

# Success Story

## Central Vermont Public Service Manages Records and Meets e-Discovery Requirements

Central Vermont Public Service (CVPS) is an independent, investor-owned company that provides energy and energy-related services to 157,000 customers across Vermont. As the largest of the 21 utilities within the state, CVPS has its share of content issues. "As with any other organization we manage massive amounts of information. Additionally, there are multiple authorities that regulate our information environment," says Chuck Piotrowski, Corporate Records Manager for Central Vermont

"As of December 2006, new federal rules of civil procedure began to dictate—and the courts now expect—that all corporations know what information they have, where they have it, who is responsible for it, and how long they need to keep it. With Open Text, we feel we have the best control over the situation, and we can tell a court with confidence that we don't have something, or we can provide them with that item in a timely manner."

**Chuck Piotrowski,**  
Corporate Records Manager,  
Central Vermont Public Service

Public Service. "We have compliance challenges; we have information organization challenges; and we have business process challenges."

CVPS realized that if they wanted to be more effective and efficient while complying with federal and state rules and regulations, they had to improve the management of their electronic information. After a detailed selection process, they chose a document and records management solution from Open Text to help them get the most out of their content.

documents, PDFs, etc. "Livelihood ECM – Records Management offers one-stop-shopping, so to speak, when employees need to find, organize, and manage information," explains Piotrowski. "With Open Text, we have much better control over information across the enterprise. For example, in litigation, we can provide requested information in a very timely manner. If the information is not extant, we can authoritatively demonstrate that we purged the information in compliance with laws and regulations."

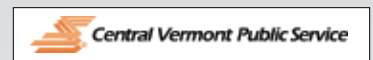
The scope of the implementation embraces the entire organization from HR through legal and operations, to support services. CVPS manages all of their information as an asset. They have a program called "Information Asset Management" in which all content, whether it's an email, Articles of Incorporation, a spreadsheet, etc., has to be managed from its moment of creation to its ultimate disposition. This way, the company knows exactly what happened to the information, whether it is stored, deleted, or destroyed in the normal course of business.

The Open Text records management capabilities provide an automated system that resolves many of the complexities of electronic records management, making processes transparent to end users. Additionally, CVPS uses Livelihood ECM to improve business processes through scanning, workflows, and e-forms.

### Industry

Energy

### Customer



### Business Challenges

- Manage all structured and unstructured content
- Find information quickly and easily for compliance regulations
- Improve business processes

### Business Solution

- Livelihood ECM – Enterprise Server
- Livelihood ECM – Records Management

### Business Benefits

- Improved productivity and efficiency
- Enhanced records management
- Increased compliance and e-discovery support
- Return on investment

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Experts... we do!*

## Meeting Compliance Requirements

Another reason CVPS manages and stores nearly every type of content with their ECM solution is due to the many compliance issues within the industry. “We are storing a wide range of business information because our regulators may be very interested in all information—whether it is a record or not. You will be asked for emails; you will be asked for records; you will be asked for any information relating to a specific topic,” explains Piotrowski. “The Open Text solution provides us with access to all information, regardless of whether it’s a record or not, as well as the control of all information, whether it’s a record or not.”

CVPS uses the Open Text tool for compliance purposes in many ways. One example of achieving compliance with Livelink ECM – Records Management can be seen in what they call a “rate case process” in which they have to submit information to their state regulators. The company uses the solution to serve as a library for this sort of e-discovery purpose. Through working with Open Text, CVPS now has the ability to find information in seconds rather than days.

Another compliance example is seen in their ability to put non-destruct notices on any stored information. In addition, CVPS can now organize and compile their regulatory events to the Federal Energy Regulatory Commission and other government agencies, and they use Open Text for the creative space, as well as the final document space for those filings.

With the new, higher expectations regarding regulatory compliance, CVPS feels secure with Open Text. “As of December 2006, new federal rules of civil procedure began to dictate—and the courts now expect—that all corporations know what information they have, where they have it, who is responsible for it, and how long they need to keep it,” says Piotrowski. “The company must also be able to provide that information to a court in a timely manner. This is very rigorous compared to what was expected before. No longer can corporations claim ignorance about what information they may, or may not, possess. Corporations will have to know what they have, and they will have to attest to the fact that they don’t have something. Most corporations have a very difficult time doing that. With Open Text, we feel we have the best control over the situation, and we can tell a court with confidence that we don’t have something, or we can provide them with that item in a timely manner.”

## Implementation Best Practices

CVPS learned a great deal during their Livelink ECM implementation, especially regarding change management. “You have to teach all of your employees how to use not only the tool itself but how to best manage information,” explains Piotrowski. “And it’s that kind of advocacy



throughout the enterprise that’s very important—even before you show up with the tool. You have to have employees who are eager to use it, who have identified that they have a problem with their information, and who want a solution, and then you can show up with your tool to help solve that problem.”

“You just can’t launch a product and walk away from it,” continues Piotrowski. “You have to have consistent follow up with every user, with every group. You have to teach them how to use the tool itself, and you have to teach them how to manage their information. You should work with them immediately after the implementation, and then you should continue to work with them on a more general basis from that time on. One of the things that people don’t realize is that while an implementation may end, information management never ends—it’s a constant, ongoing learning process. There must be continual improvement otherwise the return on investment may never be realized.”

## Business Benefits

The most significant business benefit resulting from their ECM solution deployment is the organization’s new ability to work collaboratively. Now, CVPS has a platform where people can share and use information, have version control, have an understanding of who owns what information, and then be able to securely store that information for however long they need it. In addition, their users don’t have to worry about records management. Piotrowski has the capability to manage corporate information without involving users too much. “That’s very helpful because users don’t have the time, resources, or energy in a day to manage every single record that they come across,” he explains.

With Livelink ECM, CVPS is able to meet compliance regulations and manage its operations in a more transparent and efficient manner by ensuring that all content is safe, searchable, and readily accessible—regardless of the application software.

## OPEN TEXT

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