

# Automating client correspondence

## Federal government contractor installs electronic workflow solution

Deploying automated workflows and electronic records management helps ensure compliance and information security when you're working for the Department of Energy (DOE).

That was the case for Fluor Hanford, an operating unit of the Fluor Corporation, one of the world's largest engineering, procurement, construction and maintenance services companies employing more than 35,000 people across 25 countries. Fluor Hanford is a prime contractor to the DOE on the Hanford Site in southeast Washington State. This government site produced two-thirds of the plutonium used for national defense purposes from the 1940s to the 1980s and is currently one of the largest environmental cleanup projects in the world.

At Hanford, Fluor was faced with a costly and time-consuming, paper-based correspondence process and the need for compliant, electronic records. The solution was an upgrade of an existing enterprise content management (ECM) system from Open Text™ to include correspondence workflow and records management.

*"An electronic records system saves on storage costs. We are currently paying storage fees for legacy paper records being kept at the Federal Records Center in Seattle. By using the Open Text records module, we can store documents electronically. That can save us thousands of dollars that would otherwise be spent on storing hard copies of documents."*

**Benay Doolittle,**  
IT Consultant and Business Analyst, Fluor Hanford

## Automating a labor-intensive, paper-based process

Some 2,000 letters a year, with attachments, pass from Fluor Hanford to its DOE customer. The letters were delivered by hand, mainly to ensure document security. Not helping matters is the fact that employees are spread out across the 586-square-mile Hanford Site in more than 100 facilities. The old correspondence system was characterized by varying review and approval processes and cumbersome systems for maintaining records. There were also inadequate systems for controlling versions of documents and for capturing comments.

Fluor Hanford's switch to an electronic correspondence workflow was well received by employees at the DOE's site office. The ECM solution supports electronic signatures and provides the ability for proxy signers. An electronic signature page is added to the letter and is watermarked to ensure the signature is only used for that document. "Livelihood ECM - Document Management has excellent security features," says Benay Doolittle, an IT Consultant and Business Analyst at Fluor Hanford.

The ECM solution also addresses what to do with attachments to letters, which are vital work documents. For example, the Environmental Protection organization in Fluor Hanford needs to have multiple signatures on certification attachments. Doolittle explains "We had various certifications that had to be signed by several different companies and regulatory organizations. We scan the attachments with the signatures and enter the correspondence package into Livelihood ECM - Document Management as a PDF file so nothing can be changed on it."

## Project information at fingertips

The deployment of the ECM solution has established a single interface for accessing project information (including records databases, and in the future, engineering drawings). This approach allows searches for information to be done more easily and also helps improve project management.

"You can put everything you need for a project in one place," says Doolittle. "That can include documentation such as a project schedule, a contract, risk information, or a scope-of-work. It also gives people access to all of the documents for that project. In the past, there were occasions when employees would use multiple shared drives for the same project, and it was harder to find information."

### Industry

Engineering and Construction

### Customer

Fluor Corporation

### Business Challenges

- Appropriately handle highly sensitive, complex information
- Meet strict deadlines for correspondence
- Meet government regulations for electronic reporting
- Assure compliance for record keeping
- Accommodate electronic signatures and routing

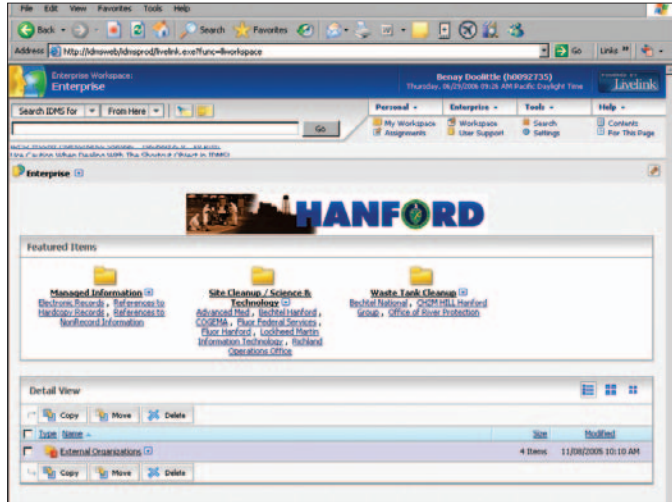
### Business Solutions

- Livelihood ECM - Records Management
- Livelihood ECM - Document Management
- Livelihood ECM - eSign

