

Success Story

Tronox Using Livelink ECM™ - Records Management for Tracking and Managing Physical Items

Open Text Technology Helps Company Enhance Efficiencies

Headquartered in Oklahoma City, Tronox is the world's third-largest producer and marketer of titanium dioxide (TiO₂) pigment for a wide variety of applications. TiO₂ is used in paint and coatings, plastics, paper and hundreds of everyday consumer products. With approximately 2,000 employees, the company operates

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five pigment production facilities around the world, serving customers in more than 100 countries.

Tronox, previously known as Kerr-McGee Chemical, became a publicly traded company in 2005. As Tronox began the process of separating the organization's physical records following its spin off from Kerr-McGee, it realized that it was time to update its system for managing physical records

with a more sophisticated solution that would simplify the complexities of records management. The company had already selected Livelink ECM - Records Management from Open Text to automate the management of its electronic records so Tronox decided it was a perfect fit to install the Livelink ECM - Physical Objects module to enable the functionality for the lifecycle management of all its physical and electronic records in one central repository.

Establishing a Physical Items Environment

"Kerr-McGee was an oil and gas and chemical company, and as you can imagine, our master retention schedule was quite large," says Scott Wallace, Manager of Global Livelink Infrastructure for Tronox. "Following the spin off, there were certain records we didn't need to manage so we made the decision to rebuild our master retention schedule for electronic records management to reflect our business."

The first objective for Wallace was to focus on the lifecycle management of their physical records to ensure proper capture, tracking, retention and timely disposition. The goal was to build a common schedule that would be adjusted to manage physical files and then expand it to the electronic files. Stephanie Williams, Records Administrator at Tronox, worked with an outside contractor to export all of the items from the old system and import them into Livelink. Wallace says this project turned out to be a bigger job than they first expected.

"As items were pulled out and put into Livelink, and we started matching up all of the boxes of information we wanted to retain, we also ended up adding more items because every time we turned around another business group would come up with more physical items they wanted to get into the system," says Wallace. "In addition, with the spinoff, the challenge of separating the information was also thrown into the mix."

However, the task of splitting up the boxes was greatly simplified since Tronox was already using an electronic system for tracking and managing its physical files. According to Williams, one of the most important features of Livelink is the ability to create a full-text index of all information stored in the system that can be searched to easily locate information.

Industry

Consumer Products Manufacturing

Customer

TRONOX

Business Challenges

- Separate thousands of boxes of records following spin off from parent company
- Replace outdated system for managing physical records
- Require a common records program for physical and electronic records

Business Solution

- Livelink ECM - Records Management

Business Benefits

- Easily track and manage off-site storage of physical items
- Centralized process for requesting and borrowing physical items
- Increased productivity, risk management and compliance

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“We were able to narrow down the number of boxes that we had to separate from Kerr-McGee from 14,000 to 4,000 by using the search results report that we ran by charge-back department. That’s 14,000 boxes that we would have had to physically touch, separate and index,” says Williams. “By being able to run those reports with the information available in the indexes, it saved significant time and cost.”

Tracking and Managing Physical Items

The Physical Objects module allows for the tracking and management of physical items such as file folders, paper documents and boxes. Tronox leverages the Physical Items to manage their circulation requirements: requesting, borrowing (charging in and charging out) and managing its off-site storage facilities, including tracking transfers of boxes to and from storage. Currently, Tronox manages over 41,000 boxes in the Livelink system.

“Tronox uses the Physical Objects module to handle the transfer of the boxes that are sent to off-site storage, including traffic back and forth to the user, searches, holds and destruction,” says Williams. “When an end-user prepares boxes for storage, they include indexes of the contents. This information is entered into Livelink as well as other identifying information, such as the name of the box originator, date of contents, business group owner, and an assigned retention schedule or a records class code. As soon as this information is entered into Livelink, it is sent to off-site storage. Once the items are picked up, they are managed within the space management area in Livelink.”

Centralized Process Protects Corporate Information

Williams describes the process when a box is requested from storage: “We open the Physical Objects Workspace in Livelink, select ‘Borrow Physical Items’ and use the unique ID to search for and request a box. We indicate the name of the person who requested the box and input shipping instructions regarding delivery date and location. We submit the request, and Livelink sends an email to the off-site storage vendor, with copies to the person who initiated the request and Records Management. This alerts everyone involved that the action has been taken.

“When off-site storage receives the email, the box or boxes are pulled and delivered to the end user. Records Management then scans the barcodes and uploads them into the system. The Circulation functionality in Livelink allows us to look at the history of an item to determine who checked out the box,” says Williams. “Overall, it’s very simple for end users to alert us when they need boxes and we have a trail that tells us where the boxes are located. It is a great system, with full audit and security controls.”

Livelink Reporting

There are many useful Reports in Livelink. The Request Listing Report details the physical items that have been requested, by whom and when. The Return Listing Report details the physical items that have been borrowed or are overdue, the number of days out and the number of days overdue.

Tronox enhanced some reports to ensure the boxes the system says are checked in or out reconcile with off-site storage. “We are provided a report from off-site storage and run the reconciliations quarterly. One of the records management functions that Livelink offers is the ability to follow up with people who have boxes checked out to ensure that vital corporate information is managed properly. If no longer required, it goes back to off-site storage,” says Williams.

Williams points to the reports as a real benefit for Tronox. “We run a number of searches for the business groups. We can turn the web



reports into a PDF format and provide to the groups, which makes it easy for them to find a certain box, even without the ID number. Since the PDFs are searchable, they can search using keywords,” says Williams.

The disposition reports are a good example of how the Livelink ECM solution has been a benefit to Tronox’s operations – they are able to tailor the system to meet the needs of the users. “We run the disposition reports based upon the location where the boxes are stored within Livelink,” says Williams. “So, for instance, if the boxes are housed under the Controller’s group, we are able to run those destruction reports from the Controller’s group workspace and pick, for example, all boxes that have been inactive through December 31, 2007. The business group can view the report and tell us whether they can go to destruction or

need to be retained for a certain period of time.” Livelink ensures that any box on legal hold will not come up for destruction.

Once Williams’ team culls the boxes and verifies them visually at the records center, they can run the process through Livelink and have those boxes removed from storage. “Livelink actually tracks a full history of all actions that have taken place on the objects, so if we ever need to go back and take a look at the unique ID, the system can tell us when it was destroyed with all other supporting data, such as who authorized the destruction and based on what schedule,” says Williams.

The hold process is now straightforward. “Records Management enters the name and number of that hold and a description, and then we make it active,” says Williams. “Then we run a search and apply the hold to all boxes subject to that particular hold.”

Making the Case for RM

At many organizations the biggest challenge is getting the right teams to work together to see the value of what RM does for the company. “I think in our particular case, what helped get the buy-in to records management was that the effort was supported by the law department, which saw a benefit in automating the records management system. Once the law department was onboard, the other groups followed,” says Wallace. “Now, all departments, as well as our plants, are following our standard procedures for managing and storing physical records.”

Wallace concludes: “Knowing where the records are at all times, whether they’re checked out or checked in, and being able to put your finger on where that box is located...that’s a huge benefit to us in terms of improved efficiencies and minimizing risks.”



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