



## Success story

### Industry

- Oil & Gas

### Solutions

- OpenText™ Extended ECM Platform
- OpenText™ Extended ECM for SAP® Solutions
- OpenText™ Extended ECM for Engineering

### Services

- OpenText Professional Services

### Partner support

- Deloitte Digital

### Results



**Increased productivity** by speeding time to find critical documents



**Enhanced compliance** and **mitigated risk** through controlled processes



**Accelerated adoption** and **productivity** with seamless ECM integration



**Reduced IT costs** and **accelerated** five month rollout with cloud-based solution

# North American oil refining and pipeline corporation transforms enterprise, engineering and asset information management in the cloud

**U.S. petroleum refiner deploys OpenText solutions in the cloud to increase productivity, while reducing costs and risk**

*“OpenText Extended ECM for Engineering and OpenText Extended ECM for SAP Solutions helps ensure that our operations and maintenance teams can rely on the accuracy of all of the data in our systems and that they can find it in a timely manner, which has greatly reduced the risk of safety issues and improved productivity.”*

Microsoft SharePoint and OpenText Administrator



**This leading United States petroleum refiner also operates thousands of miles of pipeline and produces gasoline, diesel, jet fuel, asphalt, heavy products and specialty lubricant products.**

Recently, they acquired a Canadian producer of base oils and other specialized lubricant products. After the acquisition, they faced a tight six month deadline to migrate all data and documents with minimal disruption to business and operations. The complexity of the project was compounded by the fact that they did not have an enterprise content management (ECM) system ready to accept and control approximately three million documents and 800,000 engineering drawings.

With no time to lose, they embarked on a search for a new ECM engineering and asset information management solution. They also evaluated several vendors, both on-premises and cloud-based. A critical requirement of the solution was the ability to integrate with the company's existing SAP systems. Ultimately, they selected OpenText™ Extended ECM for Engineering and OpenText™ Extended ECM for SAP® Solutions a complete, enterprise-class ECM solution that offers engineering and asset information, work process control and collaboration, data and document archiving, imaging and viewing and document and records management. OpenText also uniquely integrates with the company's SAP business applications.

***"This lubricants acquisition is a large SAP shop—almost everything they do in operations goes through SAP," explained the customer's Microsoft® SharePoint® and OpenText administrator. "Having a partner as close to SAP as OpenText was a big win in this case. That partnership was a large part of this decision."***

Drawing on the expertise of OpenText Professional Services and Deloitte Digital, they succeeded in meeting their deadline to have all of the acquisition's documents and drawings uploaded into the new cloud-based ECM for Engineering system, which augments the OpenText™

Extended ECM Platform to control engineering and asset information and processes. This includes concurrent revision control, review, markup, approval processes and transmittal management. As a second three month phase of the project, the team then implemented additional integrated solutions for SAP Financials and SAP Plant Maintenance.

***"The first server went up in the cloud in May and we had the three million documents uploaded and under control by the October deadline. This included all 800,000 engineering drawings with full version and revision metadata and process controls in place. We then received an extension until January to implement the SAP solutions and integrate them with this Extended ECM for Engineering content, which also went very smoothly,"*** said the administrator.

With the content migration complete and the new platform in place, this OpenText customer has already realized several important benefits from the solution, including cost savings, enhanced productivity and reduced risk. To start, the decision to use OpenText's cloud-based solution allowed them to avoid a time-consuming, resource-intensive deployment, while delivering savings, agility and availability. Moreover, the organization was and is able to securely manage, protect and use information, with the same trusted platform and governance framework as the on-premises system.

***"The company's management team performed a cost comparison with an on-premises implementation, including annual maintenance costs and resources required to maintain and upgrade the systems and solution, versus the OpenText Cloud solution. They found that the cloud solution was cheaper. Outsourcing this to the OpenText Cloud team also allowed us to deploy our internal IT resources on other critical projects,"*** added the administrator.

In addition to substantial cost savings, this new OpenText customer has enjoyed enhanced user engagement and productivity. Employees can

***"The OpenText solution enables this customer to maintain control and governance in one system, while allowing users to access the information from many applications. The modern user experience and tight integration with SAP make it easy for users to find the information they need. The key principle here is that you are using one source of the truth—OpenText Extended ECM for Engineering and OpenText Extended ECM for SAP Solutions."***

**Ankur Gupta**  
Manager  
Deloitte Digital





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now quickly and easily access up-to-date ECM content within the SAP business applications they typically use, such as Plant Maintenance. In the past, employees might waste days hunting through multiple systems to track down the correct version of a critical operations document. They have also been impressed with the responsiveness and expertise of the OpenText Cloud team, who have leveraged their deep knowledge of this hosted implementation to quickly resolve the issues that they have reported.

***“The OpenText solution enables this customer to maintain control and governance in one system, while allowing users to access the information from many applications,”*** explained Ankur Gupta, manager, Deloitte Digital. ***“The modern user experience and tight integration with SAP make it easy for users to find the information they need. The key principle here is that you are using one source of the truth—OpenText Extended ECM for Engineering and OpenText Extended ECM for SAP Solutions.”***

Mitigating legal, regulatory and safety risks marks another critical benefit of the solution. Extended ECM for Engineering and Extended ECM for SAP Solutions controls the entire content lifecycle in engineering projects and operations, ensuring content integrity and accuracy. By filing documents consistently and automatically within a process and in the context of a related business process, the solution eliminates the risk of users storing items on local hard drives or file shares. Any metadata or classification happens automatically in the background, making it easy to find these documents when needed.

***“OpenText Extended ECM has enabled us to put proper governance and records management in place to enforce compliant document lifecycles. Important procedures, safety documents and drawings have retention and periodic review schedules applied to ensure compliance,”*** stated the administrator. ***“If there is an audit, this***

***solution has all the necessary information structured and available so that it can be quickly presented to the audit team to confirm full compliance,”*** added Gupta.

The company was so impressed with the benefits that this first refinery was experiencing that they immediately began migrating their other six refineries and pipeline division to this integrated solution. It took approximately 20 months to migrate all but two refineries, and these last two are scheduled to be completed in the next three months. Looking ahead, this customer shows no signs of slowing down. The team plans to implement additional OpenText Extended ECM add-on integrations, including OpenText™ Extended ECM for SAP® SuccessFactors®, OpenText™ Extended ECM for Microsoft® SharePoint® and OpenText™ Extended ECM for Salesforce®.

***“This initial rollout was a great internal success story, and when word got out to the business leaders and the executives, they began asking us to roll this solution out to their facilities,”*** said the administrator.

***“Our main goal is to centralize all unstructured information into one central system and connect that content to our business applications and processes, so that users can find the information and documents that they need to get their jobs done quickly and efficiently. OpenText has proven to us that we can continue to work together to make that happen.”***

### Partner Information:

Deloitte Digital helps clients see what’s possible, identify what’s valuable and deliver on it. Deloitte professionals help clients identify and solve their most critical information and technological challenges. Deloitte professionals provide advisory through end-to-end implementation services as well as outsourcing services, and are recognized in the marketplace for capabilities across the spectrum.

[deloitte.digital.com](https://deloitte.digital.com)



### About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit [opentext.com](https://opentext.com).

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