



Barrick Gold Turns to Open Text to Help Streamline Information Flow

Document Management solution provides full content lifecycle management, offering a single, authoritative repository for storing and organizing capital project information

Industry

Mining

Customer



BARRICK

Business Challenges

- Require a single repository to collect, store and protect company information or knowledge assets
- Employees need convenient, timely and secure access to information
- Require a single document management solution for all regions
- Managing risk by creating instant accessibility to the most recent versions of information
- Difficulty in sharing large amounts of information at remote locations

Business Solution

- Open Text Content Server
- Open Text Transmittal Management
- Open Text Virtual Folders
- Open Text Explorer Professional

Business Benefits

- Unification of global regions and documentation into one system
- Significant reduction in document search time
- Increased speed and ability to get information, shortening project schedules and costs
- End-to-end content management as content flows through critical processes
- Improved information sharing

For capital-intensive businesses that are building large and complex projects, managing the flow of project information can be a daunting task. With many stakeholders involved, the communication needs are complex through the life of the project.

Barrick is the world's leading gold producer, with interests in 25 operating mines and many advanced exploration and development projects across five continents. The company recognized that moving away from paper-based processes for capturing, routing, and reviewing project information and adopting an electronic content management system would have clear advantages. It could provide more efficient and effective collaboration among employees, contractors and vendors. This is critical to reduce costs, improve the quality of decisions, and minimize rework. Barrick chose Open Text Content Server, a solution that was in place at Placer Dome when Barrick acquired the company in 2006.

Managing documents throughout the lifecycle

The Capital Projects team at Barrick has been deploying Content Server for document management since 2006.

"Our Capital Projects group is responsible for building new mines," says Tony Santillan, a project manager within the Information Management and Technology group. "A great number of documents are created through the feasibility, engineering, and construction stages, and the team needed an electronic document management solution to help streamline processes."

The Open Text document management system provides Barrick with full content lifecycle management for any type of electronic document. It offers a single, authoritative repository for storing and organizing documents. This is vital for the company because, if the most recent drawings or other documentation are not readily available, it can adversely affect the project schedule, quality, and costs.

"Every single document that is required to build a mine is stored in Content Server," says Santillan. "This includes CAD drawings, contracts, engineering data, production reports, and as-built documents. If the operational team needs to refer back to the original document, it is there in one repository as opposed to being scattered over multiple systems. That is definitely something that we are striving for, and part of the reason that we decided to implement Content Server globally."

By capturing all the information through the life of a project in a central electronic repository, the project owner can assess the material once the project is completed and decide what needs to be kept in terms of records, what should be transferred to the operational team for day-to-day use, and what can be deleted.

Currently, the Capital Projects group at Barrick has the majority of their electronic documents stored in Content Server.





“Every single document that is required to build a mine is stored in Content Server. This includes CAD drawings, contracts, engineering data, production reports, and as-built documents. If the operational team needs to refer back to the original document, it is there in one repository as opposed to being scattered over multiple systems. That is definitely something that we are striving for, and part of the reason that we decided to implement Content Server globally.”

Tony Santillan, a Project Manager,
Information Management and Technology group, Barrick Gold.

Distributed model

Barrick has eight primary Content Server instances spread across different countries, with many in remote locations. There are approximately 2,000 users of the system.

“Our new projects, operating sites and regional offices are located all over the world and often in remote locations, so we could not implement one central Content Server with remote cache servers in the different locations,” says Santillan. “Performance is a challenge at our remote locations. Open Text recommended that we implement a distributed model, which meant we would put a Content Server instance in all of our major regions.”

Business units wanted to share information such as policies, procedures, and templates that are stored on the different regional instances. To address this need to share information between the different Content Server instances, Barrick purchased a replication tool from Synergy called Replicator. It provides a full multi-directional replication capability, to replicate and synchronize key areas of the file plan within regional instances. The tool is fully integrated with Content Server.

