



# COGENTRIX

Cogentrix Secures Access to Sensitive Information in SharePoint®



## Quick Facts

### Organization

- Based in North Carolina, Cogentrix is a leading independent power producer.

### Industry

- Energy Power Management

### Challenges

- Required confidential data to be secured by legal entity/business unit and needed to secure access at the document level.
- Needed to report on how information is accessed and secured.

### Solution

- NC Protect™

### Benefits

- Dynamically determines content access based on employee role and sensitivity of the document
- Robust, highly configurable rules engine automated complex business needs and access policies
- Eliminated the need for employees to know the rules and policies for content access
- Light weight and easily to deploy across SharePoint records management project

## Background

Based in Charlotte, NC, Cogentrix is an operator and manager of power plants with a long record of successfully acquiring, developing, constructing, operating, improving and divesting power generation assets. Consistent with its engineering origins and culture, Cogentrix maintains a disciplined and well-designed approach to asset improvement. The firm's ability to enhance value has resulted in achieving superior operating performance from its power generation assets while maintaining a minimal and well-managed risk profile.

## The Challenge

Microsoft SharePoint users since 2008, Cogentrix recently undertook a project to improve its records management. The IT team assessed several content management solutions and decided that a new SharePoint installation was the best platform for this project.

Cogentrix has a complex business model requiring confidential data to be secured by legal entity/business unit and needed to ensure its team could not have broad access to every document stored in SharePoint.

The company also needed the ability to report in a structured way to management on how information is accessed and secured. Specifically, Cogentrix wanted to limit access based on each employee's role and business unit to secure confidential information such as terms of deals, financial, health and safety, and HR documents.

## Requirements

While planning the new implementation of SharePoint, Cogentrix identified two complex security gaps it needed to solve:

1. Attribute level security – The firm needed the ability to assign each individual document to a legal entity based on attribute security so only members of a specific legal entity can view it.
2. View, but not take action – Cogentrix also wanted to set permissions to allow authorized users to view documents, but prevent them from being downloaded, printed or emailed.





## Finding the Right Solution

During the project planning stage, Cogentrix identified the attribute level security gap with SharePoint. It needed a solution to overcome these issues before moving on with the SharePoint records management project and quickly came across two vendors. Dale Roddick, Director, IT Applications at Cogentrix said, "Nucleus Cyber's product was a perfect fit. The solution was too good to be true offering us exactly the security we needed."

## Benefits of SharePoint Identity and Access Management

Nucleus Cyber offers Cogentrix's IT team a powerful solution to solve its SharePoint site management issues. It leverages dynamic access, deny rules and an agentless secure viewer to sustain a wide variety of secure sharing scenarios that keep confidential information in SharePoint without complex permissions.

The solution uses business logic – document metadata, user/device/location properties and more – to create powerful rules that allow or deny access to selected content, or limits users to use a secure, agentless viewer. Cogentrix can adjust the user interface to trim ribbons and menus and remove selected options such as download a copy, email and editing properties without changing item permissions. "We stumbled across this feature after selecting the solution. Ribbon control allows us to easily disable different functions on the ribbon that we do not want employees playing with," said Roddick.

"We were able to secure our records management project without all our employees needing to know the rules and policies for content. NC Protect runs in the background giving us complete access control safe in the knowledge that documentation is secure," continued Roddick.

## Implementation and Use

Roddick continued, "We took a deep dive into Site Sheriff based on our requirements. The product offers sophisticated technology. During installation, we worked with the services and support team to ensure the product was fully functional. Support was very impressive, offering great advice and immediacy."

Once set up, Cogentrix was able to build its rules in a matter of days. "The rules engine is robust offering us customization, control and configurability based on our business needs. Our rules are long with lots of verbiage. NC Protect was able to put our complex rules into practice easily. Once set up, the solution was running smoothly securing access within SharePoint," said Roddick.

## Cogentrix Advice for Others

"Our business requires secure access of sensitive information so we can acquire, develop, construct, operate, improve and divest power generation assets for our many investors. Selecting NC Protect was exactly what we needed to solve both our technical and business requirements. Documentation is complete, installation is easy and the product does what it says," said Roddick. "The security offered resonates throughout the organization helping us to protect all of our documentation."

"If document security is critical to your organization and you need to take it to the next level, Site Sheriff is a great solution that complements SharePoint out-of-the-box functionality," concluded Roddick.

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Dale Roddick  
Director, IT Applications at  
Cogentrix

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