Constellation Energy Group

Integrating mainframe applications and corporate portal with EMC Documentum applications to improve and streamline business processes

Benefits

- Improves customer service by enabling call center representatives to handle any incoming call, prioritize customer requests, and respond more quickly

- Saves time and reduces errors by eliminating entry of identical information into different systems

- Protects sensitive account information and reduces compliance burden

- Frees up purchasing staff and empowers employees to manage IT procurement requests via the corporate portal

- Projected to cut AP invoice processing cycle time in half

Business overview

A FORTUNE 200 company with 2005 revenues of $17.1 billion, Constellation Energy is the United States' largest competitive supplier of electricity to large commercial and industrial customers and the country's largest wholesale power seller. Constellation Energy also manages fuels and energy services on behalf of energy intensive industries and utilities and delivers electricity and natural gas through the Baltimore Gas and Electric Company (BGE), its regulated utility in Central Maryland.

Challenges

To increase efficiency and maintain its competitive position, Constellation Energy has invested in a number of key technologies. For instance, the company implemented a corporate portal; an internal work queue application—a "universal inbox" of tasks used by the majority of employees; and a number of EMC® Documentum®-based applications to manage enterprise content. However, in its quest to fully leverage these new technologies, Constellation Energy realized it needed to integrate them to one another, as well as integrate them with other business processes and applications.

Need to eliminate dual entry of information

"To simplify, accelerate, and cut costs out of the IT purchasing process, we wanted to enable employees across the enterprise to submit and track IT procurement requests using the portal," says Elizabeth O'Connor, project manager at Constellation Energy. "First we replaced paper IT procurement request forms with a Microsoft Outlook form. Then we improved on that and employees filled out a form on the portal. This form came to the procurement staff as an e-mail. The procurement staff then had to spend time reentering the same information into the correct fields in an EMC Documentum purchasing application. We knew we needed to eliminate this dual entry and implement a more efficient, seamless process."

*Need for more secure process to transfer information from mainframe
application to call center*

Constellation Energy also needed a more secure way to transfer customer information
stored in its credit and collections mainframe application to its gas and electric utility
call center representatives and investigators. When an applicant calls to apply for service,
the call center representative instructs the person to fax proof of residency and identifica-
tion. The representative then queries the mainframe application for all the associated
account information on that address. If there are any issues with the applicant or
address, the request is assigned to an investigator. In the past, account information in
the mainframe was e-mailed to the investigator, who had to enter it into an EMC
Documentum-based case management application. To eliminate dual entry of information
and better protect sensitive information, the company needed to seamlessly integrate the
two applications.

EMC Documentum solution

Constellation Energy relies on the EMC Documentum platform to manage content across
its extended enterprise. The company has 19 EMC Documentum applications, ranging
from managing customer utility bills to procurement requests to project account report
approvals for auditing. To improve processing of internal IT procurement requests and
customer utility service requests, Constellation Energy turned to EMC Business Process
Services (BPS), a universal integration service that integrates Documentum process,
content, and repository services with external systems, applications, and data sources
through a service-oriented architecture (SOA). In the future, the company plans to use
BPS to leverage Documentum capabilities and processes in other systems.

Thanks to BPS, employees from across Constellation Energy's four business units now
use the portal to request and track IT purchases. Each year purchasing and IT employees
use the Documentum system to review and approve or reject approximately 5,000 IT
purchase requests totaling millions of dollars. Also thanks to BPS integration, utility call
center representatives and investigators can more efficiently and securely manage tens
of thousands of applications for service each year.

*Saving time and reducing errors by eliminating double entry
of information*

With BPS, IT procurement requests are handled much faster and more efficiently. To
request IT purchases, employees fill out an IT procurement request form on the corporate
portal. When they click to submit the form, EMC Documentum BPS transfers the requests
using Web Services to the EMC Documentum system and sends back a unique identifica-
tion number they can use to track their requests. BPS also enables the employees to
upload supporting attachments (or delete previous attachments), such as vendor
quotes, master agreements, or contract addendums.

In addition, BPS automatically adds the IT request to the corporate work queue application
so that it shows up as a task on the queues of each person who needs to review and
approve it. Reviewers don't have to be in their offices to view requests and supporting
information; they can approve or reject requests from anywhere via a secure web-based
user interface. Consequently, IT requests can be turned around much faster and more easily.

Utility service cases are also processed faster. When an address or account needs investigating, BPS, working in conjunction with TIBCO BusinessWorks enterprise application integration software, automatically routes various fields of associated account information—such as whether a connection already exists, listed service holders, outstanding amounts due, and so on—directly from the mainframe to the appropriate folders in the Documentum call center application. If the case is new, Documentum workflow creates a new folder. If it is a pre-existing case, workflow automatically updates the case information.

"Once we implemented EMC Documentum Business Process Services, we saw a huge cycle time improvement in processing and managing service applications and requests," says O'Connor.

Empowering employees and freeing up IT with 'self-service' IT procurement

Being able to submit, add, or delete supporting documents, and track the status of IT purchase requests through the portal has empowered employees and freed up IT to focus on more value-added work. "The process has significantly cut the number of purchase-related calls IT has to deal with," says O'Connor.

Constellation Energy also implemented EMC Documentum workflow that automatically notifies employees when insurance, service contracts, and warranties are due to expire on IT purchases. "With automatic notifications, we're helping employees be more proactive and eliminating the panicked call to IT and subsequent fire drills to renew contracts that expired yesterday," explains O'Connor.

> "Once we implemented EMC Documentum Business Process Services, we saw a huge cycle time improvement in processing customer applications for service."
>
> **Elizabeth O'Connor, Project Manager**

Providing better customer service by enabling call center representatives to handle any call

Before implementing BPS, when a request was assigned to an investigator, all the account information would be e-mailed from the mainframe to that one person. If the assigned investigator was on the phone, the caller would have to wait on hold. And if the investigator was sick or on vacation, no one else could answer incoming calls related to that case. Not anymore.

"With BPS enabling direct transfer of information from the mainframe to the case management application, any call center representative can answer any call anytime," says O'Connor. By querying the case management application for the applicant's name or address, whoever takes the call can pull up all the necessary information on his desktop. In addition, Documentum-based applications help Constellation Energy prioritize incoming calls and respond faster to those situations needing more urgent action. If a caller's power is out, for instance, the call center representative flags the account as having higher priority than those that have service.

Protecting sensitive account information and reducing compliance burden

Being able to prioritize cases and respond to highest needs first also enables the utility business to comply more easily with state regulations that require, for instance, restoration of service within a specified amount of time during the winter months. And because the Documentum platform provides an audit trail of approvals, it is easier to comply with internal audit requests.

In addition, thanks to encryption and the EMC BPS-enabled direct integration between the mainframe and case management application, all customer account information is extremely secure. Only authorized employees, as specified by access control lists in the EMC Documentum platform, can access personal account information.

Summary

"By using EMC Documentum Business Process Services to integrate business processes between different systems and applications, we are getting a lot more out of our other technology investments," says O'Connor. "With integrated processes, we have been able to reduce cycle times, improve customer service, and increase productivity."

About EMC

EMC Corporation (NYSE:EMC) is the world leader in products, services, and solutions for information storage and management. Through information lifecycle management (ILM) strategies, EMC helps enterprises of all sizes manage their growing volumes of information—from creation to disposal—according to its changing value. EMC information infrastructure solutions are at the heart of this mission, helping organizations manage, use, protect, and share their information assets more efficiently and cost-effectively. The result? Information with greater business value and at lower management cost.

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