



HEADINGTON OIL

PROCESS IMPROVEMENTS CORRAL OIL COMPANY CORPORATE CHANGES

When executives of this prominent independent oil company found themselves relying on a paper-based filing system to make critical business decisions from around the globe, it became clear that a better solution was needed.

With problems locating documents, multiple versions of the same document in play and remote access to critical information out of the question, Headington went in search of an enterprise content management (ECM) system that would replicate the existing filing system but prevent lost and missing documents, multiple versions and allow user access to information from anywhere.

Based in Dallas, Texas, Headington Oil is part of the larger Headington Companies, consisting of seven major entities and their sub-entities. Headington's companies grow and expand and are created and broken up on a regular basis in reaction to industry conditions, tax laws and government regulations. As a result, numerous documents are required each time a company is acquired or created, including formation documents, investment documents, contracts and other legal documents. According to Earl Browning, a consultant for Headington Oil for 15 years, most of these documents originate in paper format.

It was a result of all this paper that led Headington executives to approach Browning about finding a solution. "They asked me to take all these paper files and get them online so that they're accessible from anywhere at any time and so they could free up some space," says Browning. Headington had more than 200,000 multi-page backfiled documents taking up several rooms and more than numerous filing cabinets.

Browning sought out Authorized OnBase Solution Provider DataBank—Diamond Award recipient for exceptional service and support of OnBase—to assist with the search and it was specific functionality that led Headington to ultimately select OnBase. Headington selected OnBase because of its ability to replicate its

existing system but do it more efficiently and more securely. "OnBase's foldering capability was our number one reason for selecting the product," says Browning. OnBase Folders use an interface that features tabs, mimicking physical folders and easing end-user adoption. OnBase's customizable Folders were ideal for Headington's unique corporate structure because of the related nature of the Headington Companies, according to Browning.

Beyond providing users with a familiar, intuitive look and feel, OnBase Folders ensure accuracy and compliance via Auto-Foldering, which automatically creates a folder hierarchy and placeholders for all required documents based on Headington's business rules. For example, many different documents are required when Headington buys or creates a new organization, including tax and other government forms and legal contracts.

OnBase facilitates the management of these documents and makes it easier for employees to create and find necessary documents. By using Auto-Foldering, users know at a glance if any required documents are missing when Headington adds a new company, thereby ensuring compliance and potentially saving the organization time and money.

EMPLOYEES DRILL FOR DOCUMENTS, HIT MOTHER LODE OF INFORMATION

In addition to Folders, Headington was looking for a way to quickly locate all related documents as well as a way to find all documents with a specific phrase or even a single word. Before OnBase, users had to page through folders and folders of paper documents to hopefully locate what they were looking for. This was a frustrating, time-intensive, error-prone process, Browning says. Now that OnBase has been implemented, the process is completely automated.

Once a contract is complete, it is scanned and converted to a text document using optical character recognition (OCR) in OnBase. This

AT A GLANCE

Headington Companies consists of multiple related entities that are constantly growing and evolving in response to market fluctuations and tax law changes. Headington Oil relies on enterprise content management (ECM) technology to simplify its document storage, cut time spent looking for documents, ensure compliance and increase user productivity throughout the organization.

BENEFITS

- Increases employee productivity by drastically cutting search time
- Creates a logical electronic foldering solution that allows single documents to be in multiple locations
- Ensures compliance when new companies are added to the Headington group
- Increases security for sensitive human resources documents
- Provides access to documents anytime from anywhere for approved users
- Won over skeptical end users who mastered the system in less than an hour
- Frees small, resource-strapped IT staff for other projects
- Blazes corporate path for additional efficiencies, including an upcoming integration with key line of business applications
- Reduces document and file searches by more than 20 hours per week

APPLICATION

- Executive Leadership
- Human Resources
- Information Services

COMPLEMENTARY PRODUCT INTEGRATIONS

- Fujitsu Computer Products of America fi-6750, 6240, 5120c

(continued)

allows the contract to be full-text indexed, which makes it possible to search every document for a specific word or phrase anywhere within a group of documents. Instead of pulling contracts from a paper file, researchers can retrieve them immediately from OnBase.

Aside from contracts and legal records required to document the formation of a company, Headington also stores extensive tax and accounting information in OnBase. To maximize profitability in the rapidly changing oil industry, data accessibility is critical, particularly for Headington accountants. Before implementing the ECM solution, accountants were accustomed to spending their time "digging through files all day and now they use OnBase and absolutely love it," says Browning.

The Headington Oil Human Resources Department (HR) is also taking advantage of OnBase, including its inherent security features. Instead of storing confidential employee documents in paper format in filing cabinets, the HR Department now scans paperwork, ranging from employment applications to I-9 government forms, and stores it in the centralized and secure OnBase repository.

Employee documents e-mailed to the HR department are also imported directly into OnBase via the Integration for Microsoft® Outlook®. "Our HR department uses a small desktop scanner and all scanned employee documents go directly into OnBase," says Browning. By applying appropriate user groups and rights to the HR documents, only authorized employees can access the sensitive HR information.

Before implementing OnBase, Browning and his IT counterpart scheduled a three-hour meeting with users to demonstrate how to use OnBase. "We covered everything we needed to in about 40 minutes and spent a little more time answering questions," Browning says. Further, Browning adds, since the original meeting not many questions have arisen around OnBase, let alone the need for additional formal trainings.

For a two person IT staff any solution that runs with minimal intervention and requires minimal resources benefits the company immensely. "There's no doubt about it, OnBase just runs," Browning says, adding that this saves the company money, allowing time to be spent on other projects.

But it hasn't always been that easy at Headington. Before putting OnBase into action, Browning says there was some reluctance about implementing ECM technology. "The users didn't buy-in at first—they thought it would be smoke and mirrors," Browning says. "But once they started using OnBase they were pleasantly surprised at how easy it is to use and how fast it is to retrieve documents."

Results after implementing OnBase at Headington have been overwhelmingly positive, according to Browning. "I'd put everything that we have in OnBase and do away with the paper system and someday we might," he says.

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