

## Case Study:

# Bath & North East Somerset Council

**Bath & North East Somerset Council continue to develop their successful use of Agresso and credit Integra with adding value to their projects and ultimate solutions.**

Bath & North East Somerset Council, a unitary authority, was formed from three very different authorities. With a well defined vision of what it needs to achieve to make the region, 'an even better place to live, work and visit', the council embraces change but had been clear from the start that the Agresso implementation must be robust and achieve a smooth transition for the users. This was critical as the phased implementation would ultimately involve over 1100 users across more than 50 different locations.

The first phase of the project was the implementation of the core financials. The Council were working with Agresso themselves to implement the Accounts Receivable, Accounts Payable and General Ledgers as well as Budgeting and Bank Reconciliation. It was at this stage in 2003 that Integra were first asked to join the internal team to complete some general ledger training. As Pauline Jeffery recalls, 'We recognised that the consultant's approach was different, he looked at the requirements from our point of view, quickly understood our needs and using his experience of

other organisations made recommendations as to the best approach for us. Training was a small part of his final role.'

The next phase saw the Council devolve their purchasing by firstly piloting Agresso Purchase Order, including Web Requisitioning, across two council departments. This and the roll-out to other departments over the next two years devolved the complete procurement processing of requisitions, orders and invoices across a diverse range of users. The project achieved the high standards of design, implementation and user training that are essential when distributing a solution across such varied operational and physical environments. This was the case here with users ranging from the finance department to staff in old peoples homes.

Key benefits were identified in the ownership of distributed processes, operational efficiency and savings as well as the availability of timely management information.

*'Integra consultants have proved to be an integral part of our team, sharing our enthusiasm and adding benefits through their professional and practical support.'*

**Pauline Jeffery**

*Project & Systems Development  
Officer*

*Bath & North East Somerset  
Council*

**Integra Associates is an independent consultancy specialising in implementing financial business solutions and is made up of qualified accountants and IT professionals.**

The later project phases have addressed the Council's objective to achieve a better degree of project control over particular areas of their Capital and Revenue Programme as well as a number of departments who provide 'project' based services both internally to the council and externally.

The first solution was for the in-house building and engineering maintenance team who provide services via a helpdesk to both internal and external clients. Next the solution was implemented for Transportation and Highways where larger Capital schemes require accurate and timely project costing. Finally the solution was implemented within the Property Services Department. They manage the capital plans and maintenance and are staffed with architects, surveyors and engineers who subcontract work internally and externally. Previously each department operated independently, often using their own standalone systems and the system has replaced these by a single cost effective solution that provides more timely and accurate management information.

Integra provides all the consultancy services and, by working with both the central finance team and the key staff in the individual departments, an agreed basic project structure and costing approach was adopted. The individual departments were permitted the flexibility to add additional configuration to assist them in running their specific business areas.

The solution includes the capture of project costs, via timesheet entry, purchase ordering/invoicing (for materials, services, and 'works' contracts, including the management of contract changes, via a bespoke variation order module) and purchase cards. For external clients, full project billing has been enabled and in addition the value of work to be transferred to capital and full internal recharging is also processed via the project invoicing functionality.

All grant funding for schemes can now be captured and allocated at the appropriate level of detail.

By using the Project Budgeting facility, the Council can now monitor the project financial performance over the life of the project.

Specific benefits have been achieved in:

- Clear visibility of each project's financial performance
- Improved management knowledge allowing the most appropriate allocation of vital limited resources
- Improved project delivery within budgets avoiding overspends
- Cost savings and maximum return on investments
- The concept of true value for money can now be measured

#### INTEGRA Services:

- Business Analysis
- Consultancy
- Training
- Technical Consultancy

*Integra asked Pauline Jeffery how their consultants had worked within the Council's internal project team and what value they have added.*

#### INTEGRA adds value by its:

- Knowledge of Agresso
- Rapid effectiveness within the team
- Experience of other organisations
- Identifying with the Council & its needs
- Putting the Council's interests first
- Pro-active identification & resolution of additional issues such as performance tuning
- Supporting the team with knowledge & assistance
- Flexible & collaborative support of business reviews with expertise & advice
- Being a catalyst for advancing clients' internal systems management skills

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