



SUCCESS STORY

ITC Holdings

Industry

- Energy

Solutions

- OpenText™ Extended ECM

Challenges

- Storing redundant documentation.
- Simplifying the management of federated user access rights.
- Enhancing the visibility of digital records to strengthen confidence in regulatory compliance.

Results



Records automatically decommissioned after the retention period.



Reduced costs associated with search and review activities.



Fine-grained insights into company-wide records management activities.



ITC Holdings Corp. supercharges records management efficiency to accelerate compliance activities

Independent electricity transmission company establishes cost-effective records management processes with OpenText™ Extended ECM

“OpenText Extended ECM gives us a great sense of confidence when it comes to knowing what records we have, where they are stored, for how long they will be kept, and who can access them.”

Lisa Aragon
Director, Ethics & Compliance
ITC Holdings Corp.



Headquartered in Novi, Michigan, ITC Holdings Corp. (ITC) is the largest independent electricity transmission company in the United States. It owns and operates high-voltage transmission infrastructure in Illinois, Iowa, Kansas, Michigan, Minnesota, Missouri, and Oklahoma. Established in 2003, ITC employs over 700 people and regularly works with over 1,000 contractor employees.

Protecting vital energy infrastructure

To keep energy flowing smoothly from power plants to millions of people's homes and businesses, ITC builds, manages, and maintains high-voltage transmission lines in seven states. And because ITC plays such a key role in US energy infrastructure, it must adhere to strict Federal Energy Regulatory Commission (FERC) and North American Electric Reliability Corporation (NERC) regulations.

"Our operations generate huge volumes of data and confidential documentation—everything from electrical engineering designs to real-estate records," explains Lisa Aragon, Director, Ethics & Compliance at ITC. ***"Our records, documents and files must be maintained in accordance with stringent data protection, retention and management guidelines set by our regulators. To protect the company from regulatory and reputational risks, it's crucial for us to meet these requirements at all times."***

To avoid accidentally disposing of data, ITC's approach to records management was to retain as much information as possible. ITC recognized that continuing down this path could have ultimately led to decreased efficiency and increased costs related to storing, finding and managing growing volumes of content.

"While the previous approach ensured we had the right information when needed, retaining more documents than required did create challenges for the business," comments Melissa DeKarske, Manager, Records and Information Management at ITC. ***"It took longer than necessary to sift through our records, which were intermingled with transient information that was no longer needed."***

Taking a fresh approach

To boost operational efficiency and savings, ITC looked for a solution to consolidate and automate its records management activities. After carefully evaluating several solutions, ITC decided to transform its approach to records management using OpenText Extended ECM.

Lisa Aragon comments, ***"We wanted the flexibility to try a range of approaches to records management and find the one that suited us best—and that's exactly what the OpenText solution allows us to do. We were especially impressed with the fact that Extended ECM offers user-friendly, automated records management capabilities. It's also easy to extend and integrate the solution with other platforms, which gave us confidence that the solution would support whatever records management process we ultimately decided on."***

ITC used Extended ECM to centralize and automate key records management activities across the organization and has established permission access control for over 700 users.

Looking ahead, the company plans to integrate other OpenText solutions that automate the process of making scanned documents searchable across different work environments, which will improve the user experience when searching for documents.

"Adopting OpenText Extended ECM gave us the ability to automate the disposal of physical and digital archived records—a task that we always had to do manually before. As a result, we were able to build efficiencies in the review and disposal processes, realizing an 8% reduction of expired digital records in the first year."

Melissa DeKarske
Manager, Records and Information Management
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“During the implementation phase of the program, we made sure that every business unit at ITC had their voice heard, which helped us build up user adoption quickly,” says Melissa DeKarske. “Taking this approach also gave us a much deeper understanding of how each department manages their records so that we could design processes tailored to their unique needs.”

Becoming a leader in content management

By deploying Extended ECM, ITC has significantly improved efficiency in its document management activities and gained more granular control over user access rights and information requests.

Melissa DeKarske explains that ***“Adopting Extended ECM gave us the ability to automate the disposal of physical and digital records—a task that we always had to do manually before. As a result, we were able to build efficiencies in the review and disposal processes, realizing an 8% reduction of expired digital records in the first year.”***

Furthermore, with Extended ECM, the organization was able to implement an enterprise-wide email management policy. The implementation of this policy helps govern how transient and record email communication is organized and stored long term.

“By saving storage space, we’re streamlining processes in all environments by making it faster and more cost-efficient to find documents and information,” says DeKarske.

With Extended ECM, ITC can create a broader range of user access privileges, spanning from read-only to full editorial access. And by offering end-to-end transparency, OpenText solutions make it much easier for ITC to demonstrate regulatory compliance during audits. Already, a leading consulting firm has recognized ITC for its advanced approach to records management.

“Extended ECM gives us a great sense of confidence when it comes to knowing what records we have, where they are stored, for how long they will be kept, and who can access them. Equipped with this information, we can keep our core business processes running smoothly and focus on delivering reliable, cost-effective services to our customers,” concludes Lisa Aragon.



About OpenText

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