Collier Restaurant Group

DocStar®

Dynamic Restaurant Conglomerate Improves Workflow Processing With DocStar ECM and DocStar AP Automation

Company Facts

Overview

▶ Location: Servier, Tennessee
▶ Industry: Restaurant Management
▶ Specialty: Restaurant Group
▶ Number of Locations: 14+
▶ Website: collierrestaurantgroup.com

Success Highlights

Challenges

▶ Exiting platform continually crashed, putting a lot of pressure on the IT team to do restores, reboots and backups

▶ Lack of flexibility and scalability in homegrown system to other departments like HR

▶ Manually processing 20,000 invoices a year, from multiple locations was expensive and time consuming

Solution

▶ DocStar® ECM
▶ DocStar AP Automation
▶ Integrated with Sage 100 ERP

Benefits

▶ Full conversion of legacy data meant no data loss

▶ Automated workflows improve speed and efficiency of processing documents in AP, HR, and other departments

▶ Ability to comply with Affordable Healthcare Act as well as human resources requirements—eases audit stress and resource burdens

▶ Intelligent Data Capture and full integration with Sage 100 ERP saves more than 50+ hours a week in manual processing

▶ Improved security with data backups and anytime access to data

Collier Restaurant Group has offered the tourists and residents of Sevier County, Tennessee dining options for more than 40 years. With nearly 600 employees, the firm owns and operates 14 establishments under six different brands, including nationally recognized names such as TGI Fridays, Golden Corral, and The Melting Pot.

Collier Restaurant Group's CFO, Royce Pruitt, offers insight into the firm's experience implementing DocStar ECM solutions. Responsible for all finance and IT functions, Pruitt has both a high-level understanding of the necessity of efficient processing and also a tactical understanding regarding functionality and flexibility. His familiarity with the firm's numerous workflows and processes made him the ideal lead for Collier Restaurant Group's quest for the right document management system.

Existing challenges

When Collier Restaurant Group (Collier) initially approached DocStar in 2011, their existing platform was creating more trouble than it was worth. Because of both the high volume of scanning and poor search design, the system routinely crashed, wasting 15-30 minutes each time and often required server reboots. "The initial platform was falling down, crashing all the time," described Pruitt. "The system wasn't designed for the volume of scanning we were doing."

But it wasn't just the increased downtime that led Pruitt on a search for a new system. It was also the lack of flexibility. Collier needed a system that could grow and develop toward their goal for each individual restaurant to supply invoice, payroll and revenue data automatically into their accounting software without having to rekey information. This desire for a more streamlined and integrated system that omitted duplicate processes was the motivation for Pruitt's search.

After investigating numerous alternatives, Collier selected DocStar ECM and DocStar AP Automation. "The design of the solution allowed us to keep our existing internal processes

Processing 20,000 Invoices Per Year	
Industry Avg: $15.61/invoice*	**$312,200**
Best-in-Class: $3.09 /invoice*	**$61,800**
Estimated Yearly Savings	**$250,400**

*Source: Aberdeen Group, April 2011

without having to adapt to a document management software system," Pruitt continued, "The DocStar solutions were clearly a superior product [to our existing solution] and no one else had the integration that worked with our databases."

Implementation and expansion
It wasn't long before the DocStar and the ITC team, including Mike Shaw, were given their first real opportunity to shine. "I was extremely fearful that they would not be able to convert our legacy data," Pruitt began, "Technical issues kept preventing the conversion and I figured that they would throw their hands up and give up on us."

However, Collier was given immediate support, as multiple program engineers dedicated their time to analyzing and addressing the challenge. "They didn't give up. They kept working at it, kept fixing it, and they got it. I was incredibly impressed," Pruitt stated. Once the two systems were aligned and all of Collier's data was converted, process implementation began right away.

Human resources workflows
Employee files
Employee files were the first documents to be brought into the system. Everything from W-4 documents to disciplinary records are now maintained in one central, secure platform. This allowed for a more streamlined workflow to be initiated for new hires.

Health insurance
With the upcoming changes to health insurance as a result of the Affordable Care Act, there will be a significant increase in the level of documentation required for processing health insurance. "[The changes] are huge," stated Pruitt, "We didn't anticipate a lot of participation in the new health insurance we were going to offer, but the cost of administrating it is going to be as great as the cost of the insurance we provide." If Collier were to manage the process manually through traditional paper documents, it would be impossible due to the volume and flow. "The DocStar ECM solution is going to save the day as far as administrating the healthcare law," he added, hailing its ability to streamline the capture and processing of required documents.

Accounts payable processing
Collier has more than 100,000 documents in their existing AP database and continues to process approximately 20,000 invoices annually. So, they are focused on AP document processing efficiency.

