Captaris
Workflow

SCDOT Deploys Paperless Procurement System

Achieves Rapid ROI by Reducing Overhead and Cutting Costs

Industry	Government procurement
Challenge	Critical goods and services delayed due to time-consuming paper-based methods for routing, retrieving, filing
Solution	The SCDOT Electronic Document Management System powered by Captaris Workflow
Integration	Mainframe; Microsoft SharePoint, Microsoft .NET, Microsoft SQL Server, Microsoft Windows, Microsoft FrontPage, InfoPath; planned RightFax
Results	Expedited delivery of goods and services; monthly processes previously requiring weeks reduced to hours; ROI obtained within six months; savings likely to grow exponentially across the state

BACKGROUND

With more than 5,100 employees, South Carolina Department of Transportation (SCDOT), www.dot.state.sc.us, is a state government agency focused on promoting safe and efficient transportation. As one of 201 business units, the SCDOT Procurement Division provides a centralized source for pricing, bids and other documents.

THE CHALLENGE

During their daily rush-hour commutes, few S.C. residents consider the materials or services required to maintain state highways and bridges, unless those residents are members of the SCDOT procurement team. Every concrete slab must be detailed, reviewed and approved with requisitions, bids or other documents managed by the Procurement Division. "We handle millions of documents every year," Steve Collins, Information Technology Manager with SCDOT, said. "It became a paper nightmare to keep track of all that data." The circuitous path for one hard copy requisition to become a purchase order included waiting for approval from up to four managers mailing it to headquarters, and then finally filing the hardcopy to fulfill the archival requirements of the South Carolina Procurement Code.

SCDOT made strides with a system that allows users to electronically transfer requisitions to headquarters. The mainframe application, named Statewide Purchase Order / Requisition Tracking System (SPORTS), succeeded in enabling electronic transmission of requisitions from close to 200 buyers located in all of the state's 46 counties. Once the files were received they were printed and stacked awaiting processing. The final phase for SPORTS extended paperless status through the entire procurement process and added automatic routing and workflow documentation as well as electronic signature and storage. These capabilities addressed specific issues:

- **Time-intensive processes -** To determine the status of an order, buyers had to make calls and track paper. Procurement staff often left their desks to file and retrieve documents. "It is very hard to be productive when you are chasing paper most of the work day," Norma Hall, Director of Procurement with SCDOT, explained.
- **Delays -** Due to slow, manual methods two weeks could elapse before orders were picked up for processing.
- **Paper shortcomings -** Hard copies are hard to secure and organize by latest version, and are easily misplaced.
- **Storage shortage -** "We were running out of space," Collins said. "We've been in our building since 1979; just like your house, you keep accumulating things."

THE SOLUTION

SCDOT's procurement process was expedited by as much as two weeks thanks to its Electronic Document Management System (EDMS) powered by Microsoft SharePoint Portal Server 2003 and Captaris Workflow. The solution, integrated by MetaLogix and implemented in May 2004, leverages SCDOT's existing mainframe and Microsoft investments and provides a standardized, secure portal and extendable .NET-ready workflow engine enabling real-time integration capability with other technologies including SQL Server, FrontPage and InfoPath.

With the enterprise-ready document management platform, SCDOT met its goals to automate document processing and routing, provide easier access to files and status and distribute information in an electronic format that is accessible throughout the state. Collins detailed: "As soon as order requisitions are entered in SPORTS, the system sends a PDF file to SharePoint with metadata…Workflow acknowledges receipt then takes it all the way through the process to the signing of the purchase order, which we're doing electronically through the workflow." SCDOT plans to streamline efforts with another Captaris solution, RightFax. While the agency is already using RightFax e-document delivery to quickly provide Oversized / Overweight Permits to trucking companies, SCDOT plans to extend RightFax desktop faxing capabilities to the procurement office. "They'll be able to fax right out of Workflow so there will never have to be a hard copy of the document," Collins said.

Hall summarized, "By transforming manual processes that are labor intensive and extremely time consuming into fast, reliable electronic processes that require less human interaction, (Captaris Workflow) significantly increases office productivity." As a result, staff has more time to use their talents in completing solicitations and managing contracts, an efficiency which ultimately benefits the public. "We have a responsibility to tax payers to spend our money wisely and give them the best service we can for the least amount of cost," Collins stated. "With Workflow, we receive an impressive return of benefits for what we spent." Not to mention, the daily commute home is probably more relaxing for procurement staff members enjoying the benefits of automation.

THE RESULTS

- **Fast Return on Investment -** Nine procurement managers conducting monthly audits on buyers reduced the process from two weeks to one hour "With Workflow, we went from 18 man weeks in our audit process to about nine man *hours,*" Collins said regarding the 80-fold productivity improvement. According to an in-house study, work-in-progress tracking was cut by 672 man hours per year, leading to an annual salary savings of nearly $12,000. Applying the same estimates, the processes alone total more than $164,000 in overhead savings per year. "We could safely say that Captaris Workflow deployment paid for itself within six months of installation," Hall stated.

- **Faster turnaround -** Orders that waited two weeks for processing are now automatically entered for real-time accessibility. Projects are completed faster with materials that arrive on time. "We're doing more of (just-in-time type of delivery) now instead of storing or stock piling tons of items," Collins said. "That leads to big savings."

- **Electronic advantages -** Since one document can be shared by users in dozens of locations, electronic files support version control and prove easier to secure with PIN-based access.

- **Expansive storage -** Cubic feet limitations are no longer a concern; employees access needed files within seconds rather than an hour-long excursion to the storage room. The EDMS also automates retention and elimination tasks in accordance with guidelines from the South Carolina State Archives Agency.

FOR MORE INFORMATION

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