



eReq

At a Glance
Keewatin-Patricia District School Board

Industry
Education

Headquarters
Ontario, Canada

Solution
Epicor Enterprise eReq

Distance No Barrier for Keewatin-Patricia District School Board Purchasing Department

The Organisation

The Keewatin-Patricia District School Board (KPDSB) is responsible for public education in a discontinuous territory in Northwestern Ontario, Canada. In total, it operates over an area of 70,950 square kilometers or the equivalent of the land area the size of France and manages 24 schools and two district offices. Indeed, the travel time for the furthest community points of the Board is around four hours. The organisation has around 813 staff making it the equivalent of a medium-sized company.

The Challenge

In accordance with the Board's Finance Department mission to manage financial resources so that educational opportunities for students are maximised, the organisation's purchasing department has recently overhauled its purchasing process, in order to equip itself with a platform for accurate and efficient purchasing, and reporting. The previous purchasing software had been unable to scale with the needs of the organisation or integrate with the Board's Epicor financial software backbone as it evolved.

The Solution

The KPDSB searched the market for an online purchase, requisition and workflow solution, initially to replace its isgi financials solution, before selecting eReq from Precise Business Solutions, an Epicor Software Alliance Partner.

eReq is an online requisition management and workflow solution that delivers full-cycle procurement functionality securely to the desktop through an individual user's web browser.

The Results

While initially selected for its ability to tightly integrate with their Epicor Financials Suite, the organisation's implementation of eReq has slashed the time taken to process the generation and approval of PO requests from days to minutes. It has also been enthusiastically adopted by a geographically dispersed team of users in what was a seamless migration across the KPDSB.

Managing Geographically Dispersed Requests

KPDSB's purchasing and accounts payable department includes five staff charged with management of all tendering and payments across all the organisation's widely spread schools and district offices.

As Arlene Szesztopalow, Purchasing and Payables Officer, KPDSB, says, "We had initially implemented the Epicor Financial Suite in 2002 together with a purchasing solution from isgi but found that it could not be easily upgraded to optimise new modules evolving from within the Epicor product set, nor was it capable of being integrated with our Microsoft SQL database."

“What appealed to us most about eReq is that it’s a tool that puts in-depth product information into the hands of the individual schools. It not only provides great integration with Epicor but allows individuals wherever they may be located to requisition school purchases via a catalogue of approved vendors and terms,” says Szesztopalow.

In keeping with KPDSB’s IT and finance departments’ strategy to run the latest software available, Szesztopalow reviewed the market to see what requisitioning products were available for the Epicor platform and found that eReq from Precise Business Solutions offered ease-of-use, interoperability and scalability within the Epicor Financials Suite and sophisticated reporting applications.

“What appealed to us most about eReq is that it’s a tool that puts in-depth product information into the hands of the individual schools. It not only provides great integration with Epicor but allows individuals wherever they may be located to requisition school purchases via a catalogue of approved vendors and terms,” says Szesztopalow.

With eReq providing live online integration with Epicor Enterprise’s Financials and Distribution solution, the KPDSB embarked on a program with Precise Business Solutions to transition to the application, which was guaranteed to work and adapt to KPDSB’s systems at a competitive price. Following its decision to move ahead with eReq in early 2006, the system went live in May.

Requisitions in the Hands of the Schools

Initially, eReq was installed in a test-bed environment on a Microsoft SQL database. During this time, Precise Business Solutions worked closely with Szesztopalow and her team as well as the organisation’s IT department specifically to review eReq’s server install requirements.

The organisation realised the full potential of the software when it embraced training assistance from Precise Business Solutions. In the lead up to the system going live, staff in the outlying schools were each trained via a web-based video-conference link to all locations. Some staff also received one-on-one training during this time.

“The training really helped to steer us in the right direction to achieve the desired results straight away. To our surprise, the whole implementation was very smooth and we were quite stunned. We were anticipating some issues but were impressed at the small number of issues that actually came up.

We had put in some padding of time for cleaning up the tables but this didn’t happen as everything was automated. At the same time, our account manager at Precise Business Solutions was extremely knowledgeable and knew how to fix things immediately. In a way, he boosted our confidence,” says Szesztopalow.

Increased Response Times and Accountability

With eReq now available at each school via an intranet connection and web browser, the software has enabled individual staff within the KPDSB to requisition items, including anything from art and stationery supplies to printers, software, textbooks, playground equipment and contractor services, while ensuring they adhere to contracted buying agreements.

The software includes a flexible approval and notification workflow engine which helps to automate the entire procurement process, enforcing control and speeding up approvals.

Like a shopping cart, the eReq catalogue includes a pre-defined, searchable list of goods and services that users can quickly search through and select

“We needed something that would work across this distance but not cost the earth. eReq has provided this capability,” says Szesztopalow.

when adding a line on a requisition. The catalogue enables staff simply to put in the quantities of materials required. Staff are also able to purchase “non-catalogue” items, ensuring centralised processing of all types of requisitions.

At the same time, requisitions are routed to relevant individuals within the organisation for approval. The finalized PO is sent live and direct to the Epicor Financials Suite which incorporates various Accounts Receivable, Accounts Payable, Cash Management and General Ledger modules, automatically generating a purchase order for the vendor and eliminating the double handling of data.

In an organisation which generates more than 2,000 POs each year, eReq efficiently provides the purchasing and payables department with notification of requisition submissions, while approvals and denials are automatically emailed to the staff concerned, keeping them informed as to the status of their requisition.

PO receipts can also be acknowledged directly in eReq, allowing users to manage the PO receiving process further reducing lost time and demands on the purchasing and accounts staff.

“You’re also not limited by a set number of characters, which enables you to put in a complete description of what is requested. This reduces inquiries and improves process efficiency.

We are geographically unique as most goods come from a considerable distance. We needed something that would work across this distance but not cost the earth. eReq has provided this capability,” says Szesztopalow.



Epicor Australia L32 100 Miller Street, North Sydney NSW 2060
Phone: (02) 9927 6200 Fax: (02) 9956 8976 Visit our Web site at www.epicor.com.au