



CASE STUDY

Nexant Automates Energy Efficiency Workflow with Captaris Workflow Previously Known as Teemplate

The California Public Utilities Commission (CPUC) needed more effective document management capabilities within its energy efficiency programs groupware (EEGA) application. Nexant, Inc., teamed with Congruent Solutions, successfully deployed the statewide solution. EEGA is a Web-based application used to monitor a growing number of energy efficiency programs and increased reporting requirements. As an integral component of EEGA, Captaris Workflow provides an integrated workflow that has automated the reporting process for significant timesavings.

BACKGROUND

The California Public Utilities Commission (CPUC) regulates privately owned electric, telecommunications, natural gas, water and transportation companies, in addition to household goods movers and rail safety. The Commission oversees implementation of 185 state and local programs that represent energy efficiency measures worth almost quarter billion dollars of annual public funding.

THE CHALLENGE

As a statewide regulating organization, CPUC requires and processes information for a variety of efforts, including almost quarter billion dollars worth of energy efficiency programs every year. Close to 185 programs across the state follow regulatory requirements to submit comprehensive, consistent reports that involve hundreds or thousands of data items. When reporting frequency was increased from quarterly to monthly bulletins, CPUC and the energy efficiency program implementers found it difficult to manage the workload related to documentation, reporting and communication, according to Dr. Venkatesh Ravirala, Nexant Senior Consultant. Among the challenges, exchange of data and monthly reports using emails with large attachments was ineffective while monitoring, approving and aggregate reporting processes became cumbersome.

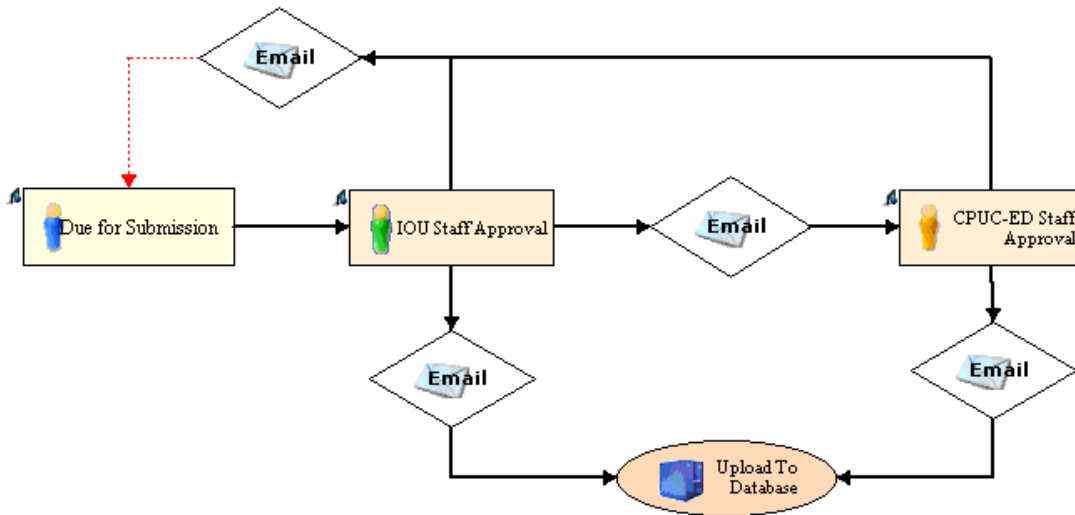
"The CPUC needed a better and automated way to gather and organize reports and extract data for creating business intelligence information," Ravirala said. "The program implementers needed a secure and flexible workflow process to track their report submissions, requests for additional documentation and approval status."

Implementing a comprehensive solution would require custom features but the initial timeframe quoted for the project was six months, including less than two months for development of the document management and workflow component. "We wanted to replace internal spreadsheets with a database, update email- and phone-based interactivity with auditable and automated electronic workflow process, and provide an easy-to-use Web interface and reporting application," Ravirala stated. "Although there are open source development suites and technology components, few met the specific and overall project needs and we didn't have time or the budget to develop the entire application ourselves."

THE SOLUTION

Following evaluation of potential solutions, Nexant and its software development partner Congruent Solutions felt confident in teaming with Captaris: "Captaris Workflow was the ideal support solution for the workflow and document management component," Ravirala said. Arun Ganapathy, Project Manager with Congruent, added: "We were impressed by all the functionality available in Captaris Workflow that readily met our project needs."

Captaris Workflow became a critical component of the Nexant-architected Microsoft .Net solution for implementing the CPUC energy efficiency groupware application (EEGA). "Much of the data and reports gathering, approval and monitoring processes are now automated," Ravirala said. "Apart from providing significant savings in development costs, the EEGA solution built by integrating Captaris Workflow now saves trouble from mishaps or human errors."



"Captaris Workflow has significantly improved energy efficiency program's monitoring and tracking capabilities for CPUC." —Dr. Venkatesh Ravirala, Nexant

BENEFITS

Energy Efficiency - Before EEGA, it was difficult for the CPUC and program implementers to meet the regulatory requirements by managing complex data exchange and workflow requests. "Now, information flow and business processes are organized, well-automated and all EEGA functionality is easily and securely accessed through Web interfaces," Ravirala said. Every step of the process is documented and next steps, such as receipt notification, are automatically triggered. This has significantly reduced the effort needed to monitor and track progress and people no longer play phone tag managing requests. Instead, report submission tasks are auto-generated and CPUC Energy Division Staff can see when submissions were made. Also—with built-in authorization capabilities—only designated persons can view specific status notes and comments. In addition to timesavings and accessibility, EEGA will help the Commission produce analysis-based reports and support long-term decision-making strategy. "Using Captaris, we have significantly improved the energy efficiency program's monitoring and tracking capabilities for CPUC," Ravirala said.

Implementation Efficiency - Captaris Workflow processes are integrated into the EEGA Web application that is being developed on the Microsoft .NET platform with a Microsoft SQL Server 2000 database. As architects and developers of the EEGA application, both Nexant and Congruent recognized effective Captaris Workflow integration capabilities. "It was easy to install and configure and its well-documented API allowed us to fully integrate Captaris Workflow with our .NET-based application and automate key operations. Captaris Workflow cut down our development time and efforts significantly, which allowed us to meet tight deadlines," Ganapathy said.

FOR MORE INFORMATION

Captaris - Captaris Business Information Delivery solutions capture, process, archive and deliver data and documents enabling customers to reduce costs and increase the performance of critical business information investments. Through its global distribution network, Captaris delivers cost-effective software products and services that help organizations manage and leverage the value of corporate information. In partnership with leading enterprise technology companies, Captaris has installed more than 90,000 systems in 95 countries in companies of all sizes, including the entire Fortune 100. For more information please contact us at www.captaris.com or call +1.520.320.7000.

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Congruent Solutions - Congruent Solutions, Inc. (<http://www.congruentsolutions.com>) is a software development alliance partner to Nexant. The company provides innovative IT services in the areas of Web application development (J2EE, .NET, Web Services) as well as application integration and workflow solutions in several verticals. Congruent is an ISO 9001 certified development organization and is also a Microsoft Certified Partner.

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