ELO Case Study
Palisade

Adding Value Through Asset Document Control

Palisade Integrated Management Services (PIMS) has achieved the highest professional standards for the control of its asset documentation through the successful implementation of **ELO**professional replacing a number of legacy systems. Effective control and management allowed Palisade to reach an unprecedented level of accuracy for their documents, allowing for a greater oversight and reduction of redundant activities.

PIMS is a dedicated management services business, staffed by an experienced team of hands-on operators, engineers, accountants and general managers with real life, practical engineering, operational, maintenance, commercial, finance and general management experience.

PIMS has grown strongly since its establishment in 2015 to now directly manage eight standalone, independent businesses valued at approximately $1.9B. The PIMS portfolio includes three wind farms, a solar farm, two gas transmission pipelines, a power station and a regional livestock exchange network of seven sales facilities.

"The introduction of ELO has streamlined our document management process and ensured that all our asset documentation is readily available whenever and wherever it is required. ELO provides us with a robust structure to ensure documents are managed consistently across our asset portfolio, while providing the flexibility to adapt to individual asset requirements"

Wacek Lipski
General Manager Pipelines

The solution

Practical benefits

Overview

State: Victoria (Head Office)
Industry: Asset Management

Company

Palisade Integrated Management Services (PIMS) is a dedicated management services business, staffed by an experienced team of hands-on operators, engineers, accountants and general managers with real life, practical engineering, operational, maintenance, commercial, finance and general management experience. PIMS currently manage eight standalone businesses, each with its own suite of documents and records.

The Challenge

With an expanding business and an increasing number of managed assets, the volume of documents controlled by PIMS was increasing at an exponential rate.

Solution

The solution for the PIMS project was to provide document and access permissions, while standardising archive taxonomy and document metadata structure. This success in turn allowed for an enhancement of the scope for new projects.

Benefits

- Standardisation of the archive taxonomy and related document metadata

- Overview and management of document permissions and access

- Simplification and automation of document filing

- Access ELO from around Australia

- Management of legacy documentation

PIMS is focused on improving asset performance through:

- "Maximising Returns Safely" – our primary focus and the fundamental reason we exist

- Practical application of Environmental, Social and Governance to ensure employee buy-in

- Best practice operations, engineering, maintenance and asset management

- Challenging past practices and identifying business improvement opportunities

With an expanding business and an increasing number of managed assets, the volume of documents controlled by PIMS was increasing at an exponential rate. Each asset added to the portfolio came with its own legacy document management system, with varying levels of maturity and complexity. This meant that the team members would spend a considerable amount of time and effort focusing on manual tasks, such as filing, indexing and searching for documents. Therefore it was important that PIMS found a fit for purpose product, capable of reducing workload, while maintaining the professional standards expected from their stakeholders.

In early 2017 PIMS undertook a comprehensive evaluation of a range of document management systems which led to the implementation of ELO. PIMS was impressed by the ease of use and flexibility of **ELO**professional for all users, regardless of their level in the company or technical skills. ELO also impressed PIMS with its capability to implement several document control activities using standard out of the box functionalities, as well as the possibility to implement customisations to suit PIMS' specific needs.

The overall aim of implementing the document management system was to provide a consistent and robust filing structure for documents across all assets. This ensures all documentation can be easily found and eliminates the risks of incorrect versions being used. The aim was to also ensure that documents can be accessed easily when away from the office and by third party suppliers where required.

As the project has progressed, PIMS has opted into expanding this scope to allow for a setup of automated document numbering, review workflows and related expiration notifications. Due to the significant amount of travel and remote tasks, PIMS also required, and ELO provided, a means for users to submit and manage documents on the move, allowing them to work on the go, no matter their location.

Due to the large scale of documentation present in the PIMS project, ELO consultants were able to devise a solution that provided benefits to PIMS' processes. One example of this was the standardisation of the archive taxonomy which helped to reduce their workload and provide a means to centrally manage permissions and access to documents.

Activities such as filing, numbering and indexing have been considerably simplified and automated, which in turn has led to the ongoing development of automatic expiration notification and the review of existing documents.

With the clear benefits that ELO has provided PIMS, the scope of the project has continued to grow as the efficiency the software has been proven across all assets. As PIMS continues to add assets, documents will be imported using ELO's migration framework. This tool has proven its worth over a range of systems and customers, allowing for a smooth migration from legacy systems to ELO.

Palisade is also making effective use of ELO Express, a one-button light client designed for minimum input and maximum productivity for contributing end users. ELO strives to provide a means to maximise the effectiveness of all PIMS operations whilst removing redundant exercises and simplifying complex time-consuming practices.

"We operate a number of assets which are regulated by strict safety regimes. ELO allows us to clearly demonstrate compliance with these and contributes to the ongoing safety of the assets"

Wacek Lipski
General Manager Pipelines

"Working with the team at PIMS has been a rewarding process. The team's challenge was to implement a document control system that can easily be seen as an industry-wide best practice solution while maintaining highest levels of compliance."

Rainer Krause
Managing Director
ELO Australia

ELO Modules Used

- **ELO**professional
- **ELO Express**
- **ELO for Mobile**
- **ELO Web Client**
- **ELO Import Tool**