

Success Story

Santee Cooper Gets a Handle on Document Management

Livelink ECM™ Provides the Tools to Make Records Management Happen

More than two million South Carolinians receive their power directly or indirectly from Santee Cooper, South Carolina's state-owned electric and water utility. Serving over 162,000 residential and commercial electric customers in Berkeley, Georgetown and Horry counties, the utility also generates power distributed by the state's 20 electric cooperatives to more than 685,000 customers in all 46 counties, and provides power to municipal power authorities in Georgetown and Bamberg, Charleston Air Force Base, and 29 large industrial facilities throughout the state. Santee Cooper also supplies water to 137,000 consumers in Berkeley and Dorchester counties and the town of Santee.

"Now that we have a tool for managing electronic records, users don't have to worry about declaring a record and sending physical files to us. Records management is done behind the scenes, and it's done efficiently. It's a win-win situation for the records department and for users."

Michelle VanAllen,
Supervisor of Records Management
at Santee Cooper

Taking Control of Electronic Records

When Santee Cooper began looking for an electronic records management solution, it had several issues that needed to be resolved. Even though the utility was doing a good job of managing its physical records, managing the electronic records was a challenge.

Another issue was the utility's large volume of engineering drawings that were dispersed across

several different plants. "We had drawings dating back to the 1930s through to current day. We had no centralized system for managing them and we were starting to get to the point where many of those drawings were electronic," said Michelle VanAllen, supervisor of records management.

To add to the confusion, most of these documents were stored in some type of network drive with no way for them to be shared with other areas except by sending copies, which meant multiple copies were floating around the utility offices. With a growing employee base of approximately 1,800, Santee Cooper needed a solid solution for electronic document management with a records management application to address all of these issues.

VanAllen was key in the selection process for Santee Cooper's records management solution provider. "We had a project team which consisted of Legal, Records Management, IT and user areas. We all had different priorities for the project. For me, records management was the prime issue before we started evaluating vendors, but many of the companies involved in the demoing either didn't have a strong understanding of records management, or they would tell us why we needed to manage records. I am a records manager, so I understood that. We needed a supplier who understood records management and could provide us with the tools to make that happen. We were able to do that with Open Text. Out of all the solutions, Livelink ECM – Document Management and Livelink ECM – Records Management seemed to be the easiest solution for users to understand, and it had everything we needed from a records management perspective."

Industry

Energy

Customer



Business Challenges

- Duplication of information across different locations
- Massive amounts of physical folders and documents
- Lack of any type of records management system

Business Solution

- Livelink ECM – Document Management
- Livelink ECM – Records Management

Business Benefits

- Mitigate risk through version control
- Promotes knowledge sharing
- Reduced labor resources and manual processes
- Increased productivity, safety and compliance

*Trust the Content
Experts... we do!*

Keeping Workers Safe—Behind the Scenes

Currently, Santee Cooper is using Open Text's Document Management (DM) solution and the Workflow capabilities to manage two areas—property management, which handles all of the leases and properties owned by the utility and two of Santee Cooper's generating stations. This makes up about 300 users in the system.

"Because we operate a federally licensed hydro-electric project, we own property around lakes Marion and Moultrie," says VanAllen. "We manage hundreds of lots that people lease, but back when we began implementing document management we were completely reliant on hard copy with filing cabinets filled with hundreds of thousands of paper files. We ended up scanning about 500,000 documents and saved them in the DM system because even though some of the documents are very old, they still use those files daily. Now all of that information is completely electronic."

VanAllen adds: "Storing engineering drawings for the generating stations in the DM repository allows plants to go into the system and search for a drawing based on several different attributes and pull out drawings as needed to work on a certain piece of equipment in the plant. If there's a change made to the drawing, it's sent back to the control group through Workflow, and the controlled version is put back into the system. The most current version of the drawing is always in the system. This is an important safety measure for us, because we want to make sure that people know, for example, where an electrical line is when they dig or work with a piece of equipment."

