Block & Co. Future-Proofs ECM with Low-Cost Cloud Technology

Company Gains 24/7/365 Support, Smooth Transition for Users

Software that is inexpensive, upgrades automatically and offers unlimited storage is usually a welcome choice for any IT professional—especially when a change is unwanted, but necessary, due to discontinued support and a platform at the threshold of maximum capacity.

Such was the case for Kremena Hagen, Manager, Information Technologies for Block & Company, a leading manufacturer of POS and money handling equipment, security and office products based in Wheeling, IL. Support ended in 2013 for the company's on-premise electronic content management (ECM) system used in its Accounts Payable, Distribution, and Customer Service departments, and a new solution was needed.

Led by Hagen, the four-person IT team at this 81 year-old firm had already been working since 2012 on major hardware, system and application upgrades to meet company goals of faster data access, better integration between systems and more process automation.

For the ECM system conversion, Hagen had three primary goals: retain the same functionality, no disruption for users and contain costs.

Affordable, Cloud-Based ECM

Hagen turned to Block's ECM consultant Integrated Document Technologies (IDT), Itasca, IL, to assist with selecting a new system. "We trust IDT's technical expertise, vast experience with multiple ECM systems, and most importantly, knowledge of our own infrastructure and data," says Hagen. The two companies have worked together since 2001, when IDT designed, installed and integrated the company's first ECM system, and on a prior conversion in 2009.

For its next upgrade, Block considered new enterprise ECM software from its current provider. But Hagen found the cost too high, and, didn't want to purchase yet another system on premise that may not be supported four years from now.

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To meet cost constraints without sacrificing functionality, IDT recommended a Cloud-based system, Tronitech's VAULTview ECM, that would provide Block with several long-term advantages: reduced infrastructure and maintenance costs; unlimited storage; and greater functionality and flexibility than the previous system.

"By moving ECM to the Cloud, Block eliminated on-premise servers and IT infrastructure, plus licensing fees. All that's needed to use it is a web browser," notes Mike Nolfo, IDT president. "With upgrades included, there's no downtime or added cost. And since space is always available in the Cloud, unlimited storage is another plus." Tronitech also offers technical support 24/7, 365 days a year, a relief for busy IT teams.

All these factors added up to good reason for Block to move to the Cloud.

"Internally for IT, we have one less server and application to worry about," says Hagen. "ECM systems are not in the core of our IT expertise, and having someone else taking care of it is welcomed."

Importantly for many companies, too, says Nolfo, a Cloud ECM system like VAULTview is a good solution for disaster recovery. Rather than having hardware on premise, servers are housed in a compliant data center and regularly backed-up, again eliminating work for in-house IT teams. This became another value-add for Block, since the company is in the midst of developing a disaster recovery plan.

A Successful Conversion

In line with Hagen's goals of not disrupting the user experience or requiring training, IDT and Tronitech were committed to configure the new ECM system to closely resemble the set up the company had previously.

For data capture, scanning and indexing, Block was happy with the performance of its current technology, CAPSYS® CAPTURE, and wanted to keep it in place.

The web-based, thin client software enables documents to be captured electronically from anywhere, on any device, making it especially useful for companies with team members working at multiple locations.

"IDT knew how to easily integrate VAULTview ECM with our data capture system, and for us that was a key, since CAPSYS performs database lookup/validations against our ERP for indexing documents," explains Hagen. An upgrade to the latest version of the capture software was all that was needed—CAPSYS CAPTURE adapts easily to either on-premise or other Cloud ECM technologies.

Following the successful conversion of 1.2 million documents, the new ECM software is functioning as it should for its specified use in document search, retrieval and archiving.

"The new ECM system is intuitive, and closely resembles the same index look and feel as our prior ECM system, so our users haven't been disrupted," says Hagen. Some new features have been well-received, including a convenient preview bar that helps users quickly navigate to the proper file; the ability to highlight and make notes on documents; and the ability to batch records for emailing.

The Tronitech VAULTview ECM system is intuitive, with new features that have been well-received.

Overall, Hagen and the company's users are pleased with the software's performance, and what was accomplished in the process. "We replaced an unsupported system that was at risk and reaching its capacity. That allowed us to upgrade our capture software and SQL database, together with an overall Windows OS upgrade," explains Hagen.

In terms of future business value of the Cloud-based technology, Hagen says access for remote employees, like those currently in Mexico, may prove beneficial. The VAULTview ECM system may also eventually be deployed elsewhere throughout the organization.

As for advice she'd offer other companies faced with converting to a new system?

"First of all, it's an advantage to have an integrator that understands both the old and the new software systems," she says. "Then, realize that conversions take time. Always allow more time. That includes spending the time to really learn the old software and process flows, before rushing into implementing a new system."

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About Block & Company

Established in 1934, Block and Company Inc. is a privately held manufacturer and distributor of office products headquartered in Wheeling, IL. Block, MMF Industries and MMF POS are divisions of Block and Company, Inc. Block is a distributor of cash handling and office supplies and equipment to businesses in the banking, gaming, hospitality, vending, restaurant, educational and business services industries. Product categories include coin and currency handling, check handling and document storage, coin and currency bags, drive-up and ATM supplies, forms, imaging supplies, signage, lobby supplies and crowd control products, identification and security products and office, breakroom and janitorial supplies.

About IDT

Integrated Document Technologies (IDT) helps companies eliminate paper at its source, offering consulting services and a full line of content management, data and image capture and process automation products including hardware and software systems and Internet-based electronic solutions. Since 1992, IDT has put its sole focus on creating customized document management solutions for companies in diverse industries, serving as a one-stop resource for design, integration and long-term system support. With system installations nationwide, IDT's expertise as a system designer and integrator continues to expand as new document management technologies become available. Contact IDT at 630.875.1100 or visit www.idt-inc.com.

For More Information:

Mike Nolfo
President, IDT:
Michael.Nolfo@idt-inc.com or 630.875.1100

Press Contact:

Susan Duensing, CBC:
Element-R Partners
+1 (847) 639-8300
Susan@rurelevant.com

Connect with IDT: