



## The OU Purchasing Department Lowers its own Costs and Increases Efficiency Using Email & Fax Workflow & Document Management

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### Overview

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- **Business**  
UK's largest University
- **Business Solution**  
Document distribution via networked printers, fax, email and intranet/extranet.  
  
On-line Archive (COLD, Scanning, PC file, email & fax import).
- **Scope**  
0.5million records by 2004  
  
Scanning 10,000 invoices p.m.  
  
Delivering 125,000 documents p.a. (at least 250,000 pages as most documents are two pages or more)
- **Architecture**  
Windows NT/2000  
Sun, Unix server  
Ethernet TCP/IP  
ROSS Systems Renaissance
- **Key Business Benefits**  
Pre-printed stationery costs & misalignment problems eliminated  
  
Electronic copy document distribution by network, fax/email, saves time & money  
  
Access to online document copies enables more informed decision making, in less time  
  
Outgoing documents are automatically archived and indexed as they go to print, removing the need for manual filing  
  
8 years of archived information is accessed in seconds using a number of different search criteria  
  
Enables the automation of many business processes, giving staff more time to concentrate on more productive tasks



The purchasing department of the Open University were not content with just reducing prices of incoming goods and services: they have dramatically lowered their own operating costs by using AutoFORM automated email & fax workflow & document management solutions from EFS Technology.

Dave Dunford explains: "The old joke characterises the situation in most large organisations: it takes only one person to need a lightbulb, but three to do the paperwork. While it is never that bad, it does underline the point that in order to control several millions pounds of expenditure, we do need to generate, send and file a great deal of paper in order to create a detailed purchase order authorisation trail. However, handling & processing 15,000 purchase requisitions from several hundred managers in 13 regional centres was proving to be a major cost centre in itself - that is until we invested in AutoFORM LaserNet.

When these costs were analysed we realised there were two issues to be resolved. First, eliminating the cost of pre-printed stationery. The cost of all the paper to print our orders on was running at several thousands pounds per year. Secondly the laborious task of posting paper requisition and purchase order copies backwards and forwards between the central purchasing office, finance, suppliers and the originating departments. While the popular conception is that paper is inexpensive: in reality bursting continuous stationery, photocopying, filing, manual faxing and envelope stuffing takes up a lot of time: and time costs.

## Output & Document Management

### The Solution was AutoFORM

Dave Dunford spent a few weeks evaluating a number of packages. "At first we thought we would have to bolt together a number of different printing, email & fax and an archiving solutions from a number of suppliers, which potentially could have led to integration problems. However, we were delighted to learn that AutoFORM would offer us all three options with a single interface. What is more the developers, EFS Technology are UK based which meant that if we ever need help it is never far away.

### Eliminating the Need for pre-printed Stationery:

AutoFORM arranges for all the logos, watermarks, and other design elements to be included in the print output. In addition AutoFORM conditionally inserts several hundred variations of supplier or department specific data such as payment terms, delivery instructions, & VAT numbers. This saves the requisitioner having to type it in each time.

### Delivering Documents by Network, Email & Fax

The cost & time benefits of electronic delivery are well recognised—in the region of £0.50 to £1.00 per document, depending on whether the administrator has to manually convert each document to PDF and send it by email or fax, or whether the system does it for you. It is the automation aspect of AutoFORM that has really brought the advantage.

The OU purchasing department creates circa 125,000 documents p.a.. We can now send 90% of these by automated email, which saves us several hours per day.

As we generate purchase orders, AutoFORM converts them to email or fax format - according to the suppliers choice. They are held on the server until 9pm, merged with address details and sent out. We delay the delivery until 9pm so that our suppliers receive all our orders in one daily shot - which helps them to consolidate multiple orders into one cost effective delivery.

### DOCUMENT REALITY CHECK

Hewlett Packard report that office workers spend five hours per week, photocopying, manually faxing, delivering and filing documents. According to HP, additional time is lost as staff often use these tasks as an opportunity to catch up with the gossip, or plan social activities.

### Automated Archiving

AutoFORM archives outgoing orders as they go to print & incoming documents such as the suppliers invoice are scanned. Relevant PC files, emails & faxes can also be imported and linked to associated documents. This information can then be accessed by those that need it online (and not by those who don't) via a webbrowser. Not only do we save on the time and cost of storing paper documents, we are empowered with immediate access to information enabling us to make more informed purchasing & financial decisions and resolve queries in less time.

### Main Advantages

- No operator intervention: orders are sent out at a pre-set time, and copies sent to requisition department, and automatically archived, all completely without an operator.
- Manages high volumes of documents c. 125,000 p.a.
- Cost benefits of using e-mail or fax, no printing or paper costs. No need for somebody to separate paperwork and put into envelopes for posting.
- Fax orders are automatically sent at off-peak rates.
- Supplier receives documents direct, orders and remittance advices, so no printing or postal delays.
- Copies printed out, when needed, direct to the individual network printers so no distribution necessary.
- No paperwork to file as copy automatically archived.
- Full audit trail with Auditors having access to archive records.



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