

Documentation and Record Keeping

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Background



Documentation

- Joined Plains November 2016 to manage the *eLibrary* and Document Management Office (DMO)
- Comprehensive company-wide governing document management system
- Resides within SharePoint 2013 on premise

Records

- Records Management resided under the Law Department
- 3rd party vendor utilized to manage offsite storage and retention schedule

Plains All American eLibrary



If you have questions regarding Plains Document Management, eLibrary, or finding/amending/creating documents, contact the Document Management Office (DMO) at dmo@paalp.com. For additional information, please review the [eLibrary User Guide](#) & [eLibrary Tips for Users](#).

[eLibrary Search](#)

[Safety Manual](#)

[PAA O&M Manual](#)

[PGS/PNG Manuals](#)

[Add'l Resources](#)

PLAINS ALL AMERICAN PIPELINE, L.P.

By Business Areas (* Indicates Content Pending)

- + View All Documents by Business Area
- + 10 --- PAA Enterprise
- + 20 --- Safety and Security
- + 30 --- Engineering
- + 40 --- Environmental & Regulatory Compliance
- + 50 --- Operations
- + 60 --- Commercial *
- + 70 --- Marketing *
- + 80 --- Finance *
- + 90 --- Law

PLAINS GAS SOLUTIONS

PAA NATURAL GAS STORAGE

By Business Areas (* Indicates Content Pending)

- + View All Documents by Business Area
- + 310 --- Gas Executive Leadership *
- + 320 --- Gas Safety, Security, & Training
- + 330 --- Gas Engineering
- + 350 --- Gas Operations

By Filters

- + View Gas Documents by Facility



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Where are we now?

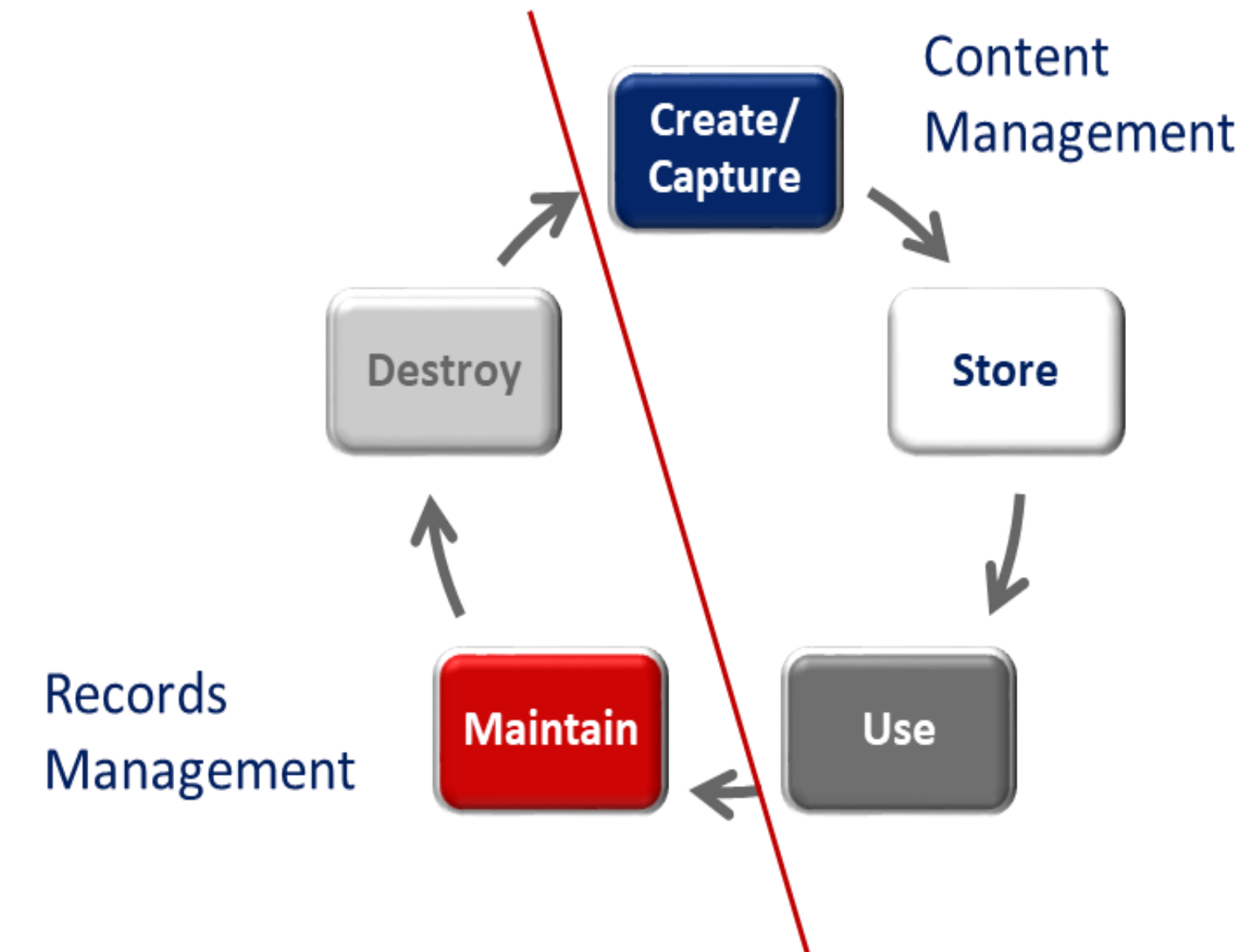


- Expanded the DMO and formally established an Information Management (IM) Team
 - Transferred Records Management from the Law Department to IM; however they remain a key stakeholder
 - Industry experts to provide consulting between the business users and IT
 - Providing solutions with embedded retention
 - Managing governing documents, records, and content (email retention, share drive clean-up, content migrations, converging content)
- Merging and improving US and Canadian processes in support of Plains' convergence and in support of the Plan-Do-Check-Act methodology
 - Utilized 3rd party vendor to merge and enhance the records retention schedule; 90% reduction in records codes
 - Developed a North American, Enterprise Information Governance Policy, Records Management Standard, and Content Management Standard
 - Developed training videos
- We've made great strides to improve the maturity of our OMS sub-elements but we still have a LONG way to go!
 - It's a marathon, not a sprint



