Electronic invoice scanning and workflow automation

Cheshire Constabulary has invested software to improve the efficiency of its financial management processes. The software automates the end-to-end workflow from invoice capture through to payment, ensuring compliance, auditability, and efficiency.

First published
20 October 2025

Key details

Does it work?	Untested – new or innovative
Focus	Organisational
Topic	Digital Operational policing Organisation including workforce
Organisation	Cheshire Constabulary
HMICFRS report	**PEEL 2023–25 Police effectiveness, efficiency and legitimacy: An inspection of Cheshire Constabulary**
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Region	North West

Key details

Partners	Police Private sector
Stage of practice	The practice is implemented.
Start date	October 2021
Scale of initiative	Local
Target group	Workforce

Aim

The primary aims of the financial management software are to:

- enhance efficiency - automation of the processing of invoices to reduce manual workload and improve the speed and accuracy of financial operations
- improve accuracy - minimise human errors in invoice processing and payments by using automated systems
- increase productivity - free up finance staff from repetitive tasks, allowing them to focus on more strategic and value-added activities
- support frontline services - redirect resources and time saved from back-office tasks to frontline policing and community services

Intended outcome

The intended outcomes of financial management software are to:

- increase efficiency
- improve accuracy

- enhanced productivity
- reduce costs
- faster payment processing
- improve the allocation of resources

Description

Cheshire Constabulary implemented a financial management software system to automate the processing of invoices. By automating the invoice processing, the force aims to improve efficiency, reduce errors, and free up staff to focus on more strategic tasks. This initiative is part of a broader effort to enhance operational efficiency and support frontline services.

Why was it introduced?

- Historically, invoice processing was manual, paper-based, and resource-intensive, creating delays, compliance risks, and unnecessary queries.
- By speeding up routine processing, the expectation is that finance can provide quicker turnaround on payments and better support operational teams, ensuring officers are equipped without administrative delays.

Main stages

- Software selection - a business case was developed comparing available systems. The software, Proactis, was selected for its track record in the public sector and integration with police finance systems. Considerations included user-friendliness, supplier adoption, compliance with public procurement rules, and scalability.

- Implementation - the software was integrated with existing IT systems, including duty management and rostering solutions.

- Testing and rollout - the software was tested to ensure it met the constabulary's needs before being rolled out across the finance department. In addition, end-to-end, stress and IT security testing were conducted with live invoice samples to check accuracy and reliability of the systems. Pilots were also run in parallel with existing manual processes to compare outputs.
- Training - staff received structured training on how to use the software effectively. This also included guidance notes and process maps to support staff and feedback sessions to identify

gaps in understanding.

Who was involved?

- The programme had strong senior leader buy-in, with executive support secured by emphasising how automating transactional finance would release resources for higher-value activities aligned to the policing plan. Approval came via chief officer group with endorsement from both the chief finance officer and chief constable, given the operational impacts.
- The finance team, previously responsible for manual invoice processing, were involved in the implementation and testing phases.
- The IT department provided technical support for the integration and maintenance of the software.
- Strategic steering groups including senior finance officers and operational managers set the vision and ensured alignment with organisational priorities.
- External consultants assisted with the implementation and ensured a smooth transition.

Costs and funding

- The cost of purchasing and implementing the software was part of the force capital expenditure. Approval was sought through Capital Bids and sent to chief officer group. Implementation costs were around £1m and service costs around £300k each year.
- The project was funded through the constabulary's capital budget, which includes allocations for IT and digital transformation initiatives.
- There will be ongoing costs for software maintenance, updates, and support services budgeted via the force's priority-based budgeting process undertaken each year.

Measuring outcomes

Measurable outcomes will be tracked to ensure the success of this intervention, including the:

- average time taken to process invoices before and after the software implementation
- number of invoice discrepancies and payment errors over time, this can be measured by the software, but the force also have dashboards such as Power BI and Excel reports to log and track this information
- costs associated with invoice processing before and after software implementation
- average time taken to process and pay invoices
- reallocation of resources to frontline services and community policing

Overall impact

Main impacts of the evaluation include the following.

- The automation of invoice processing has reduced the time and effort required to handle invoices. This has led to a decrease in the time spent on invoice processing by finance staff, allowing them to focus on more strategic tasks.
- The software has minimised human errors in invoice processing and payments. This has been observed through a reduction in the number of invoice discrepancies and payment errors.
- Finance staff have been able to focus on higher-value activities. This has resulted in an increase in the completion of strategic projects within the finance department, such as training and development, journal processing, budget setting and analysis.
- The software's ability to make automatic payments has sped up the payment process. There has been a noticeable reduction in the average time taken to process and pay invoices.
- The time and resources saved from automating invoice processing have been redirected to frontline services and community policing. This has allowed the constabulary to allocate more resources to these areas, enhancing their effectiveness and contributing to safer communities and more effective policing.

Learning

Successes

- Providing thorough training for finance staff ensured they were comfortable using the software, which helped in smooth adoption and effective use.
- Involving main stakeholders, including finance and IT departments, in the planning and implementation phases fostered a sense of ownership and collaboration.
- Regular monitoring and evaluation of the software's performance allowed for timely adjustments and improvements, ensuring the system met the constabulary's needs.

Challenges

- Some staff were initially resistant to change, preferring the familiarity of manual processes. Overcoming this required clear communication about the benefits and support during the transition.

- Integrating the software with existing IT systems posed challenges, requiring additional time and resources to ensure this was integrated and working efficiently. For example, invoices in varied formats (PDF, scanned images, XML and so on) were not always consistently read at the implementation stage. The force also had to ensure secure connections between the software and police networks to ensure any data held in the software was compliant with general data protection regulation (GDPR) and management of police information (MoPI). Engaging with IT and finance teams from the start of the project and pilot testing helped to identify format and workflow issues before full roll-out.
- Data cleansing was an important step to ensure data was high-quality, enabling the software to process and prevent errors. This involved liaising with suppliers to ensure sufficient, readable data was included on their invoices so the software could read and process this efficiently and accurately. (For example, substitute any hand-written invoices with electronic data, clear labels and numbers).

Considerations

- The reliance on automated systems means that any technical issues or downtime can disrupt financial operations, so having contingency plans in place is vital. Developing a contingency plan involved identifying critical processes, assessing risks, defining responsibilities for manual fallback procedures, ensuring backups were completed, and training staff to understand their processes for if the system failed. The plan should be tested and reviewed regularly to ensure they are kept up to date.
- While the initial investment was significant, ongoing costs for maintenance, updates, and support need to be factored into the budget.

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