

## GlobalSearch® – The “Complete Package” Solution for Assembly and Packaging Specialists

With an array of “Made in the USA” products, the trained experts at Gardan provide major corporations with valuable manufacturing assistance from initial product design to assembly and final distribution.

“Our primary focus is manufacturing sub-assemblies for OEMs [original equipment manufacturers],” Chief Financial Officer, Kathy Westover explains. “For example, if a company manufactures a generator, we might make the control panel for that generator. If a company manufactures a vehicle, we might assemble the wire harnesses that carry the power in that vehicle.” In addition to mechanical assembly, electrical assembly and wire harnesses, Gardan provides packaging and kitting services, particularly related to service parts.

With over 25 years in business, Gardan’s success had created many issues with paper-based methods of operating. “Capacity was an issue for us, as was security,” Westover continued. “With so many files and employees on site, how do we control who can see and remove what?” Filing cabinets had consumed an abundance of storage space, and staff members, like Accounting and Human Resources Specialist, Crystal Ebeltoft, struggled to consistently find documents in a timely and efficient manner.

“Throughout the work day we would physically print out every sales order so they could be acknowledged and delivered to the floor,” said Ebeltoft. Not only was this a waste of paper, it slowed workflow and delayed the start of production. We stored every order, invoice, remittance advice and check copy.”

Executives were considering off-site storage, but knew it would not solve issues with accessibility and collaboration. Plus, with a \$150/month storage charge, Gardan would be spending dollars better spent elsewhere. “As a company, part of our strategic plan was to move toward doing as many things electronically as possible,” said Westover. “We knew we needed to start with an Electronic Document Management system.”

When searching for the right solution, Westover had a few “non-negotiables” in mind. “Key requirements were ease of use, speed, flexibility, security and price.” Westover continued. “I had looked at other document storage solutions but the price of GlobalSearch, relative to its capabilities, was

## Snapshot

### Industry:

Mechanical Assembly & Packaging

### Departments Impacted:

Accounting, Human Resources, Sales and Compliance

### Featured Products:

GlobalSearch

### Objectives:

Effectively share documents internally, easily follow documents within a process, allow immediate and secure access to documents, streamline workflow

very reasonable. We also needed effective document sharing, while ensuring no files were lost or misplaced. We no longer wanted to search for who had what last – it was time-consuming and we wanted to improve productivity and service by always knowing exactly where our documents are.”

Gardan implemented Square 9’s GlobalSearch solution in 2011 and today the award-winning software is used nearly company-wide, including by the entire management team. Members of the Sales team use GlobalSearch to review customer purchase orders, Accounting and Materials departments use it daily to control vendor invoices and customer orders, while Human Resources uses it to securely store all employee records. “We also keep all of our legal documents and contracts in GlobalSearch,” Westover explained. “Plus all compliance related documents, such as W9’s, sales tax exemption forms and more. In terms of numbers, we currently have 9,000 PO’s in GlobalSearch and 17,000 vendor invoices. **Our physical storage has significantly declined – we’ve eliminated almost all of our physical filing cabinets.**”

**Eliminated  
File  
Cabinets**



Westover continued, “Not only is it easier to find items, we all sleep better knowing that because our documents are stored on our server, they are backed up with our other critical data. If a fire or other disaster were to occur, our documents are not physically on site. GlobalSearch keeps all of our important files

**Easy  
Setup**

secure," Ebeltoft added: "Yes, the security of GlobalSearch is fantastic! It's a very big plus for us, and it was very easy to setup permissions."

Managing thousands of HR documents, Gardan has scanned every HR related file previously held in a locked cabinet drawer into the GlobalSearch repository. "For anyone who applies for a job here at Gardan, and everyone who currently works here, we can keep all their documents on file. If we want to look at a document related to benefits, if we want to look at an employee's time sheets, whatever we need, everything is there," Westover continued. "Before GlobalSearch, filing time sheets was a time consuming process, and nobody wanted to do it. But now everyday it's like whoosh! You scan them, and without a lot of effort, HR can find what they need."

"I agree! It's really nice not having to get up to look for a file or ask someone where it could be – that takes a lot of time out of my day," said Ebeltoft. "With all POs and invoices saved in the database, all the information is right at your fingertips."

Plus, we can use a number of different searches we've set up to pull related records. Accessing a file is now up to five minutes faster."

**Faster  
File  
Access**

Using built-in document workflow, Gardan has customized GlobalSearch for their company specific invoice approval process. "We can mark a document as "Pending-Materials" so the Materials team can later go in and execute a search to pull up only the documents they need to address," explained Westover. Plus with annotation features, managers can add notes or stamps for reference. "It's one thing to have an index field or Status but if they can add a note saying 'I'm waiting to hear back regarding X,' Accounting knows the invoice isn't approved for payment yet and why. The ability to add annotations is a great feature."

"Next, when the president needs to sign checks, he can easily review the electronic documents via a search without flipping through a bunch of paperwork," explained Westover. "Also, the invoices aren't laying out for others to see. Once an invoice has been approved and is paid, users can go into the database and view the details of all purchases. This is a feature used frequently and provides the support we need to meet ISO and other compliance requirements."

So what's next for Gardan? "We use it to manage so much of our paperwork now, it's hard to imagine many other applications, but one idea we're reviewing is keeping all of our equipment and user manuals in GlobalSearch. Then, if someone needs to look up something about a particular piece of equipment, they would no longer need to search through drawers to find dog-eared copies that may or may not be the most recent version. This would also allow the user to highlight particular sections and email pages to coworkers or vendors, which is a great feature," said Westover.

"Running files through a scanner and being able to index them immediately is more effective than piling documents up and waiting for someone to file them when they have time. GlobalSearch forces a discipline to manage documents appropriately, and it works wonderfully. Organizations are scrambling for Electronic Content Management options and for larger corporations like Gardan, GlobalSearch is a great choice."

Winner of the Better Business Bureau Torch Award for ethics and integrity, Wisconsin-based Gardan can simplify and streamline any aspect of your manufacturing process. To learn more, please visit [www.gardan.com](http://www.gardan.com).