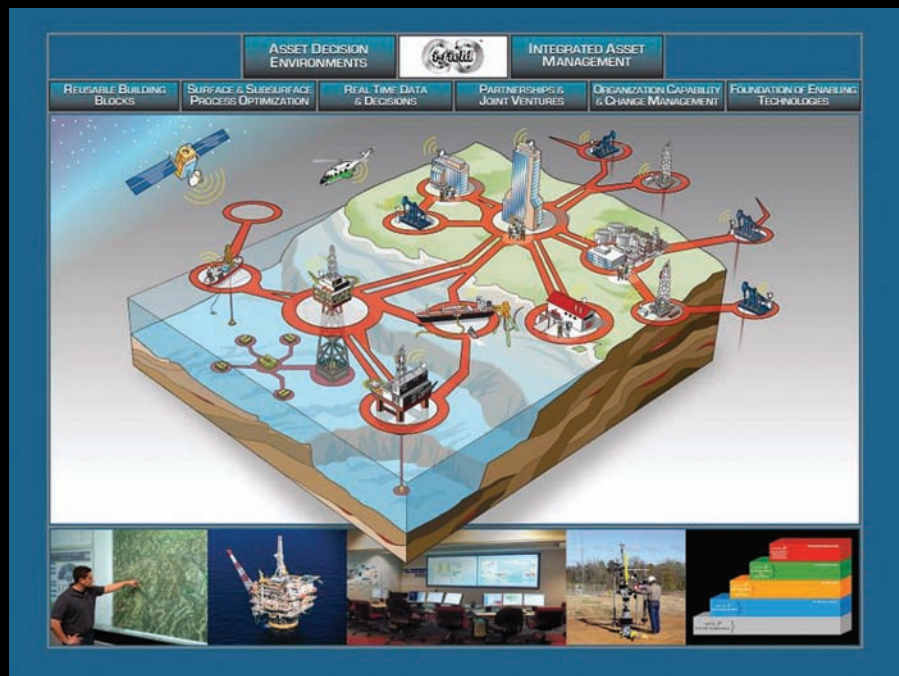


# UPSTREAM TECHNOLOGY

A Focus on the Full Spectrum of IT Solutions for Oil & Gas



## Interview: Tim Fleet, Sword Group

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**Tim Fleet**  
Business Manager  
Sword Group

Sword Group is a global provider of technology solutions such as document management, geophysical information systems (GIS), business intelligence (BI), content production and artificial intelligence (AI). Founded in 2000 with offices in London and Houston, Sword Group has grown rapidly by acquisition. Its latest two acquisitions were CT-Space of San Francisco, purveyor of solutions for Web-based collaboration, business process management (BPM) and document management; and Real Time Engineering of Glasgow, Scotland, whose oil and gas business includes pipeline leak detection, product tracking and production data analysis.

In addition to the oil and gas industry, Sword serves the banking, insurance, nuclear and pharmaceutical sectors as well as trademark and patent management agencies.

*Upstream Technology* Editor Jeanne Perdue recently interviewed Tim Fleet, Business Manager, Sword Group, about the company's **Fusion Share™** application for Microsoft SharePoint 2007®, which cuts information technology (IT) risk, cost and delay for large engineering projects.



Figure 1. Fusion Share Pilot was launched a year ago at the 2007 DaratechPLANT conference in Houston.

**JP/UT:** Large-scale construction and engineering projects always seem to struggle with engineering documentation. The physical work gets done on time, but the paperwork lags and disputes arise. Is there anything new to deal with this?

**Tim Fleet:** One of the biggest challenges for IT departments is supporting engineering and construction professionals working on large-scale capital projects. These are fast-paced, short-lived projects that are very large, highly distributed, constantly evolving and highly user-centric. User-centric, of course, means on-the-fly and often ad hoc. Developing document management systems for engineering projects is driven primarily by user demands and day-to-day management decisions. High flexibility and

speedy reconfiguration are crucial.

**JP/UT:** What's wrong with the systems they have now?

**Fleet:** For IT managers, there are usually only two less-than-ideal options in meeting user demands like these. One is custom-coded application development, in-house or outsourced, and the other is purchasing a general-purpose system and then tailoring it extensively. Both have high costs, long development timeframes and sprawl over dozens of separate business units. Both also push programmers into dealing with rapidly changing requirements – unfamiliar territory for some IT groups. As a result, many document managers and users in engineering projects are left pretty much on their own.

**JP/UT:** What are the business risks and opportunities here – the big picture?

**Fleet:** With a construction surge imminent in energy, the engineering/procurement/construction companies (EPCs) and owner-operators (OOs) have much at stake in their document management systems. In addition to the usual cost, time and technology pressures, regulatory burdens keep growing, and environmental oversight is stringent. Penalties

for noncompliance are high, and even small errors may cause long delays. Legal liabilities are potentially crippling.

And unfortunately, many project-engineering managers don't focus on documentation until deadlines have been missed, payments withheld and penalties assessed.

