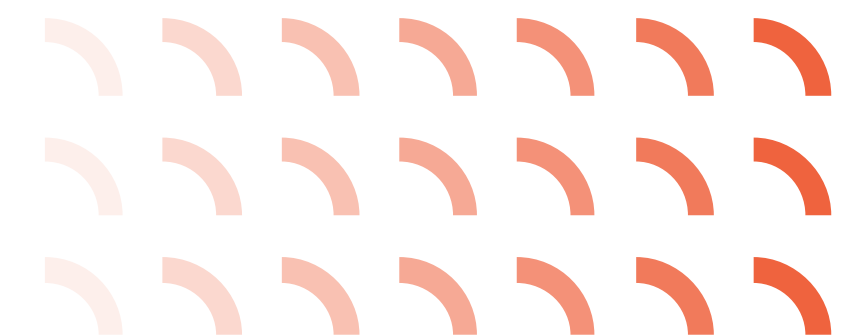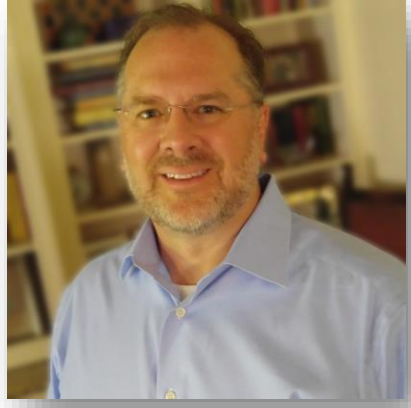# Extended ECM for Engineering
Gaining Insight and Oversight of Capital Projects

OpenText Enterprise World

Toronto 2019

Speakers

Bret Kimmel – Sr. Director – TerraLink

Evgeniy Kuchiyash – EMEA Director – TerraLink

Jim Dodds – Services Director – vdR Group

Houston – We Have a Problem…

Large Oil & Gas Manufacturing/Services

- Wrong revision of documents sent

- Missed deadlines

- Delayed invoicing

- Non-productive work

- Re-do Aftermarket product documents

- Contract Compliance

- Project Profitability (Insight)

But so does everyone else…

Large Distribution Company

- Managed construction of warehouses and plants
- Wrong documents sent to wrong subcontractors
- Manual tracking internal/external communication
  - Lost
- Delays in construction
- Regulatory compliance

