Efficient Administrative Processes
Your System Can Help

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Agenda

- **Introduction**
- **Handling Revisions**
- **Exhibits**
- **Mail ballots**
- **Accessing electronic documents**
- **Gas Handling Agreement**
- **A&D**
- **Mail merge**

Introduction

- **Increased demands to do more in same amount of time**

- **Budgets demand fewer resources**

- **JI System can provide efficiencies**

- **Allows valuable time to be spent on higher priority tasks, including gaining better understanding of business aspects of agreements**

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Business Processes – part of Design

➡ **Design included business**

- ➡ JI is not Land
- ➡ Business / Software designers – a team
- ➡ Time spent thinking about processes, data, relationships
- ➡ Compliance to agreement terms
- ➡ Goal - enter data once
  - ➡ Large effort to load data and keep it accurate
  - ➡ Generate required documents from data in system
- ➡ Result – time saving, accurate, efficient; still improving

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Handling Revisions

➡ Organize data by revision

➡ Revision No, Effective Date, Issue Date, End Date (Obit Date) , Description

➡ Allow revision to be copied, auto populate Obit Date

➡ History is provided with very little work – accounting can easily see details from previous revisions

➡ Useful in CO&O or Unit Interest, Unit Tracts, Service Agreement Rates and Production Sources, anywhere that exhibits are amended during the life of the agreement

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Exhibits

- **Identify exhibits that are used most often**
- **Exhibit information**
  - Is the information that varies available in system
  - Data extracted and Exhibit produced as a pdf or Word file
- **Examples**
  - Working Interest Owner Exhibit
  - Well Exhibit
  - Service Agreement Rate Exhibit
  - Unit Exhibit "A"

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Mail Ballots

Mail Ballot details can be stored in system

- Use to manage project approval
- Details can be used to generate mail ballot form
- Results stored in system
- System becomes part of process, not just an extra data entry task
- Should allow for formatting customization
- Potential - link to electronic distribution

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Accessing Electronic Documents

- **Today much of our communication is electronic**

- **Organize electronic documentation**
  - Spend some time planning the structure
  - Naming convention
  - As simple as possible

- **Link the structure to the associated file in system**

- **Result is information accessible quickly without spending time searching / following up**

Gas Handling Agreement

Gas Handling

- Use information stored in system to produce the Exhibit "A" and Exhibit "C"

- Relate the rates to each facility and each production source

- Matrix is produced that identifies the production flow and the facility and rate being charged for each production source

- Quickly identify missing rates

- Wells easily sorted by location; not easy in Excel

A&D

→ Relationships provide efficiency

- → List all documents related to a well
- → Ensure no documentation is missed
- → List of documents extracted to Excel for efficiency in working with the files

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Mail Merge

➡️ **Mail Merge process in Word**

➡️ Define a template document

➡️ Extract data from system into Excel

➡️ Attach Excel file to Word as a source

➡️ Insert data elements into appropriate place in template

➡️ Good for larger tasks that require notices for several agreements

Summary / Questions

→ **Including your system in admin processes can help increase efficiency**

→ **Planning and rethinking the way data is stored and organized is key**

→ **Business involvement is very important**

→ **Questions**