



## Macquarie Generation

### Macquarie Generation turns to enterprise content management to support growth



#### Business overview

Established in 1996, Macquarie Generation is Australia's largest electricity generator. The State Owned Corporation owns and operates two power stations in the Hunter Valley, New South Wales and specialises in the production and wholesaling of electricity to the National Electricity Market. Each year, Macquarie Generation produces about 15 percent of the electricity required by people living in eastern Australia from South Australia to northern Queensland.

#### Challenges

A long-time user of Documentum, EMC's enterprise content management solution, Macquarie Generation migrated to Documentum version 6 from version 5.2.5 over December 2007–June 2008 to ensure continued support and take advantage of new functionality.

The relationship with EMC started in 1998 when Macquarie Generation first implemented Documentum to manage its engineering drawings base. In 2003, the Corporation implemented Documentum 4.3 throughout the business to manage records. In 2005, it completed its migration to Documentum 5.2.5 across both records and drawings.

Since 2003 the number of registered records has climbed by roughly 10,000 per year to about 63,000 in 2008, while the number of registered drawings has reached around 150,000.

In 2007, Macquarie Generation turned to Astral Consulting, the content management and business process consultancy that had undertaken the implementation of Documentum 4.3, to review its content management options. Astral had forged a trusted relationship with Macquarie Generation based on the successful implementation of the Documentum 4.3 system with customised records management functionality. The partner leveraged experience gained from having been an EMC Documentum partner since 2001 to complete the engagement.

#### EMC solution

##### Meeting Compliance Obligations

Macquarie Generation identified that using Documentum 6 with a Web client could ensure it met its compliance obligations, while functional improvements could enhance the management of both drawings and records.

The Corporation evaluated all its options, including migrating to the newly-released Microsoft Office SharePoint Server 2007, before deciding to upgrade to Documentum 6. Macquarie Generation has a hybrid records management system that covers both electronic and physical documents and at the time, Microsoft could not support this requirement in a single repository. The Documentum 6 system easily scales to support the growth in Macquarie Generation's records and drawings.

Documentum's audit trail capability also enables Macquarie Generation to confirm who has viewed, changed, and checked a document.

### Presets Enhance Document Management Capabilities

When Macquarie Generation first implemented Documentum, the Corporation used a desktop client. One of its challenges was finding a way to push metadata onto records without manual intervention.

If it remained a manual process, users faced both the stress and time of ensuring metadata was entered correctly and the possibility of compromising the system's integrity.

To address this issue, Macquarie Generation created 40 to 50 metadata templates that staff could use to ensure the correct data was applied. However, the metadata template functionality is not available in the Documentum 6 Web client.

In preparation for the move from a desktop client to a Web client, the records team at Macquarie Generation is about to embark on a project to implement the presets functionality in Documentum 6. This functionality applies metadata at a folder level and therefore alleviates the requirement for users to populate fields every time a record is registered in the system. Macquarie Generation plans to work with Astral Consulting over the six months until mid-2009 to implement presets.

The records team believes the presets and drag and drop functionality, combined with the user-friendliness in Documentum 6, is likely to further encourage staff to use the new system.

**“We expect the new system to substantially increase the quality of enterprise content management at Macquarie Generation.”**

**Spokesperson, Macquarie Generation**

### Making Document Searches Easier

Macquarie Generation has also moved drawing users from a heavily configured search screen to an out-of-the box version with some customisation.

The drawings in the system are named and filed according to a number-based naming convention that can create difficulties for staff when trying to locate a drawing.

With more than 150,000 drawings now in the system, the Corporation is looking at an alternative way to access drawings.

It is proposing to retain the current naming convention and search screen, but create an additional folder structure based on Macquarie Generation's technical functions. This gives users the ability to drill down to the appropriate technical folder to find a drawing or perform a more refined search.

The drawings are to be linked to the new folder structure, avoiding duplications in the system.

### Summary

With support for its existing version of Documentum running out, Macquarie Generation evaluated its enterprise content management options and with the assistance of Astral Consulting was able to implement Documentum 6. The scalability and ease of use of the new system is expected to enhance adoption of the records and drawing management system within the Corporation.



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