

What CIOs of Utility Companies Need to Know About Modernizing Their Enterprise Content Management Without Driving Up Costs

Introduction: Modern ECM Is Mission-Critical

As CIO of a utility company, you are caught between a rock and a hard place.

On the one hand, with territories and prices that are fixed for several years, your organization is under regulatory constraints to keep costs down. As a result, you struggle to find room in your budget for new software solutions that can facilitate business transformation.

On the other hand, you need sophisticated tools to keep a comprehensive audit trail and comply with health and safety regulations. You need to enable users to collaborate and share documents with outside partners without compromising the Information System. You need to support field workers with mobile access to up-to-date documentation, online and off. And with the highest tenure of any industry¹, your users need tools that are user-friendly.

Just as the industry as a whole is undergoing change, more and more CIOs of utility companies adopt new enterprise content management technology to prepare their organization for the future and to lower costs. This paper uses case studies to show how critical a modern ECM solution is to the success of their mission.

The Limitations of Traditional Tools

Your organization likely uses a mix of legacy document management solutions that do not readily integrate with other applications. The resulting information silos hurt user productivity. Worse, incompatibilities with the rest of your Information System hamper retrieval of critical information.

Traditional ECM solutions typically become obsolete and are in need of replacement after five years. Yet it is impossible to anticipate what your organization's requirements will be in five years' time. As a result, you find yourself locked in a system that lacks flexibility and, because it does not comply with common standards, leads to exit costs that are almost as high as entry costs.

A Single Source of Truth: Content Management Across the Organization

You need to be able to centralize all company information in a single, unified repository—a single source of truth—capable of handling large volumes of data and quickly retrieving critical documents.

A standard-compliant ECM solution is ideally suited to the task because it can manage an almost unlimited number of formats; seamlessly integrate with any application; and accommodate existing hardware, operating systems, and databases. This is especially useful in the case of mergers and acquisitions.

¹ US Department of Labor, <http://www.bls.gov/news.release/pdf/tenure.pdf>, page 9

→ French gas distributor GrDF wanted to minimize costs, optimize performance, increase flexibility, eliminate content silos, and facilitate information sharing among its 11,000 employees. GrDF asked IT services provider Sopra to migrate data held in four different solutions to a single, open source ECM platform.

Cap Gemini was tasked by French gas company TIGF to merge data from two legacy solutions into a new platform integrated with MicroStation and with the IS. CAD solution MicroStation embeds metadata and versions into technical drawings created by the engineering team. The new, standard-compliant ECM solution integrates with a PDF editor, retrieves the metadata and versions, and provides full document management of technical drawings.

UK Power Networks centralized all its contents in a single open source repository, allowing the company to validate and publish information on its website in real time. UKPN is now able to develop new capabilities at short notice, such as when unusually severe storms disrupt distribution of electricity. The success of the newly integrated online presence has seen the company's website recently win a Best Consumer Website award in the 2013 Corporate Communications Digital Awards.

Eurostar merged previously independent operations in Britain, France, and Belgium into one company. The organization consolidated all technical drawings in a single open source repository with multilingual search capabilities.



A More Efficient Way to Meet Regulatory Compliance

Health and safety regulations require proof that the right documents are available to the right person at the right time. With a solution that includes archiving and record management out of the box, you can easily track processes and validation.

→ Sopra was asked by French water company Syndicat des Eaux de la Charente Maritime to configure a new solution capable of managing all the documents for its Department of Inspection and Control of the Sewage System (CICRA). The new tool provide daily support to the department for its mission and adds significant value to the business process. Today, the Syndicat des Eaux de la Charente-Maritime meets the requirements of the NF EN ISO/CEI 17020:2012 standard, as well as the implementation rules of COFRAC, the organization in charge of inspecting and controlling sewage systems.

An agile solution streamlines processes across your organization.

Automating internal processes with workflows and rules saves time, prevents errors, and ensures that users receive information that is critical to their jobs.

Efficient document management combines a variety of metadata. An engineer creating a technical drawing and a partner company implementing the design need different types of metadata for the same document. The ability to associate metadata with a profile gives you the flexibility to support your users' individual needs.

→ When a UK Power Networks customer sends an email to the company via its website, the ECM system adds the appropriate metadata and automatically starts a workflow. As a result, the company is able to provide outstanding customer service while saving on the costs of a call center.

You need to be able to manage the entire lifecycle of a record, from initial creation to final destruction. Erasing data that has reached its expiry date limits your organization's exposure to litigation.

→ The application implemented by Cap Gemini for TIGF associates a version of a technical document with a version of a piece of equipment. The document expires after a set date.

In an industry where tenure is high, usability is critical. A web-based solution that is intuitive and simple to use is key. Users also greatly benefit from the ability to "like" and follow sources of information that are tailored to their needs.

