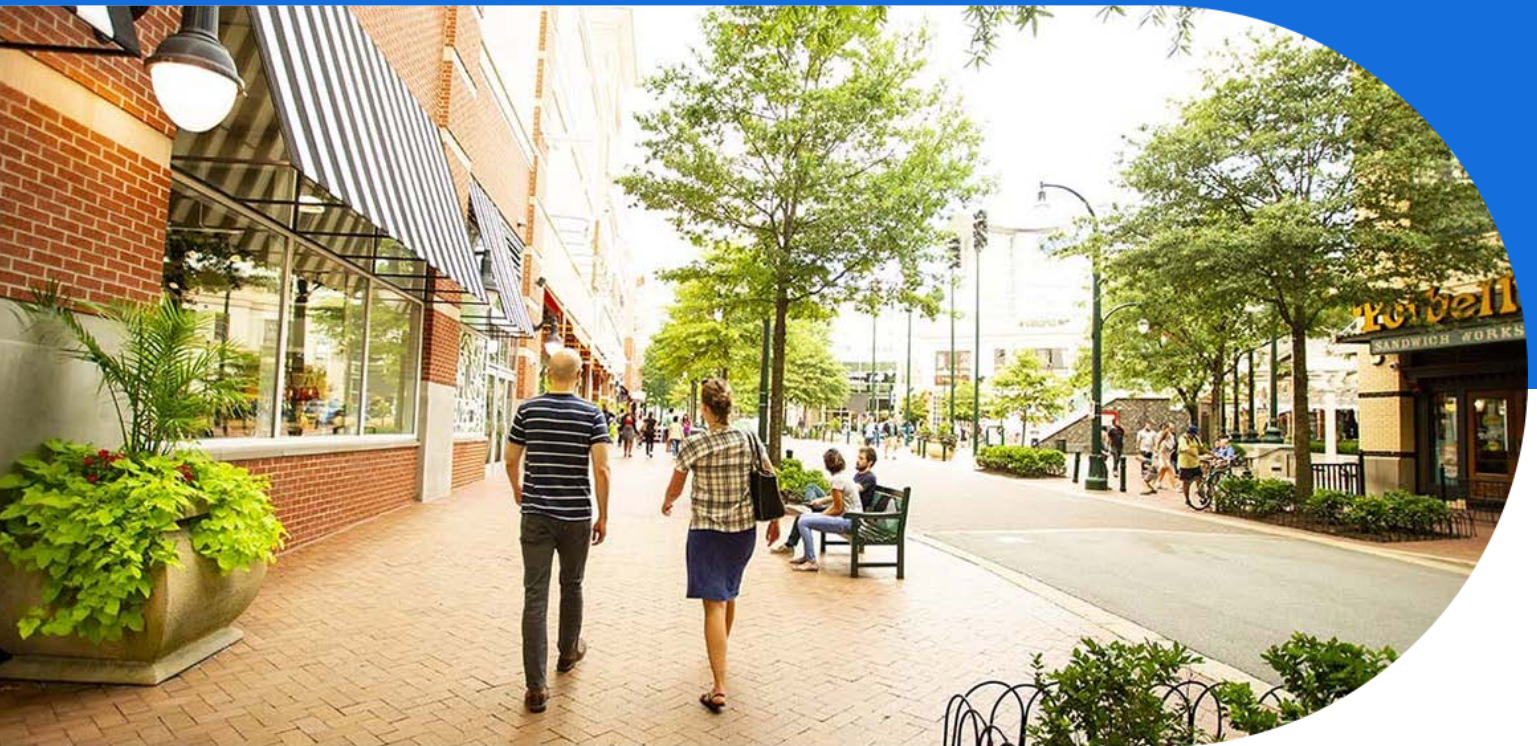**KnowledgeLake**

CLIENT SUCCESS STORY

Montgomery County (MD) Automates Administrative Processes in the Cloud

Just outside Washington D.C., Montgomery County is the most populous county in the state of Maryland. The county's legacy on-prem records management system made it difficult to streamline day-to-day business processes, impeding user productivity.

