

Oncor Achieves Operational Efficiencies with CaseWare IDEA®

Highlights

- Regulated electric transmission and distribution service provider with nearly 10 million customers
- Valuable data is stored within different systems and formats needed to be prepared for analysis
- IDEA is used to extract, summarize and join data to improve processes and efficiency levels
- Tasks that once took up to 100 hours are now completed in a few hours, freeing staff to focus on more value-add work and expand their use of data analytics across the organization

About

Oncor is a regulated electric transmission and distribution service provider serving nearly 10 million customers across Texas. Oncor helps Texans meet the challenge of rethinking energy use for greater efficiency, cost savings, and positive environmental impact. The internal audit team needed to acquire years of data from different environments and formats to help improve processes and efficiency levels.

Challenge

Like many large corporations, the company collects and stores data in different systems and formats. Internal auditors wanted to extract data from different databases to analyze trends and tendencies using client, employee, system access, billing and accounts payable data. Auditors also wanted a tracking mechanism to establish best practices among their staff of more than 50 professionals and increase the quality and consistency by automating repeatable processes to reduce manual work.

Solution

Auditors were using a programming-intensive analytics package and when the software provider moved to subscription-based pricing model, Oncor looked for alternatives. Internal Audit Manager Sam Steinfath and several staff members had used IDEA in the past and found it easy to utilize for data analysis. The Internal Audit department attended public and private training led by Audimation Services to either rekindle or build their skills to increase productivity levels.



We completed one audit and got amazing results. The ability to take raw data from different systems and bring it into a single platform helps us rework our business processes to achieve operational efficiencies that would not be possible otherwise.

— **Sam Steinfath,**
Internal Audit Manager,
Oncor

Using IDEA, auditors have streamlined their process of preparing data for analysis including pulling and joining data from different systems, scanning and reconciling PDFs and handling large batches of individual transactions to identify trends year over year. IDEA is used in a variety of ways including:

- Analyzing data from more than 19,000 projects each year to quantify costs, material charges and other information to improve business processes
- Comparing dispatch tickets to billing information for meter change-out services to ensure accuracy
- Validating contract audits performed by third-party providers
- Analyzing up to 40 types of billing codes for hourly services to benchmark and track work performed by employee, type, and frequency
- Conducting contract audits for high-volumes of transactions
- Preparing and cross-matching data for administrative staff using Just Numbers, which provides an alternative approach to address cross-matching to avoid the problems of variances in punctuation, spelling, and abbreviations to return a higher number of true matches

Results

Oncor is using data analytics to help bridge the gap between its disparate systems to analyze high volumes and variances of data to identify business and operational improvement opportunities. The Internal Audit Manager used IDEA to prepare a time summary analysis in 10 minutes, which previously required 15-20 hours using Excel. Administrative Audit reports that once required 80-100 hours of work are now completed in a few hours. IDEA has significantly reduced the amount of time to prepare raw data for analysis and provides better uniformity of data.

The Oncor internal audit team continues to expand their use of IDEA with plans to analyze service order and contractor billing projects, something the company has not previously been able to do. They are also using IDEA to make process and contract audit testing much faster and more effective.