

Case Study: Serimax

Knowledge Management in a Mobile Context: an Offline Client for Serimax

At Serimax, an international full service welding company, knowledge management is critical. Their challenge? Keeping engineering and welding data up-to-date and accessible as the company grows and work environments change. Their Knowledge Management application was built with Nuxeo Document Management, with an additional offline client mode.

The Context

Serimax engineering and welding teams often work offshore or on sites that have little or no network connectivity, hampering access to the technical documents and acquired expertise captured by teams from all over the world. To address these issues, Serimax launched a project to deploy a knowledge management application with an offline client feature.

An initial analysis determined that documents were often duplicated, not managed, and difficult to find. They were stored in various places, including siloed departmental databases, in file systems or on desktops. The Operational Methods team defined three key goals for the project:

- the KM application must be **centralized**, yet accessible by every Serimax employee on the basis of his/her access rights
- the KM application should be available **both online and offline**
- the KM application should be based on **an open source solution**, to enable evolutions and avoid vendor and integrator lock-in.



Project Profile

Serimax

- International full service welding company
- 4 Business lines: Offshore, Spoolbase, Landlines and Fabrication

Technology

- Nuxeo Document Management
- Unique feature: **offline client**

System Integrator

- Smile

Key Dates

- Project launch: → **June 2008**
- In production since: → **December 2009**

The Project in Numbers

- **800** users
- **20** countries

Serimax measured the success of the solution based on these objectives.

The Solution

None of the solutions initially tested by Serimax met all of the company's requirements out of the box, but the evaluation process conducted with Smile led Serimax to choose Nuxeo DM as the basis for their KM application, because it met all requirements except one: the offline client feature.

"From all the software packages we looked at, **Nuxeo was the only one that could provide us with an offline mode**, with

just a few product developments," noted Elodie Pénet, Document Director for the Operational Methods Department, Serimax. "Given the high mobility of our employees, who travel for international projects and do not always have access to the Internet, the possibility for them to have offline access was vital."

Serimax, Smile (System Integrator) and Nuxeo's teams worked together to fully define the feature and fast-track development to meet Serimax's requirements. The quick development of the offline client feature, made possible by the flexibility inherited from the Nuxeo Enterprise Platform, also relies on Eclipse RCP (Rich Client Platform). With an embedded lightweight web server, the offline client ensures a user experience very similar to the one users are accustomed to with their standard web browser interface.

Key application features include:

- **Workflow:** to track document validation by business managers for each domain
- **A centralized document repository,** so that final documents are always up-to-date and accurate
- **An access rights management system** that allows all users to access relevant documents based on their permissions, with the possibility to extend permissions when necessary
- **Collaboration features:** forums for user discussions about documents, and document annotation capabilities.

Elodie Pénet is very pleased with the application: "Users warmly welcomed the benefits they've realized from

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the application. Soon, we'll be able to identify internal specialists and expertise across domains, thanks to the knowledge and discussions our employees can contribute."

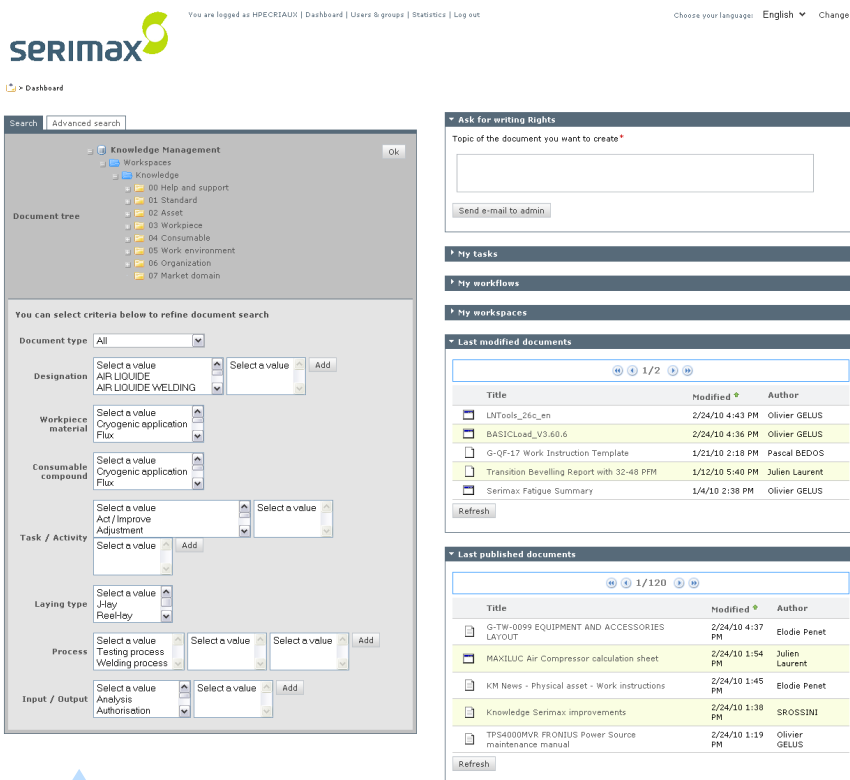


Serimax Knowledge Management application

Results

Above and beyond meeting the functional requirements, the KM application has triggered innovation for Serimax in two interesting ways:

- Protection of Intellectual Property** with offline local data encryption. The acquired and cumulative knowledge of their engineering and welding teams is one of the most valuable assets of Serimax. Before deploying the KM application, Serimax teams carried all of their documentation on hard disk drives and CDS when they went into a field engagement, running the the risk of losing CDs or HDDs and leaking the company's valuable Intellectual Property. With the KM application, the encryption of offline data together with user authentication allowed exclusively from a Serimax-authorized machine protects the company against this risk.
- Extending the notion of Knowledge Workers** outside of the traditional office setting. For Serimax, the KM application's main users and owners of company expertise are maintenance managers and welders, who often work outside of the office. This trend will continue to grow, and both KM and document management applications will have to adapt in order to follow the experts in the field.



Serimax Knowledge Management application

Looking to the Future

Today, all of the 800 employees from Serimax use the KM application to access, share, add, and comment on technical and quality documents such as user guides, maintenance guides, implementation guides, technical procedures and datasheets. The next steps include the integration of other document databases into the company's document backbone.

nuxeo Galaxy
Systems Integrator

