

Information is Power:

The Untapped Potential of SharePoint in Energy Utilities

Without energy utilities to keep the lights on, the modern world would go dark; but what is it that powers this critical industry?

Information—energy utilities run on millions of documents to accomplish complex business operations and support their foundational principles: ensuring worker safety and providing reliable energy to end users at a reasonable cost.

Today, in every company there’s a story of disruption, digital evolution, and upheaval. How organizations manage their digital information has become a key source of competitive differentiation. This is no truer than when looking at asset-intensive energy utilities, with their unique information environment and obligations—here are a few:

1 One of the Most Regulated Industries

Organizations operating in the energy utilities vertical are required to collect, store, and share documents that relate to regulatory compliance.

2 Responsible for Powering the World

The task of delivering power is brokered across extreme geographies, and power companies must maintain highly technical equipment distributed to these remote locations.

3 Workers Must be Protected

Safety is the utmost priority, and energy utilities are duty-bound to share current and relevant

information to safeguard their most important asset: workers.

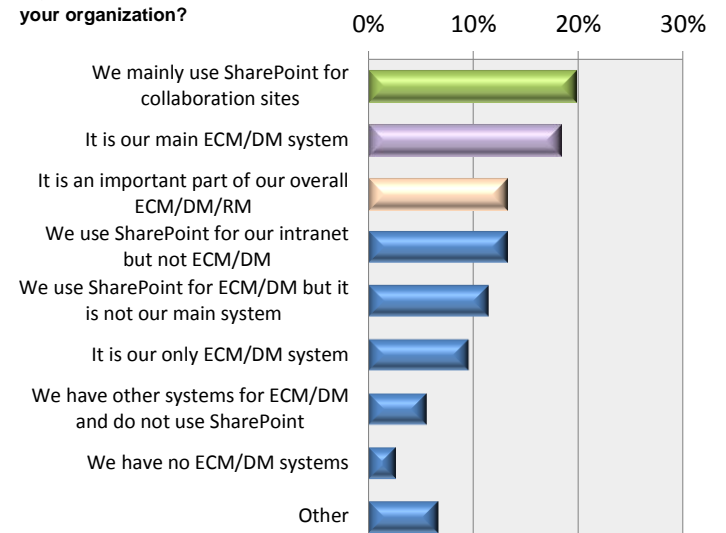
4 Security and Compliance is Mandatory

Energy utilities manage a great deal of sensitive information, and security breaches and data exposure are real threats. With 85% of the Fortune 500 now using SharePoint, for many companies it is the primary tool for fulfilling information management obligations stressing even greater need for information governance prioritization.

AIIM’s 2016 Industry Watch Report titled: “*The Impact of SharePoint – 2016*,” provides insight into how the energy and utilities sector is leveraging SharePoint today, and where the potential lies for further growth.

Finding 1: SharePoint is an enterprise fixture in energy and utilities firms, but is held back by awareness and implementation issues

Figure 1. Describe the use of SharePoint as an ECM/DM system across your organization?



As gleaned from “*The Impact of SharePoint – 2016*,” SharePoint is the option presently deployed, to some degree, by 52% of organizations. Moreover, 24% of energy utilities only use SharePoint some of the time and 28% are dedicated to SharePoint as their only or primary document management solution. (Figure 1)

The indication is that SharePoint is progressively emerging as a dominant back end. Some organizations have initially been reluctant to use cloud software, but recent AIIM research finds that nearly one third of organizations across all sectors view SharePoint Online/Office 365 as a strategic platform vision. In addition, 22% of energy and utilities respondents report that user adoption to SharePoint is increasing rapidly, which may be occurring because of available hybrid cloud options, potential for fast ROI, and cloud blockers that are beginning to recede.

Finding 2: Mobile workers must be connected to backend enterprise content without jeopardizing security, but energy and utilities firms have ground yet to cover

Having access to the right standard operational procedures at the right time is critical to prevent injuries in the field. Yet, many organizations have not yet successfully connected their field teams to SharePoint, most likely due in part to findability and connectivity issues.

In an article in *The American Oil & Gas Reporter*, Colligo CEO Barry Jinks posits that this problem of accessibility of procedures documents is particularly acute in industries like oil and gas, with a progressively aging workforce. “...this is especially relevant for mitigating the safety and liability risks that have arisen with the arrival of less experienced workers.”

Recent AIIM research found that 73% of energy and utility respondents believe that a mobile application of SharePoint is important to very important for controlled document access and distribution.

