

# OIL & GAS

## CASE STUDY

Centralizing engineering documents and enterprise records into a cloud platform to improve access, governance and records management.

### SUMMARY

A large pipeline company grew rapidly through acquisition, leaving engineering, operational and corporate records distributed across multiple systems and locations. Information was difficult to find, document quality varied and governance was inconsistent.

ReVisionz designed and implemented an enterprise information and records management strategy and deployed a cloud-based OpenText platform. Several million documents were reviewed and a subset was enriched and migrated from dozens of systems into a centralized repository. This supported more than 70 groups across corporate, operations and projects.

The program reduced operational risk, improved workforce productivity and delivered strong financial outcomes while establishing a governed foundation for records management and AIM maturity.

*“There’s less reliance on spreadsheets to track content, clearer version control and much more confidence that information is accurate and easy to find.”* – Business Analyst



Experts guiding your digital journey



Year  
ROI



Annual  
benefit



Documents  
migrated

### Project Snapshot

**Client Industry:** Oil & Gas

**Practice Areas Utilized:** OpenText, ID&AAI (Applied Artificial Intelligence)

**Project Duration:** ~4 Years (+Ongoing Sustainment Support)

### Client Success Criteria

- Reduce storage costs and system licensing through consolidation.
- Standardize tools, governance and document management processes.
- Establish a centralized enterprise records repository and provide reliable information access.

### Challenges

- Engineering documents were distributed across multiple systems, shared drives and field locations.
- Staff struggled to locate reliable information and often kept shadow copies.
- Multiple systems required costly licenses and specialized resources to maintain.
- Governance and document standards varied across departments and storage locations.

## Key Results



### Reduced Risk & Improved Compliance

Centralized records management improved regulatory compliance and access to accurate information during operational events.



### Improved Workforce Productivity

Engineering and operations teams spent less time searching for documents and managing files on network drives.



### Enterprise Records Governance Established

OpenText became the central repository for engineering and corporate records with retention policies applied.



## ReVisionz' Strategy

- Designed an enterprise information and records strategy and standards framework.
- Implemented a cloud-based OpenText platform as the central repository with the retention module enabled.
- Reviewed several million documents, enriched metadata and migrated prioritized content into the new system.
- Implemented CRT for revision-controlled documents and integrated MOC with Maximo and SDx.

## Tools & Tech Used

OpenText Content Server (Retention Module)

OpenText Knowledge Discovery

OpenText xECM for Engineering

*"The ECM Team delivered excellent work implementing OpenText within our organization, carefully considering our program requirements and reflecting them effectively in the final configuration."* – Records Analyst

## Takeaways

- Executive sponsorship accelerates cross-organizational adoption.
- Document governance improves regulatory compliance and operational reliability.
- Migration from network drives requires enrichment to attach usable data to files.
- Early alignment on scope and governance reduces program risk.

## Complexity & Innovation

- Implemented OpenText for both asset information and corporate records within one program.
- Migrated large volumes of documents from network drives lacking metadata, requiring significant enrichment.
- Aligned governance and system adoption across business and IT stakeholders.
- Managed delivery through major organizational change following an acquisition.

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