



Clearwater

Enterprise Content Management solution enables leading environmental solutions provider to reduce risk, drive down costs and improve accuracy.

A leading British provider of water treatment and air hygiene solutions, Clearwater Technology Limited wanted to improve the accuracy of business processes and reduce the operational risks associated with high volumes of paper documentation. Working with Datalytx, Clearwater implemented an Enterprise Content Management (ECM) solution that leveraged its existing platform and integrates with essential line-of-business applications. KnowledgeLake software enables the company to meet strict compliance requirements, providing a complete audit trail, while other benefits include faster processing times, improved client service and significant savings on paper and storage costs.



Clearwater

Client

UK-based water treatment and air hygiene solutions provider.

Challenge

Improve business processes and reduce risks caused by paper-based documents.

Solution

Enterprise Content Management solution including KnowledgeLake software.

Benefits

ROI through instant access to critical information, audit trail for compliance, substantial cost savings, improved business processes and client service.

Challenge

With 500 employees and 10 offices across the UK and Ireland, Clearwater provides water and air treatment services for public and private sector, chemical cleaning treatments and control services to enable clients to comply with statutory legislation. This industry is highly regulated, and Clearwater must provide proof of site work to support regulatory and compliance requirements. This led to over-reliance on paper records, despite electronic copies being sufficient to meet compliance requirements. "Accurate filing is critical to us as we are a growing business," explains Geoff Griffith, IT Manager. However, "The high volumes of paper generated by the business represented a growing risk to the organisation." Clearwater saw it could achieve cost benefits by reducing paper, printing and storage, and also wanted to leverage its existing SharePoint 2007 platform. Any solution had to integrate seamlessly with existing line-of-business application that managed the internal database, while the company also wanted to leverage its current server environments and Multi-Function Capturing Devices (MFDs) already installed in offices. The overall requirement was for an improved process that would enhance customer services, support compliance requirements and manage the risk of lost or damaged documents.

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Geoff Griffith
IT Manager

Why Datalytx?

Geoff Griffith says Datalytx was chosen "because we had confidence in their understanding of our requirements. This was demonstrated by their provision of a comprehensive report detailing how to tackle the challenges of a paper-driven environment. The solution proposed was cost effective for Clearwater as it leveraged our existing SharePoint system and allowed us to move to the new scanning process seamlessly. Furthermore, the solution was considered easy to use and maintain."

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Geoff Griffith
IT Manager



The solution

The Datalytx team supported Clearwater on both the upgrade to SharePoint 2010 and implementation of the KnowledgeLake document scanning and imaging software. Prior to the solution, each regional office manually filed its own documents. Documents were stored in filing cabinets and shredded after seven years to meet compliance requirements. To support the transition to the new business process, the IT team specified a date after which all documents were to be scanned.

With the project delivered on time, the solution is known as the EDM (Electronic Document Management) platform. The paper and electronic data capture process included the scanning of job schedules, service reports and certificates using MFDs in offices. Scanned images are routed to KnowledgeLake's Capture Server – integrated with Clearwater's custom-built database application – for batch processing, index validation and archiving in SharePoint. With KnowledgeLake Connect installed on desktops, branch administrative teams upload and save emails and other electronic content directly to SharePoint. Datalytx also provided structured training to ensure user adoption following this significant business process change. To help further, the solution was also implemented with pre-defined search interfaces, so users can retrieve documents in a familiar way by entering client and site information into search fields to easily retrieve documents, surface document metadata and preview documents using the thumbnail feature.

Benefits

Hundreds of paper and electronic files are scanned and archived monthly, with the primary users in Sales, Administration and Compliance departments, and EDM managing a diverse range of documents including job sheets, service sheets, certificates, contracts, contract reviews, quotes, work requests, purchase orders and other correspondence. After electronic copies of compliancy documents are uploaded and the content indexed, paper copies can be destroyed.

Instant access to information is an important gain, with greater efficiency in handling client files. Users have a complete view of each client via individual folders that contain all related details and documents, including contracts, contract reviews and site visit reports. The EDM process also removes the risk of having only one paper copy of a critical file, dramatically reducing reliance on paper documentation. Storing data electronically minimises the business risk of misplacing, damaging or misfiling documents. Clearwater also realised significant savings in annual storage costs, while electronic storage also created opportunities for Clearwater to automate segments of various business processes. By eliminating time-consuming manual tasks, the company further improved response times to both internal users and external clients. Clearwater is also meeting strict corporate compliancy requirements, with a full audit trail of work with a customer easily retrievable for compliancy reviews. With further developments planned, "By extending our platform to other parts of the business, Clearwater has the potential to realise an additional return on investment for systems already in place today," says Geoff Griffith, IT Manager.



About Datalytx

"Datalytx is a leading UK provider of big data, digital transformation, governance and analytics solutions, all delivered as a service from the cloud. Our client-focused approach delivers rapid gains and sustained ROI, meets requirements to store and manage huge data volumes, deploys powerful business-focused analytics, and digitises essential business content and processes. The trusted management information that results enables more effective and more profitable decision-making. We partner with leading providers to deliver best-of-breed solutions, including Microsoft, K2, Talend, Tableau, HP Vertica, KnowledgeLake and Hortonworks."

