

Trinity Technologies Success Story

Entergy, Inc. Takes Bold, Unified Approach to Electronic Document Management for its Nuclear Plants

Trinity Technologies' Project Management Team Assesses, Maps Workflows, Creates Change

"A nuclear plant doesn't run on uranium. It runs on paper," is a well-known adage at nuclear plants. So it was serious business when Entergy, the second largest U.S. nuclear generator, decided to acquire a single Electronic Document Management System (EDMS) to implement at five of its nuclear plants in the U.S. Entergy's power plants generate more than 30,000 megawatts of electricity domestically and internationally, and deliver electricity to about 2.6 million customers in Arkansas, Louisiana, Mississippi, and Texas.

Knowing its documents are an asset, Entergy wanted the most current procedures, control documents, safety reports, specifications, drawings, and plant record images viewable to all who needed them. Prior to implementing EDMS each plant managed paper and microfilm differently and supported diverse computer systems.

To identify the needs of its plants, Entergy brought in Mr. Bud Sawatzky and Ms. Joanne Crowley from Trinity Technologies. They worked with a team of eighteen people representing Entergy's nuclear fleet.

The team gathered a list of functional requirements during its plant visits, which were then distilled and consolidated into a list of 194 unique requirements. Using these requirements, the team developed an RFP that incorporated a common language for dialogue between Entergy and the various system suppliers bidding on the EDMS.

A New Approach to EDMS

"Entergy Nuclear was embarking on a totally new approach to EDMS for its plants in the US," said Sawatzky, who has been working with Entergy since June 2001. "Our team wanted to do justice to all of the company's needs."

The RFP challenged vendors to illustrate how they would meet Entergy's requirements with out-of-the-box functionality—without any customizations. Each vendor participated in a best practices demonstration, where Entergy gave a step-by-step script of tasks in the cradle-to-grave lifecycle management for records and documents. A detailed evaluation criteria was developed to grade each vendor, taking into consideration system functionality, best practices demonstrations, and reference checks. Scores were compiled in each evaluation area.

"The process was labor intensive, but it produced a quantifiable evaluation of all vendors in all areas that were deemed important to Entergy," said Crowley. "It was heartening that no plant sites brought preconceived notions to the scoring process. Every plant shared one goal: to find the best product for their needs. Everyone realized that while no system is perfect, there was an opportunity to find the best fit."



“We made our role clear from the beginning of our engagement with Entergy and placed the responsibility for decision-making on team members' shoulders where it belonged,” said Sawatzky, who established an evaluation process that was completely quantitative while they maintained product-neutral objectivity. “We facilitated the process but did not want to do anything that might cast the procurement process into question.”

Creating Consensus, Unifying Approaches

Concurrent with the system evaluation was process redesign—bringing Entergy plant personnel into consensus on one way to perform document management in the plants. In January 2002, the team visited each plant and collected information on existing work processes. This was distilled into as-is models and flow diagrams that depicted all steps involved in records management and document control. The diagrams were consolidated into to-be work processes.

Extra steps and redundancies were eliminated, and opportunities to introduce automation were identified.

Not only did the plants need to agree on unified work processes, they also needed to evolve to one language. Crowley recounted that typically a request to change a drawing might be called a document change request or a drawing revision notice, depending on the plant.

Bringing in new technology and changing work processes are not adequate by themselves without an organizational change to provide optimum return on investment. “The organization has to be in place before the system and process can be implemented,” says Sawatzky. “Entergy is willing to make these changes. The goal of standardization across all plants is to leverage resources, provide consistency, reduce errors, and save money.”

A communication plan will introduce the new system named MERLIN for Master Electronic Records Library and Information Network. Communications will educate users, promote the system, provide training, and manage expectations.

Entergy will rollout the MERLIN system one plant at a time and is expecting to bring users at the FitzPatrick plant online by early spring of 2003. The capabilities of Entergy's new system coupled with its unified work force and work processes will contribute to a competitive advantage for Entergy.

About Trinity Technologies

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