



## CASE STUDY

# University of Pennsylvania Speeds Order Transmission with RightFax and Oracle

With a large student body to support and a reputation for administrative excellence, the University of Pennsylvania's Purchasing Services department ([www.purchasing.upenn.edu](http://www.purchasing.upenn.edu)) realized the need to implement an automated document processing and delivery solution that would speed the process for sending and fulfilling purchase orders.

## BACKGROUND

Founded in 1740, the University of Pennsylvania is America's first university and one of the country's most prestigious institutions of higher education. Today, the Philadelphia institution has a student body of nearly 13,000, with four undergraduate and twelve graduate and professional schools, many of which are leaders in their fields.

The University of Pennsylvania has a long history of educational innovation. It is a national leader in interdisciplinary programs that combine academic theory with professional practice. The nation's first medical school, its first collegiate business school, the first journalism program, the first university teaching hospital and the first modern liberal-arts curriculum were all established at the University of Pennsylvania.

The University of Pennsylvania is also an acknowledged leader in eProcurement in higher education.

## THE CHALLENGE

The University of Pennsylvania Purchasing Services department currently maintains a database of approximately 25,000 approved purchasing suppliers. The University has an EDI relationship with its 22 most commonly used contract suppliers.

In the mid-1990s, Penn managed its high volume of documents with one full-time purchasing employee who was devoted to mailing or manually faxing papers. This method was cumbersome and time consuming. Adding to the challenge, outbound purchase order volume grew to approximately 100,000 orders annually, with continual increase expected.

Continuing to use the manual process was "not an option," according to Ralph Maier, Associate Director of Purchasing Services for the University.

"Customers expect next day delivery on products and services, so when purchase orders (POs) are approved, it's imperative that we route them to suppliers as quickly as possible," he said. "Delays in processing can jeopardize research projects and impact customer satisfaction."

The University's eProcurement team needed an automated document processing solution that would speed the process for sending and fulfilling purchase orders.

In July 1996, Penn implemented Oracle Government Financials (purchasing, payables and general ledger). "Oracle is a leader in the marketplace and it was our determination that it was best suited for our business requirements," Maier said.

In more recent years, the University added Oracle Internet Procurement, an electronic requisitioning product, and launched the Penn Marketplace, its private online supplier exchange, in January 2002.

With this infrastructure in place, the eProcurement team searched for a solution that would integrate with Oracle applications to distribute documents in a timely and efficient manner.

The solution needed to promote faster processing of documents so that the purchasing staff would have additional time to negotiate more cost effective contracts. Also, while cost savings were not a top priority, the team was looking for a solution that offered ways to further reduce the cost of products and services required by the University.

"Improvements in administrative systems, process efficiencies, and cost reduction provide a return on investment to the institution in support of the University's educational and research mission", Maier explained.

## THE SOLUTION

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*"Using the joint solution, our procurement cycle was reduced from days to less than two hours." —Ralph Maier, University of Pennsylvania*

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In July 1996, the eProcurement team implemented CommercePath, a first-generation automated fax solution from Captaris. The product proved effective and reliable, so when CommercePath technology was built into the Captaris RightFax product line, it was an easy choice for the department to migrate to the new RightFax solution.

In 2003, the University upgraded to RightFax Universal Information Exchange (UIX) from Captaris. RightFax UIX, a full production-level, e-document delivery solution, was co developed with Oracle to give users a powerful way to reduce costs and save time by automating delivery of business-critical documents via fax, email or the Internet directly from their Oracle applications. The University is now using RightFax Enterprise Server, a solution designed for high-volume transactions.

## IMPROVED CUSTOMER SERVICE

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*"Fast delivery through RightFax has had a positive impact ...our customer service rankings are at an all-time high."*

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As opposed to expensive and time-consuming manual processes, with RightFax and Oracle, the University's purchase orders are created via the Penn marketplace, processed and approved in the Oracle Purchasing System and automatically faxed to the suppliers. The process of creating, approving and transmitting orders has been reduced from days to less than two hours.

The University's main challenge was to increase supplier and end user satisfaction. Suppliers now receive purchase orders quickly, consistently and accurately, thereby providing the end-user with the correct product in a timely manner.

"Fast delivery through RightFax has had a positive impact on our relationship with suppliers and internal customers," Maier said. "As a result, our customer service rankings are at an all-time high."

## ENHANCED EMPLOYEE PRODUCTIVITY

RightFax users within the Purchasing Services department also appreciate substantial time-savings via RightFax automatic delivery.

"Productivity enhancements have enabled us to re-deploy staff members to more value-added activities such as customer service and supply chain management," Maier said.

The deployment of RightFax has proven to be a reliable product to ensure that suppliers receive their purchase orders. "RightFax established confidence immediately," Maier related. "It has performed flawlessly."

## INCREASED COST SAVINGS

Though the eProcurement team's main priority was to streamline the purchasing process, installing Captaris solutions also returned significant cost savings. The University eliminated 95 percent of its mailing costs related to purchase orders. Such hard costs add up quickly: According to a Captaris study, when purchase orders are manually prepared,

printed and mailed, they can cost more than \$1.20 (USD) each. In contrast, RightFax automatically delivers the same documents electronically for approximately 10¢ per document.

"I continue to marvel at the performance of RightFax," Maier said. "It has been bullet-proof and I highly recommend RightFax and Oracle for handling the order transmission process." In the end, the solution better equips the University to deliver on its mission of innovation and excellence in education and research.

### FOR MORE INFORMATION

Captaris Business Information Delivery solutions help organizations of all sizes automate the information and document flow throughout the information lifecycle (capture, process, archive, deliver). With a comprehensive suite of software and services, Captaris helps organizations to grow revenues and increase profits while meeting compliance goals. Through a global distribution network of leading enterprise technology partners, Captaris has installed more than 90,000 systems in 95 countries in companies of all sizes, including the entire Fortune 100. For more information, visit [www.captaris.com](http://www.captaris.com) or call 1.800.443.0806.

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