

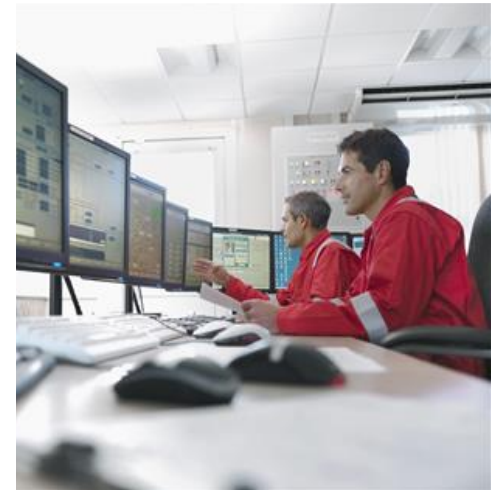
Case Study | Canadian Oil & Gas Company

Oil and Gas

“Easy electronic access has been great for our field consultants and external auditors. We no longer have to copy files for them – just move or scan into a collection. Our mobile users love the system, it has been a huge help for them while on the road.”

– End User

Canadian Oil & Gas Company



Background

Our client is a growth-oriented natural gas producer, operating in Western Canada. Their philosophy focuses on growth through production development drilling for natural gas and natural gas liquids.

They turned to us to establish the foundation for the future of the company's growth. The aim was to improve the day-to-day operations as well as to set processes and procedures in place that would allow for seamless scalability moving forward.

The Challenge

Managing information across its various cross-functional areas of the business had become a significant challenge for our client. For a company that had a large contingent of employees at outdoor gas drilling sites away from its head office, it was necessary for staff at head office to know who was working on what, when, and if changes were made across any of its worksites.

In order to facilitate information sharing both onsite and offsite, our client had volumes of documents stored physically across offices and sites, which took up to 3 business days to retrieve. In terms of

electronic storage, the company used various media to house documents, making it difficult for different departments to share information.

With slow document retrieval times, and no effective way to quickly provide access to these documents to employees in the field or those who travel, it was becoming apparent that a more efficient document management process needed to be implemented.

Multiple functional areas of the business such as legal, accounts payable, field operations, IT, and the facilities departments all had their own specific information management challenges.

The legal department required version control, document change management, easy search, and features supporting restrictions & security.

The accounts payable department was previously using a manual invoice process. This caused inefficiencies with workflows and did not allow for integration with any other systems.

The facilities department was using their own separate document management systems, some still involving boxes and binders. This created slow change management, sharing of documents, and a

manual approval process. Their current system was prone to human error, and there was little integration with other functional areas.

The IT department was still using legacy systems and required a more modern approach to keep up with the high-speed demands of a modern workforce.

The field operations department had been releasing forms in-person to the field operatives, which in turn caused a large amount of unnecessary end-of-day paperwork. There was also little visibility into real-time, in-field information, such as where the field operatives were geographically, time spent driving, speed – all resulting in limited monitoring.

After assessing the challenges of inefficient workflows, form processing both in the office and in the field, while staying cost-effective, we had the ideal solution for the Canadian oil & gas company.



The Solution

We implemented a multi-phase solution to employ an Electronic Content Management (ECM) system, and integrate it with Weever Apps® for their employees in the field.

The first phase of the solution was a previously implemented fleet of Xerox multi-function devices, which was scalable for the future, and saved time and cost.

The second component of the solution was Electronic Content Management which included a Xerox® DocuShare Content Management Platform installation with Optical Character Capture (OCC). After the equipment and systems were in place, the Xerox® Professional Services team personally trained the client's administrative team on how to easily process documents. This knowledge was later scaled into the training of its staff.

The ECM solution consisted of features for version control, user restrictions, easily retrievable information, search capabilities, quick approval processing, departmental linkages, and the automation of workflows.

The implementation of an ECM was purposed with helping cut down document retrieval times in the field, a significant decrease to the physical storage needed for storing documents, and the vast improvements to workflow of end of day forms – eliminating the delays from manual processing of the forms.

DocuShare® was a key to the shift towards a more technology focused, automated workplace, which allowed documents and information to be shared between departments much more efficiently. The ECM played an integral role as a foundation for the next phase of the solution and how it handled documents in the field.

Weever Apps® is the final phase of the solution, providing a framework for how staff interact with employees in the field. Weever Apps® offers immediate access to real-time data for employees in the field, logistics & tracking features for crews, site mapping & access routes to sites, a complete inventory management system with bar code scanning, and utilizes Geo Fencing to notify when an employee enters a worksite.

Weever Apps is integrated with DocuShare®, whereby all digital forms processed by the software are saved in the ECM for easier access. This is achieved by having forms that are processed through Weever Apps® captured and saved to DocuShare® as PDF documents. This provides seamless mirroring of all documents between the two systems, with complete version control all handled all in real-time.

The Results

The combination of DocuShare® and Weever Apps® brought about significant improvements to the management of information and forms.

The search time for documents has improved from up to a 3 business day retrieval time to almost instantaneous. This has led to large gains in the speed of processes and allows field agents to always have instant access to the most recent versions of documents in the field.

The immediate access to documents has also allowed documents shared between departments instantly, no longer having multiple hours of a buffer period when waiting for revisions and returned emails.

The need to manually process invoices has been completely eliminated, shedding 40 hours of manual work per week. Invoices are now scanned and automatically sorted into the appropriate locations.

Field operations has also seen great benefits of the implemented solution. Weever Apps® seamlessly integrates with DocuShare® creating an effective and elegant way to manage worksite forms, without the hassle of large volumes of paper.

Overall, the solution has been able to save the company up to \$50,000 annually, all while improving processes and workflows.

At a Glance

Challenge

- The Canadian oil & gas company was looking to upgrade a paper storage system for more efficiency in the time it took to get documents out to employees in the field.

Solution

- DocuShare® was implemented to remove the dependency on physical documents and improve processes which used them.
- Weever Apps® was chosen as the system to handle field operations leading to better communication between head office and the field.

Results

- The implementation of DocuShare® led to improved document retrieval times; from 2-3 business days to instant access.
- Hour long buffer periods for document sharing between departments became instantaneous.
- Weever Apps® and DocuShare® have eliminated the manual processing of forms, saving 40 hours a week.
- Up to \$50,000 a year has been saved with the implementation of DocuShare®, with added improvements to document workflows.
- Field operations have seen major improvements with the availability of real time information and documents.