



Business Issue

For a leading Colorado exploration and production company, records play a significant role in daily operations and revenue generation.

When the Director of Administration started her new role that included Records and Information Management responsibilities for the entire organization, she saw a sprawling collection that was only partly organized. This made finding information timely a significant challenge for many departments. She also saw a huge opportunity to improve the situation by converting physical files to electronic format.

Every organization wants to provide knowledge workers with fast, easy access to accurate information. This Director was able to quickly get buy-in for the project from the Vice Presidents of both the IT and Land Management Departments.



CASE STUDY:

TDS Improves Access to Physical & Electronic Information for Client in the Energy Sector

THE LAY OF THE LAND

Taking up half a floor of office space, the mostly physical land records collection presented challenges common to most information-intensive environments. Not only did the collection occupy a significant amount of downtown, high-cost real estate, it also created lost time as workers searched in vain for checked-out files and sifted through duplicates to identify original documents.

Solving these problems would require a partner with:

- Records and information management expertise;
- Relevant solutions to effectively improve access to information;
- A keen understanding of the high-regulated energy sector in which they operate.

WHERE TO START

The TDS Team took a sample collection of land records and digitized them based on the information that resulted from working sessions. In some instances, a file was imaged to the document level, and in others only to the index level, where it made sense. In this way, the result enabled access to the information they needed – to the degree of granularity necessary. And with the highly accurate OCR search tool, they are able to find what they need quickly. The resulting digital deliverable was then uploaded into a robust RIM software tool fit for the organization's size and content – with the ability to grow as their needs do.

When that was complete, a training session was held with the key stakeholders, including lease analysts, division order analysts, land staff and records coordinators. The focus was on search, find,

route, and append information. Based on the input from training, further adjustments were performed to enhance search by adding keywords and metadata.

By the end of this process, the client had the collection where they wanted it, built for future search purposes and with a number of ways for knowledge workers to find information on demand.

CREATING PHYSICAL SPACE

During the conversion, among many other pressing activities, the Director of Administration was tasked with finding space for two, new individual offices. Together with the TDS team, the existing file room was able to be rearranged to accommodate the remaining physical collection in a much-reduced footprint, but also laid out in a more efficient manner. This not only saved significant floor space, it also saved a significant amount of time to manage the finish of the new offices.

ROLLING-OUT DAY FORWARD

Following the Pilot project, TDS then began to digitize the balance of the physical collections. Every week, TDS would pick-up the next segment of the land records collection, prepare the documents, scan, validate, OCR and package the digital deliverable to be loaded into the RIM software solution. Based on the volume of the collection, this process continued for several weeks. During this time, TDS created and perfected the process the company would use to capture and accurately process all day-forward documents and new content entering the active environment.

Now the Land Admin team can track the physical location of files, find electronic versions, view audit trails and chain of custody information, as well as routing electronic information (i.e. address updates and amendments) quickly and easily. In short, all information is easily accessible in a secure, trackable environment.

UNDERSTANDING RECORDS ORGANIZATION AND WORKFLOW

The TDS Team and the client convened for a series of working sessions.

TDS' consultative approach in these sessions helped them understand how exactly the information is being used and by whom. This allowed TDS to identify physical pinch points in existing workflows, as well as understanding the search criteria, imaging levels and other details required for the solution.

The depth of experience TDS brought to the project greatly advantaged the client by utilizing industry best-practices and proven solutions in a high-touch approach.

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THE RIGHT TECHNOLOGY FOR THE CLIENT'S ENVIRONMENT

TDS presented the records and information management (RIM) software solution in best alignment with this growing O&G company's needs.

TDS outlined a plan to convert, track and manage the physical collection, and then upload that information into the RIM solution, with user training sessions along the way. As the Director of Administration stated: "We were really impressed with the capabilities of TDS' solution...what stood out for us were the robust search functions, and in particular, the way the content was organized. It made it easy for our knowledge workers to find what they needed – when they needed it." Another plus is the software solution works seamlessly with the existing land management system, and appends metadata nightly to new content entering the system."