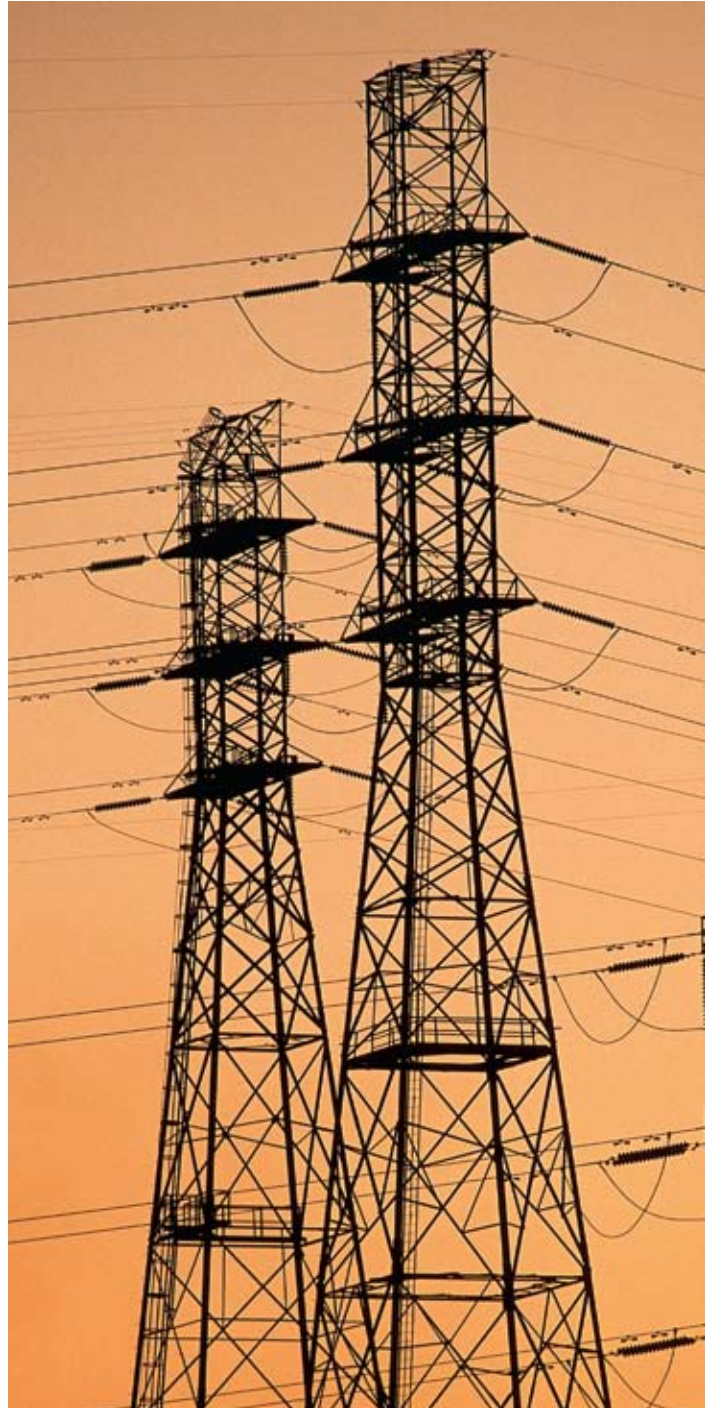
Applying records retention classifications to all documents and drawings in Livelihood ECM mitigates risk at Santee Cooper. That means users don't have to worry about declaring a record or deciding how long a record should be kept. "We are taking care of that behind the scenes," says VanAllen.

Workflow Helps Operations Flow Smoothly

Workflow for engineering drawings at Santee Cooper is executed like this: when mechanics or technicians at the plant search for a drawing to work on a piece of equipment, they access a pre-written Web Reports search screen. They can search for the correct drawing using up to eleven attributes. When they find the drawing, they can either print it or look at an electronic version using Brava.

