

# Aiimi Energy Solutions

Controlled Document Management System (CDMS)



# Aiimi Energy Solutions - CDMS

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## OVERVIEW

Since 2008 there has been an expansion of the Oil and Gas industry within the North Sea, especially on the UK Continental Shelf (UKCS), this was after almost 10 years of gradual decline. Since peak production was achieved in 1999, the decline in known reserves from then until around 2008 saw some level of either neglect, or at least a lack of desire to spend money, in the industry as a whole and certainly in non-core systems. However, since 2008 there has been an increase in activity in exploration and extraction, driven by the 3 fold+ increase in the price of oil and gas which in turn led to the renewed economic viability of exploration and extraction from previously non-viable areas. This has led to newly formed companies and joint ventures from established Energy companies, and existing exploration and downstream production companies, all commissioning new production platforms and associated facilities. In addition to the increasing demand from UK offshore oil and gas, there has been an explosion in interest in green and renewable energy and extensive construction and development of wind farms, tidal generators and carbon capture facilities. This activity has led to the renewed interest in services and software to support all of these new projects. This has seen both the implementation of completely new solutions utilising modern technology, as well as the replacement of legacy systems that were no longer fit for purpose. Another factor that has driven the willingness for companies to look at implementing CDMS applications and intelligent certification and verification systems, is the legal position and associated monetary penalties and reputational damage of not complying with regulations. This is relevant to the construction, operation, servicing and inspection of facilities and defending actions against findings, as seen in the Deep Water Horizon disaster in the Gulf.

Developed in response to a fluid environment in E&P to aid a number of our client's subsidiary and start-up organisations to manage new North Sea projects, Aiimi's CDMS solution provides controlled document receipt, collaborative review, transmission, storage, audit and permission controlled access, and is specifically designed for the energy market. It has the ability to rapidly ingest information from acquired companies, contractors and partners, process that information and distribute to on and off-shore audiences.

Aiimi's systems support the requirements for controlled document management in the energy sector and help to maintain document assets in compliance with best practice and regulatory requirements, such as those mandated by the HSE in the UK and equivalent bodies across the globe.

## INTRODUCTION TO AIIMI

Aiimi specialises in Enterprise Information Management. We offer a complete range of business and technology solutions drawing on our highly skilled consulting practice. Over the last eight years the business has delivered innovative enterprise information management solutions across a range of regulated industries including Energy, Utilities and regulatory bodies.

Aiimi has expertise across all aspects of an information management solution from strategy through analysis and design to implementation and service management. Our business comprises strategic consulting, business transformation and technical implementation capability as well as managed services through our hosting and "software as a service" solutions. We are passionate about technology, are focused on long-term relationships and always strive to deliver value and sustainable, future-proved solutions.

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Our Enterprise Content Management practice covers a wide range of disciplines including: Enterprise Document and Records Management, Business Process Management & Re-engineering, Scanning and Image Capture, Intelligent Character Recognition (ICR) & Optical Character Recognition (OCR), E-mail Management, Search and Collaboration.

Our range of services include, evaluation of strategy for information and records management, legal and regulatory compliance, information audit, and business process review. Our services combine appropriate collaboration, content management and workflow technologies into an integrated solution that captures ideas, experiences, and knowledge, and manages the complete lifecycle of electronic content from creation to archive and eventual deletion.

Aiimi are now the largest OpenText Content Server practice in the UK and we have established strategic partnerships with industry leading software vendors including:

- OpenText
- Microsoft
- Microstrategy
- SAP
- Claranet

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## INTRODUCTION TO THE CDMS

Aiimi's Controlled Document Management System (CDMS) is a document management platform for the Energy sector that provides functionality for capital project and operational document management. All of the key features required of document management in the Energy industry are included in a single platform that is available as either a hosted SaaS (Software as a Service) or as an on premises installation.

The solution offers the following core functionality:

### AUTOMATIC DOCUMENT NUMBERING

Documents stored in the system are allocated a unique document number that is set up according to your own naming convention. Document numbers are allocated from combination of metadata, usually including data such as the discipline, project code or facility for example. These in combination with a unique incremental number provide a document number that makes documents managed by the CDMS very easy to track and identify at a glance. For the appropriate types of documents including drawings, the solution also allows the allocation of sheet numbers for multi sheet documents. Document numbers can be pre-created and allocated out to suppliers for incoming documents.

### AUTOMATIC CORRESPONDENCE NUMBERING

Where documents are to be sent out to or received from a supplier, or where an email with attachments is stored within the CDMS, the solution provides the ability to create Correspondence Numbers to track that information and record the sending and receiving parties as part of a standardised correspondence number.

### INBOUND TRANSMITTALS

Inbound transmittals allow suppliers to upload documents directly to the system and route them through to a document controller for checking and approval. An inbound transmittal collects information about the incoming documents, including the subject, sending party, purpose any external reference numbers, comments and notification addresses. The transmitting party then adds the documents, including any PDF renditions of content, adding the pre-allocated document numbers at that point. The transmittal when submitted has a unique transmittal number that is passed to the internal document control team and appears in the activity list for that team. The document control team can review and reject or approve inbound transmittals and also put inbound documents immediately onto an Internal Review Transmittal.

