



## KnowledgeLake Customer Solution Case Study

# GLENMEDE

**Customer:** Glenmede

**Web Site:** [www.glenmede.com](http://www.glenmede.com)

**Customer Size:** 272 employees

**Country or Region:** United States

**Industry:** Financial services

**Partner:** KnowledgeLake

### Customer Profile

Glenmede is an independent investment and wealth management firm. Based in Philadelphia, it has offices throughout the Mid-Atlantic region and serves customers across the United States.

### Partner

KnowledgeLake

(888) 898-0555

[www.knowledgelake.com](http://www.knowledgelake.com)

KnowledgeLake develops document imaging, document capture, and workflow products and solutions for Microsoft SharePoint. KnowledgeLake extends the Electronic Content Management (ECM) capabilities of SharePoint, enabling businesses to reduce mailing costs, streamline operations, and achieve regulatory compliance using familiar Microsoft products.

### Software and Services

- KnowledgeLake Imaging for SharePoint
- KnowledgeLake Capture
- KnowledgeLake Capture Server
- Microsoft Office SharePoint Server

## Investment Firm Boosts Efficiency with New Enterprise Content Management Solution

"With the KnowledgeLake solution, our users have a better overall experience when searching through and viewing documents."

*Jerry Littenberg, Vice President of Information Systems, Glenmede*

Glenmede, a private investment firm based in Philadelphia, wanted to upgrade its enterprise content management system to create greater operational efficiencies and help employees work more effectively. To do this, they deployed a KnowledgeLake solution and Microsoft Office SharePoint Server. The solution helps Glenmede contain costs while allowing employees to search through and view documents easily and quickly.

### Business Needs

Glenmede is an independent, privately owned investment and wealth management firm with more than \$17 billion under management. The firm was founded in 1956 by the Pew family and has customers across the United States, including individuals, families, consultancies, endowments, and institutions.

In 2008, the Glenmede IT department started evaluating technologies that could overcome some of the issues and limitations in its IBM FileNet content management system. For example, when scanning documents into FileNet, it could be time-consuming to locate the source of scanning errors.

"With FileNet, we ran a nightly job that reviewed all documents that were added the

day before," says Jerry Littenberg, Vice President of Information Systems for Glenmede. "It would count the pages on file and compare them to the number of pages expected. If they didn't match, we would get an exception report the next morning. Then our scanning team would have to go digging to find the original for rescanning."

Littenberg notes that FileNet also had usability issues, such as a viewer that displayed documents in a small window, forcing users to constantly scroll to read a document.

Glenmede wanted to find enterprise content management technology that was less costly to operate, would integrate better with other enterprise systems, and would be easier to use for employees.

## Solution

To improve operational efficiencies and user productivity, Glenmede decided to move key systems to the Microsoft Office platform. This included installation of Microsoft Office SharePoint Server, which replaced the FileNet system for content management and Lotus Notes for workflow automation. Glenmede also deployed Microsoft Outlook to replace Lotus Notes for e-mail and calendar functions.

Littenberg notes, however, that there was a missing piece to the technology upgrades.

"We felt that using SharePoint Server for our content management system would give us plenty of return on investment, and its integration with other Microsoft products would help us consolidate technologies," he says. "But the content management system was not complete because we didn't have a way to get documents into it."

To scan and index documents, Glenmede decided to deploy a KnowledgeLake enterprise content management solution. Components of the solution include:

- **KnowledgeLake Imaging for SharePoint**, which enables easy batch scanning of paper documents and provides users with tools such as flexible searching of images from inside a web browser.
- **KnowledgeLake Capture**, which is used at Glenmede in conjunction with a Canon DR-9080C high-speed scanner to quickly convert high volumes of paper documents into electronic format.
- **KnowledgeLake Capture Server**, which enables cost-effective scanning from network-based devices such as multi-function machines.

Working with KnowledgeLake, Glenmede deployed the solution in May 2009. By July 2009, the firm had migrated more than 1 million documents from FileNet to SharePoint using the KnowledgeLake products. Glenmede now scans about 12,000 documents a month using the system.

The only significant issue encountered during the migration involved conversion of Tagged Image File Format (TIFF) files into Adobe PDF documents.

"We experienced some corruption issues in about 2 percent of the converted documents," says Littenberg. "Without pause, KnowledgeLake brought in their experts, decided on a course of action, and quickly got it handled. This is exactly how we want our vendors to react whenever there is a problem."

## Benefits

By migrating its enterprise content management system to a solution using KnowledgeLake products and SharePoint, Glenmede achieved a number of benefits that are helping the firm operate more efficiently while giving users the tools to work more effectively. The company realized a fast return on its investment in the technology, helping it avoid costs associated with the prior content management system. The KnowledgeLake technology has helped improve quality assurance in document capture processes. And it is delivering improvements in user tools that help Glenmede employees access and view documents faster and easier.

**Quick Return on Investment.** Glenmede benefited from a solid return on its investment in the KnowledgeLake solution and SharePoint within six months of going live. "Replacing FileNet drove down the total

cost of ownership for the content management system to a fraction of what it was before," says Littenberg. "Plus, we were able to avoid the expense of upgrading to the FileNet P8 platform, which just did not make good business sense for us."

**Improved Quality Assurance.** The tools and functionality of the KnowledgeLake products help Glenmede quickly identify any issues that arise during the document conversion process. "For example," says Littenberg, "during the scanning process, the page-comparison process happens immediately. Instead of having to figure it out the next day, the error is identified and can be addressed immediately—almost while the person scanning documents still has the original in hand. This kind of quality assurance feature is a tribute to the KnowledgeLake interface."

**Powerful User Tools.** Features like full-text searching based on indexing provided by the KnowledgeLake software and easy viewing of PDF documents make it fast and easy for Glenmede employees to find and read information on SharePoint. "During the scanning process, KnowledgeLake has a step that performs full-text index during the creation of the Adobe PDF file. It is extremely useful when trying to find specific words in specific documents," says Littenberg. "And, now that our scanned documents are stored as PDF files, we can take advantage of the Adobe Acrobat Reader to view them instead of using the small FileNet window. With the KnowledgeLake solution, our users have a better overall experience when searching through and viewing documents."