**JP/UT:** Is there anything to be done? And maybe take advantage of Microsoft SharePoint at the same time?

**Fleet:** Yes, our **Fusion Share Project Document Control** runs on top of Microsoft's SharePoint® 2007. It is a carefully chosen set of downloadable extensions to this key Microsoft document management and collaboration tool. As with SharePoint 2007, **Fusion Share** is robust, proven

and highly configurable. We adhere to industry-standard coding tools and practices – specifically those from Microsoft – so users can customize these applications themselves.

**JP/UT:** Why are project document management needs different, than, say, retail or healthcare?

**Fleet:** Essentially, engineering project document management systems are networks that change and expand constantly. The digital equivalent of living things, these networks must meet four challenges. Those are exponential growth of user headcount in the early phases, followed quickly by high user turnover as each project phase ends and the next one begins. This means the needs for interconnections and feedback loops keep multiplying. And there are massive quantities of information – hundreds of thousands of documents, some of them hundreds of megabytes in size – to be moved and tracked.

**JP/UT:** Can't IT handle this?

**Fleet:** Veteran IT programmers tackle demands like these every day in every coding effort. However, because of the compressed time schedules for even the largest of projects, programming demands are unusually urgent and risks are high.

**JP/UT:** Why can't this be done with out-of-the-box document management software?

**Fleet:** Engineering projects generate mind-boggling amounts of paper, and there is a strong likelihood of project chaos if document management proves to be unwieldy or unworkable.

**JP/UT:** What benefit does SharePoint bring to this situation?

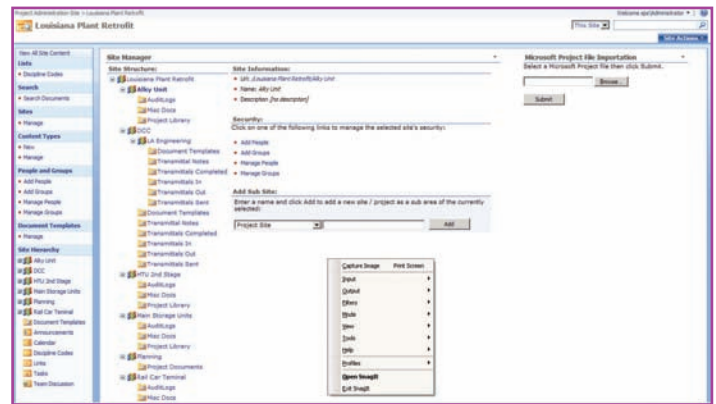
**Fleet:** Microsoft SharePoint capabilities give us about 70% of what is needed to manage documents in large projects. SharePoint provides vaulting, revision and version control, Internet connectivity, platforms for project/department intranets and extranets, and shared collaboration – things like discussion boards – as well as contact lists and task lists, user authentication, workflow management, backup and security.

**Fusion Share** focuses on the rest, particularly document distribution. This is a huge need that somehow has never been met with out-of-the-box functionality – even when that box is as good as SharePoint. We also provide project dashboards. Among other things, they track the status of every document and its timeline and can analyze the risk that any crucial document won't be ready when needed.

Share Point also brings us full integration with Microsoft's Office® suite of applications for deliverables and with its Outlook® browser for tasks and contacts.

**JP/UT:** How was **Fusion Share** developed?

**Fleet:** **Fusion Share** functionality has been developed over



more than a decade in Sword's Cimage products. We have about 50,000 Cimage users at 500 discrete sites worldwide.

**JP/UT:** So what specifically is Sword offering in **Fusion Share**?

**Fleet:** Part of **Fusion Share**'s power comes from managing the metadata, or data about the documents. This gives us cross-referencing of document types with internal and external users and departments. It also provides standard and user-defined templates for document circulation. Users get automatic recording of each document circulated and every transmittal, which is invaluable for audits. There is relationship tracking between incoming and outgoing documents, including one-to-many and many-to-one. And there is basic correspondence management, for example, keeping track of purchase orders, invoices, time sheets, change notifications and so on.

**JP/UT:** This sounds very sophisticated. Can users really manage this quickly and easily?

**Fleet:** We make things very easy for users. **Fusion Share** is a Web application with no client software to install. In other words, **Fusion Share** fits the highly interactive Web 2.0 architecture with its enormous bandwidth and the business model of Software as a Service (SaaS).

Installation is a simplified click-through that gets users up and running within minutes. There are predefined templates for projects and document types to minimize configuration needs. There are tools for further customizing in SharePoint available from Sword. And training is minimal. Most of these benefits accrue to IT, as well.

**JP/UT:** How does the IT organization fit into this?

**Fleet:** Well, after giving its nod, IT has only to monitor the users' progress. The concerns that such add-on software normally raises with IT managers have been thoroughly addressed by Sword Group. We recently partnered with a leading engineering and construction firm in order to put **Fusion Share** through its paces for real-world use. Sorry, but I can't identify them just yet, but the results are excellent. Maybe we can do a case study about it in a future issue of *Upstream Technology*, so stay tuned.

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