



## Keewatin-Patricia District School Board

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

### Company Facts

- Location: Ontario, Canada
- Industry: Education
- Web site: [www.kpdsb.ca](http://www.kpdsb.ca)

“What appealed to us most about Epicor Advanced Requisition Management 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.”

Arlene Szesztopalow, Purchasing and Payables Officer

### Success Highlights

#### Challenges

- 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.

#### Solution

- Epicor ERP
- Epicor Advanced Requisition Management

#### Benefits

- Decreased the time taken to process the generation and approval of PO requests from days to minutes.
- Enthusiastically adopted by a geographically dispersed team of users in what was a seamless migration across the KPDSB
- Ease-of-use, interoperability and scalability within the Epicor Financials Suite and
- sophisticated reporting applications

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 Epicor Advanced Requisitions Management from Precise Business Solutions, an Epicor Software Alliance Partner.

Epicor Advanced Requisition Management 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 Epicor Advanced Requisition Management 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."

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 Epicor Advanced Requisition Management

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 Epicor Advanced Requisition Management 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 Epicor Advanced Requisition Management providing live online integration with Epicor'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 Epicor Advanced Requisition Management in early 2006, the system went live in May.

### Requisitions in the Hands of the Schools

Initially, Epicor Advanced Requisition Management 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 Epicor Advanced Requisition Management'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, staffs 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 Epicor Advanced Requisition Management 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 Epicor Advanced Requisition Management catalogue includes a pre-defined, searchable list of goods and services that users can quickly search through and select when adding a line on a requisition. The catalogue enables staff simply to put in the quantities of materials required. Staff is 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, Epicor Advanced Requisition Management 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 Epicor Advanced Requisition Management, 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. Epicor Advanced Requisition Management has provided this capability," says Szesztopalow.

## About Epicor

Epicor Software Corporation is a global leader delivering business software solutions to the manufacturing, distribution, retail, and service industries. With more than 40 years of experience, Epicor has more than 20,000 customers in over 150 countries. Epicor solutions enable companies to drive increased efficiency and improve profitability. With a history of innovation, industry expertise and passion for excellence, Epicor inspires customers to build lasting competitive advantage. Epicor provides the single point of accountability that local, regional, and global businesses demand. For more information, visit [www.epicor.com](http://www.epicor.com).

Software to Empower Your Business

Contact us for more information on Epicor Products and Services



+61 8 9242 5933



[solutions@precisebusiness.com](mailto:solutions@precisebusiness.com)



[www.precisebusiness.com](http://www.precisebusiness.com)

### Corporate Office

804 Las Cimas Parkway Austin,  
TX 78746  
USA  
Toll Free: +1.888.448.2636  
Direct: +1.512.328.2300  
Fax: +1.512.278.5590

### Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int. 104  
Plaza Central, Col. Santa Maria,  
Monterrey, Nuevo Leon, CP 64650  
Mexico  
Phone: +52.81.1551.7100  
Fax: +52.81.1551.7117

### Europe, Middle East and Africa

Precise EMEA  
6-8 Market Place  
Reading RG1 2EG  
Berkshire  
United Kingdom  
Phone: +44.1189.254.964

### Asia

238A Thomson Road #23-06  
Novena Square Tower A  
Singapore 307684  
Singapore  
Phone: +65.6333.8121  
Fax: +65.6333.8131

### Australia

Precise Business Solutions  
Level 1, 116 Hobart St.  
Mt. Hawthorn, WA 6016  
Australia  
Phone: +61.8.9242.5933  
Fax: +61.8.9242.5934

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication, June 2014. The results represented in this testimonial may be unique to the particular user as each user's experience will vary. The usage of any Epicor software shall be pursuant to the applicable end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to applicable standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Epicor, Business Inspired, the Epicor logo are registered trademarks or trademarks of Epicor Software Corporation in the United States, certain other countries and/or the EU. All other trademarks mentioned are the property of their respective owners. Copyright © 2014 Epicor Software Corporation. All rights reserved.