Snohomish County Public Utility District Spotlight featuring Laurie Gootee

October 2021
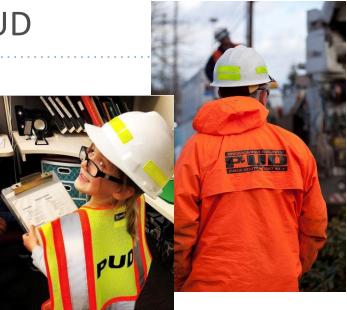
Brian LaPointe – VP Sales, Americas
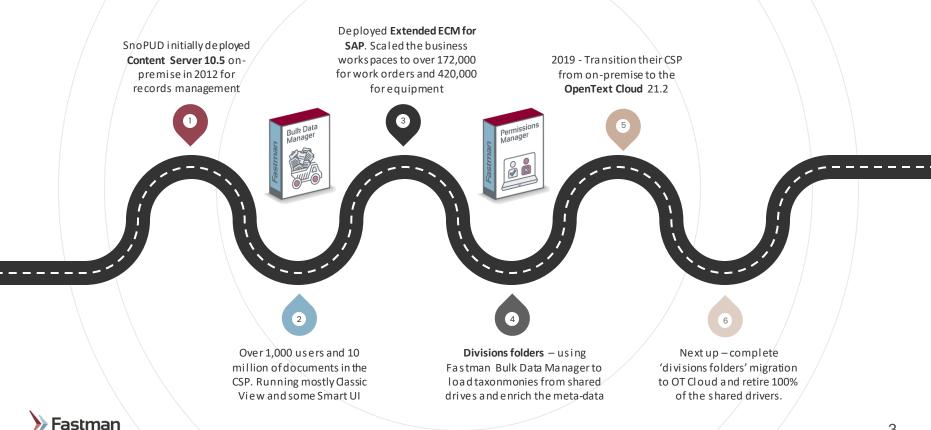Brian.LaPointe@fastman.com / T: 310-525-8802

# Introducing SnoPUD

- Snohomish County PUD (https://www.snopud.com) is the second largest publicly owned utility in Washington. Serving over 360,000 electric customers and 22,000 water customers. The service territory covers over 2,200 square miles.

- SnoPUD was created November 3, 1936, by a majority vote of the people, for the purpose of providing publicly owned electric and water utility service to the people of Snohomish County and Camano Island. The vote to create the PUD was part of the public power movement in the Pacific Northwest.

- Operating in a highly regulated industry, document control and process are critical to operating SnoPUD where they are operating and maintaining critical infrastructure. This is why they selected OpenText Content Suite primarily for its records management and SAP integration strengths.

- Today, SnoPUD is actively migrating 'division folders' from legacy shared drives to CSP and using business workspaces integrated via Extended ECM for SAP to manage work orders, PO's, inventory reports, and equipment manuals for it's 1,000 knowledge workers.

Fastman

# SnoPUD Journey

SnoPUD initially deployed **Content Server 10.5** on-premise in 2012 for records management

Deployed **Extended ECM for SAP**. Scaled the business workspaces to over 172,000 for work orders and 420,000 for equipment

2019 - Transition their CSP from on-premise to the **OpenText Cloud** 21.2

1

**Fastman**
Bulk Data Manager

3

**Fastman**
Permissions Manager

5

2

Over 1,000 users and 10 million of documents in the CSP. Running mostly Classic View and some Smart UI

4

**Divisions folders** – using Fastman Bulk Data Manager to load taxonmonies from shared drives and enrich the meta-data

6

Next up – complete 'divisions folders' migration to OT Cloud and retire 100% of the shared drivers.

Fastman

# SnoPUD Best Practice Recommendations

**Keep it Simple**

This includes your CIS model, Metadata, and Required Fields

**Use Collections Across Content**

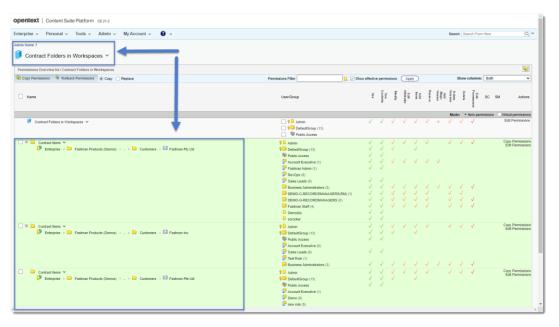Bulk update access and privileges by running Permissions Manager on the container

**Proven Integrations**

Look for proven Content Suite Integrations (i.e. SAP xECM)



**Fastman**

# Permissions Manager Focus

**Scenario: Use Collections Across Content**



- As SnoPUD deploys Extended ECM for SAP, making access and permissions changes across large quantities of business workspaces is challenging

- *Best Practice:* Use Collections across the content within the business workspaces and then run Permissions Manager to bulk update.

- Example: See the common 'Contract' folder that resides within each business workspace. By adding to collection, bulk updates can be performed in mass.

- The Fastman Permissions Manager is
  **opentext** | Cloud Certified

**Fastman**

# Permissions Manager Focus

## Scenario: Compare and Copy Group Membership



- Onboarding and offboarding users to CSP is a daily task for SnoPUD. Using Permissions Manager greatly reduces the effort and eliminates mistakes.

- Provides the ability to compare and copy group membership from one user to another.

- Option to for a user to leave a group or multiple groups

- The Fastman Permissions Manager is

# Bulk Data Manager Focus

## Scenario: Load Taxonomy

SnoPUD is **retiring multiple large 'division folders'** sets located on shared drives and migrating to the Content Suite Platform.

Using BDM, SnoPUD **loads folder structures** with documents to CSP whilst enriching the meta-data (categories/attributes).

By using BDM, the transition to the **OT Cloud** was eased whereas you can use BDM in both environments. No scripting is required and business users can perform the migration. The architecture allows for the client to **push content** located on shared drives to a **CSP cloud deployment**.



**Fastman**

# Fastman Management Suite

## Trust your data. Drive your data.

Fastman solutions ensure the security and integrity of your enterprise information by increasing the trust your business has in its Content Suite and Extended ECM platforms. We unlock new opportunities, driving more value from your data, and radically changing the way these systems are perceived and used within your business.

### Permissions Manager

Ensure that only trusted individuals can access or modify the information stored within your Content Suite or Extended ECM platforms including SAP Extended ECM by OpenText.

### Access Manager

Ensure that licence compliance is retained within OpenText Content Suite and Extended ECM platforms.

### Bulk Data Manager

Simplify the migration and transformation of your content between Content Suite instances, into the cloud, or into SAP Extended ECM.

### Digital Signatures

Digitally sign your documents within OpenText Content Suite using the DocuSign Agreement Cloud and DocuSign Signature Appliance.

# CONTACT US

Brian.LaPointe@fastman.com

www.fastman.com

@FastmanCS

(NA) +1 310 525 8802

**Fastman**