

OpenInvoice

REMOTE

PRODUCT

remote access to electronic invoicing

Electronic invoicing is great for reducing the time it takes to approve invoices. But in the oil and gas industry, invoice approvers are often based in the field and don't always have reliable Internet access. As a result, invoices can be stalled for days or even weeks until the field user can gain online access.

OpenInvoice Remote lets field users process invoices offline and then upload their work later when online access is available or more convenient.

This makes electronic invoicing even more efficient so operating companies can take full advantage of reduced cycle times and early pay discounts.

OpenInvoice Remote lets field users download invoices so they can:

Approve

Dispute

Forward to another approver

Return to coder

Re-code



What is OpenInvoice Remote?

OpenInvoice Remote™ is a stand-alone application in the OpenInvoice™ Suite that enables operating company personnel to approve, dispute or forward invoices when they cannot obtain online access. This is particularly helpful for users who are working in field locations, and who may have intermittent or unreliable Internet connections.

OpenInvoice Remote enables operating company personnel to download invoices from OpenInvoice that they currently “own” (for which they are the approver or have been configured as a delegate approver) and are in a “Pending Approval” state. The user may access the downloaded invoices in OpenInvoice Remote and code, approve, dispute or forward the invoices when not connected to the Internet.

Offline Invoice Approval: How it Works

Users are able to download invoices that are in their OpenInvoice “Pending Approval” bin. The users can “Code,” “Approve,” “Dispute,” “Forward to another Approver,” or “Return to Coder” any of the individual invoices.

The user initiates the download and upload actions from the OpenInvoice Remote application. Users are able to select which invoices to download. Those invoices will be saved as one download group. Multiple download sessions can take place, generating multiple download groups. This allows the user to download new invoices even though the user has not finished processing the original batch.

Once invoices are downloaded, they are considered “locked” within OpenInvoice (the main hosted application). Locked invoices are unavailable to other users for processing until the invoices have been uploaded back into OpenInvoice from OpenInvoice Remote, or when

a specific amount of time has passed. Company Administrators can configure the lock-out timing as required. When the OpenInvoice Remote user has finished processing his/her invoices, the invoices then return to the unlocked state where they can be accessed again by other users.

There are a number of reasons why the invoices that have been downloaded may need to be “unlocked.” A laptop might have been lost or misplaced, or someone who downloaded invoices has gone on vacation without uploading his or her invoices. In these instances, the Company Administrator can “unlock” the invoices, and they can be then processed in the online OpenInvoice system normally.

Once connectivity has been established again, users upload invoices from OpenInvoice Remote back into OpenInvoice. If more than one upload group is available, the user chooses which ones are to be uploaded.

Perform Essential Invoice Tasks Offline

APPROVE

Business rules around approval levels remain intact for downloaded invoices. Users can only approve those invoices for which they have approval authority. Custom business rule validations are performed to ensure that the coding changes applied to a downloaded invoice do not violate the company configured coding rules. All company preferences will be evaluated and adhered to when an invoice is uploaded back to the main application.

OpenInvoice Remote allows the busy E&P Professional to perform essential electronic invoicing tasks offline, anytime.

DISPUTE

Users can dispute any invoice in OpenInvoice Remote and enter comments related to the dispute.

FORWARD TO ANOTHER APPROVER

Users enter an email address of another OpenInvoice user, which results in the invoice being forwarded to that user after the invoice is uploaded.

RETURN TO CODER

If necessary, users can return an invoice to the end user who “Coding Verified” the invoice for further processing.

RE-CODE AN INVOICE

Sometimes approvers will want to recode an invoice. It might be allocated to the wrong AFE or Cost Center, or coded to the wrong GL account. The approver can go to a separate tab in OI Remote and change the coding. When the invoices are uploading, the system checks to make sure the coding combinations are valid – that is, the AFEs or Cost Centers were in the OpenInvoice system, and that the invoice could be coded to that AFE/Cost Center/GL code combinations. If the invoice does not pass the validation test, the invoice is returned to the user’s “Pending Approval” in box and the user is notified that the invoice failed the coding validation check.



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