Streamlining Contract Management with Qellus & AnswerModules

An oil and gas company faced challenges in efficiently managing their Marketing Oil & Gas Contracts Maintenance process. The existing contract management solution using Ariba resulted in decreased productivity and limited reporting capabilities. To tackle these issues, the company turned to Qellus' Extended ECM expertise, combined with AnswerModules Module Suite, to find a powerful solution.

The challenge

The company's current contract management solution lacked intuitiveness and failed to meet business demands for search, reporting, and dynamic rule management. The complexity of managing contract templates based on various values/types further hindered their ability to efficiently review, approve, and renew contracts.

Objectives

The primary objectives were to streamline contract management, enhance search capabilities, and establish management dashboards to gain better insights into contracts' status and expiry dates. The company aimed for a more intuitive and standardized approach to handle diverse contract types and templates while ensuring increased security for executed documents.

The Solution

Qellus built the new solution upon the customer's existing Extended ECM platform, leveraging its capabilities. AnswerModules forms and workflow were implemented to facilitate contract review and approval based on different contract types and templates. The powerful ModuleSuite was used to create management dashboards, providing an overview of contracts by status, expiry dates, and other relevant criteria for various user groups. Additionally, Qellus enhanced search capabilities, making Contract Metadata and Full Text Search more efficient.

Technologies at the company, including OpenText Content Server as the standard enterprise content management system, and AnswerModules, played key roles in the development of the solution.

Deployment:

The new solution was deployed to production on 10/3/2022. After this date, the interface allowed for generating Contract Workspaces to store contract-related content in folders created from pre-defined templates specific to the business line and contract type.

Contract Activities:

The solution's user-friendly dashboard enabled two main contract activities:

1. **Contract Search:** The primary entry point for creating, searching, editing, and reporting on Contracts for the Marketing Group. Users could perform searches using any metadata or full-text, and the results page presented a quick glance at matching contracts with essential details such as name, type, ID, date, status, and term.

2. **Contract Management:** Users could create new contracts seamlessly, leveraging the enhanced AnswerModules workflow capabilities. They also had the option to clone existing contracts with similar types or terms, reducing data entry for new contracts.

Contract Reporting:

The solution also provided simple reporting for two key contract reports - Certification Reports and Expiration Reports. Contract teams could now easily certify a set of contracts or review upcoming expiration dates for existing contracts.

Achievements:

Qellus' Extended ECM expertise brought significant improvements to the customer. The solution offered a more intuitive and standardized approach to managing marketing contracts. Simplified marketing contract types/templates became easier to handle, reducing complexity and increasing consistency. The ability to clone existing contracts streamlined contract creation and reduced data entry.

Furthermore, with enhanced security measures, executed documents were better protected, mitigating potential risks. The new system allowed for efficient contract management, including renewals and valuable management oversight across all agreements. The improved search capabilities facilitated faster access to crucial contract information, enabling easy certification of contracts and timely notifications of expiring contracts. This led to time savings and enhanced overall productivity.

Key Takeaways

In conclusion, Qellus' expertise in deploying Extended ECM solutions, combined with the capabilities of AnswerModules Module Suite, proved to be a game-changer for the customer, simplifying their contract management process and providing significant value. The successful implementation streamlined processes, standardized contract templates, improved reporting capabilities, and increased document security. As a result, the customer achieved greater efficiency, consistency, and oversight in their contract management practices, positioning them for continued success in the competitive industry.