HDT Automates Invoice Processing with Military Efficiency

About HDT Global

HDT Global is widely recognized for its industry-leading production of state- of-the-art, fully integrated deployable solutions, including shelters, generators, heaters, air filtration devices, robotics and other engineered technologies, currently used by U.S. and allied military units worldwide, as well as civilian government and commercial customers.

Markets: Two primary markets consisting of Military and Government solutions and Industrial and Commercial solutions.

Technical Landscape

- SAP Solution: ECC 6, Salesforce.com, SolidWorks, EPDM
- CPS Solutions; Winshuttle Studio (Mass Data), Winshuttle Foundation, (Workflow), Process BI, SolutionCARE, SmartMonitor, OCR (Psigen)

Process Challenge

Procurement and payment processing as a Military supplier is important to manage appropriately and within the context of company and government business rules. Auditability and visibility are also critical.

Having to adhere to rigorous governmental rules coupled with a fast paced, private equity ownership environment, the invoicing process was a prime candidate for automation at HDT. Complexities such as PO line item matching, touching invoices that are normal recurring items, and determining reviewers by type of invoice all consume valuable time spent by Accounting personnel. With SAP as the primary system of record, any automation efforts required easy SAP integrations while layering on the benefits of workflow control. HDT wanted to not only automate the process, but streamline AP processes to one location.

"Our process journey commenced with CPS, who completely orchestrated a comprehensive process platform solution including multiple vendors such as Winshuttle, Psigen, and SharePoint, packaging project services and solutions support. Avoiding ad-hoc vendor finger-pointing is critical as CPS manages all aspects of our process improvement paradigm shift."

- Todd Nelson, CIO at HDT

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Clear Process Solutions

Process Solution

CPS and HDT worked together to develop a robust front to back automation solution that introduced OCR technology to the organization to then trigger automatic workflow processing with Winshuttle. The workflow solution was built to leverage business rules to confirm as many "no touch" payable approvals as possible. Those invoices that require review, are the only ones presented to the appropriate party for a decision. Process BI is in place to provide live metrics of all processes and tasks; tracking KPIs of no touch invoices, those going through workflow and highlighting bottlenecks. Key features of the solution include:

- Validation of Vendors against SAP
- PO information is searched within SAP and tied to invoices, including line item detail and comparisons against line item and overall thresholds
- Dynamically ties invoice approvers to invoices based on limits of authority and cost centers
- Interacts with SAP real time for payment tables, discount management etc.
- Facilitates rejections of invoice payments, sharing of comments and allows for resubmission as needed
- Provide workflow participants in Accounts Payables appropriate form views and workflow checkpoints for tax review
- Allow for manual posts to SAP for exceptions based on business rules but automatic payable posting for those invoices that pass the rules and the necessary approvals

Benefits realized with Winshuttle Foundation:
- Faster throughput for processing invoices
- Increased potential for exercising available discounts
- Full visibility to the process with automated emails and messages
- Elimination of manual keying of payables to SAP
- Reduction of errors
- Workflow managed communications with vendors, no manual emails

HDT will continue to innovate through Winshuttle Foundation, resourcing a hybrid staffing model using HDT internal resources combined with the team at CPS.

CPS SolutionCARE will be used as production rollout evolves at HDT, where many other processes are projected for automation. CPS Process BI is also a fixture at HDT, used to seamlessly visualize invoice performance.

ROI Benefits

WINSHUTTLE®   SharePoint

PSIGEN software inc.