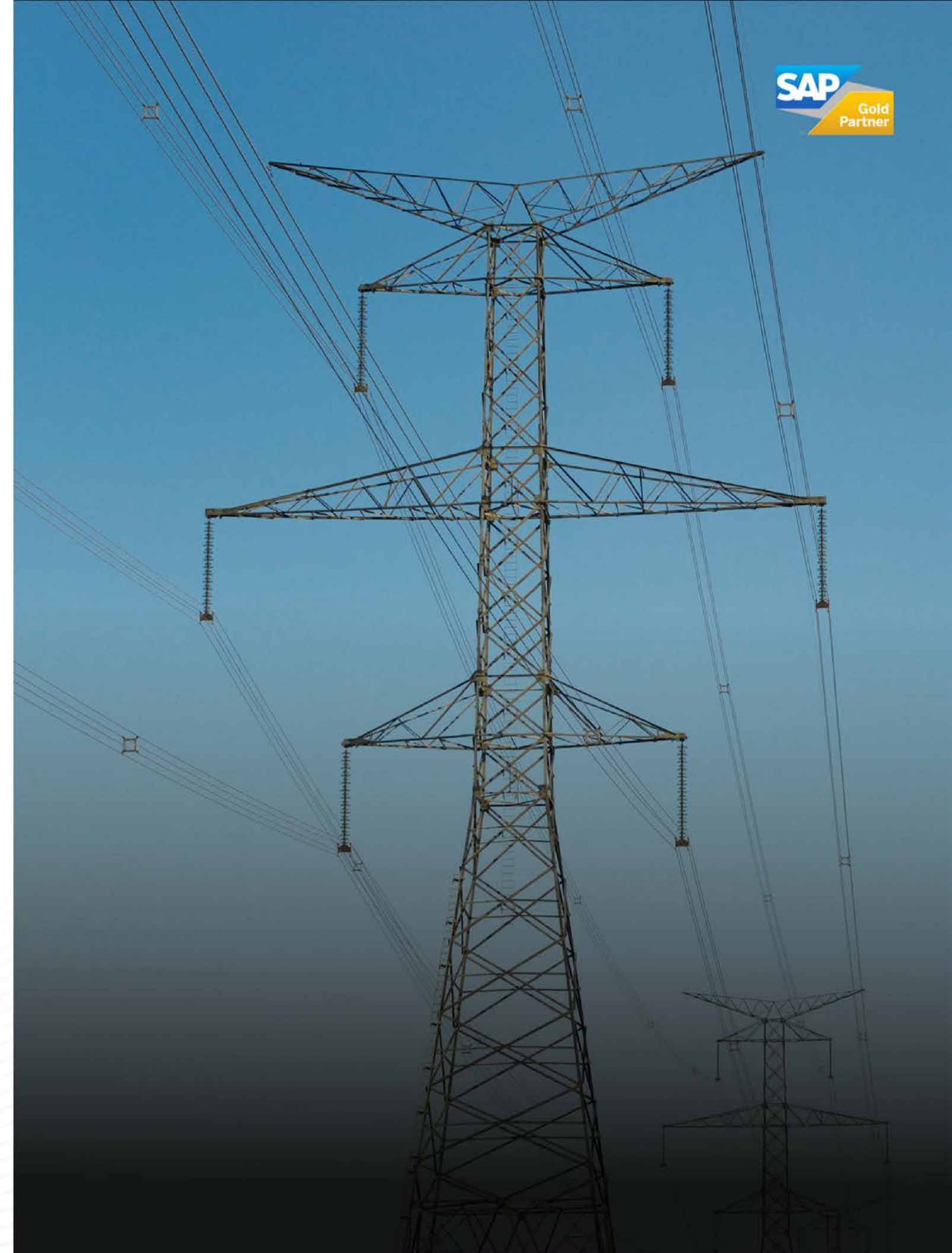


CASE STUDY:

Establishing A Single Source of Truth: Puget Sound Energy

Founded in 1997, Puget Sound Energy (PSE) is an energy utility company located in the state of Washington, USA. It provides electrical power and natural gas to the Puget Sound region with over three thousand employees.

