

IMS/21<sup>®</sup> AND TEKNION  
GREATER EFFICIENCY BY DESIGN



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C O L D



## GREATER EFFICIENCY BY DESIGN

### VANGUARD'S DOCUMENT TECHNOLOGY STREAMLINES TEKNION'S OFFICE ENVIRONMENT

Explosive growth is a great problem for a business to have, but even great problems demand solving. At Teknion ([www.teknion.com](http://www.teknion.com)), a fresh face in office environments and furnishings, its U.S. headquarters swam in a sea of documents until a tidal wave of paper required a call for help. The rescue came from Vanguard Systems ([www.vansystems.com](http://www.vansystems.com)) of Media, PA.

Founded in 1983, Teknion experienced exponential growth between 1994 and 2001. It won numerous design awards and became a favorite of companies seeking office systems as progressive as their products. Teknion prides itself on both style and durability, and there lies the rub.

#### **Lifetime Warranty Drives Lifecycle Access**

Teknion provides a lifetime warranty on its products. To support this, the company must retain all of its sales and warranty records. Thus, while the company grew 40 percent per year, compounded, during the '90s, paper storage grew commensurately. Storage was a major physical problem. Retrieval was a major service problem.

The original solution to the storage problem was banker boxes. Teknion stacked them in its New Jersey headquarters. Then it secured offsite storage. Finally, boxes filled both offsite storage *and* the headquarters. As the business grew, management looked for ways to improve office efficiency. They wanted to keep staff morale high.

Teknion did not want its employees spending time asking, "Who has the XYZ file?"

"We added a lot of head count due to the increase in business," explains Dawn Donnelly,

Manager of Order Entry. "The company showed its appreciation, and we wanted the business to continue growing, but still, there was a lot of overtime."

"We were physically cramped also," adds Todd Ritrievi, the Customer Service Manager on the project team that sought a solution. "We had to disperse people into five separate buildings. It made coordinating and storage difficult. Archiving was a pain. We recognized that our Order Entry, Customer Service and Finance Departments could be more efficient if we could access our files and documents more quickly."

**Teknion swam in a sea of documents until a tidal wave of paper required a call for help. The rescue came from Vanguard Systems.**

As the new millenium dawned, Teknion planned for a bigger, state-of-the-art headquarters in Mt. Laurel, NJ. Management wanted the building to be a jewel that reflected the advanced design and efficiency of Teknion's products. They envisioned the building itself to be a showroom for the whole product line. That meant no stacks of banker boxes and, hopefully, a happier staff and better customer service.

“We started by looking at the workflow process,” states Bill Flanders, Vice President of Information Technologies. “We wanted to be sure we knew the whole lifecycle of our documents. Then and now, we have to have access to our records.”

Management created an Imaging Project Team with members from each department with a stake in documents. Also, they hired an experienced IT project manager, Frank Gilligan. The Project Team looked at a handful of potential solutions. “We looked at Domino.Doc® from Lotus®, and we had some conversations with Xerox® but dismissed them early,” Gilligan recalls. “Second place actually went to a regional integrator with an NT solution.”

Finally, looking at Vanguard, they saw all the features they sought. “There were a couple of things that separated them from the pack,” Gilligan states. “For one, they are an iSeries and Lotus Notes® shop. Second, I had a sense that our business was important to them. Being a mid-sized company, we weren't going to get lost in a sea of large companies.”

“When we looked at cost justification, it was primarily in the area of storage,” Flanders continues. “Vanguard's solution [IMS/21] was relatively inexpensive, and cost justification was easy. But that didn't drive us to the system. Rather, we needed to improve our operation, and we intuitively knew that it was the right direction.”

Gilligan actively engaged personnel in the different departments, soliciting ideas of how technology could help their workflow. He recognized that the staff was generally computer-savvy. When Vanguard's IMS/21 system arrived, the plan was

to run parallel systems for four months. Teknion found that the intuitive interface created a short learning curve for users. The document automation worked so smoothly that, at the staff's request, management agreed to stop the paper flow after only six weeks.

## IMS/21® Provides Room to Grow

About 50 percent of the documents arrive at Teknion by fax, and most of the rest come over the Worldwide Web. IMS/21 automatically enters the images into the system, indexes them, and reads key fields. The images, stored magnetically on the iSeries' Direct Access Storage Device (DASD), are available almost immediately. The images remain in DASD “Cache” on the iSeries for a period of time. Older documents are retrieved from optical disks in a jukebox. Gilligan estimates that current storage capacity will serve four to five years.

“A really important aspect for us is integration with our current systems,” adds Sheryl Silverman, Senior Vice President of Operations. “We need an imaging system that cleanly and invisibly integrates with our other systems – our iSeries, its database, RightFax®, and especially, Lotus Notes. All four systems have to talk with one another.”



Notes® is integral to Teknion's corporate culture. Project Team member Anita Frasier, who is responsible for Notes development, adds functionality regularly. With links between IMS/21 and Notes, on-screen buttons bring up specific images for quick access to information. “Users don't have to close out of anything,” she explains. “There are just hot spots that activate links.”

**Certain efficiencies surfaced immediately:**

- 1. Expenses decreased with the elimination of color-coded folders, storage cabinets, banker boxes and warehouse space.**
- 2. The time it took to process back charges (credits) declined due to efficiencies gained between IMS/21 and Lotus Notes®, where the back charges are approved.**
- 3. Integration with Notes® simplified sending e-mail and images together. Also, the staff discovered with pleasure, electronic sticky notes do not fall off, and highlighting is removable.**

Before IMS/21, all orders – whether fax, electronic, or paper – were printed for the Order Entry Department. Now the order entry staff works from images on their screens. In fact, when the occasional order comes on paper, the operators fax the paper to themselves because that is easier than scanning.

“When we first heard about imaging, we were skeptical about going paperless,” reveals order clerk Janne Sada. “But now it is so easy, and we don’t have to create or find [paper] files.”



“It is such a relief not searching for files,” adds her colleague Georgette Hyson. “There’s just no downside.”

When questioned, the workers laughingly admit that imaging is changing the corporate culture in two ways. First, there is less socializing because they spend more time in their workstations. Second, they need to watch their weight because they don’t get exercise carrying files and searching for papers.

The use of Vanguard software at Teknion is expanding and may reach every area. Already the billing department enjoys the benefits of imaging. All invoices are still mailed on paper, but requests for duplicate invoices are now filled electronically. With a couple of keystrokes, a customer service representative calls up the invoice images and faxes a duplicate in a matter of seconds.

Gilligan gets considerable credit for the solution’s success. “Frank did an outstanding job as project manager,” Flanders smiles. “He made it user friendly, explaining everything in language we could understand.”

With IMS/21 in place, Teknion feels that once again, it can develop strategies for continued growth. “We have the time and energy to try to improve things,” notes Donnelly.

Hearing input from more than a dozen staff members, one can only conclude that IMS/21 is now a vital part of Teknion life. There is a sense of exhilaration and liberation. From the executives to the clerks, satisfaction runs high. Gilligan sees a continuing and expanding role for IMS/21 as a vital component to Teknion’s operation and growth.

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