

Cracker Barrel Cuts Paper in AP & HR

The Customer

[Cracker Barrel Old Country Store](#) is an American chain of restaurant and gift stores, operating 660 stores in 45 states and serving traditional Southern cuisine. Recognizing the benefits of successful repeatable processes that propel the launching of new stores, ideas and internal business units, Cracker Barrel consistently ranks among Fortune magazine's "America's Most Admired Companies" in the areas of financial soundness, quality of products/services, long-term investment, quality of management and use of corporate assets.

The Challenge

An early adopter of document imaging for storage, backup and retention, Cracker Barrel began scanning and storing invoices for accounts payable (AP) processes around 2004. Recognizing that its optical platter/jukebox methodology would need to be updated in the near future, Cracker Barrel looked to some of the current technology solutions that embraced the benefits it currently had with its scanning solution, but could be extended throughout the enterprise, including to its human resources (HR) department.

Cracker Barrel searched for an experienced provider to help with installation, implementation and support of the new solutions; Cracker Barrel turned to Authorized OnBase Solution Provider, Naviant, to implement OnBase for its document management needs.

Additional requirements for the new electronic document management solution were ease of implementation and scalability to other enterprise business units with easily configurable workflows. Cracker Barrel also wanted employees and vendors to be able to import documents according to individual business needs, and for employees to be able to access business-critical documents directly from line-of-business (LOB) applications.

Cracker Barrel implemented OnBase in HR initially and within three months began to roll out subsequent OnBase solutions into other business units, including AP.

"It was important for us to add other parts of the business quickly...we didn't want to have to draw out the projects," states Mary Thompson, manager, Intranet Services. "What we found with OnBase was that the speed and ease with which we could configure, maintain and understand the system allowed us to do this."

HR ELECTRONIC PROCESSES

Before OnBase, HR had an entire imaging department dedicated to scanning paperwork for backup and retention purposes. By implementing electronic versions of HR forms and creating workflows that automate processes including recruiting, hiring and performance reviews, much of the paper shuffle has been eradicated, enabling Cracker Barrel to reassign the imaging employees to higher value tasks in the organization.

New hire paperwork is vastly automated with OnBase. Although many new hire processes begin with paper, when the paper is imported into OnBase, the barcode provides automatic indexing and

adds the document to all appropriate workflows, eliminating some of the manual processes with an auditable trail. Documents are automatically associated with the correct employee file, which can be accessed at any time and from anywhere for employees with the appropriate user rights, eliminating administrative burdens on the HR department.

The HR department easily imports documents, regardless of the file format or delivery method. Benefits documents are automatically imported using OnBase Document Import Processor. Also, because Cracker Barrel captures employee data from multiple systems, it capitalizes on the OnBase AutoFill Keyword sets which allow staff to type in a single employee number keyword to automatically index the remaining keyword values for employee documents. Electronic documents are also provided on FTP sites from third-party vendors or delivered in Microsoft Word® or Excel® format.

Although it processes approximately **15,000 documents per month**, the HR department is no longer inundated with paperwork, and operates with reduced risk.

AP PROCESSES

Although documents in AP had been electronically retained for backup purposes in the old system, Cracker Barrel sought to provide better access to the documents with a solution that also accommodated the variety of input methods that AP processes demand. With OnBase, Cracker Barrel can accommodate many AP document delivery methods—including paper documents that need to be scanned or documents that are delivered electronically in EDI and COLD data streams—without sacrificing its own efficiencies.

Because Cracker Barrel recognized that its employees could work much more efficiently with instant access to supporting documents when working in the ERP system, OnBase, documents can be opened right from Infinium ERP green screens as well as from Cracker Barrel's fixed asset control system.

For document import, a front end was configured by Naviant that emulated the feel of the old document management screen, easing user adoption. To further harness and control the onslaught of paperwork that accompanies business processes requiring collaboration of multiple parties, Cracker Barrel inserted OnBase Workflow.

Although many business processes typically start with a piece of paper, once imported into an ECM system, processes can become electronic workflows equipped with innumerable methods of automated process handling, collaboration, communication and notification.

Employees scan and index payable invoices to OnBase, and the OnBase workflow designed by Naviant works in the background to send keyword data to Infinium AP payables.

Once imported, the paper is no longer needed and can be physically archived or discarded as required.

For the AP department that processes **60,000 documents per month**, removing paper from these processes and replacing it with visible, auditable and Web-accessible workflows was a logical answer to process efficiency questions.

"Going paperless with OnBase brings efficiencies and control to business process workflows that usually start with a piece of paper," states Thompson.