



## PANTHER II TRANSPORTATION, INC.

### Expediter Reduces Time Between Delivery and Payment

Since 1992, Panther II Transportation, Inc. has been building its reputation as a leader in the niche market for time-critical shipments. Based in Medina, OH, this expedited shipper employs both company-owned and owner/operator equipment for non-stop deliveries to all points in the United States, Canada and Mexico. Panther II has won numerous awards, including a Government Travel and Transport Award from the United States General Services Administration. It has also been named several times to the Weatherhead 100, a list of the fastest growing companies in Northeast Ohio. Customers call Panther II when lost time means lost profits, whether it's a crucial repair part that has to be across the country in a matter of hours or a demanding customer requiring immediate delivery. Lost time can also mean lost profits for Panther if AP and AR processes become backlogged. As a technology leader in its industry, Panther sought an ECM (enterprise content management) solution to streamline processes and chose OnBase from Hyland Software, Inc., an enterprise-class software that combines integrated document management, business process management and records management in a single web-enabled application.

One of Panther's main goals was to minimize the amount of time between when an owner/operator has to be paid and when a customer could be billed. Once a driver has completed a delivery and submitted the bill of lading, POD and receipts for expenses such as tolls and fuel, s/he must be paid. If documents are missing, payment to the driver is held up and the customer can't be billed. In addition, Panther needed to ensure that the complex and diverse billing requirements of its customers were met the first time.

Implemented by systems integrator and authorized OnBase reseller Hudson James, Panther's accounting system uses Document Imaging and Workflow to increase efficiency. The bills of lading, PODs and other documents are scanned at the central office in Medina and

a satellite office in Seville, OH using Eastman Kodak document scanners. When the file is complete, it triggers a Workflow to Payables. Using the OnBase Image Statements module, Panther automatically includes all supporting documents with the check. At printing time, OnBase gathers the documents on which the driver's compensation is based, including documents showing any advances that may have been made. The system prints these images as well as the check, providing drivers with information they need to track reimbursement and reducing calls to Payables staffers.

Panther has also automated processes associated with generating thousands of 1099 forms using Workflow. The system is configured to create verification letters and has eliminated penalty costs associated with delays.

The Payables department also uses OnBase to manage standard vendor invoices. For this process, Panther employs the OnBase Document Retention module, which automatically eliminates documents according to time-based or event-based business rules. At Panther, outdated invoices are destroyed, conserving system resources.

Once the costs of the trip and its delivery have been confirmed, Workflow routes the file to Receivables in order to match the documents with the authorization number and invoice the customer. "Billing is one of the most overwhelming jobs at Panther," says Rick Ford, finance and administration manager at Panther. "There is a two-inch thick training manual for employees in that department. Each vendor has their own requirements based on what they need to process an invoice or terms of the contract. If we don't meet them, it can hold up payment."

Now, when a billing clerk opens a file, the relevant terms of the contract appear as a pop-up to ensure accuracy. "Our goal is that every bill that leaves here is 100% accurate," says Ford. "That way we can get paid as soon as possible." The billing process also utilizes the Image Statements module by automatically gathering supporting documents to submit with

### AT A GLANCE

Recognized both for financial growth and best practices in transportation, expediter Panther II Transportation, Inc. implemented an OnBase ECM solution to streamline accounting processes and maintain a secure yet accessible repository for business-critical documents.

### BENEFITS

- Customers are invoiced up to three times sooner without an increase in personnel
- Billing clerk productivity increased by 2/3
- Improved responsiveness to customer and owner/operator queries
- Ability to easily identify which loads need to be invoiced
- Allows documents to be shared when relevant to more than one driver, information must be shared with a 3PL or access is required by remote offices
- Eliminated the cost of maintaining eight storage units full of banker boxes

### APPLICATIONS

- Accounting (AP and AR)
- Dispatch
- Safety

### ONBASE SOFTWARE

- Document Imaging
- COLD/ERM
- CD Authoring
- EDM Services
- Exception Reporting
- Host Enabler
- Image Statements
- PCL Data Input Filter
- Workflow

### COMPLEMENTARY PRODUCT INTEGRATIONS

- Eastman Kodak document scanners
- Custom developed line-of-business application running in a UNIX environment

the invoice. These documents can be redacted to remove extraneous notes and remarks such as comments about deadhead miles or payments.

