

# M-FILES FOR OIL & GAS DEMO VAULT DESCRIPTION



VERSION 1.1 | LAST UPDATED 7 JANUARY 2021

## 1. Description

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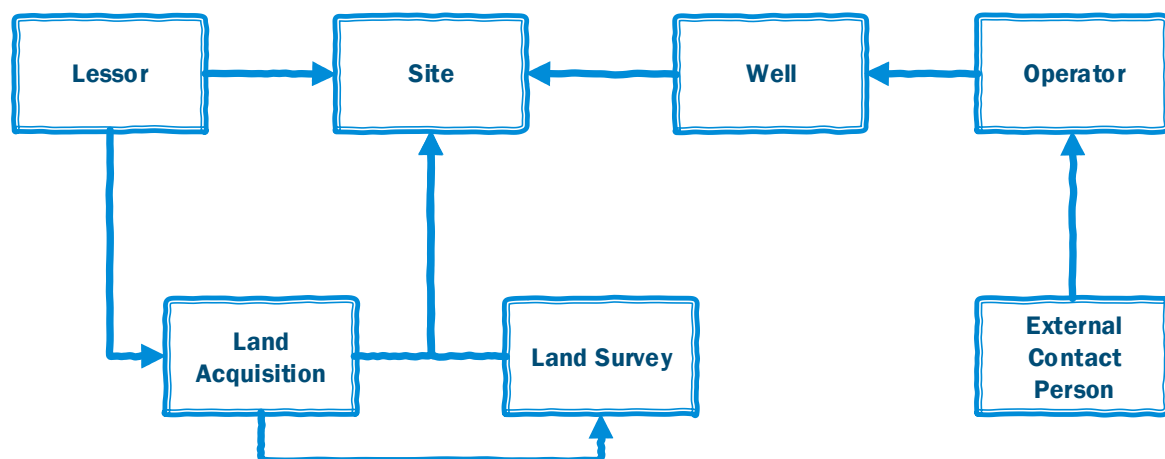
The Oil & Gas demo vault covers document management use cases that are relevant to the Oil & Gas industry.

The demo company is called **Oil & Gas Development Ltd.**

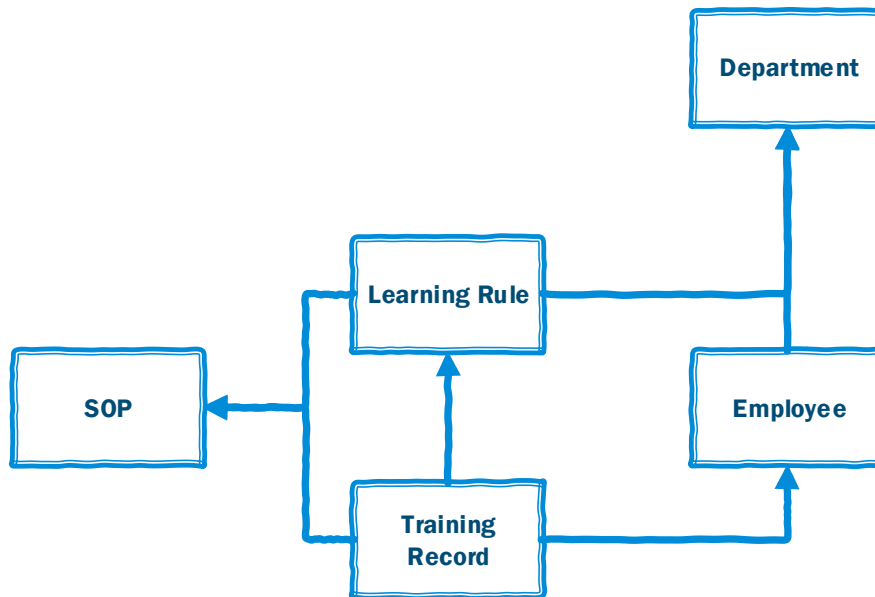
Main features include:

- Managing documents and contracts related to assets (site, well), projects and lessors
- Managing safety SOPs and Training Records
- Audit Management

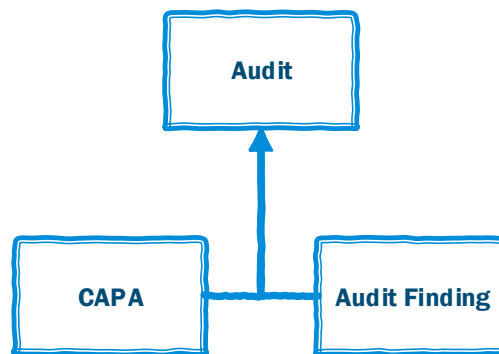
The land management related data is structured according to the picture below. A *Site* represents any land that is either being surveyed, owned, or leased. A *Well* is always on a *Site* and it may have an *Operator*. Each of the objects may contain documents, such as Leases, Permits, Surveys, Agreements or Contracts etc.



The SOP and Training functionality consists of documents that are to be learned (in this case, documents in Class Procedures). Learning Rules are referring to the document's working copy version and system automatically refers to the latest published (PDF) version. Training Records are created by the system based on the department information in the Learning Rule.



The Audit features include *Audit*, *Corrective and Preventive Actions* and *Audit Finding* objects. Implementation in this demo is less controlled than in QMS and it is meant more to support audit process than control it.



- The Demo Vault does not currently include ESRI integration. The ESRI demo is available in cloud server *Sales Demo US*.
- The Demo includes add-ons which require additional licenses and configuration that might require consultancy work to set up properly in customer's environment.

## 1.1 Using Outlook Integration

If you want to show how emails can be moved to M-Files from Outlook, you can use the information below to get started quickly.

- Create folder: "Allmon correspondence"
- M-Files Properties
  - Land Survey: Land Survey - Allmon (fixed)
  - Class: Email (fixed)
  - Sender: From (read from email)
  - Name or title: Subject (read from email)

## 2. Links for more detailed info

Playbook material in Partner Portal.

[M-Files for Oil and Gas - Demo vault, video and demo guide](#)

[M-Files for Oil and Gas Playbook - Sell Card](#)

[M-Files for Oil and Gas - Business Case](#)

[M-Files Oil and Gas Playbook - Flyer](#)

[M-Files for Oil and Gas Playbook - Messaging Summary](#)

## 3. Vault Applications and features

M-Files Information Extractor - 20.8.9339.1 - [Configuration Guide](#).

M-Files Compliance Kit - 20.10.911.3 (CK 2020)

M-Files Network Folder Connector - 20.8.9339.3 - [Configuration Guide](#).

M-Files Connector for SharePoint Online - 20.2.17 - [Configuration Guide](#).

## 4. Changes

07.01.2021:

- Information Extractor updated to 20.8.9339.1
- Compliance Kit updated to 20.10.911.3
  - License updated
- Network Folder connector updated to 20.8.9339.3
- SharePoint Online connector updated to 20.2.17
  - License updated