Facing issues with their database mainly caused by siloed data on multiple ECM platforms without established control protocols or optimized process, and the high costs of maintaining those. The company worked with Auritas to draft a solution. The successful implementation of a consolidated document management system with the help of OpenText and Auritas has enabled Puget Sound Energy to **streamline its processes, reduce risk, and increase efficiency.**





Founded in 1997, Puget Sound Energy (PSE) is an energy utility company located in the state of Washington, USA. It provides electrical power and natural gas to the Puget Sound region with over three thousand employees.

Serving 10 counties, PSE has over a million electric utilities customers and 900 thousand natural gas customers. With a \$3.3B revenue, the company's service area spans 6,000 square miles

“ We had multiple silos, making it difficult to access our documents as needed. We wanted to implement records management but did not know where to start. ”

- Mandeepak Grover, IT SAP Solution Architect



THE BUSINESS PROBLEM

The company was facing challenges managing the scattered data through the multiple ECM platforms being used. PSE's team needed to maintain access to the documents but struggled to find a solution to do so with ease, as storage costs and maintenance efforts continued to increase. In addition, the lack of streamlined and well-defined processes in place was leading to errors, and even total loss of paper documents in some instances.

On top of data management and process issues, compliance was also a considerable risk to PSE, due to the limited records management capabilities.

Puget Sound Energy did not know how to make the necessary changes to mitigate current risks and fix existing data and process management problems.

PAIN POINTS

- ✦ Siloed data on multiple ECM platforms.
- ✦ High storage costs and effort using SAP, Hummingbird, InMagic, EasySoft, File Share, Email and SharePoint.
- ✦ Lack of proper controls for unstructured data
- ✦ Error-prone processes, misfiling or total loss of paper documents.
- ✦ Restrictions to unauthorized access could not be guaranteed.
- ✦ Compliance Issues and limited records management capabilities.

AURITAS SOLUTION

After publishing an RFP, Auritas was chosen to implement a data management and process optimization solution for Puget Sound Energy. An action plan was created to craft a strategy that addressed all the project goals provided by the company.

The plan began with an assessment of the company's requirements and options, which would help develop a roadmap for success. Workshops were put in place to guide the team through the implementation and Maintenance process.

An implementation of SAP Extended ECM by OpenText was chosen for multiple use cases, including development of standardized taxonomy, consolidation of silos, and knowledge transfer and user training.

PSE's team also would take advantage of Auritas' expertise upon going live to ensure a smooth transition, with AuriCare.

PROJECT GOALS

- ✦ Strategic transformation to simplify access management and search documents from a single enterprise document and records management system.
- ✦ Develop Roadmap for Success to initially migrate and retire 4 existing systems initially and 5-year plan overall including related initiatives
- ✦ Common PSE records management system to provide:
 - Common Processes.
 - Consolidated document management.
 - Process to preserve legally relevant records.
 - Management of retention & disposition.
 - Identification system compliant w/ Sarbanes-Oxley & other.
- ✦ Develop Roadmap for Success to initially migrate and retire 4 existing systems initially and 5-year plan overall including related initiatives

