

## Chase Staffing Case Study

### Top Staffing Firm Creates Paperless Accounts Receivable Workflow to Cut Processing Time by Half

With more than 30 years of experience and a Top 100 U.S. Staffing Firm\*, Chase Staffing Services is committed to matching the right person to the right job and providing the best possible service to clients. To do so, the company looked to eliminate its paper timecard and invoice processes and replace it with a paperless solution. An automated process would also accommodate the company's 50 branch locations covering the Southern and Midwestern U.S., even as the company plans to open an additional five to 10 branches per year over the next few years.

The original accounts receivable (A/R) process was completely paper-based and drained resources. Printing, matching and mailing 1,200 invoices with 6,000 timecards per week was costly and time-consuming. In one part of the process, Chase even had to print out the invoice in order to scan it back into another system. Chase was looking to cut down on costs, speed the delivery of invoices and improve employee and client service.

To find the right solution, Chase turned to vendors included in the Gartner Magic Quadrant for Enterprise Content Management (ECM) and sent out a request for proposal (RFP) to each one. After viewing a demonstration from Authorized OnBase Solution Provider Harvest Technology Group of the OnBase ECM suite, Chase found it to be the most comprehensive solution.

"Harvest Technology Group listened to our challenges and showed us solutions that were more innovative than other vendors," confirms Chief Operating Officer Catherine Stuff. One particular need OnBase met was to aggregate all of a client's timecards into a single file for e-mailing, instead of sending each one as its own attachment

#### Ninety-Five Percent of Invoices Now Sent Electronically

Although Chase has more than 50 branches, the payroll is centralized at its headquarters in Atlanta. Before OnBase, Chase was printing the electronically generated invoices, manually matching them to paper timecards, making copies and sending them to clients. Invoices were scanned back into a legacy imaging system, which required a separate login and toggling between applications. The paper then needed to be stored, taking up space within the office.

### Chase Staffing ... At a Glance

A Top 100 U.S. Staffing Firm, Chase Staffing Services reduces days sales outstanding (DSO) in Accounts Receivable by automating the printing, matching and mailing of 1,200 invoices with 6,000 timecards each week. Ninety-five percent of client invoices are now sent out electronically, cutting AR processing time in half and increasing client satisfaction.

#### Benefits

- Creates an A/R matching process completely void of paper for a fully paperless solution from end-to-end
- Cuts A/R processing time in half
- Eliminates manual matching of 1,200 invoices to 6,000 timecards
- Reduces DSO in A/R
- Converts 95 percent of A/R statements to e-mail
- Centralizes information originating in multiple systems
- Redeploys one full-time employee and reduces the workloads of the other staff
- Ensures only the appropriate users see needed documents with advanced security
- Eases training and encourages acceptance by retrieving documents while working within their familiar line-of-business application
- Received positively by both staff and clients
- Reduces use of paper, printing and mailing costs
- Staff processes more timecards to increase efficiency
- Automatically initiates the creation of timecard bundles and identifies who receives them
- Improves indexing accuracy and efficiency with automatic indexing

#### Complementary Product Integrations

- GFI FaxMaker fax server
- Sherpa Software Mail Attender®
- TempWorks Software Inc. TempWorks™
- Bottomline Technologies Optio document processing
- Sage Software Sage MAS 500 ERP
- Microsoft Active Directory®

\* Staffing Industry Analysts, Inc.

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The process is now completely void of paper, creating a fully paperless solution from end-to-end. Centralizing information in OnBase, Chase imports documents from multiple systems automatically. Using information retrieved by the OnBase Application Enabler™ (an integration tool requiring no scripting), the files are automatically with one primary index value, improving accuracy and efficiency during the indexing process.

In addition to timecards, invoices are also stored in OnBase. Chase’s Optio software creates invoices, which are imported into OnBase. OnBase Workflow matches the invoices to the corresponding timecards, eliminating manual matching. Once matched, Workflow initiates the creation of timecard bundles and determines which clients request a copy of timecards and which do not, a key functionality that influenced Chase’s decision to choose OnBase. With the new process, 95 percent of invoices and A/R statements are now automatically e-mailed to clients, significantly reducing postal costs.

Further centralizing information, Optio creates monthly statements for clients with open invoices, which are imported into OnBase, where they can be easily retrieved along with their related documents. Because Chase integrates OnBase and Optio, users working in Optio simply need to use a keystroke to view OnBase documents related to the screen they are working in. This eliminates any toggling between applications and speeds retrieval.

By automating the process, A/R staff spends the time previously spent on paper-intensive processes on performing core job functions. Chase has reduced the days sales outstanding (DSO) in A/R in addition to redeploying one full-time employee and reducing the workloads of the other staff. “Our staff processes more timecards than they could shuffling through all of that paper. We have increased efficiency and productivity, cutting our processing time in half,” confirms Stuff. The department has also reduced paper, printing and mailing costs.

Stuff continues, “Harvest Technology Group performed a vital role in the success of the design and implementation of our OnBase and Optio solution. Their analysis, innovation and expertise made this a turnkey solution for Chase.”

### Expanding Use of ECM Increases Value

In accounts payable (A/P), electronic invoices are imported into OnBase and automatically indexed with information retrieved through an integration with Chase’s finance software, Sage MAS 500. The integration allows users to open OnBase documents while working within their familiar line-of-business application. Using dual monitors, A/P staff view MAS 500 on one screen and OnBase documents on the other for a complete view of information without searching for paper.

The payroll department also automatically indexes information into OnBase as well as retrieves documents through an integration with Chase’s TempWorks payroll software and dual monitors.

Not only does the staff at Chase’s headquarters use OnBase, the branches have access as well. Easing training and encouraging acceptance, the branch users also pull up OnBase documents through their familiar interfaces, MAS 500 and TempWorks, with a single keystroke.

### Staff and Client Satisfaction

Although OnBase has eased access to documents, it does so only for those who need to see them. OnBase uses security settings from an integration with Microsoft Active Directory along with its own sophisticated security features to ensure only the appropriate users see needed documents. If a user does not have access to a document, he or she will not even see the document exists. For example, Chase has two divisions, Chase Staffing and Chase Technical, and each division can only see their documents; and for branch locations, AP staff can only see specific documents related to their branch.

With the new paperless solution, Chase has had a positive response from both staff and clients. The staff finds retrieving documents with the keystroke extremely easy, while customers like moving to electronic invoices and timecards. “Our clients are glad they have moved the information off their desk and into their computers. Any time a customer is happy is a good thing. We couldn’t be more pleased. OnBase is a fabulous product,” says Stuff. With such great initial success, Chase plans to expand the OnBase solution to add automated workflows to the AP process and include new departments in the solution.