



FileTrail[®]

RECORDS MANAGEMENT

CASE STUDY:

Hilcorp Energy Takes Control of Oil and Well Files with FileTrail

CLIENT PROFILE

Headquartered in Houston, Texas, Hilcorp's primary operating areas are the Texas and Louisiana Gulf Coast and Wyoming's Powder River Basin. The company was founded in 1989 and has grown to be one of the largest privately-held exploration and production companies in the country.

PRODUCTS IMPLEMENTED

- » FileTrail Records Manager - A browser-based solution for records management, with advanced file room features and powerful tools for all employees. It allows file room personnel to define folders and boxes, assign destruction dates, and manage the check-in and check-out function.
- » FTSynchronize™ - Configurable tools for clients who want to schedule unattended importing of data.
- » FTColorLabel – On-demand printing of color-coded strip labels.
- » Electronic Documents - Hilcorp feeds final PDF documents from Kofax imaging to FileTrail, linking them to the physical records based on Field and Well. This allows users access to over 3 million documents that were previously not accessible to most staff, and had to be requested manually and delivered by email.



We selected FileTrail because of its intuitive user interface, highly customizable options, and great implementation team.

Records Administrator
Hilcorp Energy



BACKGROUND

For years, Hilcorp Energy Company had kept track of files manually. Having a sign-out sheet on a clipboard to log check-ins and check-outs and data entry in a spreadsheet are just a few of the manual ways the company had tried to manage files. Once the company began to experience rapid growth in the volume of files, it became inefficient to manage their files manually.

"Until the adoption of FileTrail, Hilcorp was on a fully manual system," explained Pam Matula, Hilcorp's Manager of Facilities and Office Services. "The company has seen tremendous growth over the last few years and the need to implement a fully automated file tracking system was becoming urgent."

SELECTING FILETRAIL

FileTrail was selected after consideration of several other vendors because it stood out in many ways.

Key factors that contribute to the selection of FileTrail include:

- » Service: FileTrail has a great team and had the best references from clients.
- » Quality: FileTrail's software has well-designed user interface and intuitive processes.
- » Customization: FileTrail provides intuitive configuration tools that give clients the power to change their system as the company's needs change.

"We needed a solution that could grow with the company and provide both breadth and depth to our filing system. We started with well and log files and intend to expand this system to all the records within the company over time. FileTrail will allow us to customize each area as we grow," says Matula.

APPLICATION HIGHLIGHTS

- › Color-coded labeling saves labor by simplifying filing and retrieval.
- › Users can create items, conduct records searches and initiate requests.
- › The volumes within a file can be boxed for archiving or unboxed easily.

KEY RESULTS

- › **User Adoption:** FileTrail was easily adopted by staff in training and production use because of its intuitive friendly design.
- › **Custom Configuration:** Hilcorp configured their FileTrail solution to use the terminology specific to their company.
- › **Engineering staff** have greater access to well logs and engineering files scanned by Kofax or generated by other systems as PDFs.
- › **Time Savings:** Many hours are saved by automating file tracking.

“Many of our manual processes are now performed automatically, which saves a lot of time and reduces the chance of error.”

Records Administrator
Hilcorp Energy

MANAGING FILES MORE EFFICIENTLY

Prior to the implementation of FileTrail, the inefficiency of manual tasks began to cause more problems as the volume of files continuously increased.

“With a rapidly growing inventory, our ability to effectively track records coherently was greatly reduced,” explains the Records Administrator. “Additionally, this made tracking records data on spreadsheets inefficient.”

Now, with the FileTrail Records Management Solution, employees have advanced file room features and powerful tools, including:

- › Defining folders and boxes
- › Assigning destruction dates
- › Managing check-in and check-out
- › Printing color coded labels
- › Conducting records searches
- › Initiating requests

“Many of our manual processes are now performed automatically, which saves a lot of time and reduces the chance of error,” said the Records Administrator.

POWERFUL CUSTOMIZATION

FileTrail’s fully configurable system allows each client to use the data and terminology unique to their company and industry. The configuration tools and FileTrail’s methodology provide fast delivery at a lower cost.

“I liked that the implementation process allowed for us to make changes to our fields, screens, searches, and reports as we learned how the FileTrail software worked,” said the Records Administrator.

STREAMLINING PROCESSES

- › Simplifying creation of additional volumes and viewing volumes in a series.
- › Allowing multiple users to simultaneously access a live database.
- › The ability to containerize and un-containerize a volume.”

“One of the features in FileTrail that has been most helpful is the ability to generate the next volume in a series with one click. This reduces human error when creating records,” said the Records Administrator.

FileTrail

FileTrail is the leader in information governance for highly regulated markets throughout North America, the UK and Europe.

As your long-term IG partner, we guide you through every aspect of the information governance maze beginning with physical records management through governance management including retention, disposition, and matter mobility. We also play well with other solutions.

Stay on track with FileTrail. We'll help you get there. Contact us today for a quick discovery call.

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POSITIVE EXPERIENCE

The transition from manual processes to the FileTrail solution was simple and timely. The FileTrail team made the implementation easy by providing excellent support.

"The team was very familiar with the product, executed a clean implementation and has been available for questions and support. Problems have been solved collaboratively and quickly. I have been very pleased," comments Matula.

In addition to the team, FileTrail was able to make the implementation process as easy and understandable as possible.

"The entire process was simple because of FileTrail's thorough project documents, a well prepared implementation team, efficient project management and the team's ability to execute the implementation on time and on budget," said Matula.



We needed a solution that could grow with the company and provide both breadth and depth to our filing system. We started with well and log files and intend to expand this system to all the records within the company over time. FileTrail will allow us to customize each area as we grow.

**Pam Matula, Manager of Facilities and Office Services
Hilcorp Energy**



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