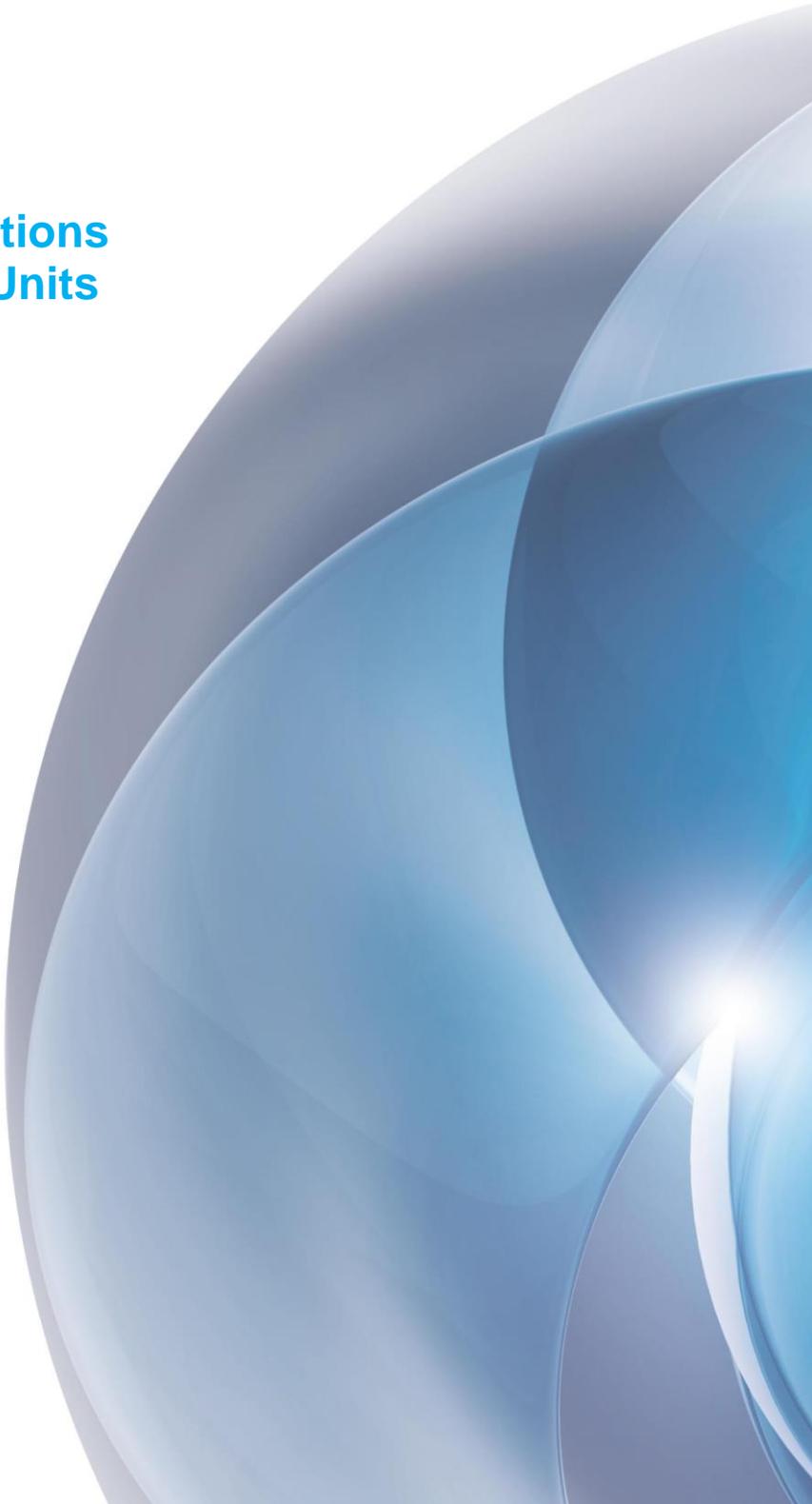


CASE STUDY



Planning solution for Operations
and Services Performance Units
of E&P unit

altius[®]

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“APS arrived just at the right time for us and the amount of time that it has saved us is incredible; we are talking about at least 2,000 man-hours, so to say it was a good outcome is an understatement. Altius really delivered when we needed it most, above and beyond our expectations.”

Finance Manager, Operations Performance Unit, Major Energy client's offshore E&P unit

The Trinidad and Tobago strategic performance unit needed to overhaul its planning processes and provide its users with a more efficient data collection method with workflow based approvals, better control over the data and improved reporting interfaces.

Manual processes were in place for tracking base and project information during their planning process. This process was facilitated by a number of Excel workbooks and caused many issues when gathering information to 'roll-up' to complete their long term planning process.

After discussions with Altius Consulting, a Microsoft Gold Certified Partner firm, the client decided to invest in a Microsoft® Business Intelligence technology based solution. Altius worked closely with the key stakeholders to understand and then replace the existing inefficient and time consuming process with a Microsoft SQL Server™ 2005 based Altius Planning Solution (APS) solution.

APS, with Microsoft SQL Server™, provides the necessary relational and On-line Analytical Processing (OLAP) components for a fully-integrated Business Intelligence (BI) solution.

Client Profile

Country: Trinidad and Tobago

Industry: Mineral Extraction

Overview: Our client's Trinidad & Tobago unit holds exploration and production licenses covering 904,000 acres in marine areas off Trinidad and Tobago's east coast. The average production in 2008 was 457,000 barrels of oil equivalent per day, comprised of oil, NGL (natural gas liquids), and gas production.