### Prevent Document Loss and Ensure Regulatory Compliance

Because the processes related to Payables and Receivables often rely on input from other departments, use of the OnBase system isn't limited to accounting. For instance, Dispatch often has information that is necessary to resolve driver or customer disputes. Through Workflow, these inquiries can be forwarded to Dispatch without having to send a physical file. This allows more than one person to work on a file at the same time and prevents lost files. Dispatch also has access to the OnBase repository in order to review any supporting documents as well.

Though Panther's safety performance is far above the national average and its carrier ratings are consistently satisfactory, improving safety and quality remains a priority. The process and quality control standards at Panther contribute to its ability to acquire certifications such as ISO 9000, CSA (Canadian Shipping Act) and FAST (Free and Secure Trade Program). The Safety and Compliance Department uses OnBase to meet increasingly stringent government regulations such as the Patriot Act and changes to the DOT guidelines for driver hours.

The OnBase repository includes driver files, verifying they have meet requirements for drug screening, insurance and CDL eligibility. OnBase also manages copies of the photo IDs required by the Patriot Act and other security clearances held by Panther. By having all of these items in one secure file, safety officers can easily determine that requirements have been met.

Driver logs are scanned and sent to a third party provider for transcription. Both the image and resulting text files are saved in OnBase for the six-month period required by law and then deleted.

The images and other documents are associated with transactional data through the OnBase COLD/ERM module, which is used to capture reports from a custom line-of-business application that runs on a UNIX system. An optical jukebox from KOM Networks is used for secondary storage. Panther generates about 20 to 25 5.2-inch disks filled with data every quarter.

### AR Productivity Nearly Tripled

When Panther was featured by Pat Summerall in a Champions Of Industry profile, CEO Craig T. Amato attributed Panther's success to strength, speed and agility. OnBase reflects Panther's efforts to embody those characteristics. Whether they come from internal employees, owner/operations or customers, inquiries are answered much faster than with a paper record. In the past, the physical file couldn't always be located easily. For instance if it went to another department to gather more information, it would be difficult to track who actually had it.

Not only does OnBase allow users instantaneous access to the file, the EDM Services module allows Panther to keep a history of what actions/changes may have affected a document and supports the check in/check out of documents. The OnBase solution also makes it easier to quickly locate the appropriate information for customers with multiple orders.

Tasks can be accomplished faster because, unlike with a paper file, multiple users can complete work simultaneously, including employees at the satellite offices in Chicago and Charlotte, NC. In some instances, documents must be "shared" between two files, which often led to errors with the manual process. For instance, if one driver took a load halfway and another completed the delivery, the POD would often only show up in the second driver's file.

Currently, when additional copies of documents are requested, such as by a 3PL, they can be sent via a fax or e-mail integration. In the future, Panther plans to support customer self-service by making many documents available on the Web.

Prior to using OnBase, billing clerks invoiced about 200 loads a day. Using OnBase, the same number of employees can invoice 500 to 600 loads a day. Individual productivity rose from about 80 invoices a day to about 200. The OnBase Workflow allows supervisors to quickly identify loads that haven't been invoiced and where a bottleneck exists in the process.

Eliminating paper has also reduced storage costs. At one time, Panther was maintaining eight storage units stacked with banker boxes full of documents. "As our system has evolved

– and continues to evolve – we have enjoyed a very good relationship with Hudson James," comments Ed Wadel, IT manager and OnBase administrator at Panther. "They have been there all the way through the process and we look forward to working with them in the future."



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