

Work sharing on a global scale

Hatch gains competitive edge with ECM solutions

A global engineering and construction management organization, Hatch has implemented Open Text's Livelink ECM to enable management of all project documentation on a global scale. The deployment has provided Hatch with a competitive edge in their engineering business by enabling the delivery of more cost effective and controlled risk solutions to their clients.

Named workSHARE because it supports work sharing around the globe, the ECM solution enables the management of EPCM projects from project feasibility study through to development, facility engineering, construction, and operation. A unified solution to track, manage, report and communicate controlled documents, workSHARE supports engineering drawing management as well as transmittal and correspondence management while enabling improved control of critical deliverable and non-deliverable documentation between Hatch clients, vendors, and joint-venture partners.

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**Ms. Fransie Bloem,
workSHARE Developer Manager, Hatch**

Capitalizing on past knowledge

With corporate offices in Mississauga, Canada, Hatch provides process and business consulting, information technology, engineering, and project and construction management to the mining, metallurgical, manufacturing, energy and infrastructure industries. A network of 7,400 employees in 80 permanent offices on the six industrial continents supports programs and projects of an aggregate value in excess of US\$20 billion.

Expertise grows from experience, and the knowledge from past projects creates an invaluable resource to engineering companies like Hatch. In fact, the organization's ability to provide efficient and sustainable business solutions to clients lies in its ability to capitalize on their knowledge. To fully utilize their resources, Hatch requires them to be fully accessible and quickly retrievable by project teams.

At Hatch, some of this invaluable knowledge such as drawings, reports, specifications, or catalogue data was stored in either a digital form or on paper. Other resources existed in databases and would wither away unless the database lives beyond the project and more important beyond the immediate user or creator.

Web-based, secure and cost effective

To fully utilize its capital knowledge and ensure competitive edge, Hatch decide to implement a global document management and control system that would enable the consolidation of 25 different document management, control and archive systems in use in Hatch worldwide. A solution was required that would ensure effective collaboration between offices worldwide and provide a global outreach to all offices, project teams, vendors, partners and customers by leveraging intranet and extranet functionalities with attention to information security.

More than nine vendors were assessed in detail over a four-month period. Livelink ECM – Enterprise Server from Open Text was selected as the basis for the new Global Document Management and Control System. Some of driving factors behind the decision were the solution's cost-effectiveness, support for SAP integration, provision of robust security for access control, and the ability to meet the majority of Hatch's key business requirements.

Lifecycle project management

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Industry

Engineering, Construction & Operations

Customer

Hatch

Business Challenges

- Provide global document reach for all offices
- Permit consolidation of 25 different document management, control and archive systems
- Capitalize on corporate knowledge
- Enable collaboration during project development between employees, clients, vendors and partners
- Provide appropriate security for portals and projects
- Leverage off existing Hatch infrastructure

Business Solution

Engineering drawing management
Transmittal/Correspondence Management
Vendor Data Management
Project Lifecycle Management

Business Benefits

- Immediate access to project documents
- Efficient management of controlled information
- Compliance support
- Improved risk and quality management
- Reduced turn around times for document reviews and receipt and certification of supplier and vendor data
- Significant cost and time savings

workSHARE supports management of correspondence and non-deliverable documentation as well as vaulting of all deliverables including technical documents, drawings and supplier data. All tender and enquiry packages and Joint Venture (JV) Project Supplier data mark-ups are issued electronically. The solution ensures electronic receipt of commercial tender/enquiry package responses and preliminary and certified final supplier data. A single URL link for a workSHARE instance serves both internal and external users ensuring that Hatch staff, Joint Venture partners, clients and vendors have comprehensive and secure document access and security.

Hatch is using workSHARE globally in Project Management, Engineering, Procurement, Construction, Project Controls, Quality, Safety, Shared Services (Finance, HR), Project Execution Technology, and various Business Units. The solution is employed to satisfy compliance and for the management of compliance documents related to ISO requirements, safety, permits, warranties and contracts and client audits and internal audits.

Transmittal management

As the sheer project volumes, size, and complexity in the EPCM market have significantly increased, manual and paper intensive methods no longer scale to support the business productivity demands, and handling of large volume of documents and communications. For example, Hatch typically transmits over 2,500 transmittals per week, for a single mid-size project (~ \$250M project) and may initiate per location over 100 projects per week for small projects, 50 projects per week for mid-size projects, and 20 projects per year for large projects.

Transmittals are the formal process of receiving, distributing, and returning controlled documents for a reportable purpose. An integrated Livelink module for transmittal management is ensuring that Hatch can manage its controlled documentation within the Livelink interface while also providing for audit trails of what has been issued to a recipient in support of the document control reports.

Responding to customer requirements

As customers are increasingly demanding 'progressive' handover of project and engineering documents, versus post-project completion handover (this has both financial and tax related benefits to them), workSHARE features such as attribute extraction, XML interchange, reporting, progressive handover and traceability have ensured a much easier package handover. Prior to workSHARE, a lot of hours were spent collecting and packaging hardcopy documents/drawings for handover. Hatch contractors and clients have access to documents and can collaborate on projects in workSHARE from anywhere in the world while tighter and more granular security control within the system enables bidders to access bid packages without gaining access or knowledge of competitors.

Thanks to workSHARE, the turnaround times for document reviews and receipt and certification of supplier and vendor data has reduced considerably, and Hatch is savings courier costs spent previously on sending drawings and packages of work to remote sites or other design offices. "Previous reliance on hard copy transmission of enquiry packages meant a minimum of 3 days to reach overseas tenderers. The ability to make enquiry package and addendum data available to our tenderers immediately as well as electronic exchange of technical and commercial documentation with vendors and contractors has had a big impact on cost and time to administer enquiries," confirms Ms. Bloem.

Risk and cost management

Efficient document control is critical in the industry to avoid project reworks, delays and costs. "Consider the impacts to project timelines, costs, safety and therefore ROI for our clients, when a project contractor builds based upon outdated or inaccurate drawings. This is exacerbated when the project is remotely situated, where 'just in time' does not exist. Simply ensuring they are using the latest versions of a drawing, has significant risk and cost avoidance," says Ms. Bloem.

workSHARE enables Hatch teams in different locations to collaborate on design with immediate access to the project documents globally. This means that online collaborative designs can be worked on around the clock. Prior to the solution, issue of construction drawings to remote sites was a time consuming process, often relying on air and road transport. workSHARE enables Hatch to make these revisions available to construction personnel and contractors in real time.

The success of the solution has been indicated by the increasing adoption of WorkSHARE for document management by all Hatch large Joint Venture projects where the Joint Venture has had the choice between the systems of the partners. "Several of our clients have adopted the system for their own project use, within the Hatch environment and there has been a natural increase in the number of projects created in WorkSHARE, and an increase in number of documents actively added over time, without the need to make a senior management directive," adds Ms. Bloem.

Additional modules and automation

Hatch is now looking to expand the solution to include additional automation within workSHARE of document control processes, through the use of workflow and other automated processes as well as synchronous integration of drawings accepted or rejected from Bentley ProjectWise to and from Livelink. Additional planned extensions to workSHARE include correspondence management, invoice approvals (workflow), email management and construction management.



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