

Unified Energy System Federal Grid Company



EMC Documentum Platform supports Enterprise Managerial Process in compliance with Russian regulations

Business overview

Open Joint Stock Company, Unified Energy System Federal Grid Company (FGC UES) was founded in 2002 under the Russian Federation's energy industry reform program. The primary goal of FGC UES is to manage the maintenance and development of the national power distribution grid.

FGC UES has a complex and multidivisional structure. Branch offices, subsidiaries, and dependent joint stock companies [SDJSC] located in various regions of the country report to the central executive body of the company.

Challenges

The cornerstone of the Russian business management practice is the method of supporting enterprise managerial processes with an appropriate document flow. According to this practice, documents are considered a medium of managerial effectiveness. To initiate the execution of a work project, a manager appends instructions to the document and routes this document to a workflow participant. At that time, a controller is appointed to monitor timely execution of the assignment. This area is a subject of special regulation in the Russian business practice.

In 2003, FGC UES decided to implement an Automated Document Management System (ADMS) to support the Enterprise Managerial Process electronically. The company set the ambitious goal of fully digitizing all document management and managerial processes across the enterprise. It decided that hard copies would only be used in those areas prescribed by law, such as when handling personnel records and outgoing correspondence.

EMC solution

The company analyzed document management platforms of leading global vendors and developers and selected the EMC® Documentum® platform. The solution was jointly developed and implemented by specialists from FGC UES and two Russian partners of EMC, TopS Business Integrator (TopS BI) and Invest Inform Proekt.

Russian standards define procedures for processing incoming and outgoing documents and for routing documents within an organization, establishing registration and indexing rules. The standards also determine requirements for real-time storage, file plan structure, and control of execution. Using the EMC Documentum platform's standard functionality, FGC UES has been able to quickly and easily meet such requirements.

Management, control, and storage

Through full automation of document flow within the company, ADMS supports management processes in FGC UES. Managers at all levels perform their management functions by assigning tasks (issuing instructions) to employees and managers of subordinate business units. The task is assigned to a workflow participant for execution and to a controller for monitoring of task execution. The manager receives a report from the workflow participant on completion of the task by a specified deadline.

All these processes are supported in the system, which essentially routes managerial impacts across the company and guarantees that appropriate checks are in place to monitor the completion or non-completion of all managerial decisions.

Various documents can be used as a medium of a managerial impact, such as invoices for the accounting department, various contracts for the sales department, design estimates for engineering departments, incoming and outgoing correspondence, in-house organizational and administrative documents (orders, instructions etc.), and meeting minutes of the management bodies for various business units. ADMS stores and manages the workflow for all document types used in FGC UES.

EMC Documentum functionality made it possible to implement the control functions used by managers at all levels to monitor execution of tasks. The system notifies management about missed deadlines and, using a scoring system, penalizes at-fault employees.

In addition, analysis of strategic reports enables management of FGC UES to track how efficiently various business units perform activities, assess whether enough managers are working on specific tasks, and whether sufficient resources have been allocated to process documents with different levels of importance. After one year using the system, FGC UES restructured its organizational structure.

Since implementing the system, FGC UES has eliminated all paper-based document flows. Incoming documents are digitized and then move in electronic form through all requisite processing stages. Only letters sent to external organizations are printed prior to sending. Even resolutions and reports are processed in electronic form. As of March 2009, a digital signature function has also become operational.

Today, ADMS is the primary working environment for company employees, providing access to all tasks assigned by management. At the start of every business day, the system provides employees a list of assignments and, at the same time, tracks deadlines and activity areas. Document access rights are dependent on the functional role of users, with certain roles allowing employees to sign documents, while others may only edit or view them. The adjustable roles function allows for flexible document routing processes and the automation of workflow tasks in the company.

This new system now provides 11 thousand users with access to more than 2 million items, primarily documents and related data, including remote access, which is important for a company that operates a number of foreign assets. To access the system, it is enough to have a workstation with Microsoft Windows and Internet Explorer installed.

For longer term storage, the Documentum platform also provides an electronic archive that operates according to internal file plan policies and rules. In the past, the archive system consisted of numerous file cabinets containing bound records, such as customer correspondence files.

Since adopting the Documentum-based ADMS platform, the company now enjoys a virtual archive, which offers far greater security and compliance protections. Individuals lacking proper access rights can not enter or view certain archive files and all archive documents are locked to prevent the introduction of changes. In each archive folder, a retention policy is designated for documents, which the system continually tracks.

Implementation phases and development plans

The Documentum implementation team built the ADMS solution in several phases. This involved a step-by-step expansion from a few separate units of the organization to ultimately include the entire, geographically distributed structure of FGC UES.

Going forward, the ADMS roadmap stipulates the development of nine new system modules, with the number of users scheduled to increase to almost twenty thousand by the end of 2009. The solution integrates with an SAP ERP system that is also in the deployment process. A new technical documentation storage system, based on the state-of-the-art EMC Centera CAS solution, is also part of the implementation plan.

Standard EMC Documentum functionality drives the entire ADMS roll out, eliminating the need for other, third-party software purchases. The flexibility and multi-tasking functionality of EMC Documentum makes it possible to meet essentially any customer requirements, and also provides the tools for resolving tasks that may not been considered during initial deployment phases.

“The ADMS implementation, based on the EMC Documentum platform, has resulted in a significant reduction in document approval times and real-time delegation of assignments at all levels of the company. This has increased the efficiency of decision making processes and improved performance discipline. The system has also enabled us to maintain a unified information environment for assignments and administrative documents serving business units located throughout disparate geographical areas.”

Natalia Kuvshinova, Administrative Director, Unified Energy System Federal Grid Company (FGC UES)

Summary

Thanks to ADMS implementation, FGC UES now has an integrated, automated environment for managing its business. The customization features within the EMC Documentum platform provide the company with infinite possibilities for routing documents across the company. The platform's support for geographically distributed architecture, allows all business units and subsidiaries of FGC UES to connect to and share the benefits of the new system. The scope of the project is unparalleled for Document Management project practice in Russia. In 2007, the project received an award from EMC, recognizing it as “the most interesting and successful industry project” in the entire Russian region.



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