☰ THESIS

USING ENTERPRISE CONTENT MANAGEMENT (ECM) SYSTEMS IN THE OIL AND GAS INDUSTRY

Russia is one of the largest exporters of oil and oil-based products in the world. According to the Ministry of Energy, the volume of oil and gas condensate production in the country in 2015 amounted to 533.6 million tons, which is approximately 12% of worldwide production. A network of businesses involved in deposit developments, processing, transportation and sales of oil spans the country from Vladivostok to the Crimea.

Given the geographical expanse, size of the companies involved and the constant flow of information between stakeholders, most oil and gas companies use enterprise content management (ECM) systems.

ECM systems are useful for most large businesses and we have implemented our solution, THESIS, into organisations across a range of industries to help them standardise and digitise documents, optimise document flow across geographically diverse offices, manage information in a central repository and monitor projects effectively. We have a number of clients within the Oil & Gas industry and in our experience, we have identified a need for some industry-specific adaptions to ECM solutions to enhance system functionality and the user experience. In this article, we explore some of these adaptations that we have made for clients in the sector.

PROCUREMENT PROCESS AUTOMATION

In the Oil & Gas industry raw materials are purchased on a frequent basis for laying and servicing pipelines, production plant or refinery upgrades and expanding the filling network, to name just a few.

Procurement departments are inundated with requests from operations departments for materials and budgets need to be signed off. Out of the box ECM solutions wouldn't normally have an option to automate the process of submitting material requests, sign off and purchasing. Working with an existing Russian client, we have developed a specific module in THESIS which allows users to automate this process so that it doesn't need to be either managed manually or managed in another separate software.

AUTOMATING TENDER PROCESSES

Oil & Gas businesses often rely on a number of suppliers for various materials they need to buy. To manage this process more efficiently, organisations often use tender processes which can involve a significant amount of admin for staff involved.

Procurement and Supplier Relationship Management systems (SRMs) are frequently used in Western industry but traditionally, this has not been the case in Russia where processes tend to be more manual and admin-heavy. To assist one of our Russian customers, we created a specific tender module in THESIS. This function is customised with tender information and requires approval from all stakeholders to help manage the tender process more efficiently for businesses.

AUTOMATING BUDGETS

Financial planning and budget management is not managed within an ECM system for most businesses. However, in the Oil & Gas industry – and other businesses that spend a lot of money on materials – an ECM system which has this built-in can be very beneficial.

Companies can use an ECM platform to plan spend across subsidiary companies as well as at business unit level. Documents relating to the budget process that require collaboration and approval can be managed and tracked through the system. We have created a module in THESIS for budget management. Businesses can prepare forecasts based on previous estimates and statistics derived from users inputting expenses.

MEETINGS MANAGEMENT

Most ECM solutions include some form of meeting scheduling and management. In THESIS, our meetings module includes wraparound services such as setting an agenda, meeting notes and delivery/ monitoring of actions.

The meeting organiser can invite participants to view the agenda and revise accordingly before the meeting. Afterwards, tasks and actions can be assigned to users and progress monitored. These features help staff to ensure that meetings are productive and ensure actions are appropriately followed up.

CONCLUSION

Large organisations across a variety of sectors use ECM solutions to facilitate workflow, task and document management, increase efficiency and improve productivity company-wide. These traditional features of ECM systems are useful to businesses in the Oil & Gas industry.

At Haulmont Technology we have developed a number of features with THESIS which are tailored to the individual needs of our customers to create an intuitive platform that really helps businesses to achieve their goals.