Husky improves productivity and mitigates risks using Open Text Extended ECM *for SAP® Solutions*

Out-of-the-box solution delivers content-enriched SAP business processes; unstructured content managed in the context of underlying business processes increases efficiencies

Industry
Oil and Gas

Customer
Husky Energy

Business Challenges
- Minimize dependency on physical documents
- Provide the ability to attach and view HR documents from SAP
- Securely store employee documents
- Ensure records compliance requirements are met seamlessly

Business Solution
- Open Text Records Management
- Open Text Document Management
- Open Text Extended ECM *for SAP® Solutions*
- Open Text Archive Server

Business Benefits
- Easily access unstructured content within the context of SAP business processes
- Improved efficiency due to easy access to information
- Unstructured content receives records management classifications
- Leverage SAP master data drives retention schedules and automation of classifications
- Leverage and re-use of IT solutions for cost containment
- Extend SAP to move more document types to the archive environment

Headquartered in Calgary, Alberta, Husky Energy Inc. is one of Canada's largest energy and energy-related companies. The company has over $25 billion in assets and employs approximately 4,100 employees. Husky's upstream operations include the exploration, development, and production of crude oil, bitumen, and natural gas in Western Canada, offshore Canada's East Coast, offshore China and Indonesia, the northwestern United States, and Greenland. Husky's midstream assets are strategically located throughout Western Canada and connect with major North American transportation systems. The operations include the Lloydminster Heavy Oil Upgrader and a 2,000-kilometer crude oil pipeline system. Husky's downstream or refined products activities include the refining, marketing, and distribution of gasoline, diesel, aviation and specialty fuels, asphalt, ethanol, and ancillary services in Canada and the United States.

Husky selected Open Text Document Management with Open Text Records Management in 2006 to replace its existing document management system. The Open Text product was selected because it provided the infrastructure for document management as well as records management functionality.

"From 2006 to 2008, approximately 2.5 million documents were migrated from the previous document management system into Open Text Document Management, which we branded the Husky Document Management System (HDMS). The HDMS is an enterprise application used by most business units at Husky," says the Manager of Documents and Records Management, Louise Hudak. "With Open Text, we were able to give the end users the document management features they were accustomed to and then layer in records management seamlessly so we could meet our objective to manage all content that went into the repository as records."

Meeting compliance requirements

Open Text Records Management enables Husky to map the folder hierarchy to the appropriate record classification and retention schedules, which fully automates the process of ensuring records are kept as long as legally required and are disposed of when that time elapses. As a result, records management is done in the background and is seamless for the end user.

"We made a conscious decision to utilize the technology rather than train all Husky employees on how to classify business records," explains the RM Manager. "For each project, the records management team makes sure that the content is correctly classified and that the Record Series Identifiers (RSIs) are set up according to our retention schedules. All of those classification codes are tied to a particular RSI. The Open Text system ensures that this

happens behind the scenes, taking that responsibility away from the end user."

Open Text Records Management has been certified as compliant with the US Department of Defense 5015.2 Standard to provide a central records management and archival system to control the lifecycle of content. The DoD 5015.2-STD certification process serves as a way to demonstrate that records management software meets mandatory functional requirements for use in the federal government.

HDMS integrations

A variety of information is stored in the Husky document management system to make access to documents as easy as possible. "We have integrated the HDMS with 15 other business applications," explains the RM Manager. "Users can attach and retrieve documentation directly from their front-end business application. It enables us to have a common repository for many different information types, which facilitates information sharing. As well, using one repository to store all records allows the application of the records management module behind the scenes so we can manage the lifecycle for compliance purposes. The principle that we follow is we treat every document as a record and we apply Open Text Records Management standards to all content in the HDMS."

