

Note: Sample is fictitious in nature and provided to give context to the illustrations in the workshop.

ABC Company

Company Size

Large - 1,000 employees and contractors.

Industry

Oil and gas.

Department

Major Projects

Department Group

Project Services

Construction Project

- Project involves three geographical areas in Alberta
- Building pipeline and facilities within all three areas
- Commenced implementation phase January 2016
- In-service target December 2016

The following sections provide a high-level overview of the as-is state.

Reporting Process

- Each area generates report data by either:
 - pulling a canned report from a system
 - manipulating data from canned reports in other software (e.g., Powerview, Excel)
 - creating manual reports using Excel
- Report owners submit reports via email to centralized reporting team who:
 - enters information into a weekly report template and analyzes for accuracy, completeness and trends
 - manually updates the Excel scorecard monthly with the data from weekly reports and provides a summary analysis of trends and variances
 - generates dashboard and overall executive summary

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File Management Process

- Report owners maintain reports in private folders and do not consistently follow document management or file storage protocols

Systems

- Cost and capital reporting recently transitioned to SAP where comprehensive reports are generated and manipulated in PowerView and Excel
- Financial data charts are extracted from SAP and entered into scorecards being prepared in Visio or Excel
- Several other systems (with no interface to each other or SAP), or manual processes are used to compile data from the following areas:
 - Health and safety
 - Environment
 - Regulatory
 - Quality
 - Supply Chain
 - Scheduling
 - Land
 - Stakeholder Relations
 - Facility construction
 - Pipeline construction
 - Power