

Canadian Oil and Gas Company

“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 and Gas Company



ABOUT OUR CLIENT

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.

CASE STUDY SNAPSHOT

The Challenge

- Outdated physical and digital document storage made sharing information between departments extremely difficult
- Physical documents took up to three business days to retrieve
- Inefficient, manual workflows were slow, paper-heavy and prone to mistakes
- Little visibility into real-time, in-field information

The Solution

- Xerox® DocuShare® Platform
- Weever Apps®

The Results

- \$50,000 in annual savings
- Instant document retrieval — down from three business days
- Real-time inter-department communication
- 40 hours of manual work saved with automation of invoice processing
- Efficient and effective management of worksite forms

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 the head office to know who was working on what, when, and if changes had been 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, taking up to 3 business days to retrieve a document. 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 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 and security. The accounts payable department was using a manual invoice process that 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, and the need to be cost-effective, we delivered the ideal solution to the Canadian oil and gas company.

THE SOLUTION

We implemented a multi-phase solution to employ an Enterprise 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 ECM 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 and tracking features for crews, site mapping and access routes to sites, and 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, so that all digital forms processed by the software are saved in the ECM for easier access. 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 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.

Search and retrieval of documents has improved from up to three business days 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 to be 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 from 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.

XEROX® DOCUSHARE®

Xerox® DocuShare® is the easiest way to digitize, automate and manage your business content and processes whether on-premise or in the cloud.

Whether you have 10 employees or 100,000, this mobile-friendly, intuitive, cloud-enabled enterprise content management platform has the tools to help you start working better today.

Learn more at xerox.com/ecm