However, although a number of organizations have realized the potential operational gains that can be achieved by empowering remote workers and supporting digital mobility, little more than a third view a mobile application of SharePoint to be important for offline work—from the perspective of best practice, this number should be much higher. Extending enterprise services and information access beyond the corporate walls is a valuable capability in a market that’s fast, and getting faster. Empowering mobile utility workers can be a game changer for utilities trying to improve customer experiences and react quickly to regulatory changes.

SharePoint offers the mobility organizations need. With the right enabling tools, field technicians can access SharePoint content remotely and be confident that the most current schematics, drawings, procedures guides, and repair documents are always at their fingertips. Further empowering field teams, 33% of respondents report the ability to capture and tag photos and save to SharePoint as quite to very important; this is helpful when a record of work completed is

required, or equipment problems are identified in the field.

Ensuring security and compliance can also be made easier through a SharePoint-enabled solution. Administrators can ensure that specific users or groups have received the most current documents that relate to their roles and manage clearance for content access. When document and user-level activity is tracked, the resulting audit trail can be used to help monitor compliance, reducing exposure to regulatory risk.

Finding 3: Overcoming remote access challenges in an ad hoc fashion presents additional risk

There is an apparent disconnect in the current state of mobile infrastructure in energy utilities and the demand for remote access. Seventy-two percent of utilities do not presently offer a process to enable mobility, and SharePoint does not natively offer the capability to seamlessly share documents with offline users.

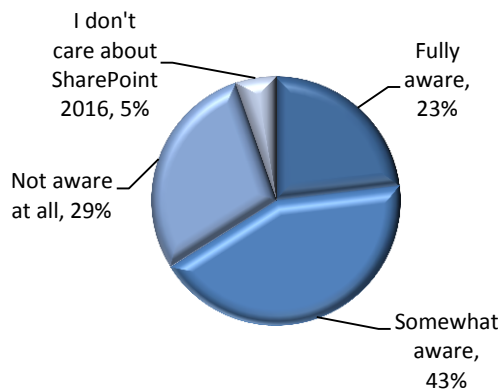
When users take it upon themselves to develop work-arounds—as the case with 50% of polled AIIM community respondents who admit to accessing enterprise resources from home via a VPN—this unfortunately introduces additional security risks and fails to solve the challenge of providing users with mobile document access when outside of wireless network range. Given that 43% of respondents say they prefer using their file-share application as a document access solution, many of these unsupported users undoubtedly develop work-arounds using USB thumb drives and unsanctioned file sharing services like Dropbox, that are outside of enterprise control.

While document access could be further restricted to prevent such unsanctioned storage, this may unintendedly result in severe repercussions. For instance, at best, too much restriction slows down employee productivity, and at worst, if the net result is that field workers are unable to access documents easily, these barriers may result in costly inefficiency and life-threatening mistakes.

There is a balance that needs to be kept between mitigating security and regulatory compliance risk, and equipping workers with user friendly tools to carry out their important tasks unimpeded.

Finding 4: There is untapped potential to capitalize on existing SharePoint investments

Figure 2. Are you aware of SharePoint 2016, and the stated enhancements it offers?



An alarming 29% of energy and utilities respondents report they have no awareness of what SharePoint 2016 has to offer; the biggest challenge may simply be one of education. Even though the majority of organizations are aware of what SharePoint has to offer and are proceeding apace, there are a significant number of organizations in this industry with no knowledge of SharePoint's abilities and limitations, and by extension, lack of knowledge of the enhancements

available to extend SharePoint's capabilities and account for its gaps. (Figure 2)

There is potential here for utilities to capitalize on their existing investments. All kinds of operations and processes can take advantage of an information management solution, such as a SharePoint backend. As IT and operational technologies (OT) converge in this space, expect to see an electrified interest and uptick in SharePoint adoption.

Produced in partnership with:



Colligo is a leading provider of collaborative apps for the digital workplace, extending Microsoft SharePoint, Office 365, and OneDrive for Business. The company's award-winning, unified suite is used by organizations every day for document distribution, email management, and mobile collaboration.

With Colligo's Briefcase app for iOS, Android, Windows and Mac, and through its Console interface, essential documents are dynamically pushed to the mobile devices of designated users - or flagged for deletion from those no longer employed – ensuring the auditable delivery of content to field workers. Furthermore, many utilities use Colligo Email Manager to seamlessly integrate SharePoint and Outlook, making it easy for employees across the enterprise to capture emails as records and enhancing discoverability and project team collaboration

Colligo is a Microsoft Gold Application Development Partner and Microsoft Silver Cloud Platform Partner, with Global 500 customers including over 25 energy utilities and field service provider companies, and four of the top five global oil and gas companies. For more information, please visit <https://www.colligo.com>

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References: AIIM Industry Watch titled: **The Impact of SharePoint – 2016**

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