“We can specify which instance we want a folder or a document to replicate to. This allows users to share information from one Content Server environment to another so they don’t have to log into an environment that may be far away geographically or have poor connectivity.”

Implementation strategy

To reduce the time and effort required to roll out the document management system for each department and functional area in the different regions, Barrick created a standard methodology to implement a file plan for each functional area. “We created a standard approach that allows us to implement a new file plan in about six weeks at a location. The methodology incorporates the Community, Information and Security (CIS) techniques advocated by Open Text.”

Santillan uses the Barrick Global file plan template as a starting point with existing file plans used for implementation in other regions. “We set up the folder structure where each department can create their own folders and sub-folders which are unique to that department’s needs. The category and attributes for that department are also specific to their needs,” he says.

“We have also created a governance model where administration is done locally—each region has super users who can administer sections of the file plan that are not locked down. Customizing is allowed at the lowest levels.”

Content Server is seamlessly integrated with the Microsoft® Office Suite software. Using Open Text Explorer Professional, users can drag and drop files from Windows® Explorer directly into the unified repository. This includes dragging and dropping their email through the Outlook® feature to keep those email records together with the other documentation. “The main users of this feature are those users who need to work offline. In some of our remote locations, the connection to the closest Content Server environment is weak. Our users want to be able to work on documents and not have multiple copies – one on their desktop and another copy stored in another repository. Using Open Text Explorer Professional, the user can download the documents, work on them and, when they are connected back to the network, Explorer Professional will synch these documents back to Content Server,” explains Santillan.

Open Text Virtual Folders

Barrick has provided users with functional views of information through the use of Open Text Virtual Folders, and this has been key to increasing user adoption. “We leverage Virtual Folders in all file plans that we design. It allows users to browse, view, and search for files using multiple presentation layers based upon metadata (categories, user defined, and system attributes). Virtual Folders can be browsed and filtered in any order, giving users the ability to ‘slice and dice’ information in different ways,” says Santillan.





Transmittal Management

Another one of Barrick's major projects is deploying Open Text Transmittal Management to transfer drawings, specifications, calculations and other information between the different stakeholders for review, comment, or approval. This ensures the complete and transparent lifecycle for a capital project's transmittals, from creation and review to compliant auditing and retention. Integrated search and user-friendly reporting provide further transparency. Once distributed, receipt and responses are managed electronically and securely with the original documents, and transmittals are protected from deletion or editing, providing a permanent record of the transmittal. All of this information is fully auditable to ensure that activity can be traced in the future if needed for conflict resolution.

"To have a system that tracks all of this information and lets us know when a transmittal has been sent or received is very important to Barrick," explains Santillan. "Transmittal Management has allowed us to automate our manual processes around transmittals and that is the biggest benefit for our users."

Following the successful implementation of Transmittal Management for one project, Barrick is now implementing it for another.

Barrick has implemented the Open Text Secure Extranet Architecture (SEA) Servlet to allow its contractors secure access to the Content Server repository from an extranet or Internet environment. The company has given contractors access to Content Server. Based on their permissions to view folders or documents, contractors can add or review documents directly in the system as opposed to having to email documents back and forth.

Barrick has also implemented eLink, which is a functionality that comes with Content Server. It allows users to create an email address for a folder. If a user cannot connect to the repository, they can email the document to that specific email address of that folder where the email and the attached document is stored in the folder.

Delivering essential capabilities

Barrick users report that some of the important features of Content Server are version control and the audit trail. However, the most important feature for Barrick is that all documents are in one repository. Using the search functionality, users are able to search within the content of the documents. Barrick has also implemented Remote Search, which allows users to search for documents on any of the Barrick regional Content Server environments.

"Content Server has been very successful for helping our Capital Projects group manage information flow and achieve objectives," concludes Santillan. "This has created interest in using the approach for other groups. We are continuing to roll out Content Server at Barrick, and have been adding additional functionality as we move through the phases of the implementation."

www.opentext.com

sales@opentext.com

800 499 6544

