

A large commercial freight company desperately needed to improve their handling and processing speed for bills of lading. Timing for pickups and deliveries was suffering due to burdensome manual indexing processes and instability in their OnBase system. This resulted in lost scanned images and time.

Utilizing **OnBase Production Document Imaging, Barcode Recognition Server, Workflow, WorkView | Case Manager, Application Enabler, and Business Activity Monitor**, a new solution was designed and implemented to provide maximum efficiency and help the client better meet customer demands.

## Client and Solution Background

In the process lifecycle of a shipment, the bill of lading is critical. It travels with the shipment from pickup to delivery, and confirms all items were shipped and priced accurately.

This client's bills of lading are first scanned upon the pickup driver's arrival at the terminal. Under the old process, billers manually indexed bills and simultaneously entered shipment data into a mainframe billing system. This data entry had to be completed for a shipment to be loaded onto an outbound trailer.

The service level agreement (SLA) for processing a bill of lading was under 15 minutes. This meant that bills needed to be scanned and viewable in OnBase in under three minutes, and assigned to a biller in less than five minutes. Under the old process, all bills were accessible by all users, which enabled billers to "cherry pick" easier to process bills. This left more complex bills unprocessed, often failing to meet SLA requirements.

## Leveraging the Power and Flexibility of OnBase

Immediately, scanners were replaced to improve scan quality and network and infrastructure improvements were made to resolve stability issues. Multiple OnBase modules were then leveraged to create a new solution to substantially improve the efficiency and stability of the Freight Bill Entry process.

First, **OnBase Production Document Imaging** was used to improve image quality and auto-rotate images, reducing re-scans and making images easier to read. **OnBase Barcode Recognition Server** was used to automate the capture of crucial keyword values, reducing manual indexing and allowing for automated routing and prioritization of bills – facilitated by redesigned **OnBase Workflow Life Cycles**. This included new logic to automatically assign bills, route exceptions to the correct users for additional research, and allow requests for assistance to be tracked and resolved within OnBase.

To maximize efficiency, a **WorkView | Case Manager** application was designed to act as a prioritization matrix. Automated load balancing was implemented in the

## Client Profile

This client is a long-standing freight company with terminals and distribution centers across North America, and beyond. The organization has used OnBase for many years, but only recently discovered that their Freight Bill Entry implementation was in dire need of a redesign due to usability issues and system instability.

### By the Numbers:

- + 350 concurrent OnBase users
- + Process up to 40,000 docs per day
- + 270 locations in North America
- + Processing time under 15 minutes per document



**Workflow Life Cycle.** and user security was configured so that each biller could only see bills assigned to them. This eliminated the chance for “cherry picking” and improving SLA compliance. Managers were provided with a separate queue containing all active bills, and options to reassign or escalate bills.

To keep management informed of potential risks to shipments, notification thresholds were set based on the age of each bill, the number of bills in queue, and risk of SLA breach. Business continuity considerations were also added, allowing bills to be reassigned from one billing center to another using an emergency override feature in case of a major outage or natural disaster.

## Summary

OnBase, with over 300 configurable modules, has the capability to improve even the most complex business processes, significantly reducing manual interaction and systematically identifying critical documents and exceptions. This client’s Freight Bill Entry solution is a great example of how to use a variety of OnBase modules to support and automate critical business processes, maximizing efficiency and reducing costs related to human interaction and error.

If you currently have a workflow solution implemented in OnBase or Perceptive Content, RPI Consultants can help you find real cost and time savings through automation and intelligent solution redesign. Contact us to learn more and schedule a consultation with one of our expert product and solution consultants.

## About RPI Consultants

RPI Consultants is a professional services organization with over 18 years of experience supporting ERP, ECM, and Advanced Data Capture products and solutions, including Lawson, PeopleSoft, Perceptive Content, Kofax, and OnBase. RPI Consultants is based out of Baltimore, MD, with other offices located in Tampa, FL and Kansas City, MO. For more information on RPI Consultants, please visit [www.rpic.com](http://www.rpic.com).

## Automated Indexing & Real-time Reporting

To minimize redundant manual work, **OnBase Barcode Recognition** was used to capture initial keyword values from barcodes on each bill. Using **OnBase Application Enabler**, these values were used to interface with the mainframe billing system and allow billers to screen scrape values into OnBase with a single keystroke.

Additionally, **Business Activity Monitor** was used to configure real-time reports on workflow volumes, user activity, and bill status, allowing management to tailor resourcing and meet SLA requirements.

## About the Author



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Sydney Isle is a Senior Solutions Architect at RPI Consultants and has over six years of experience supporting OnBase, including being an OnBase Certified System Administrator and OnBase Certified Workflow Administrator.