### Business Benefits

- Assured compliance with legislation
- Improved safety
- Reduced labor costs
- Achieved electronic records goals
- Improved productivity and accountability
- Reduced storage costs

"The search capability within Livelink ECM - Document Management is another big advantage for Fluor Hanford," says Doolittle. "Many times, Fluor will be asked for specific documents, and a search done using the old paper process was costly and time-consuming. Now, with our records and documents in the ECM system, the search and retrieval process is much quicker and less costly."



These days, the focus of document management at Fluor Hanford has shifted to the monumental task of keeping records. To address this task, Fluor Hanford has installed Livelink ECM - Records Management. "Like many organizations, we have millions of records. In the past nine years, our employees have generated millions of e-mails, documents, and various media products such as photos, videos, and engineering drawings," says Doolittle. "We're working on an accelerated schedule to move legacy records into Livelink ECM - Document Management, where we will be able to apply records retention rules provided by the Livelink ECM - Records Management module."

## Drivers behind records management

Records management and retention are critical at Fluor Hanford for various reasons. "The Hanford Site was built in the 1940s as part of the Manhattan Project to produce nuclear materials," says Doolittle. "Hanford was a workhorse of the Cold War as it produced materials for national defense. Some of the engineering drawings from throughout Hanford's 63-year history are deteriorating. Moving them into an electronic document management system is critical. We need to preserve these records for at least the next several decades."

There were several key business drivers for using the workflow module within Livelink ECM - Document Management: new government regulations, including the Government Paperwork Elimination Act; the Electronic Records and Signatures and Global and National Commerce Act, known as the E Signature Act; and the Office of Scientific and Technical Information requirement to comply with electronic reporting.

Fluor has migrated more than 140,000 records from various records

systems across the Hanford Site to the records management solution. "An electronic records system saves on storage costs," says Doolittle. "We are currently paying storage fees for legacy paper records being kept at the Federal Records Center in Seattle. "By using the records module, we can store documents electronically. That can save us thousands of dollars that would otherwise be spent on storing hard copies of documents."

## Controlled-use information

Doolittle points out that Fluor Hanford is dealing with many types of controlled-use information, including unclassified-nuclear information and applied-technology documentation. "In our records area, we have several folders set up for information that is sensitive from a legal, regulatory, or security standpoint," she says. "We can limit access to those folders to those that have a need to know."

One of the strengths of Livelink ECM - Document Management is its version control feature. "Within our Integrated Document Management System (IDMS), our records area receives the final correspondence package. The package includes a list of all attachments for each letter, as well as a record showing who reviewed the correspondence package," says Doolittle. "Before it goes into the records area, we remove older versions of the correspondence package. However, for auditing purposes, we maintain all of the older versions of the package within another area of IDMS."



## Safety and accountability

Physical safety - "a huge priority at Fluor Hanford" says Doolittle - emerges as a benefit of the correspondence workflow system. The ECM solution eliminates the need for employees to drive across the 586-square-mile site to deliver letters in person. "If a letter to the Department of Energy is late, there can be financial penalties, so the push is always on to meet the deadline," she says. Automating the correspondence process translates to fewer employees driving across the site under time pressures to deliver documents - and less time on the road means a lesser chance of getting into a car accident."

A more transparent workflow has led to improved accountability using the ECM-based system. "We can generate a workflow status report for each correspondence package, so Fluor employee can pull up a live report showing them the workflow status," says Doolittle. "That way, they can see whether or not the package has been sitting at Jane Doe's desk for three hours."



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