Document Management

Case Study

Appert's Foodservice is situated just blocks from the Mississippi River as it ebbs through St. Cloud, Minnesota. Founded in 1935, Appert's Foodservice has grown from a local family-owned frozen foods supplier to a full-service broadline distributor serving Minnesota and several bordering states. Appert's facility includes more than 157,000 square feet of production, storage and distribution facilities. Appert's 260 employees contributed to an impressive $45.6 million in annual revenue.

As the company grew, significant commitments to technology became commonplace. In 2003 they implemented a bundled ERP solution from Retalix called Power Enterprise. This system runs on an IBM iSeries model 520 and serves roughly 110 desktops. Highlights of its deployment include Retalix Power Sell for online field sales order entry, Retalix Power Net, a system that facilitates web-based customer order entry, and Power Warehouse, a warehouse management system. Most recently, they added Retalix Power Voice, a voice recognition picking system that has reduced their error rate from 1 on 1,300 to 1 in 14,000.

Until January of 2009, Appert's maintained a physical repository of thousands of paper Invoices. Up to 30 truckloads of product were delivered every day. When drivers returned to the warehouse, they would submit to the Accounts Receivable department a stack of invoices that were signed by customers. Some of these

Bob Sitzman, Director of Information Systems at Appert's explored several software solutions that could streamline this process. While independent foodservice vendors--industry-wide--rely on source documents like signed invoices to verify transactions, Sitzman felt that electronic archiving could save Appert's a great deal of time, and also improve customer service.

While attending a Retalix User Conference, Sitzman asked colleagues if they had experience with document scanning and that's when he first learned about S4i Express. A fellow Retalix customer was using S4i Express to eliminate all of the printed reports at his company, as well reduce expenses by replacing pre-printed shipping documents with ones that were produced in-house on a laser printer. S4i Express, a complete document delivery system for IBM i, facilitates report distribution, on-line viewing, archiving, retrieval, document scanning, desktop archiving, and

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documents bore important notations pertaining to merchandise that was not received or accepted. If at some point a customer called with a question regarding a bill that was subsequently mailed to him, an Accounts Receivable staffer would have to terminate the call, thumb through hundreds of invoices to find the right one and call the customer back. If the customer requested a duplicate copy, the copy would be sent to him via fax.

other key workflow functions.
Sitzman felt that S4i Express could deliver value for this project and several others so he proceeded with the implementation. Using only remote implementation support from S4i and one member of Sitzman's five-person IT team, S4i Express was installed, reports were

defined and outqueues that needed monitoring were identified. As for the build-in WebView Portal, web application server scripts automate the configuration. WebView works with any web application server on the iSeries, PC, Linux or server of choice. The web servers often used are Apache's TomCat, IBM WebSphere and IBM WebSphere Express.

Today at Appert's, payments are applied once the driver returns with the signed invoices. An employee then scans them. S4i Express makes it easy to recognize and index these invoices using OMR, OCR, or ICR, and automatically enters them into a managed workflow environment. These scanned images are then stored on Appert's production iSeries server. WebView then allows employees who have been granted authority to specific documents through their

the Invoice. If necessary, they can instantly send it to the customer via email of fax and do this while the customer is on the telephone."

Members of the IT staff have been busy working on other ways to improve the flow of documents throughout the company. Appert's is now using S4i Express as their report distribution tool on the iSeries because it offers more advanced functionality. "Daily, weekly and monthly reports will all be distributed automatically via email," he says. "They'll be available immediately after day-end processing so managers won't have to wait for them." S4i Express includes multiple image overlays for forms, signatures and logos so documents will reflect the corporate identity. These documents can be transmitted in a variety of formats including PDF, HTML, Excel, Word, and many others.

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iSeries User ID and Password, to view lists of documents from their desktops, or send them to customers as email attachments. WebView users can search for specific documents using a built-in search engine. When necessary, a system administrator can change the look and feel of the user's entry page to meet individual user requirements. "The browser-based user interface made it very easy for our users to hit the ground running," says Sitzman.

"We've really just started to move away from paper in some areas," he says. "So far, we're benefiting from being ble to archive and retrieve these documents much more easily. Invoices can be accessed directly from an employee's desktop, which means they don't have to end the customer call, leave their desk and find

He also plans to make nutritional and allergy information sheets as well as MSDS documents available to his customers through Power Net, and eliminate pre-printed two part forms with form overlays on common laser printer paper. "This will really cut down on our paper cost."

Sitzman believes that he probably won't ever see a completely paperless environment in the foodservice business but there are plenty of opportunities to move in that direction. "We can significantly reduce our reliance on printed paper documents, and in the future we will be emailing more of our reports or making them available through a secure portal.