

# Case Study

## Industry: Oil & Gas

This oil and gas company is an energy delivery company that focuses on the transportation, distribution, and generation of energy. They operate the world's longest, most sophisticated crude oil and liquids transportation system.

### Challenge:

The Major Projects group had millions of non-technical records stored in shared network drives and needed classification experts to analyze them and classify them by document type. Prior to working with FileFacets, this company was ill-equipped to locate documents in a timely manner or manage them throughout their proper lifecycle.

A later project included scanning of construction binder material before attribution, renaming and delivery. The company required a service provider that could deliver in a more efficient and less expensive manner.

### Solution:

There are no other tools available to provide classification and attribution capabilities in a cost-effective manner. Typically, in the oil and gas industry in Alberta, Records Turnover Specialists would handle these records at some expense. In oil and gas, construction records are required by regulation to be turned over at the completion of one construction phase before they can receive funding for the next stage.

FileFacets employed a semi-automated content classification, disposition, and migration process, which provides several opportunities for quality checks by all affected stakeholders prior to migration of files into the new structure. It is an inclusive methodology that guarantees buy-in by all business units within an organization and is rooted in communication, facilitated by FileFacets' collaborative communication tool.

FileFacets developed processes and procedures to handle these records more efficiently with each project. FileFacets established techniques to auto-attribute based on associated metadata and audit sampling techniques that is now incorporated into the software.

### Results:

FileFacets delivered the projects in a more cost efficient way for the client. Not only does the software include an audit feature, as required by the Enbridge projects, but the software went as far as to programmatically pull values from electronic records and cluster like-documents such as near-duplicates and varying versions.

By classifying this content to a folder structure in use in the target system and applying metadata to these legacy files, locating information went from being a tedious task to becoming a simple request.

FileFacets approached the metadata attribution in a totally different way because of these projects and the functionality seen in the current software is a result of the need to process a large amount of data quickly, on time, and on budget.

#### 7 projects in total included:

- Classification Services
- Metadata Attribution
- Scanning
- File Renaming
- ROT & Deduplication Processing

