

A federation of charter schools streamlines purchasing and invoice approval with the help of office automation.



Darryl Robinson, Business Manager Propel Schools, Pittsburgh, PA



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- Location:** USA
- Industry:** Education
- Deployment:** On-Premises
- Department:** Accounting
- Integration:** CSIU accounting software

Propel Schools is a federation of not-for-profit charter schools that brings high-performance educational options to 4,000 students in western Pennsylvania. Propel operates 13 charter schools, each with a strong focus on technology integration and creative arts, located in and around Pittsburgh.

Before DocuWare, each school in the federation ordered and received their own supplies. However, approvals were handled by a central business office. Invoices, packing slips and purchase orders were sent there for processing through inter-office mail. The Accounting Department matched the purchase orders and packing slips with each invoice and made a copy of invoices needing approval. Then the documentation went back into inter-office mail to be sent for approval. Many invoices need multiple approvals, so the documents were often passed from desk to desk.

Automated workflows make invoice processing efficient

Today, Propel's invoice approval workflow is fully automated. Staff at each school scans their documents into DocuWare. The Accounting Department accesses the documents online and performs a 3-way match. Then they quickly route the invoice out for approval. Automations save time in other ways as well. Accounting

staff no longer call individual schools to track down invoices that were "lost" in someone's in-basket. Efficiency is further improved because everyone involved in the workflow can view supporting documents online. In the past, all documentation was stored in physical files that were only accessible in the central business office. Propel's new invoice approval process is transparent, so staff can easily determine which invoices are outstanding and track their status. With DocuWare in place, invoices never need to be recopied and resent; a quick email reminder is all it takes to move the process along. Approval time has dropped from up to two weeks to just a few days.

Additional savings in time and resources

The benefits of automation are felt in every step of the accounts payable process. When Business Manager Darryl Robinson signs checks, he also references supporting documentation in DocuWare. This has eliminated a mountain of paperwork and reduced time to process from four hours to less than one.

"DocuWare is helping our business office run much smoother," Robinson says. "I love this program because it provides my staff with quick, easy access to the information we need and that makes our department look good."

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Vendor calls to request information about a payment can now be answered immediately since the staff has complete information at their fingertips, including when a shipment was ordered, received and paid for. Prior to DocuWare, finding this information would have taken as long as 15 minutes per request. Today, the staff can use that time for more proactive tasks.

DocuWare also integrates seamlessly with CSIU, their highly specialized accounting solution used in school districts in Pennsylvania as well as with other internal systems. The new electronic invoice approval workflow was so successful that Propel is planning to expand DocuWare to manage student and HR records.

