paper. Accounts payable in particular was running out of space to store the paperwork required to process 5,000 invoices a month.

"Although we used Oracle Financials, we completed many invoicing processes manually," said Anne Kavanagh, Fleet Accounting Manager, Hertz Australia.

"Documents moved from desk to desk as



we checked and approved them. We then filed the final invoices in one of our many cabinets, boxes or trays.”

The fleet accounting department faced similar issues. The department manages the onboarding process for new Hertz vehicles. Staff members were manually processing the invoice, registration documents and onboarding cost information for each new vehicle. They then scanned and emailed the batches of documents to the Hertz Corporation Shared Services Centre located in Oklahoma, USA. Hertz Australia buys thousands of vehicles a year, which meant the department was printing around 50,000 documents a year.

“We were also entering the same information into spreadsheets and then manually filing the paperwork,” said Anne. “The whole process was extremely time consuming and prone to human error.”

## Solution

In early 2012, Hertz Australia sought a solution that would enable both departments to automatically capture and store the huge volumes of accounting information they had to process. They wanted to minimise time-consuming manual processes, improve staff productivity, cut paper and printing costs and reduce the risk of human error. They also wanted to improve the visibility of the accounting information, so they could more easily share it with suppliers and other Hertz departments in Australia and the U.S.

After evaluating data capture and storage solutions from a number of vendors, including Lanier, Scan Doc and Kofax, Hertz chose to implement Kofax Capture™ and Kofax Transformation Modules™. These Business-Critical SharePoint solutions help connect SharePoint with Line-of-Business (LOB) systems, such as Oracle Financials to improve company-wide productivity.

Kofax Capture scans documents and forms to create digital images, extracting index data for retrieval purposes and delivering the images and associated data to a variety of repositories and applications. Kofax Transformation Modules adds document classification, page separation and data extraction and validation capabilities to complete the process.

“Kofax was the most cost-effective solution and the only vendor that we felt offered a full solution that met our requirements,” said Anne. This powerful, integrated solution automatically captures information from paper and electronic documents, transforms it into structured, accurate and actionable data and delivers it into Hertz Australia’s core business applications and workflows.

The accounts payable department was also looking for a robust data storage solution that would integrate with its Oracle Financials system. Data Capture Experts, the certified Kofax Partner working with Hertz on the project, recommended that they implement Microsoft SharePoint. Kofax Capture and Kofax Transformation Modules now deliver data straight into Microsoft SharePoint, which uses the information to populate column data and trigger business rules and workflows. Microsoft SharePoint also sends accounts payable invoice information automatically through to Oracle Financials. While previously, only employees trained on Oracle Financials could access accounts payable data, now any authorised employee has visibility through the user-friendly SharePoint interface. This has improved cross-departmental collaboration and decision-making.

Hertz Australia went live with the new data capture and management system in late 2012. In August 2013, the company completed phase two of the project, which enhanced the integration between the Kofax and Oracle systems.

## Benefits

The Business-Critical SharePoint solution with Kofax Capture and Kofax Transformational Modules has provided Hertz Australia with a robust, highly available data capture and storage system that can manage the full lifecycle of its accounts payable and fleet accounting documents. Both departments have seen considerable benefits from the new system.

### Operating costs cut by around \$30,000 per year

Incoming invoicing, onboarding and registration information for new vehicles now flows straight into the Kofax system for data capture and checking, then moves into Microsoft SharePoint, which automatically batches the documents. Fleet accounting staff can now easily export relevant information into Excel, rather than filling in spreadsheets manually.

“We’ve reduced the time we spend manually validating new car data from a full-time job to an average of only three hours a day,” said Anne. “This has freed up two members of staff to complete more value adding tasks in other departments, while significantly reducing the risk of human error. In the past, up to 20% of our documents had to be redone. Now, there are very minimal mistakes.”

The automated, online processes have also enabled the department to dramatically reduce the amount of paper it uses. Combined with the reduced headcount, this has cut the department’s operating costs by around \$30,000 per year.

“The whole department is more efficient, which has increased staff productivity and morale, and improved our relationship with other offices in Australia and in the U.S.,” said Anne.

### **Department saves \$40,000 in its first year**

The accounts payable department has achieved similar benefits. The team has reduced the number of staff required to complete its invoicing processes and the amount of paper it uses, saving \$40,000 in its first year. Accounts payable staff can now more quickly check and approve incoming invoices and corresponding remittance advice. They can also easily share this online information with suppliers and other members of staff. "We now have the capacity to process 800 invoices per day, compared to only 200 per day in the past," said Anne. "We also used to get up to 30 requests for duplicate invoices from other departments a day, which we would have to locate and print. Now that staff can quickly and easily retrieve the information they need from the system."

### **A change in perception**

Kofax and Data Capture Experts have provided ongoing support as the departments become accustomed to the new data capture and management system. "The new system has changed people's perception of both the accounting departments," said Anne. "We have more time to add value to the accounting tasks we complete. People now see us as teams that can get things done!"

***Business-Critical SharePoint (BCSP) is a Microsoft partner program that includes top solution and service providers who focus on LOB integration with SharePoint.***