opentext™

Success story

Santee Cooper

Industry
• Energy

Solutions
• OpenText™ Document Management
• OpenText™ Records Management
• OpenText™ Physical Objects

Results

Mitigated risk through **version control**

Promoted **knowledge sharing**

Reduced labor resources and manual processes

Increased productivity, safety and compliance

santee cooper

Santee Cooper gets a handle on document management

OpenText provides the tools to make records management happen

"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, Records Management
Santee Cooper
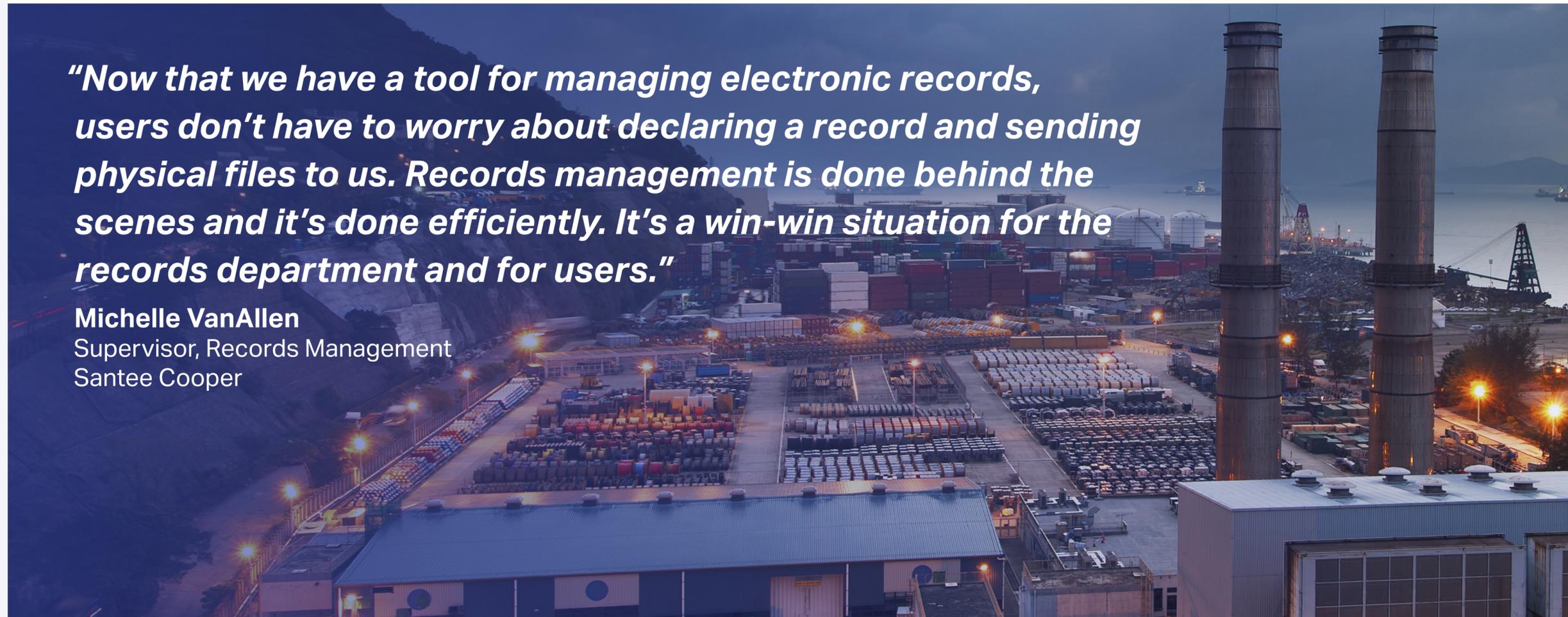
Santee Cooper is a state-owned electric and water utility and the state's largest power producer in South Carolina, serving more than 163,000 retail customers in Berkeley, Georgetown and Horry counties. The utility also generates the power distributed by the state's 20 electric cooperatives to more than 700,000 customers in all 46 counties. In total, more than 2 million South Carolinians receive their power directly or indirectly from Santee Cooper.

Taking control of electric records

When Santee Cooper began to look 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, Records Management, Santee Cooper.

