

Enterprise Content Management Solutions Enable Cato Inc. to Digitize Data and Streamline Departmental Productivity

Celebrating over 50 years as a leader in the gasoline, heating, and oil business, Cato Inc. takes an aggressive approach to keeping our environment safe by meeting and exceeding government regulations in the industry.

Now a diversified energy company, Cato has expanded operations to include convenience stores, fast food restaurants and real estate projects. However, rapid expansion came with its challenges. With approximately 500 employees, the Human Resources department was operating at minimal efficiency as paperwork was received from all directions; via email, fax, and even hand delivered. Pallets of paperwork were accumulating, making the tracking of invoices and federal paperwork difficult for Cato's Accounting departments as well.

But when Cato found GlobalSearch® Enterprise Content Management (ECM) from Square 9® Softworks, the decision to go paperless became a 'no-brainer'. The solution's scalability, effortless implementation, organized archive structuring and easy workflow maintenance provided the perfect platform for Cato, Inc. to take their document-intensive processes digital.

Before GlobalSearch, Cato's Accounts Payable clerks would file around 150 invoices daily by department and vendor, and twice a year they would have to move these invoices into storage boxes. Luckily, with an ECM solution in place, this time-consuming process is no longer needed. **Instead, Cato's clerks can simply scan in their invoices and have the system use OCR-assisted indexing to effortlessly archive documents within seconds, allowing more time to be spent on reconciliation tasks, instead of filing.**

With the help of a Square 9 consultant, Cato customized Square 9's Human Resources solution, Hire to Retire, to coincide with their new ECM solutions. Cato created one simple HR workflow within the software, which now manages six different client businesses while complying with multi-state HR requirements. By using an SQL table, whenever Cato acquires or builds a new restaurant or store, the new location is instantly added to the document workflow structure.

In addition, through Square 9's GlobalForms® Web Forms module, Cato built custom forms containing the common information a new hire must enter. All fields

Snapshot

Industry:

Utilities

Departments Impacted:

Accounting, Human Resources

Featured Products:

GlobalSearch, GlobalForms, Hire to Retire, GlobalAction

Objectives:

Improve forms processing so data can easily be captured, stored, and accessed, while also providing multiple levels of security for different archives.

are then pre-filled and nothing is manually keyed. Once complete, Square 9's Business Process Management module, GlobalAction®, separates the submissions and archives the forms in the appropriate buckets, eliminating the storage of blank forms. HR staff is then sent an email with a cover page containing the information they need to setup Payroll and benefits for the new hire.

While Cato has already expanded by 30% and continues to grow rapidly, Square 9's solutions have helped them avoid the need to hire at least two additional clerical positions. **Now with all departments using GlobalSearch to look up their invoices, Cato has eliminated at least 60% of paper and toner costs companywide. In addition, what used to be two warehouses with several hundreds of boxes of stored paperwork, has now been reduced to one warehouse with less than 50 boxes - easily a 75% reduction in paperwork alone.**

Thanks to Square 9's product suite, Cato has moved towards their paperless initiative without going through great expenses and countless hours of implementation. In the last week, Cato has upgraded all their products to include Square 9's GlobalCapture for the scanning and indexing of invoices, and have implemented signature pads to use with GlobalForms to make e-signature processes even simpler. For more information on Cato Inc. please visit www.catooil.com.



Increased Productivity



75% Reduction in Paper

Interview: Jack Rich

IT Director, Cato Inc.

Q. What business challenges led you to discover Square 9's solutions?

Jack Rich: Every year we were accumulating pallets of paperwork which are required by Local, State and Federal regulations. There were file cabinets lined up throughout the office holding the current paperwork and days were spent moving the paperwork to archive boxes which took up a lot of room in one of our warehouses.

Human Resources was receiving their employee paperwork via email, faxes and hand delivery, and then filing it in folders and cabinets in their office. This paperwork varies based upon the type of business and the State the business is located in, so keeping track of each became trying at times. And with the business growing so quickly, invoices became harder to track as well.

Q. How have processes changed since implementing Square 9's solutions?

Rich: As we continue to roll out the Hire to Retire package, Human Resources is getting the new hire information instantly and accurately. GlobalAction also made it easy to email Human Resources a simple summary page for new hires while archiving and indexing all the new hire forms to their buckets without manual intervention. This is the biggest savings, and without GlobalAction, Human Resources would probably be spending much more time manually indexing and archiving the forms. If not, the design of the system would have been much more complex and harder to maintain.

With GlobalForms, new hire information from the remote businesses is coming into Human Resources the day of hire instead of sometimes weeks later. All the required forms are accurately being completed – eliminating the need for Human Resources employees to have to call and track down the missing documents and missed information.

Q. In what ways has Square 9's product suite improved business performance?

Rich: In Accounts Payable, the clerks used to file around 150 invoices daily in file cabinets by department and vendor. Twice a year, they would have to move these



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invoices to storage boxes and put them in the warehouse. All this has gone away and the clerks spend more time doing reconciliation instead of filing. KeyFree Indexing has also helped the Accounting department streamline the archiving of invoices and daily paperwork. With the simple hover and click method, gathering all necessary information can be done within a matter of seconds!

In addition, last year, Cato physically stored less than 25 boxes of paperwork and that number will continue to go down as contents are identified to be shredded. Repairs and replacements of printers has also been reduced and the accuracy and timeliness of automated New Hire packets has dramatically reduced employee frustration.

Q. Would you recommend Square 9's solution?

Rich: Yes! GlobalSearch is a great solution for small to medium size businesses looking to move towards paperless solutions without going through great expenses and countless hours of implementation. GlobalForms is a fairly easy tool to learn and is use and GlobalAction can be a powerful way to get to a near complete paperless environment. Whether an outside party is used to create these forms, or done internally like we do, the combination of these two tools has many possibilities.