

**CUSTOMER:**

Nooter/Eriksen

**WEBSITE:**

www.ne.com

**INDUSTRY:**

Energy

**CUSTOMER PROFILE:**

Nooter/Eriksen supplies heat recovery steam generators (HRSGs) to organizations around the world. The company is based in Fenton, Missouri.

**PARTNER:**

KnowledgeLake

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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 & SERVICES:**

| KnowledgeLake Imaging

| KnowledgeLake Connect

| KnowledgeLake Capture

| KnowledgeLake Unify

| Microsoft SharePoint

# Customer Solution Case Study

## ENERGY EQUIPMENT MAKER STREAMLINES INVOICE PROCESSING WITH KNOWLEDGELAKE SOLUTION

Nooter/Eriksen, a provider of heat recovery systems for large power plants, wanted to eliminate the costs, labor and storage space associated with handling paper invoices. The company decided to deploy a KnowledgeLake Enterprise Content Management solution that works with an existing Microsoft SharePoint system and Microsoft Dynamics SL accounting software. The KnowledgeLake software helps save time and money by getting rid of cumbersome manual processes and is providing the foundation for better document management across the entire organization.

### Business Needs

Nooter/Eriksen is a global supplier of heat recovery steam generators (HRSGs), which are used to recover waste heat from the exhaust of combustion gas turbines. By using HRSGs, organizations running large plants can increase their energy efficiencies and cut costs. The company operates throughout North America, Europe, the Middle East, and Africa.

The company's use of the best technology to improve efficiencies and cut costs is not just for its customers.

Nooter/Eriksen also looks for solutions that can help internal operations run more smoothly. That was the case in 2012, when the organization sought a solution that could help it better manage vendor invoices.

*KnowledgeLake helped us eliminate hard-copy file storage and empowered us with a robust search and retrieval process that we never had before. It's providing a quick return on investment in man hours saved by dramatically cutting down on the time it takes to search for invoices.*

Rick Van Matre, Manager of Information Systems  
Nooter/Eriksen

"We were looking for a way to eliminate the hard-copy review of vendor invoices," says Rick Van Matre, Manager of Information Systems at Nooter/Eriksen headquarters. "The manual routing of paper invoices was causing problems, like invoices getting lost or misplaced. And there was a lack of visibility into the status of where invoices were in the approval process. It was also laborious to file the invoices, with an accounting clerk having to file each invoice in a filing cabinet—and then try to locate past invoices whenever there was an inquiry."

The company wanted a solution that could efficiently digitize, index, and store invoices. Additionally, the solution had to integrate with the company's existing Microsoft SharePoint intranet, the K2 workflow software used with SharePoint, and its Microsoft Dynamics SL project accounting and management system.



## Solution

After evaluating possible solutions at a Microsoft Convergence conference, Nooter/Eriksen decided to integrate a KnowledgeLake Enterprise Content Management solution with its SharePoint intranet and Dynamics SL software.

"We looked at other solutions, including PaperSave, 5280 Solutions, and ImageLink," says Van Matre. "The biggest factor that swayed us is that KnowledgeLake is built for the SharePoint platform. That meant we could easily integrate the KnowledgeLake solution with our existing K2 workflows, allowing our users to continue with the workflows they are already familiar with."

Nooter/Eriksen deployed KnowledgeLake Imaging for SharePoint, which is used for searching, viewing, and annotating invoices. It is using KnowledgeLake Capture for batch processing and indexing invoices in tandem with Fujitsu fi-6130z duplex-capable desktop scanners, which can scan and apply metadata to invoices at up to 40 pages per minute. Currently, about 2,000 invoices are scanned monthly across three locations. Once an invoice is scanned into SharePoint, a K2 workflow is automatically initiated, informing the approver that they have an invoice to review.

The company is also using KnowledgeLake Unify for SharePoint and KnowledgeLake Connect. This lets employees interact directly with SharePoint from within their daily business applications, including Microsoft Office and Dynamics SL.

## Benefits

The deployment of the KnowledgeLake ECM solution delivered a number of important benefits to Nooter/Eriksen. The company has eliminated time-consuming manual processes and filing cabinets used in the past for invoices. This has resulted in faster access and more visibility into invoices with powerful search capabilities. The native integration of KnowledgeLake with the company's existing systems helped expedite the deployment, and is providing a solid foundation for expansion of the ECM solution into other company operations.

### Faster, More Efficient Handling of Invoices

Van Matre says the KnowledgeLake software helped the company solve the problems it had in dealing with invoices. "With the KnowledgeLake ECM software, we no longer have to manually file copies of every invoice and check stub," he says. "Every invoice and check stub is scanned into SharePoint, providing our accounting department with quick access to payment records. KnowledgeLake helped us eliminate hard-copy file storage and empowered us with a robust search and retrieval process that we never had before. It's providing a quick return on investment in man hours saved by dramatically cutting down on the time it takes to search for invoices."

### Powerful Search Capabilities

The search capabilities of the KnowledgeLake solution are a boon to employee productivity. "Anybody wishing to locate an invoice can now do it at the convenience of their desk

instead of walking to the accounting department to try to locate an invoice among several file cabinets," Van Matre says. "Employees can quickly see the status of open invoices, and which invoices are pending approval or payment. If an invoice has been paid, a separate search will return the associated check stub along with the invoice. The time savings alone by having this type of retrieval process is another benefit delivering a quick return on our investment."

### Integration and Flexibility with Other Systems

The tight integration of KnowledgeLake with SharePoint was ideal for the Nooter/Eriksen goals. "KnowledgeLake provided great flexibility for customization to fit our particular needs," Van Matre says. "The complex workflows that we have implemented with KnowledgeLake would not have been possible with any other product using a 'built-in' workflow engine. And with SharePoint, we have a launching pad to initiate several other IT projects using this technology because of the ease of use of the KnowledgeLake products. We can certainly use this for more than just scanning invoices."



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