

## Lessons Learned Discussion Forum

### A Project Summary |

#### Background

In the Exploration and Production division of a multi-national in the oil & gas sector, a collaborative venture started out as a simple public folder in Outlook. This enabled experts to contribute answers in response to questions posed and was particularly popular with drilling engineers and other technicians.

To gain access users had to be directly connected to the corporate Network. As more and more engineers started to connect to the organisation's internal network via the Internet they found this shared folder was not available to them via this route.

#### The Challenge

The decision was taken to turn the shared Outlook folder into a web based discussion forum. What was required was an "ask the experts" forum, where questions could be posed by anyone to a group of experts, any of whom could proffer a response.

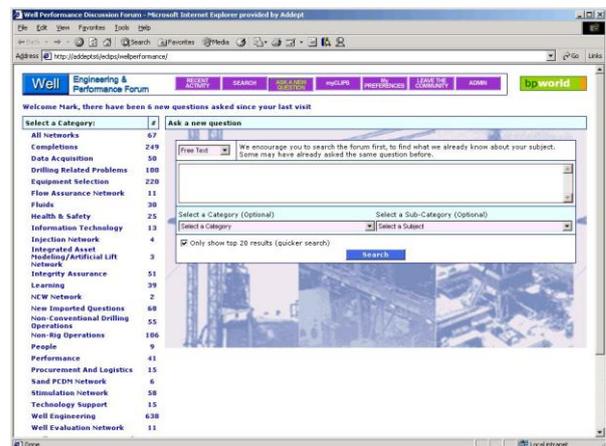
By implementing the forum as a website, employees at remote locations could access the site irrespective of how they connected to the network.

A key objective was that experts should not be asked the same question again and again.

#### The Implementation

Addept were chosen to develop the system because of their track record in delivering similar capabilities for other parts of the organisation.

The system was developed using a Microsoft Web based framework and Microsoft SQL Server backend database to hold all the information. User authentication was handled by linking the forum to Connect, the proprietary people system from Addept. This enabled users connecting to the forum directly from the corporate network seamless access, while people using the Internet needed to provide a username and password.



The distribution list from Outlook was used to populate the Community membership in Connect through automatic synchronisation.

#### The Solution

Once a user was authenticated they could start by posing a question. This could either be in the form of keywords or as a phrase.

The Microsoft Indexing Service was used to parse the enquiry and search through previous posts in the forum to find similar enquiries or answers that may be relevant to the user posing the question. This dramatically reduced the number of repeat questions that were actually posted, reducing the load on the experts and providing a timely response to those posting questions.

If the search did not produce a suitable answer or further clarification was required, the user could then ask a new question.

As well as being posted on the website, questions are emailed to the experts. They can then respond by accessing the forum site directly or by simply replying to the email (the response is then automatically posted to the forum). The replies are automatically emailed from the forum to the person who asked the question and to anyone else who has provided a response.

The site was designed so that anyone can ask a question, people who consider themselves experts can join the community in Connect so that they are then automatically informed of any questions being posed. The forum provides a link to the Community page in Connect, so that new people to join as an expert and existing users can see who else is participating in the forum.

The first forum to be set up was the Well Engineering and Performance Forum (WEPF).

A preferences system enables people to subscribe as experts to individual categories, so they are not deluged by questions which are not relevant to them. The same preferences system can be used to define which types of post are emailed to an individual. They may for example wish to see every response for a particular category regardless of whether or not they have posted a response to a question.

By linking the forum with Connect, people can find out a lot more about the individuals who are posting on a topic. By clicking on their name in the forum, it brings up a virtual business card with their photograph and contact details, clicking again takes the user to the person's profile page in Connect which details their knowledge and experience, disciplines and skills, their colleagues and other associated information. This helps to build a level of trust between everyone involved. It also makes it very easy for people to follow up with an off-line conversation if appropriate.

One particular use of the forum is to provide a platform where drilling equipment can be shared around the world. The forum acts as a focal point where people can list what specialist equipment is available and also ask for particular items that are required on a project. The potential savings from this efficient re-use of expensive equipment are massive.

### **The Benefits**

By linking the forum to Connect several benefits have been realised. Firstly people can have secure access to the forum irrespective of where they are. A user can now access the forum remotely from home or a hotel room as well as from their office, enabling people to access the expertise they need when they need it.

The background information on the people held in Connect adds value to the responses and helps to build up the level of trust between the questioner and the expert.

Information overflow is reduced to a minimum by the preferences system, which allows people to

subscribe to only those categories they feel are relevant.

The integration with email means that people do not constantly have to access a separate system to keep up to date with activity on the forum. All the relevant questions, responses and discussions are presented to them as part of their daily email correspondence and they can participate through the same medium.

With over 1300 experts participating, the forum is proving to be a great success and has gained positive feedback from everyone involved.

### **For further information**

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