DocStar AP Automation's Intelligent Data Capture feature captures the invoice image, extracts key metadata, and subsequently pushes that information to a Microsoft Access Database driven Inventory Module and simultaneously routes the invoice to a secure repository for archival.

The Collier main office is able to capture the invoice data from its various restaurants through the Microsoft Access Database driven inventory module. The line item details are then reviewed and coded before sending it on to their accounting system. Pruitt envisions expanding Intelligent Data Capture to all company operations, including daily transactions, in coming years.

Given the volume of existing and incoming data through the AP department, the search abilities of the system are critical. The DocStar solutions facilitate comprehensive searching based on flexible queries. "Our previous system had awkward search functions. So if you didn't design your search just right, it didn't find the documents and would sometimes crash the system." Pruitt commented. "It didn't have anything like DocStar ECM's 'contains' logic."

Together, the image capture and search functions allow Collier's AP department to operate smoothly in all tasks relating to archived and incoming invoices.

Purchasing/Invoice processing
As was the case with their AP processing, Collier is now able to leverage image and data capture for their purchasing/invoice processing system. This internally written software retrieves data directly from the POS systems in the restaurants and subsequently pushes that data into the firms' accounting software. The DocStar solution is able to automate components of this workflow and again allow for improved archival.

Return on Investment (ROI)
Collier experienced a variety of benefits from implementing the DocStar ECM solution. Among them were time savings, improved security and increased compliance, all of which have an impact on Collier's bottom line.

50+ hours saved per week
By eliminating the excessive and growing downtime that Collier was experiencing with their previous system, Pruitt estimated that they are saving roughly 5 man-hours every week. From the image capture function he estimated an additional 5 hours a week of time savings, and expected that number to double in the next two years. With the reduction in duplicate processing and improved workflow for their upcoming

expansion in purchase/invoice processing, Pruitt sees the potential for a further 10-15 hours of time savings by next year.

Comparing electronic content processing to a paper-based process, Pruitt estimated a minimum time savings of 30-40 hours per week. "We are not a big company but we do push technology," Pruitt noted. "Going to a paperless environment saves you a lot of man-hours. With a paper environment, someone pulls a file and it's gone and each person spends thirty minutes trying to chase it down. That's an incredible waste of time and productivity."

Increased security

"If we'd ever had a catastrophic crash with our old product, we'd be dead—gone," admitted Pruitt. Forced to support their initial system themselves, Collier was exposed to significant risk as they were open to the consequences of a major technical malfunction. With DocStar and ITC, however, they're provided comprehensive support that not only mitigates the potential for downtime, but also allows them to further adapt the product to additional workflows.

Pruitt also points out that with an electronic document management system, "you don't have lost documents" as is frequently the case with paper-based processes. With tracking and data accessibility features, Collier knows where all documents are at all times and who has access to them.

Improved reporting compliance and liability

With the flexibility and tracking afforded by the DocStar ECM system, Collier has streamlined their auditing and reporting process. "If auditors come in, we just set them up with a laptop and say 'here you go, search away.'" Pruitt states, "Before, we'd have to pull all those documents."

What's more, with digital content management, Pruitt has considerably less anxiety over the oncoming compliance issues arising from the new health insurance mandates. "There's a lot of potential liability if we don't get all our documentation ducks in a row, and that's why I think the DocStar ECM solution is going to be vital. When you offered the insurance to the people, when they declined it, when it terminates—all of these things you have to track and do right—and if we don't do something right and communicate properly with the employee, we could be held liable."

Pruitt offers an example, citing that if an employee is not correctly notified of an insurance termination and that employee subsequently gets into a serious accident, Collier would not only be exposed to fines, but could also be found responsible for any medical expenses incurred by the employee. However, with the DocStar system, tracking and archiving of such documentation is automated.

Focus on the future

In looking ahead, Collier is excited to expand DocStar technology to other departments and activities, streamlining additional workflows and further diminishing duplicate processes that occur between the individual restaurants and Collier's headquarters. They look forward to additional time savings, and broader gains in security and compliance as the system is leveraged in other processes.

"A lot of our employees were skeptical at first, but the more they're using the DocStar solutions, the more they're impressed. Where I'm really impressed is the simplicity of it, because the simplicity makes it flexible," Pruitt states, emphasizing the system's ability to integrate with unique internal systems and it's adaptability for new documents. It's clear that Pruitt sees DocStar's technology as the leading document management system.

However, before completing the interview for this study, Pruitt relates the entire positive experience to DocStar's human side: "It's the DocStar people that have made this product so strong."

About DocStar

Helping businesses translate vision into action for more than 20 years, DocStar delivers a flexible and innovative enterprise content management and process automation platform. Easy to implement and use—both in the cloud and on premises—DocStar proven technology and global process expertise empowers organizations to operate at peak performance, navigate change, and grow.

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