

OpenText Sheds New Light on Santee Cooper's Property Management Department

Utilities provider automates business processes and improves productivity with OpenText Records Management

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.

As with most organizations, Santee Cooper manages massive amounts of information. This led to an array of content issues. In 2003, Santee Cooper formed an Enterprise Content Management (ECM) Project Team consisting of Legal, IT, Records Management, and user areas to evaluate its need for electronic document management. A records management solution was needed to help the utilities provider streamline administrative processes, improve customer service, comply with federal and state rules and regulations, and retain knowledge from a retiring workforce.

"Technology changed, Santee Cooper grew, and the volume of paper and electronic records grew even faster," says Michelle VanAllen, Supervisor Records Management, Santee Cooper. "Managing these records was a necessary but burdensome task. We recognized that a solution was needed for managing the surmounting volumes of documents and electronically managing records retentions."

In search of a solution that regarded information management as the foundation of all employee work, Santee Cooper selected OpenText Records Management after thoroughly evaluating a number of systems.

"OpenText stood out for many reasons," explains Melanie Bodiford, ECM Technical Lead, Supervisor Application Support, Santee Cooper. "From an IT perspective, the OpenText technical architecture was the simplest to implement. From a records management perspective, the ability to inherit records classifications and retention periods was simple as electronic and physical records could be managed within one folder structure. From a project team perspective, the ability to work with the vendor was critical, plus OpenText had the most user-friendly application compared to its competitors. Last, but not least, from a user perspective, we were sold on the searching functionality and the process for adding documents."

INDUSTRY

Utilities

CUSTOMER

Santee Cooper

CHALLENGES

- Volumes of paper consumed through business processes
- Elaborate, untrustworthy process for retaining and managing documents and records
- Administrative staff preoccupied with photocopying and filing
- Exhaustive searches through paperwork; documents improperly filed, damaged, or non-existent
- Knowledge lost with employee retirement or career change

SOLUTIONS

- OpenText Records Management
- OpenText Content Server

BENEFITS

- Better utilization of administrative staff with paperless processes
- Documents preserved and easily found with electronic imaging
- Streamlined research projects with easy search and gathering capabilities
- 82 percent improvement in customer service response time
- Improved teamwork due to simpler, more manageable processes



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SUPERVISOR APPLICATION SUPPORT, SANTEE COOPER

Although Santee Cooper plans to roll out Records Management to all of its departments, the Property Management Department was chosen for the first implementation for a number of reasons: the frequency with which documents are accessed to meet customer service obligations; the department's records retention requirements; and the use of primary paper documents, including photos and drawings, which permitted Santee Cooper to test scanning solutions as well.

“Managing property includes managing leases, permits, neighborhood covenants, complaints, and more. The scope of the project was to convert all of the hard copy files for each of the lots and in every subdivision where Santee Cooper leases property or issues permits. This required scanning over 600,000 documents,” says VanAllen.

Building a powerful foundation

To organize and implement the project, the Santee Cooper ECM Project and ECM Technical teams worked alongside OpenText Global Services to pull together information about their documents—those that needed to be included and their usage, map the as-is document processes, and discern proper records classifications. Afterward, folders, permissions, and document attributes were identified and the processes were plotted for Records Management. When the system was up and running, users were trained and various scenarios played out to hone implementation.

“OpenText Records Management was implemented out-of-the-box; however, IT developed some process improvements so that users could more easily contribute and find content,” explains VanAllen.

“The Property Management Department uses many forms, such as leases, permits, and lease cancellations. Before Records Management, the process for completing these forms was long and drawn out. It began with completing the forms electronically, printing a hard copy, making a copy to mail to the customer for a signature, receiving a signed copy back from customer, copying the signed copy at least three times, and filing it in at least three different locations.”

“Since Records Management, the forms are completed electronically and printed. As the fields on the form are completed, bar codes are created based on identified attributes. The barcode sheet is filed while the form is mailed to the customer for a signature. When the signed form is returned, it is scanned with the filed barcode sheet. The barcodes indicate where the document should be placed in Records Management and completes any attribute fields without further input or modification by the user. The document is verified in Records Management, and the paper form is placed in the bin for shredding,” adds VanAllen.


With the help of OpenText Object Importer, Santee Cooper's new records management system ties content from the Property Management area to their Enterprise Resource Planning (ERP) system. The folder structure built in Records Management is based on how data in the ERP system and records classifications were previously defined. Folders are designed so that permissions can be applied appropriately and records management classifications inherited.

“So that the Property Management Department could easily find and view a lease related to a particular lot or customer, the lease folder for each lot in Records Management is also linked to our Oracle® Property Manager, the software that manages our leasing data. With the OpenText system, users can view lease documents from the Oracle screen by simply clicking on a button,” explains Bodiford. The users can also access the documents from a WebReports search that IT created. In addition, two workflows were written to get approvals for permits and correspondence being sent out to lessees.

Once Records Management was in place, Kofax® Capture was used to scan all of the Property Management Department's paper documents into the system, including identified attributes. All of the scanned documents received appropriate records classifications based on the folders they were scanned into. “With Records Management, the design of the lease folder and the document naming convention allows our users to look at a list of documents and easily identify the history of a lot without ever opening a document,” says VanAllen.

A new lease on property management

Although Santee Cooper hails the ease of use of Records Management, many of their employees were accustomed to working in a paper environment, making the adoption of an automated system somewhat challenging. “For the most part, the Property Management Department team was not



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excited about change. They were also in the middle of a very time-consuming project. However, once they realized the benefits of Records Management, they adapted well and are now using the system every day. The barcode sheets were the key to getting them to use the system, since this feature made it very easy to get content into the system. Users also really appreciate the Oracle® Property Manager interface because they can access the documents stored in Records Management without ever leaving the system. Today, they will tell you there is no way they could go back to the old method of managing documents," says Bodiford.

Records Management not only allowed Santee Cooper to meet its project goals, but produced residual benefits. With electronic imaging, aged paper documents were preserved; documents that were misfiled in years past are easily found by searching attributes; and costly floor space was recovered with the need for fewer filing cabinets.

"Overall, the administrative staff is better utilized. They were so busy copying and filing documents in multiple locations that we missed out on their fullest potential. Since implementing Records Management, user processes have incorporated better teamwork, large research projects are streamlined with the ability to search and gather documents electronically, and we have been able to retain the knowledge of two retiring employees by capturing it in business process modeling—knowledge that has been crucial to the remaining team. On top of all of these benefits, we have experienced an 82 percent improvement in customer service response time—from an average of 34 minutes to just 6," explains Bodiford.

Future expansion

Santee Cooper continues to roll out the OpenText solution to the rest of the organization. After the Property Management Department's successful implementation, Santee Cooper began electronically managing the drawings for their generating plants. (See success story.) "Drawings existed on paper, on aperture cards, on microfilm, and electronically; they were stored in various locations; and there was no consistent solution for updating them," says VanAllen. "We implemented and tested the process for electronically managing drawings, including a revision workflow at one of the generating stations. Other stations are currently being added. The implementation is planned to continue throughout the generating stations, as needed."

Santee Cooper has also created several workflows for the IT department to manage project documents and approval processes for their Project Management Office. As other areas of the business are being prioritized for implementations, Santee Cooper's attention is presently focused on evaluating Employee Relations (ER) to add personnel files and other ER documents to the system.

"OpenText Records Management is expected to be an enterprise-wide system at Santee Cooper that will serve the information needs of our employees, preserve and protect documents, and make the appropriate information available as needed, giving us the best value for our investment," concludes Bodiford. ■