Business Situation: The client's Trinidad and Tobago unit required a planning solution to replace an inadequate system involving multiple users accessing disparate Excel files, leading to data loss and resulting in 'Spreadsheet Hell'.

Solution: Altius Consulting — the client's consulting partner for this important project—recommended the Microsoft® SQL Server™ 2005 Business Intelligence platform along with their Altius Planning Solution (APS) toolkit.

Benefits :

- Enhanced control of data collection
- Increased efficiency in data collection and report preparation.
- Standardization of tools
- Provision of open, self-service applications to support the business.

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What we say

“Using APS enables the business to use the familiar environment of Excel to be used as a window on the data and not as the database. The users get a tool they are comfortable with and data is seamlessly and securely stored in SQL Server.”

Noel Phillips, Altius

Situation

Being one of the major operational expenditure cost centers in the client's Trinidad and Tobago organization, Operations and Services Performance Units (OPU and SPU) required a planning process with supporting tools to support effective decision making.

The previous year's planning exercise for OPU and SPU provided inadequate control over the data and required many man hours to extract any meaningful data. The manual process was facilitated by a number of Excel workbooks and caused many issues when gathering information to ‘roll-up’ to complete the Long Term Plan (LTP).

Specifically, problems were rife around:

- Data integrity;
- Versioning;
- Security; and
- Functionality for tracking projects.

The use of multiple, disparate Excel spreadsheets being changed by multiple users gave little ability to aggregate data for reporting and analysis and to present accurate information for decision making.

The Operations and Services Performance Units needed a solution to streamline their data collection, reporting and decision making process.

Solution

Altius developed a solution based on its APS business intelligence platform. The solution provided a centralized database and enhanced workflow capabilities while allowing users a

familiar environment in Excel to manage their data.

An Excel based data collection template was used to capture the various numeric and textual values required to complete the financial plan effectively and coherently. The templates were designed by the business, ensuring the layout was exactly what they required.

The templates were then integrated into the solution architecture enabling users to download them from a central website. The template could then easily be populated with data in the familiar environment of Excel. The data was then safely submitted into the SQL Server data store via an Altius developed Excel add in that hid the complexities from the end users. Using this approach, Excel is used as a window on the data rather than as a database.

Once the data has been saved, the Excel workbook's effectively become ‘throwaway’, as all the data can be re-downloaded again at anytime from the website. Almost immediately, all submitted data was available for further analysis either via pre-defined web based reports or adhoc query tools. A suite of pre-defined or ‘canned’ reports were also developed using SQL Server Reporting Services to provide live access to key information in both tabular and graphical form.

Improved control over the data was provided through the use of role based security. Several levels of data approval were facilitated through a

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What we say

“Confidence over data integrity is maintained by utilizing an approval process that is started whenever users create and submit data. To enable the submitted templates to be electronically approved, users must verify the data is correctly risk ranked, economically sound and ultimately contains all required information.”

Senior Consultant , Altius

custom workflow that was mapped over the existing business processes. To accommodate adhoc browsing of the data, Altius recommended and Excel add-in that allows business users to easily navigate financial data and create reusable reports.

The solution leveraged the power of Microsoft SQL Server 2005 database engine, analysis services and reporting services to provide an easy and intuitive way to aggregate planning and forecasting data and perform effective decision making.

Benefits

Enhanced control of data collection

The data collection templates were designed by the super users to guarantee that the appropriate and relevant data would be collected in a format that was both recognized and approved by end users. By utilizing generic reusable templates, it is easy to apply changes in a timely manner and ensure that data was collected according to client standards. It also allows for information from geographically distributed users to be collected without having to integrate multiple spreadsheets or circulate them via email.

Improved Reporting Interfaces

The Excel add-in allows non-technical business users to easily navigate the planning data. Canned reports can be built, reused and refreshed with live data on demand. The Microsoft SQL Server BI stack, .NET and Office suite, ensured that extensibility and support could continue for years to come with many changes managed by end users.

Integration with other applications leveraging similar technologies could occur with minimal additional cost and effort.

With only limited training, users were able to build and modify reports without having to embark upon lengthy and costly change requests. The time saved by not having to gather and format data into a useable format could be spent on actually analyzing the data.

Standardization of Tools

The Excel add-in allows non-technical business users to easily navigate the planning data. Canned reports can be built, reused and refreshed with live data on demand. With only limited training, users were able to build and modify reports without having to embark upon lengthy and costly change requests. The time saved by not having to gather and format data into a useable format could be spent on actually analyzing the data.

Provision of Open, Self-Service Applications to Support the Business

The use of a central website accessible by end users negated the need to collaborate on spreadsheets circulated via email. The Excel template provided two key advantages; firstly, it provided a familiar environment to users who require minimal training to input data effectively; secondly, only one version of the template would be available at any one time, vastly reducing time and effort in conforming spreadsheets from distributed users.

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For further information

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If understanding your business better is a high priority, or you would just like to discuss what Business Intelligence and Performance Management options may work for your business, please contact us today.

About Altius

Altius helps companies better understand the data that drives their organizations. We are practitioners who have personally managed successful Business Intelligence initiatives. From this, we have developed a suite of products that helps you save time, reduce errors and quickly execute projects. At the end of the day, we help you make intelligent business decisions from your data.

Altius has the experience of over 500 project implementations, spanning companies in oil, gas, energy and utilities. Altius is head-quartered in Houston, Texas with a second office location in Anchorage, Alaska.