### INTERNAL REVIEW TRANSMITTAL

Also known as an Inter Disciplinary Check in some companies, the review transmittal sends documents for review internally and to any third parties necessary. When a review transmittal is initiated, documents are attached and a number of individuals or groups are assigned to the transmittal process in the role of reviewers, approvers, comment collator, or 'for information only'. Transmittal participants can be selected automatically based upon the metadata used during the creation of the transmittal, or manually by the initiator. During a review, reviewers view and mark-up documents with the provided CaptureVue viewer. Mark-ups can take the form of text comment, or

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image markings and multiple reviewers can review and comment on the document at the same time. Once all reviewers have completed their reviews, or a pre-defined time limit has elapsed, the documents and mark-ups are passed to a collator, who reviews all comments, approves and rejects the appropriate ones and then passes the collated comments on to a document controller who completes the transmittal, and in so doing produces a transmittal sheet, approved comment sheet, all comments sheet, a copy of the original document with a comments appendix and a copy of the document itself with the comments burnt into the document. The document is then placed into an output folder ready to be sent to the supplier or other third party. Periodically the document controllers transmit completed transmittals with all related documentation to the recipient.

## SEARCH

The solution provides a comprehensive yet simple to use search interface that allows a user to quickly find documents, correspondence and transmittals using search criteria such as discipline, project, sending or receiving party etc. Users can search for anything stored within the CDMS that they have access to and can search with metadata or free text queries and pull back a read only or editable copy of the document. Users can save searches for later re-execution.

## DOCUMENT MANAGEMENT

The CDMS is based on an industry leading document and records management platform and provides all of the features to be expected of a corporate document management solution, including the ability to upload, download, secure, archive, retain, copy, distribute, collaborate on or destroy documents. There are extensive features for controlling documents, including permissions, a full audit trail and MOREq2 compliant records management functions.

## DATA TABLE MANAGER

Many traditional document management systems only allow users with access to the administration facility access to update metadata values, however the CDMS comes with a data management application that is web based and accessible to the document control team, which allows them access to administer, add, delete and edit metadata values used by the solution.

## USER MANAGER

The CDMS is designed to be used by both internal and external parties and for ease of use, supports single sign on for internal users and domain integrated security for external users, whether the CDMS is hosted by Aiimi or provided on premises. As the document control team would not typically have access to the corporate Active Directory, the solution comes with an external user manager application that creates new users and synchronises them to the CDMS from the domain.

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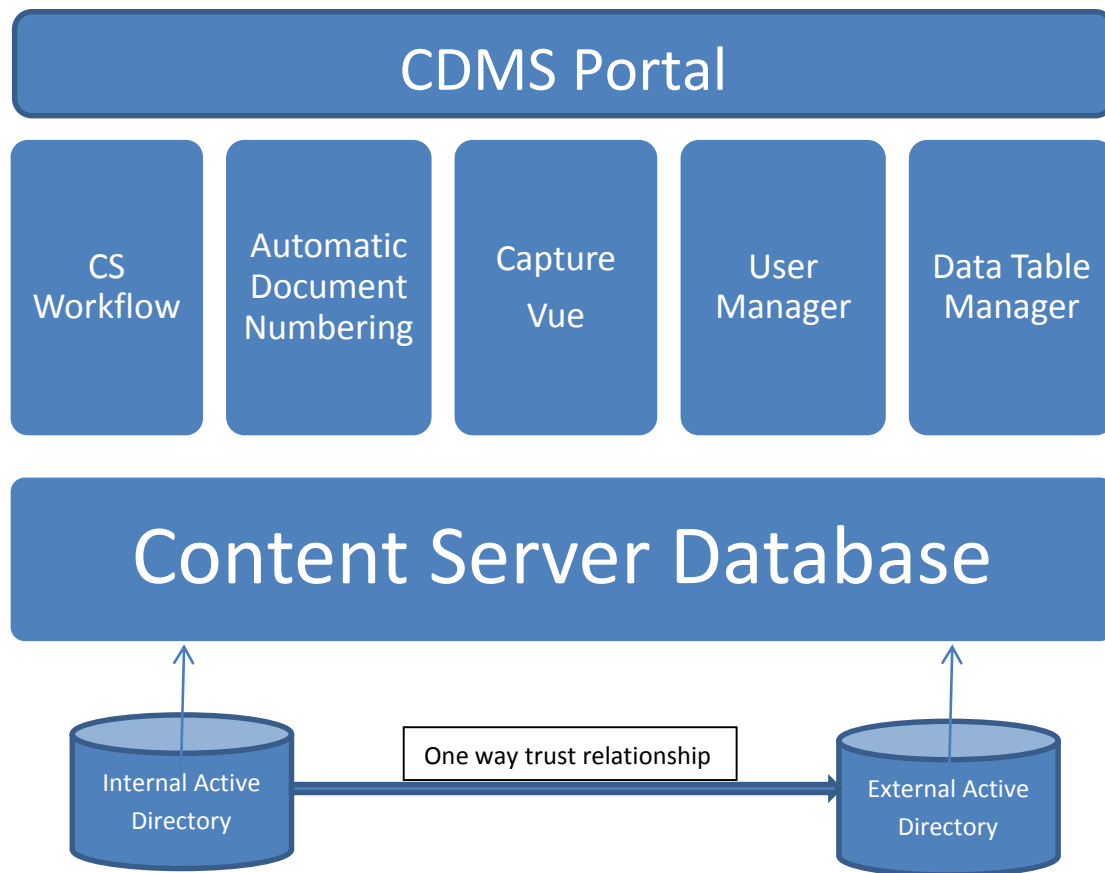
## CDMS ARCHITECTURE

The CDMS solution is built on top of Content Server 10 or Livelink 9.7.1 and utilises a number of components to provide the overall solution. These include:

CaptureVue – A document viewing and mark-up tool.

OpenText Automatic Document Numbering – The engine for creating correspondence and document numbers

OpenText Advanced Workflow – The engine used for managing transmittal task assignments



The solution utilises .Net and runs on a Windows IIS server. Aiimi provides the solution as a SaaS offering, or on-premises implementation. If your organisation already has OpenText Content Server or Livelink 9.7.1, we can layer our solution on top of your existing infrastructure.