Phase 1: Planning & Design

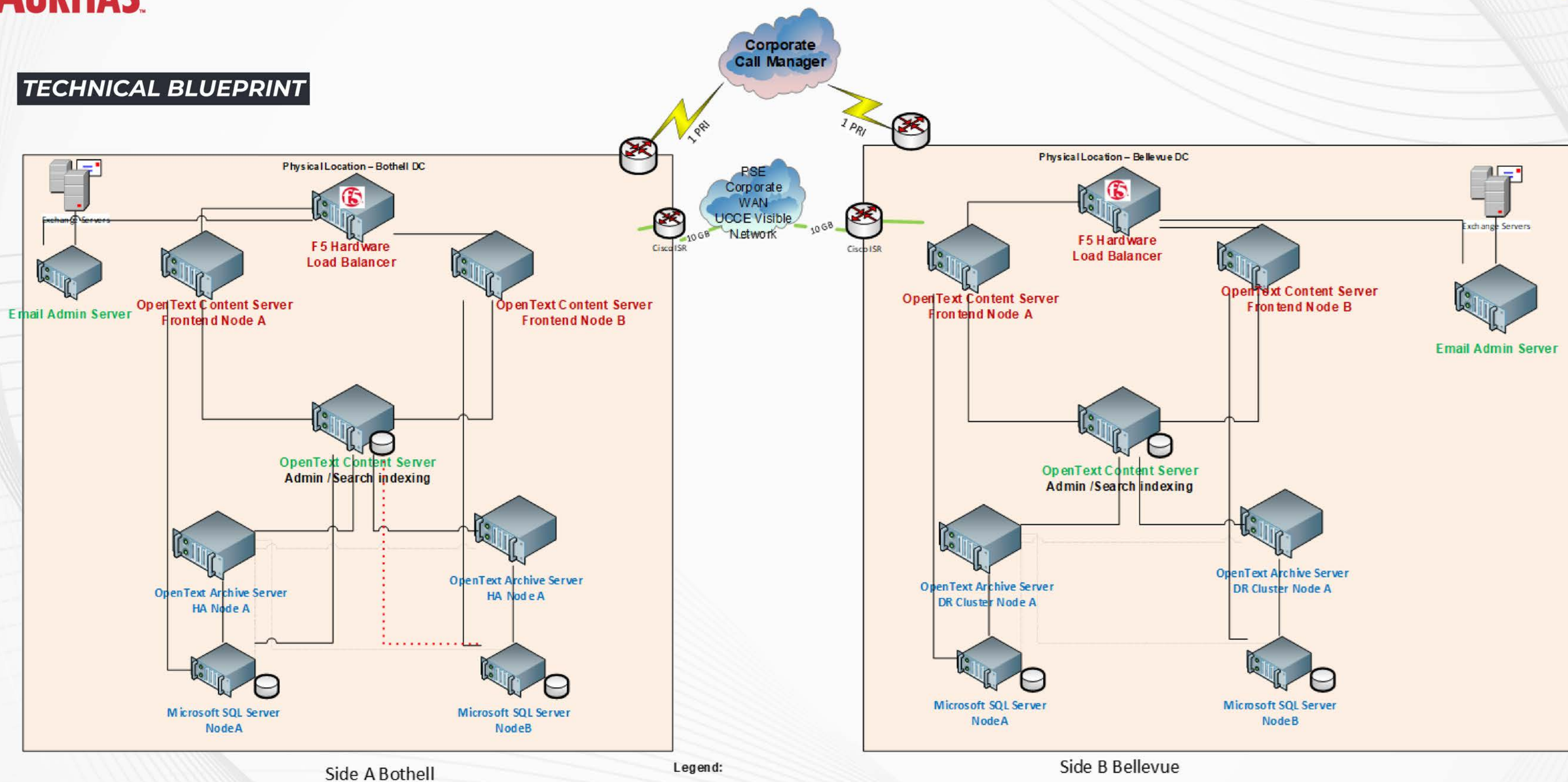
- Performed Assessments of Required Hardware & Solutions.
- Performed analysis for legacy document management applications.
- Migration Roadmap for Legacy Systems.
- Taxonomy Development.
- Presented and finalized 5-year roadmap to key members.



Phase 2: Implementation - EDRMS Project

- **Installation & Implementation of the following solutions:**
 - OpenText Extended ECM solution
 - OpenText Records Management Solution
 - OpenText Capture Center
 - OpenText Application Governance and Archiving (“AGA”) for MS SharePoint
 - OpenText Email Monitoring, Archiving, and Management
- **Configured OpenText solutions to address business cases:**
 - Implement Standardized Taxonomy
 - Set up Document Storage and Retrieval
 - Migration from multiple siloes
 - Knowledge transfer
 - Post Go-Live Hypercare

