Create!form Customer Success Profile: The University of Windsor

UNIVERSITY OF WINDSOR

TeamCain is a renowned *Oracle implementation service partner* with many years of experience using, installing and supporting the OneWorld/World solutions. Our Team averages over 14 years experience with OneWorld, and combined has nearly 3 centuries of business experience! Our full suite of partner products include RF-Smart, ARCTools, Create!form, and The Really Real Time® Inquiry Suite by The G/L Company. Our service offerings include Advanced Warehouse Management, Technical/CNC, *World* and *OneWorld* consulting. We have the consultants you need for your long-term or short-term JD Edwards project. Big or small, application or technical, you can count on TeamCain to give you results... because experience counts!

THE CUSTOMER

The University of Windsor, situated in Windsor Ontario across from Detroit, is Canada's most personal comprehensive University, with a special focus on automotive, environmental and social justice interdisciplinary research. The University supports a student enrollment of over 13,000 full time students and 3,000 part time students in both undergraduate and graduate programs. These students are supported by a faculty and staff of over 750, and the University works with an annual budget of more than $150 million dollars.

Being in a sector that is funded largely by a combination of student fees and government grants implies that the investments made by the University must be prudent and wise. Investing in technology must provide efficiencies and payback. "We needed to make sure that the solution we selected would add real value to our processes" said Sandra Aversa, Director of Finance.

THE SELECTION PROCESS

In 2004, the University decided to upgrade their existing JD Edwards World Software solution to the newer generation OneWorld level. As part of this migration, they decided that the time had come to invest in an output management/e-forms solution that would also take them to the next level. The evaluation proceeded through the spring and early summer of 2004, during which time the team at the University evaluated several package solutions for their output needs. At the end of June, 2004 the University selected the Create!form solution, to be implemented by TeamCain.

When asked why the University chose Create!form, Arla Peters, Controller of Financial Services and project leader for the World – OneWorld migration project, indicated "We thought the Create!form solution had the best combination of features. The tie in to the OneWorld product was a particular advantage, and it seemed like the design capabilities were both simple and powerful. The extensions via email were of particular interest to us, as we believed we could get some real efficiencies and savings in this area. Finally, the knowledge of TeamCain on both Create!form and OneWorld was a real plus – they understood not only the output solution but also how to make it work with our ERP engine. This was a real plus."

THE SOLUTION

The University went forward with the core Create!form PSE1 solution, with the addition of the Create!stream, Create!email and Create!MICR products. The Create!stream and Create!email products would allow them to extend their design and distribution internally and externally automatically and electronically.

"The designer is very powerful and flexible", says Cathy Wilbur of the University's IT team and the lead designer. "I can't really think of anything we wanted to accomplish with the product that we could not do. And the help from TeamCain was wonderful – they know the Create!form tools and they know OneWorld. This helped us out in so many ways."

Accounts Receivable

In the Accounts Receivable area, the Create!form team at the University created designs for both their Invoices and their customer statements. Both documents are set up to auto change selected information such as the contact phone number and name and the sending department depending on the address book search type. The search type is retrieved via ODBC look up back to the OneWorld database.

The use of Create!form has allowed the University in this instance to arrive at a more elegant and sophisticated solution; in addition internal copies are emailed out automatically.

Accounts Payable

The AP department was able to utilize the MICR and conditional output capabilities of the Create!form product to create cheques for both their US and Canadian accounts. The cheque

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form itself is greatly simplified from what was needed before, and the ability to re-format the display of currency, number and date fields has improved the readability of the cheques without RDA work. Cheques are automatically signed as required, based on conditional criteria within the design of the form, using soft font signatures.

Attachments for overflow cheques and for debit notices are also created via Create!form, in an elegant and informative layout.

Purchasing

Probably the biggest change to the internal processes within the University as a result of the Create!form implementation can be found in the purchasing area. First of all, the output itself is more elegant, and makes significantly better use of the available space on the form. Printed on plain paper, the PO form includes the standard terms and conditions printed in duplex mode on the back of each order page. The information on the form itself reacts to the data, so that it will read Purchase Order normally, but Change Order if the order is a revision to an existing order, and automatically picks up the buyer contact information. The repagination capability has shrunk the data output needs in half for what had been multiple page orders. The standard capabilities of having the University logo on the form, of reformatting number, currency and date fields, and autosizing the detail section of the PO are also used.

Most dramatic is the distribution of the order. Whereas before Create!form the output was photocopied for distribution, the process is all electronic and automated now! The purchasing department, receiving department and originating department all get their own copies of the order delivered to their email in-boxes. The customs department will also get a copy of the order… but only if the order requires their involvement. Email addresses are retrieved from the OneWorld database automatically within the process. The subject line and content of each email is built from a combination of static text and data from each individual PO.

Month end reporting

The month end reporting process has also been streamlined and automated. The standard month end reports are now run through the Create!stream and Create!email process. This has resulted in the reports being automatically burst by a person responsible code, reassembled by the same person responsible code, and automatically emailed out… with different formats and layouts for each report within the email!

The email address of the recipient is automatically picked up from the Business Unit master and Category codes master files, and the process runs itself.

Other processes

As part of their conversion process to OneWorld and their integration with their Student Information System, the University makes use of custom programs to import data into the OneWorld system – using the standard Z file processing. With Create!form, they are able to generate more user friendly edit reports, and have them automatically emailed out – no more paper chase. "This was a real bonus – a use of Create!form that we had not even considered initially." commented Colleen Harrington, Systems Consultant for the University.

The Summary

With the Create!form solution in place, the University of Windsor has established efficiencies in a number of business processes – critical within the public sector. Their dependence on a much less sophisticated forms tool has been eliminated, and they have more flexibility and adaptability moving forward.

"We believe that the Create!form solution has enabled us to be a more efficient, more effective organization" summarized Sandra Aversa. "Our payback has been great, and we are certainly looking forward to extending the use of the solution going forward. Create!form allows us to solve business issues and output formatting and distribution in ways that were just not possible otherwise. We are extremely satisfied."