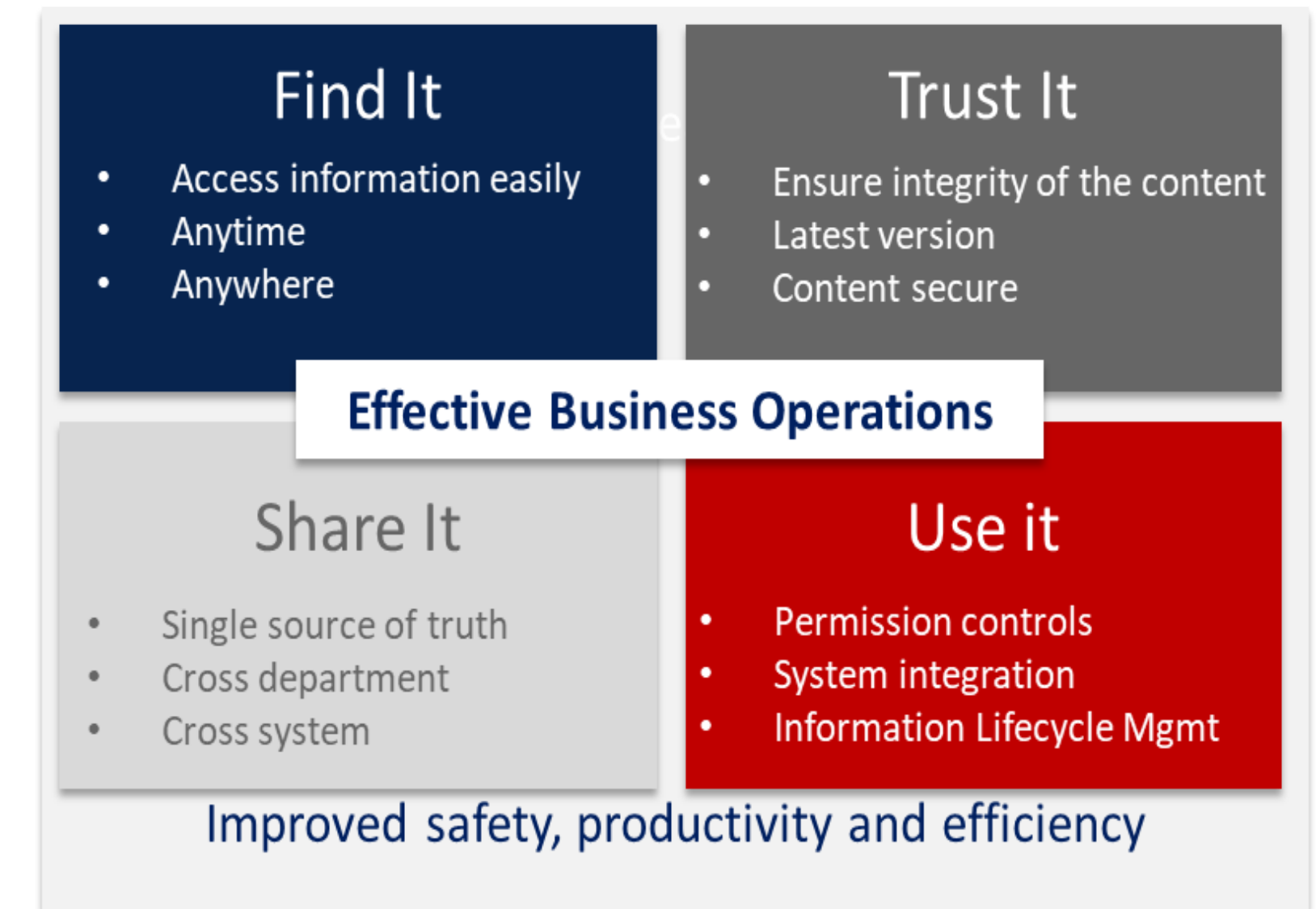
Lessons Learned

- Documents and records are part of the information lifecycle and should be looked at holistically
- Document and Records Management are enterprise-wide
 - Avoid designing a library around OMS elements
 - Avoid designing a library around organization structure
- Establish policy and standards
 - Executive sponsorship and documented policies and standards are essential for implementation; leadership needs to understand that **content must be managed as an asset**
 - Recruit a change management specialist to help address the “my way works so why change it” mentality
 - One-size doesn’t fit all; get consistency where you can but be flexible
- Know your metadata
 - Metadata is essential in the design of software solutions, numbering and titling schemas, records retention codes



Lessons Learned

- Spend the time to develop a numbering and/or titling schema
 - Do you really need a numbering schema or does a system generated unique identifier suffice?
 - Can you use function codes and other metadata within the title for sorting and grouping?
- Use technical writers or insert QA mechanisms in the capture stage of the document lifecycle
- Avoid making people think about managing records
 - Build retention into software solutions; the system should manage retention so the users don't have to
 - Unless required by law, avoid retaining records permanently
- Avoid over-customizing the solution
- Get feedback!





THANK YOU!

Visit us at: pipelinesms.org

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