

**Industries**

- Energy solutions provider (engineering, procurement, and construction)

**Solution**

- OpenText Extended ECM for Engineering

**Services**

- OpenText Professional Services

**Results**



**Created a central document management platform** to help allocate global resources to client projects more efficiently



**Consolidated 12 document management systems into one**, reducing total cost of ownership



**Defined enterprise-wide standards** and best practices for collaboration with clients and suppliers, enhancing governance and compliance

# Energy solutions provider overcomes oil-price challenges with lean, integrated operations

**Specialist engineering company enhances efficiency and avoids costly project delays with central document management system based on OpenText™ Extended ECM for Engineering**

***“In partnership with OpenText, we’re shaping lean, integrated operations that make it easier to deliver complex oil and gas projects for our clients.”***

**Spokesperson**  
Energy solutions provider





Energy solutions provider overcomes oil-price challenges with lean, integrated operations

**Around the world, energy producers depend on a vast network of undersea assets to extract and transport oil and gas. Designing, building, installing, and maintaining these assets throughout their lifecycle is a complex process. For decades, this leading energy solutions provider has been supporting the oil and gas industry with specialist equipment and services to drive exploration and extraction.**

In recent years, the price of crude oil has dropped sharply. As a result, the pressure is on for the entire oil and gas industry to find opportunities to reduce costs and unlock efficiencies while maintaining safe, effective operations.

A spokesperson for the energy solutions provider explains: ***“The impacts of fluctuating global oil prices are being felt throughout the energy value chain. As a key partner to the industry, our goal is to find innovative ways to provide cost-effective solutions to our clients around the world.”***

### **Engaging with global suppliers**

To design and deliver its solutions, the company relies on a global network of internal and external suppliers, including specialist manufacturers and engineers. In the past, the provider depended heavily on manual work to engage these resources on its projects—and the company identified a significant opportunity to streamline the process.

***“In the past, we used 12 different systems for correspondence and manufacturing management across different parts of the business,”*** explains the spokesperson. ***“Our business units were broadly responsible for managing their own suppliers, based on their own systems and processes.***

***“As well as making it difficult for us to leverage our global resources effectively on client projects, this siloed approach limited our visibility of the status of each project. What is measured, improves—and we were confident that an overview of project status and duration would help us proactively remove bottlenecks and avoid costly project delays.”***

### **Selecting a central solution**

To help lay the foundation for leaner and more cost-effective global operations, the energy solutions provider decided to replace its siloed correspondence and manufacturing management systems with a single engineering document management platform powered by OpenText Extended ECM for Engineering.

Designed for the unique requirements of engineering companies, the OpenText solution helps businesses gain clear insight into the scope, schedule, and cost of their projects, and take effective action to contain spend, control risk, and accelerate delivery.

The spokesperson confirms: ***“One of our business units was already using OpenText solutions very successfully, so we had great confidence OpenText Extended ECM for Engineering would help us achieve our long-term objectives around project control and cost-effectiveness.”***

***“Replacing 12 legacy systems with OpenText Extended ECM for Engineering enables us to reduce our total cost of ownership substantially—contributing to greater operational cost-efficiency and helping us to weather a challenging economy.”***

**Spokesperson**  
Energy solutions provider



## Targeting integrated operations

As a first step, the energy solutions provider embarked on a pilot project for OpenText Extended ECM for Engineering. The objective was to demonstrate the value of a single, integrated platform to the global business, and create an implementation template that would accelerate the future rollout and replacement of its 12 correspondence and manufacturing management tools with OpenText Extended ECM for Engineering.

Working with a team of business and IT stakeholders from across the company, OpenText Professional Services helped the energy solutions provider to configure the new solution to support its key process flows, beginning with the supplier review and approval process.

***“Mapping out our workflows and designing the optimal digital processes was a complex task, but we could always count on OpenText Professional Services to support us when we needed it,”*** recalls the spokesperson. ***“By working closely with our document controllers, OpenText helped us to design effective flows for our processes.”***

***“For example, as soon as a supplier sends a document—such as a contract, blueprint, or purchase order request—our controllers begin managing it in the OpenText solution. By assigning due-by dates at each stage of the flow, we can keep each document moving smoothly toward an outcome: approved, approved with comments, or rejected. And thanks to analytics dashboards in OpenText Extended ECM for Engineering, we can get an instant overview of the status of each project and its associated documents at the touch of a button.”***

## Achieving global deployment

Building on the success of its pilot project, the provider moved forward with the next phases of its OpenText deployment—training its global community of document controllers to use the new solution, and designing additional process flows. After configuring the solution to support all document flows, the company switched its controllers from the legacy systems to the new, central platform.

***“Today, all our suppliers and customers are managed on a single platform,”*** continues the spokesperson. ***“Replacing 12 legacy systems with OpenText Extended ECM for Engineering enables us to reduce our total cost of ownership substantially—contributing to greater operational cost-efficiency and helping us to weather a challenging economy.”***

## Boosting operational efficiency

Most importantly, embracing OpenText Extended ECM for Engineering is delivering full visibility of the end-to-end document lifecycle for all the energy provider’s global projects.

***“Since switching to a single, integrated solution for engineering document management, we are in a far stronger position to deploy our global resources where they are needed most,”*** explains the spokesperson. ***“Rather than manually routing requests to our suppliers via multiple different global teams, the OpenText solution is allowing us to create a single project center that’s integrated with all our global suppliers. Documents enter the company via this one point, and flow to the correct destination with minimal manual intervention from our employees.”***





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## Innovating for the future

As it continues its collaboration with OpenText, the company is building the unified, best-practice workflows that will enable it to sharpen its efficiency, control costs, and deliver outstanding services to global clients.

Building on its early successes with the solution, the provider plans to continue its partnership with OpenText Professional Services to integrate the engineering document management platform with

its wider digital ecosystem. This includes its mission-critical SAP business systems, as well as the company's Oracle Primavera project management application.

***"In the oil and gas sector, project delays can quickly send costs soaring—and in an uncertain economy, mitigating this risk is key for us and our clients," concludes the spokesperson. "In partnership with OpenText, we're shaping lean, integrated operations that make it easier to deliver complex oil and gas projects for our clients."***



## About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit [opentext.com](https://opentext.com).

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