TECHNICAL BLUEPRINT



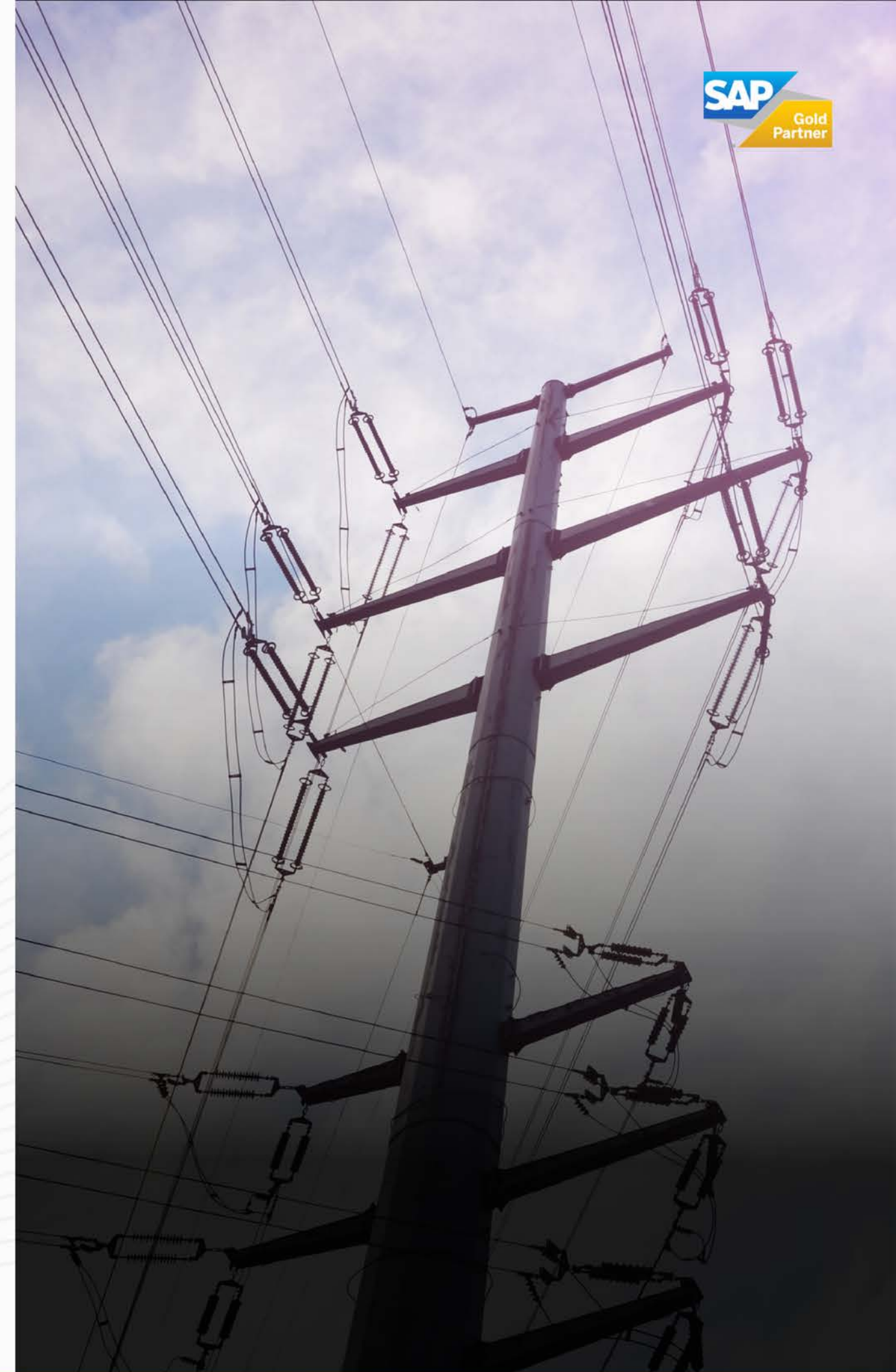
RESULTS AND BENEFITS

The results of the project included a list of benefits to Puget Sound Energy:

- ✓ Secured a 5-year roadmap for enterprise content management
- ✓ Established a records management landscape with version management controls
- ✓ Consolidated all enterprise content
- ✓ Multiple applications can access the same documents
- ✓ Established "Single Source of Truth" for documents
- ✓ Extended life of infrastructure
- ✓ Eliminated legacy siloes
- ✓ Prevention of potential legal fines through records management

“ OpenText gave us a great partner in Auritas, they made our transformation smooth and easy. ”

– Obaid Khan, Director of IT



ABOUT AURITAS

Auritas is a global ERP products and services company specialized in data management, process optimization and product innovation, with a focus on SAP Enterprise customers. Since its inception in 2003, Auritas has been closely aligned with SAP & has established itself as a leading pioneer in the market for all things data & process.

In its two decades of experience, Auritas has completed over 550 successful projects across multiple industries, including utilities, oil and gas mining, transportation, and other public and private sector implementations. With over 500M in customer savings, Auritas experts are helping clients actualize the benefits of IT footprint management, landscape optimization, process simplification and digital transformations.

Visit www.auritas.com for more information about Auritas' products and services.

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