



City of Charlottesville

Implementing seamless document management with SAP applications and Esker DeliveryWare



The City of Charlottesville, Virginia has a population of approximately 40,000 residents and is served by over 900 city employees. Its information technology team provides all network services for the city government's 22 business units, including oversight of 75 servers at 12 sites connected via fiber optic cables and over 500 software applications running on a Windows-based platform.

Challenge: To streamline financial business processes by automating document management to and from their existing SAP system

In 2005, as part of an effort to better manage internal financial processes as well as spending with its more than 7,000 suppliers, Charlottesville implemented an SAP financial system, including SAP's Supplier Relationship Management application.

Working closely with a team of SAP consultants, Charlottesville was able to outline all its business processes for the purpose of visualizing, planning, and implementing a coherent, integrated and comprehensive solution. It achieved a detailed view of end-to-end processes and defines the activities, roles, system interfaces, and business documents that would best enhance collaboration.

As a result of this picture, what became clear during the final stage of the SAP solution implementation is that while the application provided immediate benefits such as allowing suppliers to register and update their information online, gaps remained in the system. With each department in the city carrying its own contracts personnel and several vendor interaction mechanisms in use, such as fax and manual keying of invoices, there was a real potential of decentralizing the purchasing function for the city, a scenario the team had long labored to avoid. The city simply could not lose track of what was ordered, tracked and received on a daily basis.

Charlottesville thus sought a method of controlling the flow of incoming and outgoing invoices and payment records while still being able to accommodate vendors' delivery preferences. In all, the city needed to tie together systems in order to keep the purchasing function centralized and assure that everyone on the distributed financial team used the same methodology. In addition, the city wanted a solution that would not require significant resources for maintenance.

Solution: Esker DeliveryWare integrated with their SAP application

Charlottesville's IT leaders convened with the SAP implementation team to determine the best pathway toward the seamless document management the city required. The group assessed the potential use of one of SAP's native tools for doing so, but determined that the city would require a more highly tailored solution.

"At first, we couldn't seem to find one system that did it all. We even considered building a custom solution in-house, but we talked to various people at SAP and were told that Esker DeliveryWare works with SAP solutions natively," noted Donald Litton, IT Operations Manager for the City of Charlottesville. "Plus, the company's an SAP Certified Partner, so it quickly became a no-brainer — everybody pointed at Esker."

The Esker team went to work quickly on the first phase of the project — automating document delivery for all financials. Within three weeks, Esker DeliveryWare was up and running. A complete end-to-end solution, it takes the SAP application's raw data, automates production of professional business documents, and delivers them.

Esker also provided all necessary training for Charlottesville's IT team in less than a month.

"Esker was fantastic to work with — they provided a great training process and having the complete team in one place really helped keep things in line," added Litton. "And Esker DeliveryWare was very painless and seamless to implement — it took us right where we wanted to go."

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As the implementation progressed, it became clear to Charlottesville's IT leaders that Esker DeliveryWare could be further applied to other internal document processes.

"In order to work with vendors who preferred fax as a delivery method, we had been doing a lot of manual faxing. We realized that we were spending a lot of money on paper and fax machines, not to mention the hundreds of file cabinets we filled each year," said Litton. "I asked myself, 'can we kill two birds with one stone?' Why not also use Esker DeliveryWare to solve our fax problem?"

The combined team did just that. Now, Charlottesville's financial team can send and receive documents directly from SAP systems, including the most commonly used business documents such as purchase orders, sales invoices, and account statements.

Benefits

The City of Charlottesville has already reaped significant efficiency benefits while implementing a solution that requires very little maintenance, end-user training, or other intervention from the city's IT staff.

"We haven't had one problem since installation — it's been a 'set it and forget it' kind of thing," noted Litton. "From an IT person's perspective, when you don't have to talk much to

people about a technology tool, it's great. That's the beauty of a system like this — users don't even know it's there."

In addition to applying Esker DeliveryWare to its vendor management, Charlottesville has also integrated it for its HR and payroll-related SAP modules. Future plans include enabling faxing directly from individual users' desktop computers as well as implementing the product for handling the archiving of electronic records. Esker DeliveryWare will also be an important component in the city's future plans for building an SAP-based city web portal.

Immediate benefits for the City of Charlottesville, Virginia included:

- Assurance of centralized purchasing
- Automated document flow to and from the SAP application
- Automated faxing
- Time and cost savings
- Improved business process efficiency
- Compatibility with all SAP modules

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