

OIL & GAS

CASE STUDY

Standardizing engineering document management to enable consistent practices and future business unit adoption.



99.99%

Migration success

10

Standardized processes implemented

84%

Training satisfaction

SUMMARY

The client sought to establish a standardized engineering document management system (EDMS) to improve governance, reduce IT and operational costs, and create a corporate template for future rollouts.

ReVisionz delivered solution design, functional requirements consulting, content migration and change enablement, implementing Hexagon SDx as the foundation for engineering document management. Standardized processes and consistent configuration practices were introduced across business units.

A custom API cloud loader significantly accelerated migration and created a scalable approach for future projects. The solution reduced future implementation effort, improved data integrity and enabled cost savings through standardized work processes. Despite evolving priorities, the project met its objectives and positioned the client to expand standardized practices across additional business units.

Project Snapshot

Client Industry: Oil & Gas

Practice Areas Utilized: Digital Operations Solutions

Project Duration: 10 months

Client Success Criteria

- Stay on schedule and budget.
- Achieve high user acceptance.
- Deliver a standardized EDMS template for future adoption.

Challenges

- Content transformation requirements unclear during early migration stages.
- Misalignment between system build standards and content governance.
- Frequent priority changes disrupting focus on business capabilities.
- End-user resistance creating adoption barriers.

Key Results



Corporate Standardization

Established a corporate-standard EDMS solution and processes, creating a repeatable model for future business units.



High-Fidelity Migration

Migrated 1.4M files and loaded 4M tag-to-document relationships, enabling a clean transition to the new system.



User Enablement

Delivered 30 QRGs, 9 practice lab/workbooks and 1 self-paced training video to support user adoption.



Improved Data Integrity

Standardized storage and centralized data enhanced tracking of transmissions, file statuses and ownership.



ReVisionz' Strategy

- Provided business capability and functional requirements consulting to align technology with corporate goals.
- Designed and implemented an EDMS with mainstream engineering work processes.
- Executed comprehensive change enablement, including communication planning, stakeholder mapping and train-the-trainer programs.
- Delivered role-based and self-paced training, ensuring readiness for 96 participants.

Our Role in Digital Transformation

- Acted as both strategic advisor and technical partner, combining industry expertise, content knowledge and change enablement.
- Helped the client shift focus from feature-function requirements to business capability alignment.
- Delivered a future-ready solution supporting broader corporate standardization initiatives.

Takeaways

- Invest in front-end strategy when standardization is a corporate objective because cutting corners early increases downstream risks.
- Establish and enforce standards early to avoid misalignment between system build and content governance.
- Digital transformation success depends on technical execution, governance and change enablement working together.

Complexity & Innovation

- First corporate-standard EDMS deployment designed for scalable adoption across multiple business units.
- Built a reusable API loader to optimize migration into SDx Cloud environments.
Managed configuration of 6 document ENS, 155 tag ENS and 226 properties, plus 5 workflows and 12 reports.

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