It's Just the Cost of Business

Power Generation Plant

- Long contract approval life cycles

- Difficulty locating project documentation

- Lack of project status

  - status reflective of old data

- Complex document review and organization

- Constantly changing delivery dates

  - not communicated timely

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Common Themes

Different Focus

Disparate, Disconnected Systems
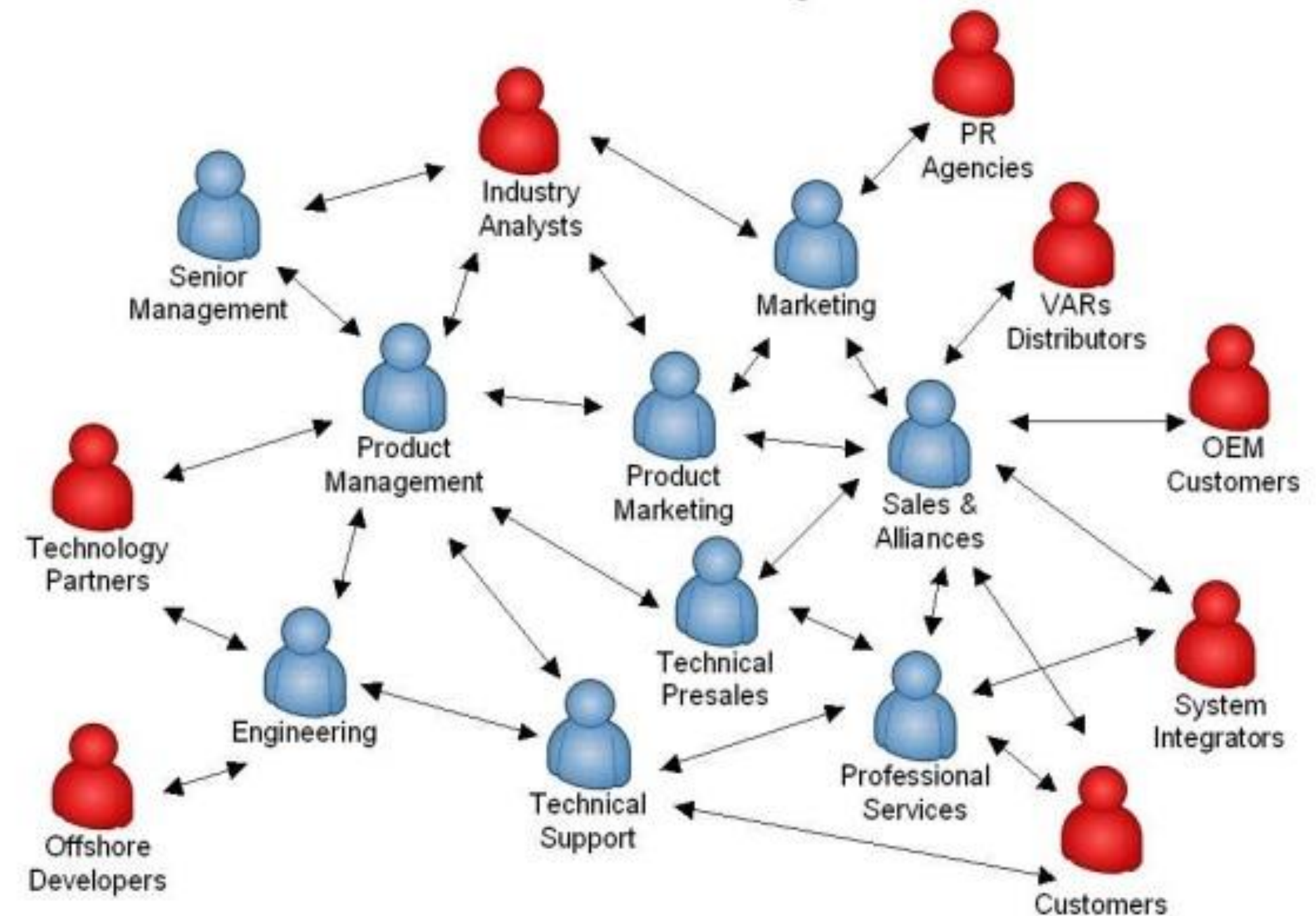
Complex Communication

- Multiple Departments
- Customers
- Vendors

Multiple Versions/Revisions in flight

Contract Compliance

Project Profitability (Insight)

Reporting, Status, etc. (Oversight)

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Solution

Large Oil & Gas Services

- Implemented a Document Control Program

- Revision and Version tracking

- Transmittals

- Process automation

- Escalation

- Notification of milestones

- Created proposal and bid methodology templates

- Integration with Aftermarket Product System (SAP)

- Process automation

- Surfacing of T&Cs to systems

- Project close audit

- Data captured at each stage of the project lifecycle. Integrated systems.

