



# Petro-Canada

Empowering employees across a widely dispersed, diverse enterprise

## Benefits

- Accelerating business processes with ERP/ECM integration
- Improving records management and reducing costs
- Increasing efficiency of mobile workforce with 24x7 Web access
- Increasing quality and quantity of information published to intranet
- Providing a foundation for future opportunities

## Business overview

Petro-Canada is an integrated oil and gas company with core businesses in all sectors of the oil and gas industry. The company explores for, develops, produces, and markets crude oil and natural gas, refines crude oil and other raw materials, and markets and distributes petroleum products and related goods and services. In 2001, the company generated revenue of \$8.7 billion in Canadian dollars.

## Challenges

The Petro-Canada enterprise spans all the Canadian provinces and includes offshore drilling operations and international operations. Managing information in such a geographically diverse company would be challenging enough. Adding to the complexity, however, is the fact that these operations are functionally and culturally diverse. Corporate headquarters and the “upstream” businesses (such as oil exploration and development operations) and “downstream” businesses (such as retail gas stations and refining operations) all need to manage different information in different ways.

### *Supplement ERP systems with easy access to relevant Info*

Petro-Canada is using the SAP® R/3® Human Resources software module across the enterprise and, in the downstream business, other SAP modules such as materials management and accounts payable. The upstream businesses use PeopleSoft financials software. In each case, efficiency could be increased if employees had easy access to information that their ERP systems alone could not provide, such as copies of an actual invoice or purchase order. Business processes could be streamlined by eliminating the need to search for documents in file cabinets, personal hard drives, or other systems.

### *Provide mobile workforce with easier access to information*

The company’s Surface Land Contracts group has staff that travel throughout the country, meeting with thousands of landowners for various reasons—for instance, when the leases to oil rights on their land come up for renewal. The lease contracts are stored at headquarters in Calgary. To obtain a copy of a contract, a field representative would request a photocopy to be sent to him on the road or he would need to return to Calgary periodically to make copies himself. In either case, productivity could be significantly increased if the field rep had easier access to contract information at any time.

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## Business profile

### Petro-Canada

### Industry

Oil and gas

### Geographies

Headquarters in Calgary, Canada. Operations throughout Canada, onshore and offshore, with international exploration and production in North Africa and the near east, northwest Europe, and northern Latin America.

### Business focus

Enterprise content management (ECM), intranet

### EMC Documentum products

EMC Documentum content management platform, Content Services for SAP, Web Publisher, and Records Manager

### Deployment summary

Standardized on Documentum for enterprise content management. 5,000 employees and contractors access via intranet.

## *Communicate effectively across widely dispersed enterprise*

To improve communications across its widely dispersed employee base, Petro-Canada implemented an intranet for sharing information within the enterprise. Petro-Canada management quickly realized that having its information systems (IS) department publish content for the various business units and the departments within them would keep IS from other critical tasks. The company needed to find a way to enable content owners to publish on their own without IS intervening while at the same time ensuring content consistency and accuracy.

## *Manage electronic records and comply with privacy legislation*

Petro-Canada was managing its paper-based records competently with an in-house records management application but realized that managing electronic records was becoming a growing challenge. The company calculated that the capacity required to store electronic records was increasing at an annual rate of 60 percent and that e-mail comprised almost two-thirds of all electronic records. Canada's recently passed Privacy and Electronic Evidence Act would require the implementation of specific retention policies for e-mail and other electronic records by 2004. Petro-Canada needed an enterprise-wide system that would enable compliance with the federal legislation yet be seamless to users.

## EMC Documentum solution

As more and more business units began asking for content management functionality, such as version control, configurable security, and better means of searching, retrieving, and delivering data, Petro-Canada started investigating content management solutions.

"We brought in EMC Documentum for a live demo to give us a better idea of how the platform could meet some of our specific needs," recalls Louise Wekel, Petro-Canada director of corporate systems and information management. "We had about 40 or 50 people from cross-functional areas across the company in a conference room, and they got really excited when they started to grasp the possibilities that the Documentum solution could offer."

In addition to the breadth of functionality, the EMC® Documentum® enterprise content management platform offered an integrated, open architecture, which was also a key deciding factor. "We wanted one manageable, end-to-end solution—not a suite of disparate tools we had to integrate and maintain on our own," said Wekel.

"As Petro-Canada requirements for document management have expanded and evolved, EMC Documentum has kept pace. The platform's scalability has allowed our diverse business units to adopt it incrementally and to align it with their differing strategic plans. And new Documentum Web tools and records management capabilities should increase penetration of the Documentum platform even further."

**Elouise Wekel, Director of Corporate Systems and Information Management, Petro-Canada**

Petro-Canada began using the Documentum platform in September 1997 and incrementally rolled it out, adding functionality over the following years. Early adopters included the Surface Land Contracts group and Vital Records. Today the company has standardized on Documentum as its enterprise content management platform with over 1,500 users across 30 departments.

