



## SUCCESS STORY FOR ENERGY

### PPL

PPL Corporation Utilizes Kofax Technology to Streamline Invoice Processing Operations throughout the Organization.

Kofax Enterprise Capture Platform Helps Leading Energy Provider Process More than 150,000 Invoices Annually.

#### The Challenge

PPL Services, a division of PPL Corporation, is responsible for processing more than 1 million customer bill payments each month as well as more than 150,000 vendor invoices annually. Like many other U.S. companies, PPL has traditionally processed receipts and disbursements in two distinct business environments: accounts receivable and accounts payable. Given the high-volume nature of its bill payment processing, the company utilizes sophisticated equipment with digital capture technology to automate the processing of customer payments. What PPL wanted to do, however, was utilize the same equipment and work group to electronically convert paper-based vendor invoices into electronic images and data streams, which could then be forwarded to the company's various front offices for processing. (While PPL has made great progress in promoting electronic invoicing, it recognizes that paper invoice volumes will continue to be significant for the foreseeable future).

This "digital mailroom" concept would not only yield operating efficiencies, it would also enable the company to significantly improve its short-term cash forecasting capabilities by capturing all of its upcoming vendor payment obligations before being forwarded electronically to the company's various front-office environments.

PPL's initial attempt at implementing a scanning and invoice processing system required templates to be built for every vendor and invoice format used by the vendors, before the data could be recognized. Creation of these invoice templates was very time-consuming and labor intensive. In addition, PPL needed to process several disparate types of invoices, including purchase orders, contracts and special approvals. Each of the invoices would typically arrive in different shapes



*PPL Corporation, headquartered in Allentown, Pennsylvania, controls more than 11,000 megawatts of generating capacity in the U.S., sells energy in key U.S. markets, and delivers electricity to 4 million customers in Pennsylvania and the United Kingdom. The company has been successful by adhering to an integrated corporate strategy to generate and sell competitively priced energy in key U.S. markets and operate high-quality energy delivery businesses in selected regions around the world. They have become one of the most successful energy companies in the nation by focusing on excellence in operations, financial discipline and outstanding customer relationships.*

#### Products in Use:

- ◆ Kofax Capture™
- ◆ Kofax Transformation™

**Focus:** AP and Invoice Automation

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Denise Baker, Project Manager at PPL Corporation

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and sizes, which required PPL staff to employ unique processing methodologies in order to process the invoices. Over time, the system became very inefficient and ineffective.

## The Solution

In early 2007, Kofax Certified Solution Provider BizTech was awarded the contract to implement a Kofax enterprise capture solution, the foundation for Kofax's strategy to help organizations streamline business processes, for PPL Services. As part of the implementation, BizTech created an OPEX Import Utility (OIU) to establish workflow from PPL's OPEX scan stations to the Kofax solution, and to capture and process hundreds of invoices daily. The solution included:

Kofax Capture, the world's leading automated information capture platform, and

Kofax Transformation™, which streamline the transformation of business documents into structured electronic information by automating the processes of document classification and data extraction.

Based on PPL's need for precise classification and extraction, BizTech implemented both Kofax Capture and Kofax Transformation, which enhanced the power of the Kofax solution. With its full suite of classification and extraction technologies, Kofax Transformation enables PPL's cash processing department to process paper invoices and automatically identify any incorrect or missing data, which provides staff with more time to focus on issues requiring their immediate attention. With its user-friendly interface, this solution automates document processing functions previously handled manually while also increasing the accuracy of information.

## The Results

In the months following the implementation of the Kofax enterprise capture solution, it has quickly demonstrated its value. Now, when a new invoice is received by PPL's cash processing department, OPEX 3690i scanners scan the document and the BizTech OIU moves each document to the Kofax solution where data is extracted, regardless of any unique fonts used in each invoice. The data is then transferred into a server for processing through Kofax Transformation. More than 150,000 paper invoices are now processed by PPL annually.

"We are very pleased with the Kofax solution and the BizTech implementation," said Denise Baker, project manager at PPL Corporation. "We reviewed many different options and chose the Kofax solution because of its ability to integrate with our workflow, the simplicity of its interface, and reputation for being a low maintenance solution. The Kofax enterprise capture platform has fit very nicely into our IT environment and has greatly improved the entire invoice processing system in the months since its installation."

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