Open Text Extended ECM *for SAP Solutions*

When Husky acquired a refinery in 2007, projects were identified to integrate the people, processes, and technologies of the two companies. This acquisition presented an opportunity to extend management of employee files from a paper-based process to a new business process that included attaching documents to the SAP Human Capital Management (HCM) module and storing them in the Open Text Archive Server. This opportunity was realized with the initiation of a document management project.

Husky acquired the archive server repository to decommission the previous document management system. "We intended to connect the archive server to SAP but hadn't reached that point yet. When we started investigating the functional capabilities, we realized we could benefit from Open Text's enterprise-class solution. It is

robust enough to integrate with our SAP instance, and we could leverage the foundation for the rest of the data that needed to be migrated from the other document management system," says the IT project manager.

Archiving is a definitive aspect of the Open Text ECM Suite, enabling organizations to centrally manage the physical storage of all enterprise content—without impacting the way that users work with content. Husky decided to implement Open Text Extended ECM *for SAP Solutions* for unified records management and archiving for all SAP content.

Deployment plan

Husky began the document management project in June 2008. "The first four months were spent aligning our road maps, gaining architectural approval, getting our licenses in place, and finally preparing a Statement of Work with Open Text Professional Services. Next, we held a four-day workshop to outline our requirements in detail and start to determine the full solution and the timelines for that solution," says the IT project manager.

The deployment was split into two phases. Phase one was to implement the required infrastructure and SAP changes. Phase two, which began in March 2009, was integration with Open Text Records Management. "As soon as the records management integration was in place, Human Resources (HR) could begin to scan their HR records," explains the IT project manager.

Extended ECM uses SAP metadata to trigger the retention schedule and automate classifications in a manner that is transparent to the user. By embedding content management directly in the business process, the context of the content is automatically maintained.

Associated documents stored in Open Text Document Management are linked to employee records in the SAP HR system so they are accessible to employees and managers. Users of the SAP software no longer have to log in to multiple applications to find information.

Mitigating security risks

Documents are stored in the archive server in an encrypted format and encrypted while in transit (HTTPS) to ensure all documents are transmitted in a very secure format. The archive server is restricted

to the minimum number of IT personnel required to support the server and its database and application code. Husky implemented tracking tools so they know when unauthorized access is attempted on restricted file locations. "For people who do have access, we've implemented controls so if they change a file or do any kind of maintenance, we'll get a report. This gives us additional comfort that it is secure," explains the IT project manager.

In addition, message digests are used to ensure that only personnel with adequate permissions are allowed to open the document URL in SAP. Role-based security was implemented for viewing and adding documents to employee records. The Windows viewer was implemented, which provides the ability to "save as" and print HR documents on an individual level. Only the Records Management team has access to the documents in Open Text Document Management.

"With Open Text Extended ECM, not only did we want to add records management and improve business processes, we also wanted to introduce the highest level of security that we could in managing the content through SAP and the Open Text archive server," says the RM Manager.

Linking content to data enhances operational efficiency

In addition to the SAP HR module, Husky also deploys SAP ERP Financials, Materials Management, and Plant Maintenance. The organization sees the value in using Extended ECM *for SAP Solutions* to standardize and streamline more of its core business process by enriching them with enterprise content management functionality. The two worlds can exist cohesively as opposed to co-existing in parallel isolation from one another.

Today, Husky is replacing its previous document management system and migrating over six million documents to the archive repository. "Once implemented, all those documents will be in the Open Text archive repository and an end user can look at the documents in the archive from SAP with no visible difference."

Conclusion

By providing transparent access to all kinds of enterprise content—whether scanned images of invoices or an HR benefit enrolment form—from within familiar SAP applications, users are much more productive because it provides them with the content they need in context of their work. This not only saves time and the cost of filing and retrieving information, it drives additional value from the business processes themselves—all the while improving compliance.

As an SAP user, Husky has been able to benefit by transparently leveraging its ECM investment in conjunction with its portfolio of SAP applications. There is no need to change its existing processes, purchase additional applications, or retrain its users.

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