



Whitepaper: Automating purchase order entry system for Medical Devices Company



Integration Technology	.Net SQL Server UNIX
Industry	Manufacturing
Enterprise Applications	Documentum EDMS ERP SAP SQL Server
Document Flow	Inbound Outbound Fax
SNAPS Products	Snapsflow

Executive Summary

The client, a medical devices manufacturer, had invested in a RightFax server because almost all of thinner purchase orders were received via fax. While RightFax allowed them eliminate the problems associated with lost faxes, they were still printing the purchase orders and routing them manually. The reason for this was because of the scanning process they used to get the PO's into thinner document management system. By utilizing Snapsflow, the client was able to use FaxUtil as thinner indexing client thus eliminating the need to print and scan the documents into their EDMS.

Case Study Details

This client was receiving hundreds of purchase orders each week from their customers. 90% of them came in via fax. The other 10% came in via email or USPS mail. Since they had no good way to integrate their RightFax server with Documentum, they were printing the PO's and routing them by hand. Each PO line item had to be entered into SAP for manufacturing. After the order entry process was complete, the PO's were scanned and indexed by a separate group of people. Detailed description of the solution:

In order to automate this process we built Snapsflow policies to do the following:

All faxed orders coming into the Assistance Center will arrive in a single FaxUtil mailbox named 'ACC_Inbound_Faxes'. The Customer Service Representative (CSR) who monitors this FaxUtil mailbox will open each order and record the PO number in the 'Data Field 1' column. After closing the viewer, the CSR will then drag the fax order into a sub-folder that is designated for the appropriate region.

Snapsflow will be configured to monitor each of the region sub-folders under the ACC_Inbound_Faxes mailbox. When an order is dropped into one of these sub-folders, Snapsflow will perform the following tasks every 10 to 15 minutes as a priority level 1 task:

- Extract the appropriate index data from RightFax
- Create a Documentum index file
- Extract the fax history data; convert it to a TIF image
- Extract the fax image from RightFax and merge the fax history TIF with it
- Wrap the new fax image in a PDF document
- FTP both the PDF and index files over to the Documentum server
- Route/Forward the original fax to the region designated by the folder it was dropped in

Once Snapsflow has routed the order to the appropriate region, a CSR will open it and create a new order in SAP. The CSR will then record the SAP order id in the 'Data Field 2' column. After closing the viewer, the CSR will then drag the fax order into a personal folder called 'Completed Orders'. When an order is dropped into this sub-folder, Snapsflow will perform the following tasks:

- Extract the appropriate index data from RightFax
- Create a Documentum index file with the UPDATE flag set to YES
- FTP both the index files over to the Documentum server
- Move the original fax to a folder called 'Completed Orders' a sub folder of ACC Inbound Faxes.

Snapsflow was implemented with the RightFax interface module. Both a development and production system was put in place. The initial install took two days. We worked with them for the next week, tweaking the Snapsflow policies and working out any problems that were encountered.

Business Need

This client was looking for a cost effective method of integrating their RightFax server with Documentum. They wanted to leverage the RightFax client software as a front end tool for indexing documents into the EDMS. The manual process of scanning purchase orders was expensive and time consuming.

Benefit/ROI

As a result of this project, the client was able to speed up their ability to process PO's. This ultimately allowed the client to produce the product and get paid sooner. They were also able to eliminate the manual labor associated with two employees. While no headcount reduction was realized, they were able to process more orders without adding additional personnel.