

Client Success Story

Montgomery County Maryland Accelerates Everyday Administrative Work and Process Efficiency with New Records Management System

Client Profile

FEATURED CLIENT

Montgomery County,
Maryland

WEBSITE

montgomerycountymd.gov

INDUSTRY

Government

Montgomery County, which neighbors Washington, D.C., is the most populous county in the state of Maryland.

“As we engaged more and more with KnowledgeLake, we quickly noticed that the product has a lot of potential and could be a great solution to replacing our current records management system.”

– Rishi Gulhar, Enterprise Services Team

BUSINESS NEEDS Montgomery County Maryland was looking to replace their legacy on-prem records management system with a modern cloud-based solution that would securely house all official county records. The legacy system made it difficult to streamline day-to-day business processes, impeding user efficiency.

“Looking at our immediate short-term needs, two of the major problems we identified with our current system were a lack of user efficiency and an inability to streamline commonly found business processes,” Rishi Gulhar, Enterprise Services Team at Montgomery County said. “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 their 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 simple search feature did not meet their users’ needs. The new system they selected would not only need to

easily integrate with the SharePoint Online environment, but also provide more advanced search functionality. They were also looking for a solution that was both user-friendly and easy to administer.

SOLUTION After evaluating multiple vendors, Montgomery County selected KnowledgeLake. “KnowledgeLake met all the requirements set by the county’s 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, which was born out of working from home during the pandemic. “As the county implemented new technologies and processes to allow users to work from home, we started seeing that most documents being entered into the system were digital,” said Gulhar. “KnowledgeLake has provided good out-of-box solutions that allow our user to continue their work while providing them with the correct outlets to upload and process digital documents.”

The integration makes it easy for the county to store, manage, and retain multiple types of digital documents, including Outlook emails, Word and Excel documents, images, and PDFs. It also provides users with multiple methods for uploading digital documents

during the scanning process. Additionally, both the paper-based intake and electronic-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, barcode 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.

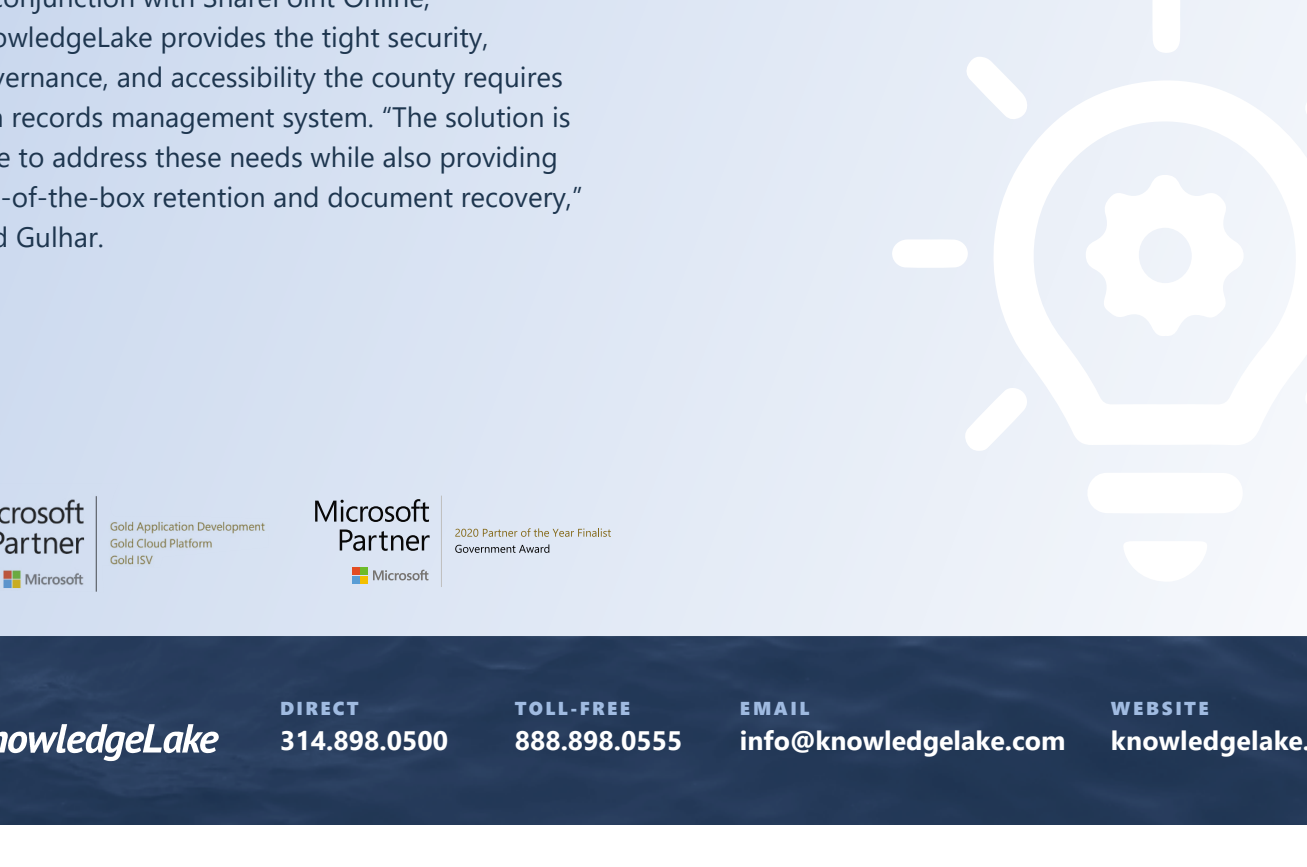
IMPACT

Advanced Automation

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.

Enhanced Usability

KnowledgeLake has given end users and administrators additional features and capabilities, such as advanced document search, without sacrificing usability. “The interface is well designed and easy to use from both a user and an administrator’s standpoint,” said Gulhar. For example, the KnowledgeLake Search app, which integrates with the county’s SharePoint Online



“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

and Azure Active Directory environments, has improved the previously inflexible SharePoint search experience by giving users “exactly what they need in a clear, user-friendly view,” said Gulhar.

Improved Security

KnowledgeLake’s integration with SharePoint Online and certification in GCC High has ensured adherence to Montgomery County’s existing security standards for records management. KnowledgeLake’s GCC High certification has helped with the approval and implementation process within the county’s GCC environment.

In conjunction with SharePoint Online, KnowledgeLake provides the tight security, governance, and accessibility the county requires in a records management system. “The solution is able to address these needs while also providing out-of-the-box retention and document recovery,” said Gulhar.

“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



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