How Todd Energy streamlined document management with Smart Records

Highlights

- One million documents needed managing
- Health & safety and compliance obligations met
- A new process developed
- iWorkplace Smart Records 365 solution
- Immediate benefits, including improved time and efficiencies, reducing risk and cost savings

> "IL was fantastic throughout... It's a two-way conversation, we learn from them and they learn from us"
>
> Stephanie Richardson,
> Senior Information Specialist

Todd Energy

Todd Energy is a leading energy company, with onshore natural gas fields in Taranaki and are a major New Zealand hydrocarbon producer. They are a significant contributor to the New Zealand economy and, in conjunction with their Gentailer, Nova Energy, employ over 500 staff.

Customer Challenge

- The task of running the country's largest natural gas operation produces more paperwork than you might think - over one million documents!
- Todd Energy wanted to reimagine their enterprise content management (ECM) system and establish a better way to manage their mountain of digital documents
- They were already working in the Microsoft 365 and SharePoint environment and wanted a system that would add world class document management tools
- They specifically wanted an efficient way to manage how documents were retained or earmarked for disposal and to ensure they were meeting their health and safety and compliance obligations

The Solution

- Todd Energy implemented Information Leadership's **iWorkplace Smart Records 365**. This is recognised as the leading document management application in the Microsoft environment globally
- Microsoft 365 already has a rich toolset for information protection and governance; Smart Records made it easier to use these tools by:

- Providing a helicopter view for good information management and governance

- Allowing users to create a taxonomy and set rules to govern retention and destruction of documents, enabling automation of much of the process.

- Providing full flexibility over design governance of document libraries, metadata and folder use, auto classification tools, permissions controls and reporting functions and is designed to support the systems requirements of the NZ PRA

- Working with Information Leadership, Todd set about mapping their taxonomy and deciding which of their existing hard-copy retention & disposal (R&D) rules could be applied to their digital documents

Results

- The benefits of moving to Smart Records were immediate for Todd Energy

- They saw an immediate improvement through **saving time** and **reducing business risk**

- They have been able to **reduce** their **storage costs**, going from "storing everything" to being "active"

- The process of **searching and finding documents** became **quicker and easier**

- They **reduced their risk** of accidentally **deleting** important documents or holding onto them unnecessarily

- Todd Energy have already identified a number of next steps to improve reporting and governance

- As they continue on their digital transformation, Smart Records will allow them to more easily navigate future changes to the structure of its business

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