

## Case study

# Durham Students' Union



Durham Students' Union exists to be the champion of every Durham student. It is responsible for supporting student welfare, advocacy, charitable fundraising and around 300 student clubs and societies.

## The challenge



### 'Dying' system made heavy work of routine tasks

The finance team at Durham Students' Union had an enormous workload. A mountain of routine tasks took so much time that it was difficult to get to the higher-value work.

It's a big and complex organisation, with a turnover of around £2.5m. The Durham University Charities Committee (DUCK) is thought to be the largest student fundraising body in the UK, with its biggest event – an annual fashion show for selected charities – turning over around £253,000. Unlike many unions, Durham SU has its student clubs and societies fully integrated into the organisation, so the team is responsible for the finances of around 300 groups, with a wide variety of budgets.

All this complexity was more than the union's previous finance system, Exchequer, could handle efficiently. What's more, the software was old and relied on a university cloud server only accessible by VPN-ing into desktops hidden in cupboards in the students' union building, making efficient remote working at times impossible.

"Exchequer was showing its age," says the union's Head of Central Services, Martin Horrocks. "During the pandemic, we had to move very quickly to remote working. The clunky remote logging into Exchequer on the university's servers was highly unreliable. We lost faith in Exchequer. We hadn't had an upgrade in seven years, and they wanted to charge us more and more for a system that was starting to die on its feet, and it was clear their representation didn't know what they were doing. So much time was wasted"

**Previous system:** Exchequer



# The solution



## Big time savings from automating everyday processes

The team first heard of iplicit when exploring the Student Expenses app developed by Konnekt365. “We knew iplicit integrated with Student Expenses and that integration alone would reduce our workload significantly. However, we did consider other systems, like Access, Iris and Sage,” says Martin.

“In the end, the deciding factor was the relationship with iplicit and how comfortable we felt with the organisation. We had the sense that iplicit would hold our hands through the process of getting everything set up.”

Implementation of the new system went more smoothly than anyone anticipated. Lisa Dodds, Central Services Coordinator, says: “Transitioning from Exchequer wasn’t nearly as stressful as I expected. Martin was on holiday when we went live with iplicit but people barely noticed the changeover. It was just ‘Goodbye Exchequer, hello iplicit’.”

Martin adds: “All of us have been involved in a few integrations in the past and this was the best. Ian Ross at iplicit was diligent in setting everything up so it was right the first time. I’ve never experienced that before.”

### The time savings from the move to iplicit are still mounting up.

- 1 Student expenses.**  
Lisa used to spend around a day and a half processing the student expenses that arrived by email, checking everything before keying the figures into the finance system. Today, students submit their claims through the Student Expenses app, which populates iplicit automatically. “I would say I spend an hour and a half on expenses, at most,” she says.
- 2 Bank reconciliation.**  
Bank reconciliation has also become a much shorter job. “With a live bank feed into the system, bank rec is just a question of matching transactions with the records that are already in the system,” says Lisa.
- 3 Easy approval workflows.**  
The team has also seen big time savings from iplicit’s automated approval workflows. “We used to receive invoices and had to email the relevant people to approve them, chasing if necessary, before we could put the invoice onto the system,” says Martin. “Now, iplicit scans the invoices and puts them onto the system and they’re put in front of the right person for approval.”

- 4 Audit-ready records.**  
Having approval records available instantly will also make life easier at audit time. “When the auditor needs to see the authorisation for any transaction, there’ll be no need to find the relevant email because the information will be there in the system,” says Lisa.
- 5 Self-serve access to data.**  
As well as reducing manual tasks, iplicit has enabled users to see their own data without having to request reports from the finance department. “You’ve got so many societies, from the Law Society that might have £60,000, right down to groups who’ve got £10 – and they all need to know how much they’ve got,” says Martin. This used to mean laboriously running reports on Exchequer and transferring the data into spreadsheets. “You could make a cup of tea, have a sandwich and come back to find Exchequer was still running the report,” says Lisa. “Now, with iplicit, the students just look at their statement in the app. It’s all up to date and even includes pending transactions.”

- Time spent on expenses cut from 1.5 days to 90 minutes
- Budget holders serve themselves to data
- Staff have more time to focus on higher-value activities

# The outcome

## Staff freed to do higher-value work

All this automation has freed up time for higher-value work. “Instead of struggling to get things done because Exchequer took so long, we can do the things we really should be doing but didn’t have time for,” says Lisa. “We have more time to investigate anything we need to and to help students with what they do. For example, we can work with the students closely on budgeting big projects like student balls.”

This kind of work wouldn’t have been possible for the team when everyone was under pressure with transactional tasks. As Martin says: “It feels like we’ve joined the modern world of finance.”

