Industrial Supplies Firm Uses Enterprise Content Management to Organize Orders, Invoices

Customer: S.J. Smith Co., Inc.
Web Site: www.sjsmith.com
Customer Size: 145 employees
Country or Region: United States
Industry: Specialty retail

Customer Profile
S.J. Smith provides welding supplies and other industrial products and services to business customers in the central Midwest. The company is based in Davenport, Iowa.

Partners
KnowledgeLake
(888) 898-0555
www.knowledgelake.com

KnowledgeLake develops enterprise content management solutions for Microsoft SharePoint, helping businesses streamline operations and achieve regulatory compliance.

McGladrey
(800) 274-3978
www.mcgladrey.com

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Software and Services
- KnowledgeLake Capture
- Windows SharePoint Services

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> Kyle Shradel, Systems Development Specialist, S.J. Smith Co., Inc.

S.J. Smith Co., Inc., has a long history of providing customers in the Midwest with welding and other industrial supplies and services. To streamline the way orders and invoices are stored and accessed, the company deployed KnowledgeLake Capture and Windows SharePoint Services from Microsoft. The solution makes it fast and easy for employees to find and read documents, helping them work more effectively.

Business Needs

S.J. Smith Co., Inc., is a family-owned company that provides welding and other industrial supplies and services to businesses in the Midwest. Founded in 1950, the company operates from 13 locations in Iowa, Illinois, Missouri, and Indiana. Its services and products include safety and industrial supplies, high purity specialty gas manufacturing, welder repair, resistance, spot welding and a welder training program that is used by S.J. Smith customers to educate, certify, and upgrade their welding capabilities.

As the company grew over the years it began scanning and storing customer order and invoice records as digital records. The goal was to provide employees with a way to look up customer information without having to deal with paper files. However, the initial solution used for digitizing the documents eventually proved inadequate.

"As our business expanded, the solution we had in place for working with these digitized documents no longer addressed the volume of our needs," says Kyle Shradel, Systems Development Specialist for S.J. Smith. "The solution saved the images in a proprietary format that required client-side software to view the images. Plus the interface to scan and apply optical character recognition to the images was cumbersome and outdated."

By 2008, the company began looking for a technical solution that could help fulfill its core business goal of providing its business customers with value through continuous improvement and innovation.

Solution

Following up on a recommendation by McGladrey, an assurance, tax and consulting firm and Microsoft Certified partner specializing in enterprise IT solutions, S.J. Smith decided to deploy a KnowledgeLake solution and Windows SharePoint Services from Microsoft.

"We found that KnowledgeLake's integration with Microsoft SharePoint was the easiest solution we could deploy for our enterprise content management," says Shradel. "SharePoint addressed our need to provide a searchable library interface that displays scanned images in a non-proprietary, Web-compatible format. Compared to the competition, KnowledgeLake shined in all the areas we looked at."

The company started planning in April 2009 and deployed the solution a month later with KnowledgeLake Capture, a high-volume capture system that scans and indexes the documents with metadata tags, and then stores them in TIFF, PDF, or XPS file formats. KnowledgeLake Capture is integrated with SharePoint, and stores the electronic files in the appropriate SharePoint repository after the scanning and indexing processes are completed.

To scan the documents, S.J. Smith uses a Fujitsu fi-6670, a high-speed, duplex-capable document scanner that lets the company scan about 90 pages per minute, nearly triple the volume of the old system. During the scanning process,

KnowledgeLake Capture lets S.J. Smith establish templates for the different types of documents being scanned.

Benefits

With its KnowledgeLake solution in place, S.J. Smith has improved core business processes surrounding the storage and accessing of customer orders and invoices. The KnowledgeLake software combined with SharePoint provides a fast, simple way to make electronic documents available throughout the company. The tight integration of the products extends to other enterprise software, turning the KnowledgeLake solution into a seamless, integrated part of a larger enterprise system. And the indexing and search capabilities delivered by KnowledgeLake help employees quickly find and access important customer information.

Fast, Simple Enterprise Content Management
The KnowledgeLake solution is significantly easier and faster to use than the prior document imaging solution at S.J. Smith. It adds speed and efficiency to tasks that used to be time-consuming, enabling employees to redirect their time and efforts to other duties.

"The speed and simplicity of scanning documents using KnowledgeLake Capture saves our office staff valuable time," says Aimee Beadel, the S.J. Smith employee with the primary responsibility for scanning and uploading the order and invoice documents. "The new scanner software scans and OCR's extremely fast and it is very user friendly."

Tight Integration with Other Systems
The use of common imaging formats and easy-to-understand tools in

KnowledgeLake and SharePoint has allowed S.J. Smith to make its new enterprise content management solution an integral part of the larger enterprise. Shradel notes that when the company deployed a new enterprise resource planning (ERP) system, it was easy to integrate with the KnowledgeLake and SharePoint software.

"With the KnowledgeLake solution, the use of Web-compatible images and the SharePoint system has enabled cohesive integration into various technologies," says Shradel. "We were delighted in how quickly we were able to integrate the scanned images from KnowledgeLake Capture with our ERP system. Now our employees can pull up documents with just a click of a button from within the new ERP software. This kind of simplicity of integration means less work for everyone."

Rapid Searches for Information
The ability to tag images with metadata allows the S.J. Smith staff to search through tens of thousands of images easily to find specific documents. Notes Jill Hutcherson, Office Manager for S.J. Smith: "The variety of ways we can search for a document, and the speed of the searches, is a huge benefit."

Shradel concurs, saying the metadata associated with scanned documents contributes to the speed and simplicity of finding important information.

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