To add to the confusion, most of these documents were stored in a 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 that consisted of Legal, Records Management, IT and user areas,"* she said. *"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 OpenText. Out of all the solutions, OpenText™ Document Management and OpenText™ Records Management seemed to be the easiest solution for users to understand and it had everything we needed from a records management perspective."*

Keeping workers safe—behind the scenes

Currently, Santee Cooper is using Document Management and the workflow capabilities to manage two areas: property management, which handles all of the leases and properties owned by the utility and two Santee Cooper 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," said VanAllen. *"We manage hundreds of lots that people lease, but before 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 document management 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."*
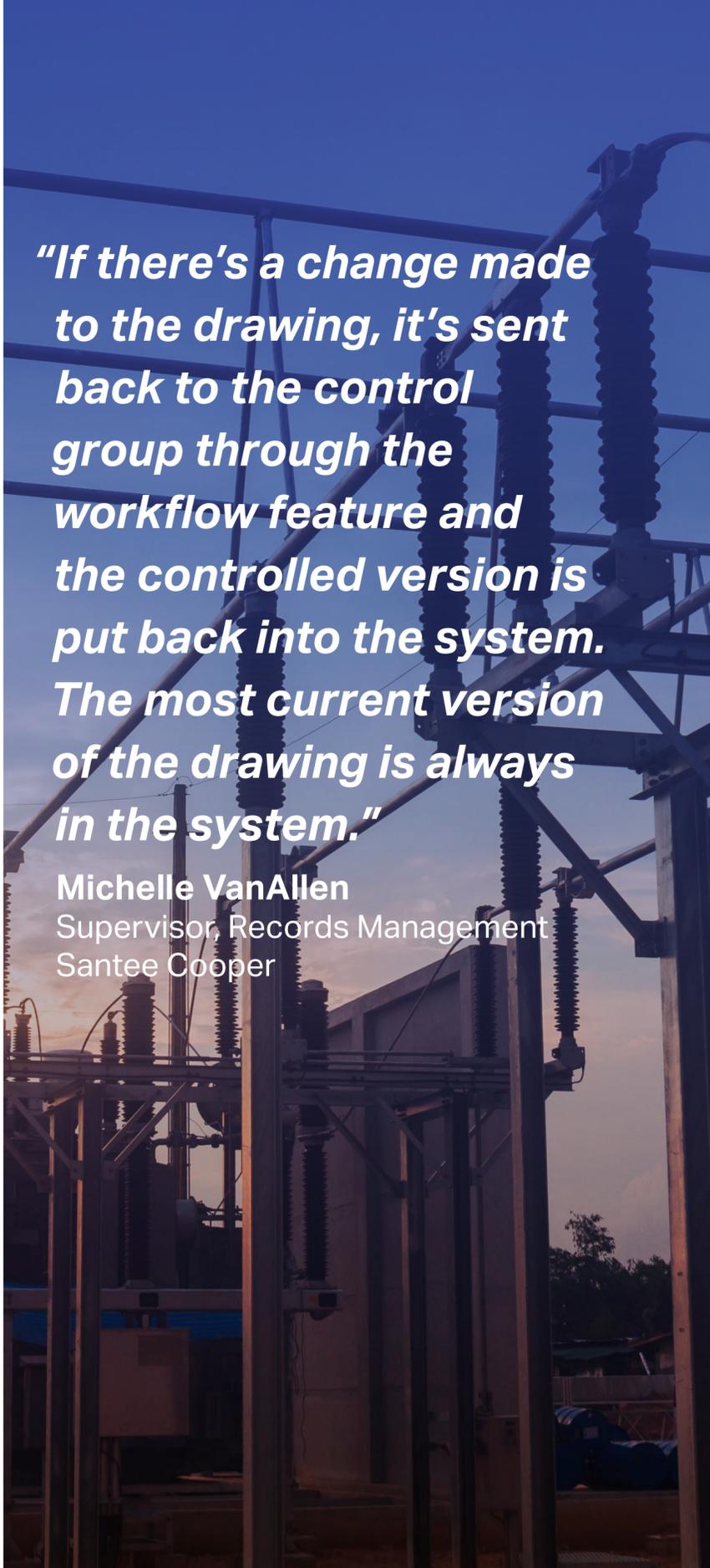
"If there's a change made to the drawing, it's sent back to the control group through the workflow feature and the controlled version is put back into the system. The most current version of the drawing is always in the system."

