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**Sue Holtby**

Senior Finance Manager  
Hertfordshire Partnership  
NHS Foundation Trust



customer review

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“Version One and Datel invited us to a demonstration of integrated document management software that showed purchase invoice scanning, identification of the supplier via data capture with automatic routing for authorisation. We process some 40,000 invoices per year so when we realised the data was automatically logged in Sage it was obvious the savings we could make.”

**The Hertfordshire Partnership NHS Foundation Trust employs over 3000 people including management and nursing staff who look after mental health clients and people with learning disabilities in over 80 sites across the whole of Hertfordshire and manage Specialist Learning Disability Services in Norfolk. All logistics, finance and administration tasks are controlled from their centralised management point in St Albans where there are 40 users of a Sage Line 500 system which has been in place for over 10 years.**

**Diane Richardson, Finance Service Manager, who is in charge of IT systems and Sue Holtby, Senior Finance Manager, who manages the Financial Services team discuss their experiences of the system and the support they receive from Datel.**

*You became a customer of Datel when they acquired the Sage Business of TAH. How have you found that transition?*

[DR] It went very well. We were with Tetra originally, then we went to Sage until they decided they didn't want any direct customers and we were transferred to TAH. TAH was bought recently by Datel but the changeover has been seamless. When we first became customers we were inundated with staff from Datel - we must have seen all their top people. They came to introduce themselves and they went round the department and spoke to the people using the system day to day - a lot of the bespoke suggestions have come from these end users. We also went to Warrington to see the office there and met the people on

the support desk and met Alan Simpson the MD who is hands on and very approachable. Datel are Premier Sage Partners. They win awards every year and the set up is very professional

*Has Datel's size and status, as Sage's largest business partner, been of benefit?*

[DR] Yes, even little things like the fact we don't have to be on the most recent version of Sage, Datel will say we only need to have an upgrade if there is a benefit to us. With TAH, as part of their agreement, we had to be on the most current version. They are more flexible. We have kept many of the same consultants as they know our system and what they did last time they were here. Someone new would have to familiarise themselves with the system and may work in a different way. It's better for Datel too. The consultants have been there a long time so there's no need to keep going over the same ground with new staff. Certainly from any of the queries we've had they seem to have the expertise.

*You've introduced other products into the system such as 'Version One' document management software?*

[SH] We had an archiving system which was dying and we'd seen the Version One system but we had to put a business case forward to get it. We took our Deputy Director of Finance to one of the Version One demos where they were covering capture and authorise. When he came out it was a case of "How soon can we implement this?"



We're passing in the region of 40,000 invoices a year along with the associated paperwork, some invoices are only 1 page but some, like Vodafone, can be 200 or 300 pages. It's all automated; we feed it into a scanner, using the Visual Recognition Software within Version One. We can teach it where to find the date, invoice number, totals etc. then route the document on a preset path, round the organisation – it doesn't matter whether its in this building or 50 miles away. The person at the other end sees the invoice, can accept it, send it back and it can be up into Sage the next day, no more keying. Then, when it's approved, the data goes into the appropriate table, saving a lot of time.

What's more, we can track the invoice from day one so we know how long someone's had it, who's got it, who's seen it, who hasn't and what's been said about it. And we can allocate it to other relevant things so all the information stays together.

*And you're also looking to add 'Business Intelligence'?*

[DR] Business Intelligence will solve some Financial Services reporting issues. Because we're now a Foundation Trust it's vital that the reporting is very accurate and detailed. We are responsible to the Board and Governors which includes members of the public so we have a very diverse community requiring reports. BI will make that process quicker, allowing us to spend time developing other projects.

*How have you found working with Datel?*

[SH] When we had an upgrade at Christmas, one of the consultants came in and ran a workshop for a day to go through the new functionality. We chose 10 new projects from the new Sage version and had the opportunity of testing each one rather than just turning them all on. It was the safest way - to test everything before it went live. We also had the consultant go through past versions as well, there was functionality there that we didn't know about and we can now use. Datel walked us through everything and told us what they would be doing, what we needed to do and what we would do together, resulting in a system that's up and running in the shortest possible time. Datel achieved what they had to do in about 70% of the time quoted, which left time for lots of extras.

*Inevitably with a complex system such as yours. There will be occasional issues, how good are Datel at supporting the system?*

[SH] Well, we had a problem recently. We had to be ready for Foundation Trust status which meant we had to set up a completely new company in Sage and Version One. Everything was tested and working, then we got our status confirmed and it went live. Sage was fine but then we had some issues with the Version One applications. Datel were on to it straight away, taking consultants off other jobs to resolve the problem. Both Datel and Version One understood the complexity of the situation and sorted it. We are confident Datel can support us and add more resources required when the need arises.

**“We have a good relationship with Datel and it's nice to know they're working for us. Alan, their MD, is hands on and very approachable. Datel are premier Sage partners, they win awards every year and the set up is very professional.”**

The Datel logo consists of the word "Datel" in white, bold, sans-serif font, centered within a solid red square.The Sage logo features the word "sage" in a lowercase, green, sans-serif font.

Business Partner

A large version of the Sage logo, with the word "sage" in green, lowercase, sans-serif font.

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## About Datel

Datel is Sage's largest Business Partner in the UK and is acclaimed as its leading systems integration specialist. Headquartered in Warrington, Datel also has offices in Leeds and the Netherlands employing a loyal team of over 140 highly-skilled people who look after its growing base of over 800 customers worldwide.

We specialise in Sage 200, Sage Line 500 and Sage 1000, Sage CRM and SalesLogix as well as our own in-house products which we have developed to integrate with, and sit alongside, Sage solutions. Known as Datel FUSION, the suite of products enhances and extends the functionality provided by the core Sage applications.

Datel looks after a broad ranging base of customers including those in distribution, manufacturing, construction and the food and drinks sectors. Typically they are mid sized companies who rely upon Datel to make the most of their investment with Sage.

We pride ourselves in our approach to doing business. We seek to know and thoroughly understand our customers and their businesses so, in turn, we can appreciate fully all of the issues and challenges they face. Only then can we presume to offer a solution that will make a real difference to the way they do business. Everything Datel does is guided by our belief in providing only the very best in customer service. To find out more about our products and services, visit our website at [www.datel.info](http://www.datel.info)

## The Hertfordshire Partnership NHS Trust Solution:

- **Business Management Software**  
Sage Line 500 providing finance, purchasing and logistics processes for 40 users.
- **Integrated budgeting and financial reporting software**
- **Document storage software, incorporating**
  - Data capture with automatic supplier recognition
  - Predefined document routing
  - Electronic authorisation with escalation
  - Full integration with Sage software including automatic data entry