

Client: DSE Oil and Gas

Industry: Architecture, Engineering, Construction (AEC)

Extracting More from ERP

Oil & gas engineers link ERP system to M-Files for airtight document management

When Nanco Eelman and Richard Keijser started Dutch Separation Engineering (DSE) Oil & Gas a little over a year ago, one of the first steps was to purchase an ERP system. They knew that an Enterprise Resource Planning (ERP) application was important for managing the planning and financial details of the separation engineering and power quality engineering projects but they knew they needed something more.



"We're a young company. Both my partner and I come from larger companies with large data systems. We know from our past experience that we needed a bit more control than the ERP alone," says Eelman. "For example, it was very difficult for us to keep track of documents and their version numbers when you just store everything in project folders on a hard drive. If you were looking for specific documents a year later because you now have a similar project, finding them was sometimes difficult and inefficient. It was also very hard to determine the status of the documents found -- where exactly in the revision process a drawing or contract document was."

Ideally, DSE wanted version tracking for AutoCAD, ePlan (for electric schematics), Word, and Excel files. And they also wanted to attach basic metadata to every document they produced for fast file searching. Metadata would include not only a project number, but a basic set of descriptive attributes, like client name and contact information, document type, dates, revision status, and so on.

Attaching ERP data to Windows files through database links

The solution came with the addition of M-Files document management software, which offers a simple and flexible database-driven platform. M-Files attaches metadata to documents created with any Windows application and integrates directly into the operating system's Windows Explorer and common Open... and Save/Save as... interfaces.

"With the help of the people from Host Access Solutions, the M-Files distributor in The Netherlands, we have been able to directly link M-Files to our ERP application," says Eelman.

“Every new item in M-Files is associated with a project number generated in the ERP system. The linkage automatically supplies new projects and contact information from the ERP to the M-Files database. When saving any type of document through M-Files, employees simply choose the project number from a drop down list, and the rest of the descriptive search terms populate from the database.

“All the documents we work on -- every single item -- is securely stored in M-Files,” says Eelman. Even incoming email or hard copies from clients are indexed digitally. “If we get an invoice from a vendor, we scan it into the system, and M-Files automatically includes the vendor info in the associated metadata and processes the invoice according to a customized workflow.”

Creating self-populating Templates

DSE went even further to create templates that display the project attributes in the page header on many common documents in several different applications, like Word, Excel, or AutoCAD.

“M-Files-driven templates save us an enormous amount of time. For example, we generate a project completion file with all our final work. Previously, we had to open all the documents, open all the headers, change the headers, and save the documents. M-Files can update the headers automatically, so what would have taken us half a day before, we can now do in M-Files in half an hour.”

“It all comes down to a major time saver. A formalized workflow structure, quick document searches, and automatic templates all keep our projects moving forward,” says Eelman. “We are actually ahead of our customers. We will get something from our client and we tell them, ‘no actually, that’s not the right version. We already received this other one.’”

“We’re ecstatic about the new system,” Eelman says. “Everyone – not just the partners who chose it and set it up, but all our employees -- have picked it up very quickly and they’re happy using it as well.”

About DSE Oil and Gas

Dutch Separation Engineering Oil and Gas brings together a team of experienced engineers, fully qualified to undertake all aspects of system integration, and project management, onshore and offshore. Operating globally, DSE also offers Power Quality core analysis for oil and gas installations through the revolutionary DSE EPAQ system view (www.dse-epaq.com), as well as oil and gas installation equipment sales, rental, and service. For more company information, please visit: www.dseog.com.