"Once plant personnel have completed the work, they can physically draw any changes made, that is, make a "red line change" on to the actual drawing," says VanAllen. They then send that drawing by scanning it or sending it through inter office mail to the drawing control group. The control group pulls up the drawing in Livelihood and makes the changes electronically. Once the control group has made the changes, the drawing is sent through workflow for verification and approval. An engineer, using workflow, approves the revision and returns the drawing to the control group, which uploads the official version into Livelihood. A notification of the new record is then sent to Records Management.

"Prior to the Workflow everything was done manually," says VanAllen. "Each plant had its own system for managing drawings and records. When a new drawing was created, plant employees would send it to us on paper. We would scan it, make a copy on an aperture card and send them a duplicate aperture card. As you can imagine, there was



an entire library of aperture cards to dig through to pull the right card. It was difficult to ensure that we had the most current version, but thanks to Workflow and the drawing control group, we always have the latest version because only they can put versions of the drawings in the system. The workflow creates a 'check and balance' for us."

Full Lifecycle Management For All Electronic and Physical Records

According to VanAllen, the main benefit of records management implementation is that Santee Cooper can manage electronic records, no matter where they are. “The old way had us packing records in boxes and sending them to the records center. And there were copies everywhere! Even when it was time to destroy a document, when its retention had been met, we could not be sure that there weren’t copies out there because electronic versions could still be sitting on shared drives. We didn’t have a good way of managing it,” she says. “Now that we have a tool for managing electronic records, users don’t have to worry about declaring a record and sending physical files to us. Records management is done behind the scenes, and it’s done efficiently. It’s a win-win situation for the records department and for users.”

Currently, Santee Cooper is implementing the Livelink ECM - Enterprise Server Physical Objects module to help control physical records throughout their lifecycle stages. “For physical objects, we currently have a system that was built in-house about ten years ago. It basically

is an inventory system that tells us what we have, where it is, and what box it is in,” says VanAllen. “We are taking all of that information from the home-built system and moving it into Livelink...the boxes, the shelves, which folders are in which boxes, that type of thing. So, we have big plans for the Livelink system.”

Physical Objects will enable Santee Cooper to manage physical items such as paper records, equipment, and more, adding representative object graphics to the Livelink ECM interface. In addition, it supports the use of XML-based color labels and barcode labels for physical records such as folders, boxes and shelves directly from within the Livelink ECM - Records Management interface.

Finally, VanAllen praises Open Text for its support. “Being part of the energy group, we’ve met other utility companies who use Livelink through networking,” she says. “We’ve formed our own mini users’ group, and we have Open Text-sponsored meetings and webinars to talk about different implementations and issues, which is very useful. Open Text has been very supportive...we are very pleased with that.”



Sales	Americas	Europe	Asia/Pacific	
www.opentext.com sales@opentext.com North America Sales 1 800 499 6544 International Sales +1 800 4996 5440	United States 100 Tri-State Int'l Pkwy Lincolnshire, IL 60069 Phone: +1 847 267 9330 Fax: +1 847 267 9332 Toll Free: +1 800 538 7723	Germany Technopark 2 Werner-von-Siemens-Ring 20 D-85630 Grasbrunn Phone: +49 89 4629 0 Fax: +49 89 4629 1199	United Kingdom Grosvenor House, Horseshoe Crescent, Beaconsfield Buckinghamshire HP9 1LJ Phone: +44 1494 679700 Fax: +44 1494 679707	Australia Level 23 100 Miller Street, North Sydney NSW 2060 Phone: +61 2 9026 3400 Fax: +61 2 9026 3455

If you're an Open Text partner or customer, visit online.opentext.com for more information about Open Text solutions. Open Text is a publicly traded company on both NASDAQ (OTEX) and the TSX(OTC).