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"By storing engineering drawings for the generating stations in the document management repository, plants can 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." said VanAllen. *"If there's a change made to the drawing, it's sent back to the control group through the workflow feature and the controlled version is put back into the system. The most current version of the drawing is always in the system,"* said VanAllen. *"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 OpenText 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,"* VanAllen said.

Workflow helps operations flow smoothly

The workflow for engineering drawings at Santee Cooper is executed in the following way: when mechanics or technicians at the plant search for a drawing to work on a piece of equipment, they access a pre-written WebReports search screen. They can search for the correct drawing using up to eleven attributes. When they find the drawing, they can either look at an electronic version using Brava!® or simply print it.

"Once plant personnel have completed the work, they can physically draw any changes that have been made; that is, make a "redline change" onto the actual drawing," said 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 OpenText and makes the changes electronically. Once the control group has made the changes, the drawing is sent through a workflow for verification and approval. An engineer, using the workflow, approves the

revision and returns the drawing to the control group, which uploads the official version into OpenText. A notification of the new record is then sent to Records Management.

"Prior to using the workflow feature, everything was done manually," said 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 the 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 the 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 said. *"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."*

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Currently, Santee Cooper is implementing OpenText™ Physical Objects 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,"* said VanAllen. *"We are taking all of that information from the home-built system and moving it into OpenText…the boxes, the shelves, which folders are in which boxes, that type of thing. So, we have big plans for the OpenText system."*

Physical Objects will enable Santee Cooper to manage physical items such as paper records, equipment and more, adding representative object graphics to the OpenText 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 Records Management interface.

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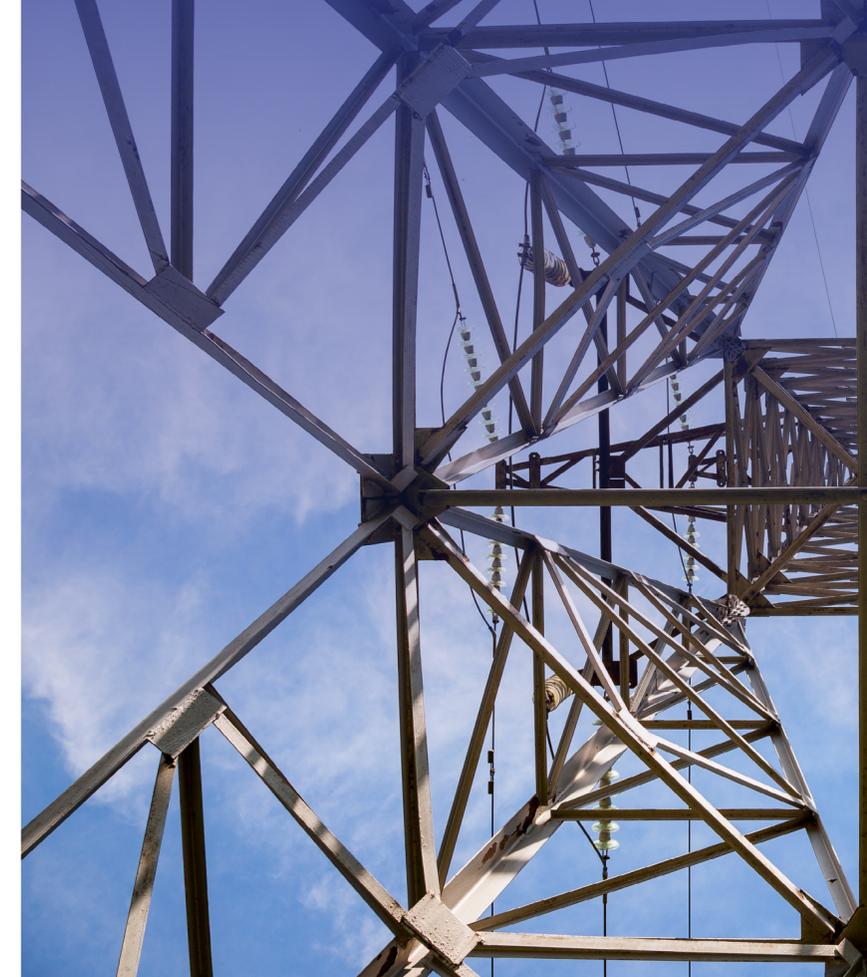
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