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Wood
FusionLive® helps Wood consolidate and automate its document management system to improve operational efficiency

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Kathy Lust
Senior Manager of Project Information for Process and Chemical Projects
Wood

Background:

Delivering world-class consulting, project and operations solutions

Wood is one of the world's leading consulting and engineering companies operating across energy and built environment. With 160 years of experience, the company provides world-class consulting, project and operations solutions in more than 60 countries, employing around 40,000 people. One of Wood's greatest strengths is its engineering expertise – overseeing over 400 active engineering projects at any given time.

Challenge:

Simplifying operations through system consolidation and automation

With business growing exponentially, Wood was looking to consolidate and automate its document management system to simplify operations – moving from legacy systems to a unified digital platform that could improve operational efficiency. "Previously, we were using multiple EDMS (Electronic Document Management Systems), work processes and procedures that needed to be aligned. Those were great tools, but we wanted just one robust and scalable system – an integrated solution that could meet our functionality requirements," says Kathy Lust, Wood's Senior Manager of Project Information for Process and Chemical Projects in the Americas.

Solution:

Accelerate efficiency in project execution with FusionLive®

After reviewing its document management systems, legacy business processes, and the cost of support, Wood undertook a gap analysis by conducting cross-functional working sessions. After evaluating the root cause behind process inefficiencies and finding opportunities for improvement, the Projects business unit decided to invest in Idox's FusionLive® – a versatile and secure cloud-based Engineering Information Management (EIM) solution that employs intelligent automation, tag extraction, best practice document controls, out-of-the-box workflows and customised dashboards to accelerate efficiency in project execution. "With open communication, frequent discussions, and live meetings, we examined our functional gaps with Idox. The team took the time to understand our process bottlenecks and work collaboratively with us to create a solution. They included our requirements in the product development roadmap, so much of the deliverables management component of FusionLive® was built based on our direct feedback," explains Drez England, Document Control Manager at Wood for Process and Chemical Projects in the Americas.



While Wood was in the process of migrating projects to FusionLive®, a different legacy DMS (Document Management System) began to fail, causing a major crisis in one of Wood's largest ongoing EPC (Engineering, Procurement, and Construction) projects. Construction was already well underway, and several new contractors were about to start work. The project had approximately 6,000 engineering deliverables, and already had around 30,000 unique vendor documents by the time half of the total purchase orders were placed. Simply put, the required project performance wasn't possible without rectifying the EDMS situation. Wood had to make the decision to upgrade its current system or bring forward the implementation of FusionLive®.

Wood decided to expedite FusionLive® immediately – which pushed implementation four months ahead of schedule. "Due to the challenge that was presented, the learning process with FusionLive® was expedited, while the project was still active. We had to introduce the new system to a large project team and contractors who had no prior exposure to it. Our team met those challenges head-on with the assistance of Wood's EDMS Support Lead, Raul Rosales and Idox by our side. Raul and Idox worked tirelessly to ensure the success of the development, migration and implementation of FusionLive®, filling the gap between challenge and solution," Drez reveals.

The Wood team identified that FusionLive® could meet their execution needs. Therefore, the product was implemented in 2019 and adopted across the Americas by 2020. Since then, Wood has been managing all new projects in FusionLive® as well as migrating all older projects into the new platform. As the product is user-friendly, the team has been able to carry out the migration internally – which has helped cut back on cost. Moreover, migration can happen in a phased manner. "Since we didn't need to migrate all the projects at once, migrating projects to FusionLive® was a lot more convenient. The simplicity of the tool has enabled us to migrate projects in our own time using our own method – safely moving critical information first followed by everything else," Raul elaborates.

Outcome:

Delivering improved EIM performance, increasing efficiency and reducing time spent on manual processes

Implementing FusionLive® has meant that Wood can deliver improved EIM performance and keep vital projects on track. By automating the transmittals process, allowing for pre-populated metadata, and simplifying the creation of formal submittals for reviews, FusionLive® helps Wood reduce time spent on these tasks by approximately 30% – resulting in significant cost savings. By directly attaching parent and child documents, search and processing time is reduced by 15% compared to previous performance, creating further efficiency savings. These are compounded by auto-rendition processes, which allow for quicker returns to end customers by keeping document control from having to publish each document individually. When formal reviews are finalised and ready to be returned, the system auto-generates and re-uploads the consolidated version into FusionLive® – thereby increasing efficiency and reducing time spent on these tasks considerably.

Michelle Garza, Project Information Manager at Wood, explains, "We wanted to have a new look and feel with little to no disruption to the current work process. With FusionLive®, we were able to mirror the existing interfaces of our project management APIs (Application Program Interface) – making the transition for document control smooth and hassle-free. Our clients are happy because there's more data available in FusionLive®. Previously, information such as expected return dates resided in project management tools, but now it sits on FusionLive® – eliminating the need to create ad hoc reports for clients to have complete visibility of vendor data. The search capability in FusionLive® is also a lot more user-friendly and intuitive than the previous platform we were using. FusionLive® requires no installation and is a browser-agnostic system, therefore it's accessible from anywhere with internet access and we're no longer limited to using Internet Explorer."

Wood wanted to integrate all document management processes into one place and roll it out across different locations around the globe. Drez continues, "With FusionLive®, we've successfully reduced the number of platforms that we use across the business as well as the number of resources required to support our tools. This has been very cost-effective. Right now, there's a massive effort for championing FusionLive® globally and supporting the tool based on a local support model – something we've been working on for the past couple of years. So far, the system has been rolled out in seven offices including our Calgary division." Dashboards and reporting systems in FusionLive® provide the metrics to easily capture areas for improvement or inconsistencies. Most importantly, it helps standardise data – thereby maximising the effectiveness of the digitally collaborative environment Wood operates. "Although we have offices around the globe, FusionLive® allows us to function as one unit and eliminates working in silos.

The software is a lot more efficient than the previous platform that we were using. It gives us the ability to proactively manage our projects so that every man-hour spent delivers the best value and quantifiable benefits. FusionLive® has been successful in supporting our processes for project execution – helping us integrate seamlessly with contractors, subcontractors, customers, and record management systems," Kathy confirms.

Going forward, Wood aims to focus on the amalgamation of FusionLive® with other business applications within the company to continually deliver added value to its customers. In 2021, the company implemented a global EDMS consolidation program using the same concepts for the evaluation that were used the Americas. FusionLive® was once again selected as the preferred EDMS. The Idox and Wood team continues to work together to solve not only today, but tomorrow's challenges. "Our vision is to ensure that we have predictable, repeatable project outcomes that will go beyond just meeting customer expectations, by exceeding them," concludes Kathy.

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