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### ***Accelerating business processes with ERP/ECM integration***

Many users in Petro-Canada's downstream businesses can now securely access information stored in the Documentum system using the SAP interface on their desktops. Users now have direct and immediate access to content such as vendor contracts, invoices, standard operating procedures, material safety data sheets, and engineering drawings. Such instant access eliminates the personnel time and costs of searching for, filing, and storing this content, or having to log on to another system. For example, an accounts payable clerk can instantly see a vendor's invoice or purchase order simply by clicking on an SAP transaction report. When field engineers need a maintenance order for a specific piece of equipment, they can look it up via the Documentum interface or from within an SAP Material Master form.

For the upstream businesses, which use PeopleSoft financial software, Petro-Canada built a custom integration to the Documentum system. Now an executive can drill down from a PeopleSoft financial analysis report to a specific invoice. According to Bruce Darwin, senior advisor of corporate systems at Petro-Canada, "Linking Documentum and our ERP systems has enabled employees across the enterprise to complete their day-to-day tasks faster and more efficiently while maintaining data integrity and avoiding information silos."

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**Bruce Darwin, Senior Advisor of Corporate Systems, Petro-Canada**

### ***Improving records management and reducing costs***

Another benefit of integrating ERP systems with the Documentum content management platform is improved compliance and auditability. Petro-Canada uses the SAP Human Resources module across the enterprise. Having it linked to the Documentum content management platform makes it easier to archive and retrieve SAP tax reports, payroll forms, and other documents, many of which are required by law to be kept for a number of years.

For example, the company might need to find out how much an employee was paid in a pay period two years prior. Today it is easy to pull up that information from an SAP screen. "Before the Documentum integration, trying to determine what happened in the past would have been extremely difficult and time-consuming," explained Darwin. The SAP system on its own cannot produce a report from a previous time period, and attempting to recreate a report is tricky because there may have been adjustments to payroll files since the report was originally created. Integration with Documentum also saves significant costs by greatly reducing the amount of physical storage space needed to store such documents.

### ***Increasing efficiency of mobile workforce with 24x7 Web access***

Now that contract information is stored in the Documentum repository and accessible via the company intranet, Petro-Canada employees on the road can easily get the information they need on their laptop screens. "Our Land Surface reps are much more efficient now that they have the information they need right at their fingertips, as opposed to having to request a fax from headquarters or go out of their way to stop in Calgary to make photocopies. Also, administrative staff time is freed up at headquarters as a result of not having to support these types of requests," said Darwin. "In addition, being able to securely access a host of general company and HR information anytime, anywhere via the Web is a boon to all our employees, but especially those on the road."

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### *Increasing quality and quantity of information published to intranet*

Using the Documentum platform—and, more recently, Documentum Web Publisher—Petro-Canada created standard templates that provide a framework for different types of content. Individual departments have the flexibility to rework headings and apply content where they see fit without involving IS. According to Wekel, “Freeing up the IS department is definitely a benefit, but an even bigger benefit for us has been that more information gets published to the Web more often. And thanks to Documentum content management processes, that information can be trusted as accurate. As a result, more employees are turning to the intranet as their single source of information for everything from company policies and procedures to pension information.”

“Because we have hundreds of external service providers for any one of our mining operation projects, there is even talk of using EMC Documentum to power the content for a business-to-business extranet for external service providers. As our users become more sophisticated, the possibilities continue to grow.”

**Bruce Darwin, Senior Advisor of Corporate Systems, Petro-Canada**

### *Providing one inclusive system to manage lifecycle of all records*

In 2003, Petro-Canada will be implementing Documentum Records Manager to manage all records enterprise-wide, whether paper-based or electronic. “We expect that having a single, inclusive system to manage all records will both mitigate our risk of litigation and be cost-effective,” said Betty McLean, senior records advisor at Petro-Canada.

### *Providing a foundation for future opportunities*

Petro-Canada continues to refine and improve its content management systems. For instance, the company plans to leverage Documentum workflow and lifecycle management capabilities and integration with e-signature technology. Petro-Canada is also considering a corporate portal, with content coming from Documentum. “Because we have hundreds of external service providers for any one of our mining operation projects, there is even talk of using Documentum to power the content for a business-to-business extranet for external service providers,” said Darwin. “As our users become more sophisticated, the possibilities continue to grow.”

## Summary

By standardizing on the Documentum content management platform and integrating it with the company’s ERP systems, Petro-Canada is reducing operational costs and paper flow, empowering employees across the enterprise, and delivering information faster and more accurately throughout the company. The end result is more efficient business processes in each of the company’s diverse business operations.



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