

# CASE STUDY

## Technical Records Management Is Critical For Operations

● **INDUSTRY**  
Energy

● **COUNTRY**  
USA



### LACK OF INFORMATION GOVERNANCE

In March, 1991 and March, 2005 routine maintenance turned deadly for two different refining companies. Faced with loss of life, safety violations, and significant fines, these organizations had to make changes in their operations management systems and culture, including access to technical records and operating procedures.

Investigations revealed the use of outdated drawing and equipment information, gaps in procedures, and failure to have correct P&IDs.

How could information governance help to organize and manage this critical information?

### TECHNICAL RECORDS MANAGEMENT SYSTEM ESTABLISHES CONTROLS

Time-intensive processes to locate critical information that was only available in certain locations and formats needed

an upgrade. Hard-copy documents needed to be imaged and indexed for retrieval. But first, the integrity of the information itself had to be validated by subject matter experts.

Access Sciences provided expertise to these refining organizations for the design and implementation of technical records management systems to enable electronic access to critical equipment and process safety information. Our approach included:

### SERVICES DELIVERED:

- Content Migration
- Document Control
- Engineering Information Management
- Ingestion/Imaging/Classification
- Policy and Process Development
- Taxonomy Development
- Training Strategy and Curriculum

### ISSUE

Lack of information governance results in significant impacts to safe operations



- Working with refinery technical professionals who conducted site inspections of equipment in order to determine the accuracy and version history of existing equipment files
- Addressing the people side of change by conducting sessions with operators and maintenance workers to talk about why this was being done and hear their perspective from similar past attempts
- Developing a taxonomy for the classification and indexing of equipment files and operational and maintenance procedures that allowed for linkages to technical drawings
- Designing the process for image capture, quality control, and upload into electronic repositories
- Developing document control processes and procedures for point-forward document management
- Migrating existing hard-copy files and vendor data-books to the content management system
- Delivering training to operations staff on document processes and procedures
- Providing on-site services for back-file conversion projects

---

## SOLUTIONS

- ✓ Design and implementation of technical records management system
  - ✓ Content transformation and migration
- 

---

## BENEFITS

- ✓ Reliable access to technical documents and drawings
- ✓ Reduced time spent searching for information
- ✓ Consistent use of the same record version across locations
- ✓ On-time production of records for regulatory compliance

## RELIABLE ACCESS TO TRUSTED VERSION OF TECHNICAL RECORDS

The new technical records management systems resulted in:

- Reliable access to technical documents and drawings for all rotating and fixed equipment
  - Capability to demonstrate compliance with Occupational Safety and Health Administration (OSHA) standards for process safety management
  - Increased confidence by operations and maintenance workers in documents used to operate and maintain equipment
- 
- Considerable time savings, such as reductions in information access and search time as well as travel time required to site or unit in order to verify asset information