



CAPTARIS CUSTOMER CASE STUDY

CUSTOMER PROFILE

INDUSTRY Public Education

WEB SITE www.cbe.ab.ca

LOCATIONS Alberta, Canada;
approximately 215 schools

EMPLOYEES More than 5,500
teaching and 3,000 support staff

SOLUTION SNAPSHOT

CHALLENGE Managing 25,000 purchase orders and 10,000 requisitions per year using paper-based processes; copies were difficult to track; buyers spent hours faxing daily

SOLUTION Captaris RightFax

INTEGRATION Oracle E-Business Suite 11i, Microsoft Exchange

RESULTS Saved thousands of dollars by eliminating extra copies; reduced time spent on faxing by thousands of man-hours per year; created audit trail for quick status reporting

Calgary Board of Education Streamlines Purchase Orders with Captaris RightFax

RightFax-Oracle Integration Reduces Time Spent Faxing, Saves Money and Supplies Audit Trail

The Calgary Board of Education serves close to 97,000 students. Its stated focus is to be a dynamic learning community “Educating Tomorrow’s Citizens Today.”

The Challenge

The Calgary Board of Education Purchasing Services Department manages up to 25,000 purchase orders annually. Each document averages three-to-five pages in length. Previously, staff members used a three-step manual process for handling the documents: Requisitions, purchase orders and payments were all distributed via fax machine or mail. To request goods schools and departments printed copies of requisition forms to be sent to buyers, who then created copies of a three-part purchasing form to be faxed to vendors, returned to the requisitioners and filed. Delayed fax failure notices would slow retransmittals and delivery confirmations. Manual handling was a hindrance when printing, faxing and filing the documents and led to deteriorated image quality, according to Amin Dadani, manager of Corporate Financial Systems and Special Projects for the Calgary Board of Education.

Purchasing Services maintained a quick turnaround for orders, but not without the time-consuming processing and related frustration. Using a paper-based system to track status could be a “nightmare,” Dadani noted. “When someone sent a requisition number and asked for status, that’s when the questions started, ‘Where is it? Who has it?’ We had to physically chase down the documents.”

The department wanted to reduce paper and manual processes. Integration with the district’s Oracle enterprise system was the top priority for an electronic document delivery solution. “Accounts payable, receivable—everything we do—is in Oracle,” Dadani said of the purchasing department. “We needed the ability to fax straight from Oracle and conveniently deliver the information to requisitioners and buyers.”



The Solution

The Purchasing Services department installed RightFax to electronically process and deliver purchase orders, working directly from Oracle Purchasing. The team also sought RightFax to enable desktop faxing and create a document audit trail.

Now, as soon as a purchase order is created within Oracle, it is ready to be sent to vendors. Rather than printing forms and carrying them to the fax machine, buyers simply “click the fax button,” and RightFax delivers the orders to vendors directly from Oracle while an email copy of the fax is sent to the purchase requisitioner. Employees may also fax from other applications, including Microsoft Word, PowerPoint and Excel. RightFax automatically records recipients and delivery times, then creates a history of delivered documents for digital storage and retrieval.

Using the RightFax Microsoft Exchange Connector, buyers manage faxes within the email system. Incoming faxes are received at a central server, then distributed by purchasing clerks to buyers' Inboxes. “Clerks label the information which enables us to track anything that has come in and where it has gone,” Dadani explained. Buyers may easily forward emails with the image attached to the schools and departments requesting goods or to the vendors supplying products. “End-users have responded favorably to receiving purchase order copies via email rather than faxed copies,” said Frankie Steele, manager of the Purchasing Department. The organization credits the effective RightFax installation to the district's relationship with LANslide, a Captaris partner in British Columbia. “LANslide worked with us to assess our needs and show how RightFax would address them,” said Paul Cockburn, senior systems analyst. “They were able to quickly implement any changes to the RightFax setup that resulted from user product testing. And, they met all IT services requirements to effectively integrate RightFax into our technology architecture.”

The Results

Delivering and approving the majority of purchase orders with the integrated RightFax and Oracle system “has significantly reduced time and paper cost,” according to Steele. Dadani estimated time-savings of up-to-15 minutes per fax, which may total thousands of man-hours per year. While the actual cycle remains the same, buyers now spend less time worrying about fast turnaround. Also, by eliminating two hard copies for every purchase order, the team foresees cost-savings of at least thousands of dollars per year. “All better efficiencies and cost reductions automatically benefit schools and students,” Steele noted.

“With RightFax, we now have confidence in delivery and an audit trail for the requisition process.”

Buyers now immediately receive confirmations or notices of failure when sending faxes. In addition, thanks to an electronic sent/received log, users easily track the location of purchase orders in the approval process. “We now have confidence in delivery and an audit trail for the requisition process,” Dadani said. “We know who has the file, when they received it and what happened thereafter. When a school asks for status, we can quickly go into RightFax and trace its orders.”

Dadani envisions expanding RightFax to others within the district, such as the legal and accounts payable departments, possibly using RightFax to deliver electronic remittances to vendors instead of issuing and mailing manual copies.

Eventually, RightFax may be available to the schools. “The fact that people can do desktop faxing will provide huge efficiency to school personnel,” Dadani said.

For More Information

Captaris, Inc. is a leading provider of software products that automate business processes, manage documents electronically and provide efficient information delivery. Our product suite of Captaris RightFax, Captaris Workflow and Captaris Alchemy Document Management is distributed through a global network of leading technology partners. We have customers in financial services, healthcare, government and many other industries, and our products are installed in all of the Fortune 100 and many Global 2000 companies. Headquartered in Bellevue, Washington, Captaris was founded in 1982 and is publicly traded on the Nasdaq National Market under the symbol CAPA. For more information, please visit www.Captaris.com.

LANslide Integration Services Inc., based in Abbotsford, BC, is a Captaris Gold partner and Western Canada's top provider of Business Information Delivery solutions. For more information, contact Todd Scheven at +1.604.607.7190 or visit www.lanslide.com.

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