Client
Montgomery County Maryland
www.montgomerycountymd.gov

Industry
Government

Founded in 1776, Montgomery County is the most populous county in the state of Maryland. Neighboring Washington, D.C., the county is home to over 1 million people.

> ## "The new system has significantly cut down on the amount of time it takes users to complete a process end to end and is generally quick and easy to use."
>
> – Rishi Gulhar, Enterprise Services Team

BUSINESS NEEDS

The county sought to replace their legacy system with a modern Cloud-based solution that would securely house all official county records. "Looking at our immediate short-term needs, two major problems we identified were a lack of user efficiency and an inability to streamline common business processes," said Rishi Gulhar, Enterprise Services Team.

"As we explored KnowledgeLake, these two items were of special interest to our team since we were looking for core system functionality that would help our users streamline day-to-day processes."

Since Montgomery County's existing infrastructure was predominantly Microsoft, the county chose SharePoint Online to be the backbone of their new records management system.

Although the county leveraged crawled/managed properties, SharePoint's simplistic search didn't meet their needs. The new system would need to both easily integrate with SharePoint Online and provide more advanced search functionality, plus be user-friendly and easy to administer.

KnowledgeLake

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> "KnowledgeLake was able to plug into our SharePoint Online environment(s) with ease and is easy to use both from a user and administrator standpoint."
>
> – Rishi Gulhar, Enterprise Services Team

IMPACT

After evaluating multiple vendors, Montgomery County selected KnowledgeLake. "KnowledgeLake met all the requirements set by our end users," said Gulhar. "It was able to plug into our SharePoint Online environment(s) with ease and is easy to use both from a user and administrator standpoint."

KnowledgeLake also fit into the county's existing Microsoft infrastructure, which includes M365, Azure, and Power Platform. KnowledgeLake's integration with SharePoint Online has eased Montgomery County's transition from paper to digital.

"As we implemented new technologies and processes to enable remote work, we saw that most documents entering the system were digital," said Gulhar. "KnowledgeLake has provided out-of-the-box solutions that allow our users to continue their work while providing them with outlets to upload and process digital documents."

The integration makes it easy for the county to store, manage, and retain multiple types of digital content, including Outlook emails, Word and Excel documents, images, and PDFs.

It also provides users with multiple methods for uploading digital documents are accessible through the firm's intranet during the scanning process. Additionally, both the paper- and digital-based intake can be configured to account for special behaviors within the uploading process before the document is stored.

These include database synchronization, automated processing, file name parsing, image enhancements, bar-code recognition, and Zonal OCR. Montgomery County now uses KnowledgeLake for records management in multiple essential departments, including human resources, police, finance, procurement, and the county attorney's office.

> "When we had our first look at KnowledgeLake and all the search features and abilities it provides, we knew they were exactly what our users were looking for."
>
> – Rishi Gulhar, Enterprise Services Team

Streamlined Processes

KnowledgeLake's advanced automation technology has helped Montgomery County streamline manual, repetitive records management processes in multiple departments. Automating these processes has introduced unprecedented efficiency in the county's day-to-day operations.

Instant Document Access

End users and administrators can now leverage powerful features and capabilities, such as advanced document search, without sacrificing usability. "The interface is well-designed and easy to use from both an end user and administrator standpoint," said Gulhar. For example, the KnowledgeLake Search app, which integrates deeply with the county's SharePoint Online and Azure Active Directory environments, has replaced the inflexible SharePoint search experience by giving users "exactly what they need in a clear, user-friendly view," said Gulhar.

Strengthened Data Security

KnowledgeLake's close integration with SharePoint Online and certification in GCC High provides the tight security, governance, and accessibility the county requires in a records management system. KnowledgeLake's GCC High certification has also helped ease the approval and implementation process within the county's GCC environment. "The solution is able to address these needs while also providing out-of-the-box retention and document recovery," said Gulhar.

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