

# Document Management Case Study



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## Tankersley Food Service

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Speaking metaphorically, when a company grows faster than spinach, great computer technology can serve as a strong, supportive root system. Such is the story for Tankersley Food Service, LLC, the largest independent foodservice distributor in Arkansas, and Oklahoma.

Founded in 1928, Tankersley has accomplished something that seems rather improbable. It went from \$8 million in annual sales in 1999, to yearly revenue of around \$95 million in under eight years. This quantum expansion has been the product of a shift in business strategy, an increase in the number of field sales representatives, and a fervent commitment to technology.

several important components in Power Enterprise including its web-based customer order entry portal and a voice recognition warehouse picking system. Here, Retalix Power Enterprise runs on a reliable IBM System i, model 520.

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*Casey Carter, Director of Information Technology Tankersley Food Service, LLC.*

In foodservice parlance, Tankersley is a broadliner, meaning they offer dry, frozen and refrigerated food items, fresh produce, meat, beverage service supplies and cleaning products to businesses and institutions. Early on, Don Tankersley, the company's CEO, decided to deploy powerful computing technology and licensed Retalix Power Enterprise, an ERP solution specially designed for the food industry. Their IT shop is using

information technology, “Problems like this start off small. You start by sending one report to one person and then it becomes a couple of pages and before you know it, you’re spending a day printing, bursting, scanning, and emailing reports. As we grew the problem got bigger and we didn’t even realize it. We thought we had to print all



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these documents to make the business work.” At one point, Retalix Power Enterprise would run end-of-day processes and 50 different reports would print. Many of these reports were referenced only periodically so the bulky 11” by 17” greenbar output was folded and stored. In an effort to eliminate waste, they started archiving report spool files on the System i but spool files take up a lot of disk space, and it was a hassle for users to find specific reports because searching for them involved scrolling through 2,000 documents.

In 2008, Carter attended a Retalix user conference in Dallas, and stumbled upon a solution from Retalix Business Partner, S4i. By then, he had already deployed a PC-based electronic document management solution that seemed to work, but had its shortcomings. For one thing, it didn’t have the ability to capture spool files, so System i reports would first run on a system printer, then get scanned into a PC-

modules were very expensive. “The total cost of S4i Express was less expensive than the cost of upgrading the other solution’s scanning component,” he says.

S4i Express is a complete document delivery system for IBM i that electronically captures, separates, indexes, bundles, and delivers or archives documents and reports. Output options include .pdf, .html, .csv, .rtf and other formats. It also supports automated report distribution to fax machines. At the Retalix conference, Carter discussed S4i Express with IT professionals from other foodservice companies and felt confident that it was a solution he could work with. His initial intention was to simply duplicate the level of reporting automation that he had with the previous system.

S4i Express was easy to implement because it captures spool files in defined outqueues, so programming is not necessary. Says Carter,

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based system, and get emailed or faxed to hundreds of recipients. Carter also explains that the first document automation system was difficult to configure and maintain, and it was often necessary to hire a contractor to make changes. Finally, upgrades and additional printing and labor. Honestly, the reporting process never operated this efficiently.” Carter started by capturing 13 documents and is now doing roughly 200. Over a short period of time Carter says he acquired expertise with S4i

“We started capturing spool files automatically, converting them to electronic reports and distributing them through distribution lists. This process was about as painless as it could be, and it eliminated a lot of unnecessary

Express and took off running. “It’s a lot more useful than we thought it would be. Many times, when you license a product to do a specific task, and it does that task, you’re satisfied. We thought we



were going to replace our old system and trade apples for apples, but we got much more functionality at about the same cost of our old system. This has opened up new opportunities for us that we hadn't previously considered."

Carter is also using S4i express to place orders with vendors, a process that was once very paper-centric. Orders were once printed on roughly 1,000 pages of greenbar, and manually split. The segments were then mailed to dozens of vendors. "We don't have to spend a whole day going through these reports, labeling them, labeling the envelopes and mailing them," says Carter. "S4i creates PDF files and automatically emails them to our vendors."

Think document automation and then some. *Since then, Carter has deployed S4i Express in ways that even S4i finds imaginative. As an example, some of the printed reports that Retalix Power Enterprise produced were difficult to read in places where the lighting was dim, so Carter configured S4i Express to grab specific spool files, increase the size of the type in critical areas of these reports, and send them to the printer. "When the end user tells it to print, the system handles all of these operations automatically and the report comes off a laser printer in a format that's much easier to read."*

Tankersley attends two food shows every year, and meets with all of its vendors. Since Tankersley offers 12,000 different SKUs from 300 manufacturers, preparation for this event is intense, and up until this year, it has involved a great deal of printing. "Years ago, we would print a stack of reports that would stand about 24 inches high. Last year, the stack of reports

was as tall as a man. It became a nightmare," says Carter.

Carter has different plans for the next food show: He is going to facilitate a shift to electronic documents. This will eliminate 90 percent of the paper used, and fewer temporary workers will be hired to help prepare for the show. "It's going to be phenomenal. It will also free up our buyers and sales managers who won't have to hand-deliver these documents. It will free much of their time so they can meet with our vendors."

Carter has also set up S4i Express' web-based document management portal to facilitate employee access to electronic documents. "Using their System i User ID and Password, employees can access the Portal and perform document searches in seconds. "No training is necessary because it's very intuitive." Carter has set up indexes in S4i Express so users don't have to open documents to find the information they are looking for. Through database indexes and OCR, Carter's search mechanism can find specific values in column headers.

Has S4i Express eased Tankersley's growing pains? "There's no doubt about it," says Carter. "The number of processes needed to run our business has grown and is more complicated. Many of them involve reporting, so from every angle, S4i Express has been a good investment. It saves time and the expense associated with printing paper documents. We've gotten much more than we expected and it has helped us a great deal."



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