→ For Eurostar, usability was key in replacing its ECM solution. Users regard the new web-based solution as "natural" and required little training.

Capitalizing on Innovation Using Secure Collaboration With Outside Partners

No CIO wants to give the outside world access to the company's IS. You need a safe way for users to collaborate and share documents with partners and subcontractors. A hybrid solution keeps your on-premise ECM behind the firewall and syncs limited data with a cloud-based version, giving you full control of external accesses.

A hybrid solution also provides significant cost savings. With ECM that includes a cloud solution as part of the license, you get high availability out of the box. Because there is no platform to deploy, integrate, or maintain, you gain the cheapest form of redundancy. Content is not duplicated but simply synced, providing outside users with access to information in real time.

→ TIGF subcontracts part of its technical documentation to partner companies. Each supplier accesses a dedicated space including a list of tasks on a cloud-based ECM solution. Every time the supplier connects to the space, the list is automatically synchronized and updated. When the supplier adds a document in the space, it is automatically synced back to the on-premise solution, and a notification is sent to the project manager at TIGF. The list of tasks is automatically updated, providing the project manager with the real-time status of the project. The system checks metadata at every step and uses roles to control access.

Actions that were previously done manually—notification to the supplier, download and upload of new documents, notification to the gas company, etc.—have been automated, eliminating the risk of errors. A single reference is used for each document; the supplier reference appears for information only.

Supporting the Field Workforce With Full-Featured Mobility

Field workers greatly benefit from an ECM solution that supports mobility. They can access the latest version of technical documentation, take pictures of problems with equipment and upload them in the company's system, or search for components by keywords such as "references." They can consult documentation offline and automatically sync to the latest version whenever there is Internet access.

→ IT service provider Smile developed a mobile application for a French water company. A company scheduler manages field staff and their equipment. Previously, staff had to visit the office every morning to collect up to 200 sheets of documentation. A new Android app integrates with the scheduler solution to provide the location of the required maintenance, while the on-premise ECM solution provides technical documentation, Google Maps integration, and a form to fill in electronically and automatically upload, together with photos where appropriate. The app works off-line and syncs automatically when it is connected to the Internet.

The app manages tasks in chronological order. The first job of the day is displayed onscreen, then the second, and so on. If priorities change, the system updates the order of jobs and the associated technical documentation. If a technician is delayed, his next job is transferred to another technician's tablet. The system optimizes workloads and saves both time and gasoline by eliminating daily visits to the office. The company is more responsive and provides great service to its clients—a requirement of the industry regulator. The app is used on standard Android tablets, because they are cheaper to replace if they get damaged, rather than on expensive ruggedized tablets, though the app could work on either piece of equipment.

Lowering the Cost of Ownership Today and Tomorrow

With revenue fixed for several years, CIOs of utility companies are slow to invest in new technology. But by choosing an ECM solution that combines new efficiencies with a lower cost of ownership, you can afford to give your organization the business transformation tools it needs.

A solution that meets all requirements out of the box provides you with significant savings in licenses, maintenance, and “exotic skills” that cannot be reused.

→ UK Power Networks began operations in October 2010 following its purchase of EDF Energy Networks from EDF Group. With the need to rapidly implement a new content management solution to replace three legacy Documentum (web content and document management) and Stellent systems, the company chose a single platform capable of supporting all its ECM, WCM, collaboration, and compliance needs. UKPN saved £1.5 million in licenses and has only one solution to maintain.

Another way to significantly reduce costs is to avoid heavy customization using a modular architecture. Open standards, such as REST APIs, allow seamlessly integrated components to operate as standalones. They prevent problems at upgrade time and redevelopment afterward. Integrating standard-compliant solutions—such as Google Maps—is straightforward and therefore much cheaper.

→ By choosing an open source platform, UK Power Networks was able to get more features for the same planned cost of development.

A flexible architecture supports an almost open-ended volume of content. You can easily scale by adding processing power, without redesigning the architecture.

Open standards will remain valid for many years to come. An open source, standard-compliant solution gives you the ability to integrate tomorrow's best-of-breed technologies that may not even exist today. It removes the risk of technology lock-in and greatly lowers exit costs.

→ UK Power Networks capitalizes on its open source platform's agility with an approach of continuous development. As a result, the company believes it will not need to replace its solution after five years, as would typically be the case with a traditional solution.

Summary

By choosing a flexible, modern, and cost-effective ECM solution, you can provide your users with full mobility, faster retrieval of critical information, greater efficiency, safer collaboration with external partners, and higher usability. You can benefit from a single source of truth that seamlessly integrates with your IS and tracks processes and validation for regulatory compliance.

An open source ECM solution gives you the required agility to adapt to today's environment, address tomorrow's risks and uncertainties, and better position your organization to achieve its mission.

About Alfresco

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