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Solution

Large Distribution Company

- Program Management Office revamp
- Implemented a Document Control Program
- Secure, segregated environments
- Automated review and approval process
- Secured creation and storage of Records
- Search
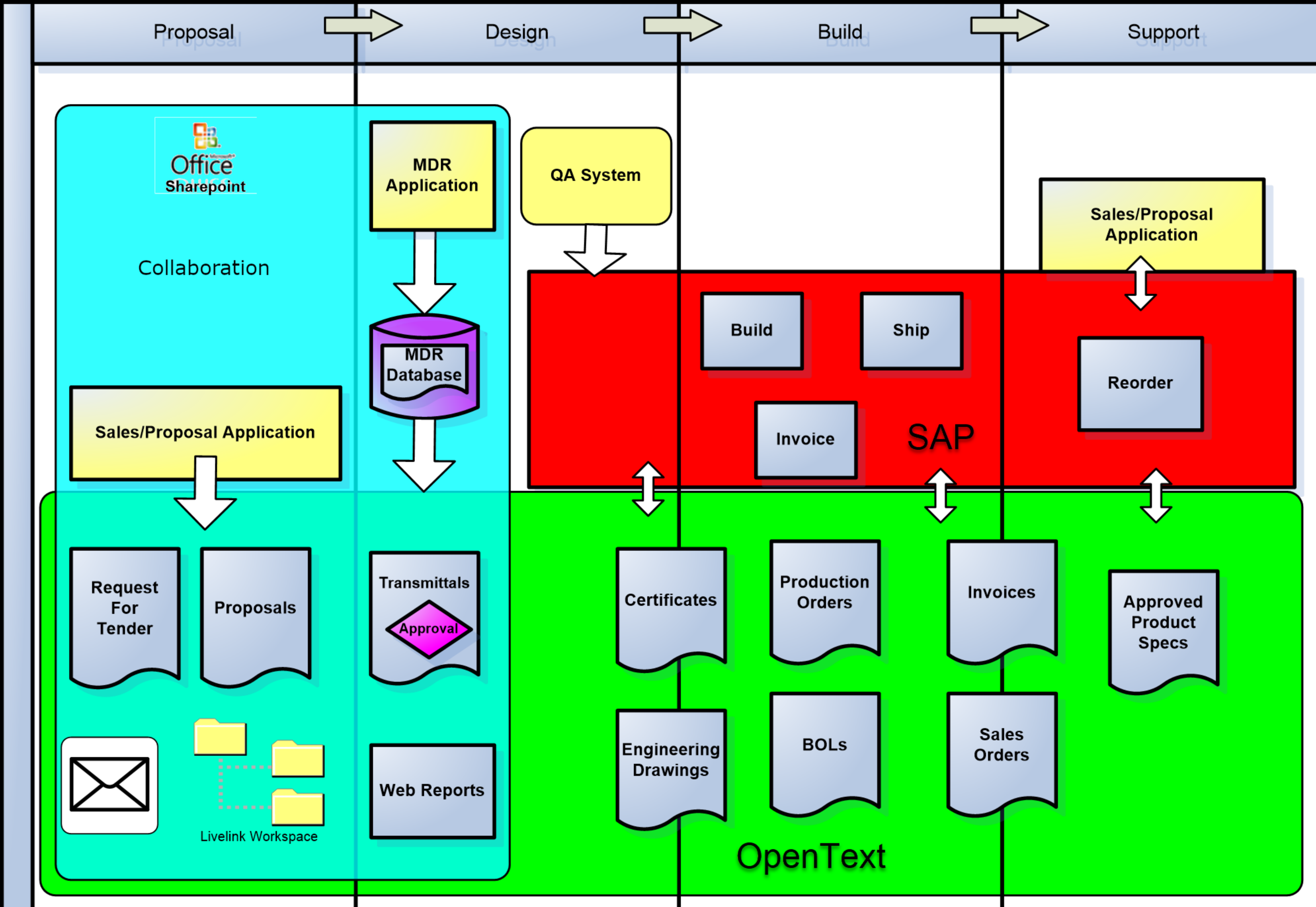- Audit reporting dashboard
- Transmittals

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Solution

Power Generation Plant

- Process automation
- Application of metadata
- Search
- GIS interface
- Primavera integration
- Transmittals
- Brava!
- SAP integration

Proposal → Design → Build → Support

Benefits

- Single Doc Instance
- True Workflow
- Reduction in Applications/Interfaces
- Reduction in manual touch points
- Minimal Points of Failure
- Collaboration
  - SharePoint
  - Tracking
  - Secure
- Compliance
  - Doc Security
  - Policy Enforcement
- Increased Efficiency
- Decrease Cost/Expense
- Increased Profit

Collaboration

Office Sharepoint

MDR Application → MDR Database

QA System

Sales/Proposal Application

Sales/Proposal Application

SAP — Build, Ship, Invoice, Reorder

OpenText — Request For Tender, Proposals, Transmittals (Approval), Web Reports, Certificates, Engineering Drawings, Production Orders, BOLs, Invoices, Sales Orders, Approved Product Specs, Livelink Workspace

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Q&A

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