

CASE STUDY

Building a Sustainable ECM Ecosystem for a Leading Energy Enterprise

How Qellus helped a global energy organization unify its information landscape through OpenText™-enabled transformation.



Executive Summary

A leading U.S.-based energy producer operating multiple refineries faced a challenge familiar to many asset-intensive enterprises: managing enormous volumes of documents, drawings, and maintenance records scattered across siloed systems.

Despite investing in OpenText technology years earlier, the company lacked a coherent strategy, leadership direction, and the internal expertise needed to realize its potential. What existed was a patchwork of disconnected initiatives, stalled archiving projects, isolated document repositories, and a growing backlog of unfulfilled ECM requests.

Qellus became the organization's trusted partner. During their journey, Qellus helped establish an enterprise-wide ECM vision, streamline SAP integrations, and embed content management into the company's daily operations.

The result is a sustainable, scalable ECM ecosystem that connects structured data and unstructured content in perfect harmony — transforming information from a burden into a strategic asset.

Client / Context

The client operates in the oil and gas sector, managing several refineries and complex downstream operations across the United States. Its teams rely heavily on SAP for plant maintenance, engineering, procurement, and project management, alongside specialized platforms for safety and compliance.

This was not a single project—it was a long-term journey requiring continuous solutioning, technical excellence, and strategic leadership.

While the company had deployed OpenText Extended ECM years before, it lacked a structured approach to content and records management. Leadership turnover and limited internal ECM knowledge left the system underused, fragmented, and unsupported. Over time, inefficiencies grew, critical maintenance documents were hard to find, project drawings were duplicated, and record retention was inconsistent across sites.

Problem Statement

The organization faced multiple, interrelated challenges:

- **No clear ECM strategy or governance:** Content was scattered across shared drives, legacy systems, and SAP attachments, with no consistent ownership or process.
- **Limited ECM expertise:** The internal teams lacked the knowledge to leverage OpenText capabilities effectively.
- **Leadership gaps:** Without executive sponsorship, ECM initiatives struggled to gain traction.
- **Stalled projects:** A once-promising data archiving initiative, aimed at shrinking the SAP database, never reached production.
- **Overwhelming backlog:** More than 50 internal xECM-related requests sat unresolved.

In short, the company needed **ongoing, expert support** to manage its ECM systems, streamline SAP integrations, and extend content capabilities into critical operational areas such as **engineering and health & safety workflows via Enablon**.

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Objectives

When Qellus entered the picture, the objectives were clear:

- Establish a **cohesive ECM roadmap** aligned with business strategy.
- **Stabilize and support** existing OpenText™ infrastructure through continuous administration and troubleshooting.
- Deliver **seamless SAP integrations** for plant maintenance, projects, contracts, and vendor management.
- **Improve document control** across engineering, safety, and procurement.
- **Empower leadership and end-users** to see ECM as an enabler of business value, not a technical afterthought.
- **Build a foundation** for future growth, including integrations with Salesforce and SuccessFactors.

Analysis / Discovery Phase

Qellus began by assessing the current landscape: technically, organizationally, and strategically. The analysis confirmed what the client already suspected: ECM was not broken but underutilized.

Qellus' team conducted interviews across departments, mapped document flows, and reviewed system configurations. They found redundant repositories, disconnected metadata, and missing integrations between SAP objects and related content.

This phase also revealed a key insight: while technology was part of the issue, the deeper challenge was a **lack of governance and clarity**. Without leadership support and a consistent operational model, ECM had never evolved from "a place to store documents" into "a system that drives process efficiency."



Solution / Approach

Qellus took a multi-phase approach, balancing stability and innovation.

1. Establishing a Stable Foundation

Qellus began by providing **expert ECM administration and managed support**, resolving system issues, optimizing performance, and restoring user confidence. This reliable foundation allowed business teams to focus on transformation rather than firefighting.

2. Strategic Enablement

Qellus worked directly with senior leadership to define a long-term ECM strategy and governance model. Through workshops and roadmap planning, leadership came to understand the platform's potential as an enterprise enabler, a key turning point for cultural and organizational alignment.

3. Expanding and Integrating OpenText Solutions

Once stability and leadership alignment were in place, Qellus led a series of targeted implementations:

- **xECM for SAP Plant Maintenance** – linking technical documents, equipment records, and work orders directly within SAP.
- **xECM for Engineering** – enhancing traceability and collaboration for engineering drawings and revisions.
- **xECM for Project Systems & Contracts** – ensuring consistency and auditability for project and procurement records.
- **Vendor Invoice Management (VIM)** – embedding content into financial workflows for faster processing and transparency.
- **Integration with Enablon** – connecting OpenText™ xECM to the company's safety and compliance platform, enabling document access within health and safety workflows.
- **xECM for Salesforce®** – extending ECM principles to customer engagement and CRM processes.
- **xECM Workflows Automation** – creating flexible, content-driven automation solutions across departments.

4. Continuous Improvement and Roadmap Development

Throughout the partnership, Qellus continued to provide **Application Managed Services (AMS)**, overseeing daily operations, development, and solution architecture.

Ongoing initiatives include the **revival of the data archiving project**, currently in RFP, and the planned **implementation of xECM for SuccessFactors in 2026**, bringing HR content into the same ecosystem.

Implementation

The engagement spanned several years, delivered through coordinated waves rather than isolated projects.

Each phase focused on one domain or integration area, ensuring steady progress while minimizing disruption. Qellus collaborated closely with internal teams, offering change management, documentation, and training to help business users adapt to new workflows.

By embedding ECM directly into everyday systems like SAP and Enablon, Qellus eliminated the learning curve that often stalls adoption. Users continued working as before, only now with content that followed them seamlessly through their processes.

What began as a tactical support engagement evolved into a continuous, trusted partnership.

Results & Outcomes

Today, the organization operates a **fully integrated ECM platform** that supports operations across multiple departments and systems.

Content that once lived in scattered drives is now centralized, governed, and accessible through familiar interfaces in SAP and Salesforce. Maintenance teams can retrieve documents effortlessly, engineers can manage drawings with full version control, and compliance officers can rely on consistent retention policies across the enterprise.

What began as a tactical support engagement evolved into a **continuous, trusted partnership**, one that has spanned more than seven years and continues to expand into new business areas.

The ECM environment is no longer an afterthought; it is a cornerstone of operational excellence, connecting people, processes, and information in a unified ecosystem.

Learnings / Best Practices

From this engagement, several enduring lessons emerged:

- **Leadership sponsorship drives success.** Once senior management understood ECM's strategic value, adoption accelerated.
- **Sustained partnership outperforms point solutions.** Qellus' long-term involvement enabled continuous improvement and stability.
- **Integration creates adoption.** By embedding ECM into SAP, Salesforce, and Enablon, Qellus made content management a natural part of work.
- **Balance innovation with reliability.** Every enhancement was grounded in maintaining operational continuity and user trust.

Conclusion

This engagement reflects Qellus' philosophy in action, helping large organizations take back control of their unstructured information and harmonize it with the structured data that powers their business.

Through deep expertise in OpenText solutions and a pragmatic, partnership-based approach, Qellus guided this energy enterprise from scattered, reactive ECM operations to a cohesive digital foundation supporting engineering, maintenance, finance, and compliance functions.

The journey continues — but the result is already clear: a connected, content-enabled enterprise where information flows freely, securely, and intelligently across the business.