

# MIDSTREAM OIL & GAS

## CASE STUDY

Streamlining document control and reducing licensing costs through strategic OpenText implementation.

**\$800K**

Annual licensing  
cost savings

**98%**

Successful content  
migration

**30 Min**

Saved per day  
per person

### SUMMARY

The client sought to modernize its engineering document management processes by retiring and consolidating its legacy platforms into OpenText Content Server. The goals were to reduce software licensing costs, improve information access and prepare the organization for upcoming capital project execution, including a major export facility.

Despite a budget shift mid-project, ReVisionz adapted quickly and delivered a flexible, future-ready platform that reduced onboarding time, supported fewer required hires for the capital project and enabled centralized access to engineering content. By deploying tools like Smart UI and CAD Capture, we helped the client adopt a modern document control system aligned with their evolving needs.

*"We brought ReVisionz in because they understood this space better than anyone. They were best equipped to help us through the complexity."* - Business Stakeholder

### Project Snapshot

**Client Industry:** Midstream Oil & Gas

**Practice Areas Utilized:** Intelligent Data & Insights: Engineering Document Management

**Project Duration:** 12 months

### Client Success Criteria

- Reduction of operating costs through streamlined licensing.
- Consolidation of document management platforms.
- Efficiency gains across document control and project teams.

### Challenges

- Legacy platform cost burden exceeding \$1M annually.
- Engineering content spread across disconnected systems.
- Manual processes that slowed document retrieval.
- Need to scale document control without scaling headcount.

**REVISIONZ**

## Key Results



### Licensing Cost Reduction

Replaced legacy Aconex system with OpenText Content Server and reduced annual subscription from \$1M to \$200K.



### Successful Content Migration

Moved ~100% of legacy content to the new platform with minimal disruption.



### Improved Retrieval & Productivity

Enabled tag-based search and faster access to trusted drawings, streamlining engineering workflows.



*“ReVisionz simplified the technical challenges in a way that was accessible to the business. They made the training material understandable and actionable for end users.” - Doc Controller*

## ReVisionz' Strategy

- Led strategic planning and stakeholder alignment via RACI sessions and roadmap development.
- Implemented OpenText Content Server using latest-generation modules.
- Deployed CAD Capture to enable tag-based drawing interaction within a typically static EDM system.
- Managed large-scale migration from legacy platforms for metadata integrity and data quality.
- Delivered role-based training with a focus on usability and business process alignment.

### Tools & Tech Used

OpenText Content Server (Smart UI)  
OpenText Core Share  
OpenText CAD Manager

## Takeaways

- Strong alignment between IT and business stakeholders is essential for success.
- Cost savings alone are not enough, and true value comes from trustworthy data.
- Starting with clear governance and stakeholder roles can prevent mid-project disruption.
- Even tactical projects can drive strategic value when delivered with integrity and expertise.

## Complexity & Innovation

- Introduced Smart UI and CAD Capture early in the client's adoption cycle.
- Converted non-intelligent drawings into interactive, tag-based workflows.
- Redesigned document control processes to improve capital efficiency.

## Get In Touch



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