

# OnBase®

a Hyland Software solution

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## CRACKER BARREL OLD COUNTRY STORE®

### BILLION DOLLAR ENTERPRISE 64,000 EMPLOYEE-STRONG SIMPLIFIES HR/AP WITH ECM

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.

With more than 580 company-owned units in 41 states and approximately 64,000 employees, Cracker Barrel serves an average of 7,350 guests per week, earning \$2.38 billion in net sales in fiscal 2008.

An early adopter of document imaging for storage, backup and retention, Cracker Barrel began scanning and storing invoices for accounts payable (AP) processes approximately 12 years ago. 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.

Imperative for Cracker Barrel was a local provider to help with installation, implementation and support of the new solutions; Cracker Barrel turned to Authorized OnBase Solution Provider, LBMC Technologies, LLC, to implement OnBase for its document management needs. Developed by Hyland Software Inc., OnBase is an integrated suite of enterprise content management (ECM) software solutions, including core capabilities in document imaging, electronic document management, workflow, COLD/ERM and records management.

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 ACROSS 580+ COMPANY UNITS IMPROVES EFFICIENCIES REDUCES RISK

With a workforce that is 64,000 people strong and growing, Cracker Barrel's HR department needed electronic document management for all employee personnel files and processes including recruiting and hiring, payroll, taxes and regulated policies.

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.

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#### AT A GLANCE

Cracker Barrel rolls out electronic document management and workflow solutions to business units across the enterprise to increase efficiencies among its 64,000 employees while reducing risk for compliance initiatives, including SOX. By eliminating approximately 75,000 paper documents from most business processes in HR and AP, Cracker Barrel is able to reduce costs associated with paper while speeding processes and improving service.

#### BENEFITS

- Instant access to documents through ERP
- Vastly automates new hire paperwork along with other HR paperwork for 64,000 employees
- Provides auditable journal entry procedures that enforce organizational rules and make all supporting documents and notes available from one central location
- Supports SOX compliance
- Fosters collaboration by improving accessibility to needed documents
- Reduces costs for creating, storing transporting and maintaining paper files

#### APPLICATION

- Enterprise-wide
- Accounts Payable
- Human Resources
- Tax

#### COMPLEMENTARY PRODUCT INTEGRATIONS

- Infinium Human Resources
- Infinium Accounts Payable
- AS400-based, in-house developed, fixed asset application

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.

### 60,000 PAPER DOCUMENTS ELIMINATED FROM AP PROCESSES EACH MONTH

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 LBMC 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 LBMC 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.

### ONBASE SOX SOLUTION TO SIMPLIFY AND IMPROVE INTERNAL CONTROLS

The next item on the Accounting group's agenda is to extend its journal controls to include a method to track the approval process and control both who can submit a journal entry and who can approve entries.

Because Cracker Barrel already had a system in place to handle the SOX components of journal entry management, the OnBase solution was designed and configured in just two weeks.

Previous processes required some of the documentation to be retained in paper format and some in Microsoft Excel, with all communications tracked through e-mail.

Now all information will be available through one central repository and instantly obtainable when needed. Employees will be able to easily access journal entries and transaction descriptions along with any notes, supporting documents, and transcriptions or conversations regarding justifications without having to hunt through e-mail threads or filing cabinets.

Cracker Barrel continually finds simple ways to remove paper from business processes.

"Documents generated from our retail PO system that need to be retained for compliance are converted into PDFs and imported into OnBase for retention without ever seeing paper," remarks Thompson.

The tax department manages documents and information by importing COLD report data streams from its general ledger and tax systems. The reports are automatically turned into OnBase documents, fully indexed and text searchable should they be needed for audit purposes.

These simple adjustments and workflows have an immediate business benefit in hundreds of hours of time recovered each month. Time formerly spent in duplicated data entry and scanning, printing, filing or tracking can now be repurposed to higher value tasks.

**"Going paperless with OnBase brings efficiencies and control to business process workflows that usually start with a piece of paper. There is no end to what you can do!"**

**-Mary Thompson**  
Manager, Intranet Services

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