



Streamlining Technical Service Bulletin Process for Triangle Package Machinery Co.®

About Triangle Package Machinery Co.

Founded in 1923, Triangle Package Machinery Co. is a Chicago-based family-owned and operated company. With a reputation spanning nearly a century, Triangle® serves the world's leading food manufacturers and distributors, offering innovative sanitary food packaging equipment. Their products range from Vertical Form Fill Seal (VFSS) bag machines to multiheaded weighers and cartoners. Serving diverse markets like seafood, cereal, poultry, meats, and more, Triangle's commitment to excellence is seen in their ability to service machines from the 1950s and their global network of distributors.

Challenge: Technical Service Bulletin (TSB) Process

Triangle faced a significant challenge in managing the process of Technical Service Bulletins (TSBs). These essential documents required a formal business workflow process involving multiple reviews, approvals, and email communications. Tracking the status, collaborating on changes, and maintaining real-time updates was challenging for the various Team Members. Triangle desired a more streamlined solution that brought more accountability to the team members and visibility of the process to its leadership team.

Solution: IDT's Cloud-Based ECM Solution

IDT collaborated with Triangle to create a customized solution leveraging OnBase by Hyland software. This system automated, streamlined, and provided a rules-based workflow for the TSB process. Key features included:

- **Business Process Automation:** OnBase Workflow ensured a trackable, accountable process.
- **Microsoft Office Integration:** Existing tools like Microsoft Word templates were leveraged.
- **Notifications:** Automated reminders, or "nag emails," kept the process on track using workflow triggers and timers.

- **Dashboards:** OnBase Dashboards provided real-time insight into the TSB process.
- **Document Management:** OnBase by Hyland provides document imaging and document management capabilities including revision control tracking.

Impactful Outcomes

Implementing the OnBase Automation Project led to transformational results:

- **Efficiency:** Reduced processing time for TSBs, enhancing productivity.
- **Control:** Streamlined process with real-time tracking.
- **Search Capability:** Easy search for TSBs based on various parameters.
- **Scalability:** Inspired similar solutions for other departments like Finance, Sales Engineering and HR.

Future Collaboration

Triangle continues to work with IDT on upcoming projects such as:

- Integration with Microsoft Dynamics NAV™ and Microsoft Business Central™
- Automating the pre-sales change order process.
- Deploying [IoT Smart Connected Scanning™](#) appliances for paper document capture.
- Automating Employee Onboarding, Employee File Management, Asset Tracking and more.

Conclusion

Triangle Package Machinery Co.'s collaboration with IDT represents a success story in leveraging technology to enhance business operations. From the intricate challenge of managing TSBs to broader applications across the organization, this case demonstrates the power of a well-executed solution to drive efficiency, control, and innovation for an organization that is leading the charge in delivering the highest quality food packaging products and services in the marketplace.

For more details about Triangle Package Machinery Co.® and their offerings, visit <https://www.trianglepackage.com>.

For more details about IDT and our full range of Enterprise Content Management products and service offerings, please visit <https://www.ready4idt-inc.com>.