

# Top IT Consulting Firm Utilizes DocAve® to Manage SharePoint Infrastructure of Global Banking Organization

## CASE STUDY

### Customer Profile

One of the largest and most well respected information technology consulting firms in the United States recently faced an interesting challenge. Among the consulting firm's many clients is an international banking organization headquartered in Washington D.C., and composed of 185 member countries. For this organization, the firm provides consulting services related to network and database infrastructure, including a large and mission-critical SharePoint 2007 (MOSS) deployment. This important client needed a flexible and powerful SharePoint infrastructure management platform, and the consulting firm was tasked with sourcing this solution.

### The Challenge

When the firm's client wanted to build a collaborative digital workspace and centralized knowledge repository for its 3,000 employees, MOSS was recommended as an ideal platform. The client's objective was to move beyond an "email-centric" approach to information sharing by providing knowledge-workers a single interface to access digital assets and correspond with colleagues. In May 2007, the client deployed MOSS on a six-server production farm and several development and testing farms, all housed in their Washington D.C. headquarters.

Throughout the deployment's conception, consultants worked with the client's administrators to formalize a series of Service Level Agreements (SLA's) intended to govern platform management. From these discussions arose a number of fundamental service requirements:

#### Protection

First and foremost, the client's network administrators needed to diligently protect valuable data from accidental deletion or corruption. To inspire confidence in the platform's ability to store business-critical assets, administrators needed the ability to granularly restore full-fidelity content and the flexibility to create automated backup schedules to be run throughout each day. After analyzing the data protection capabilities of the native STSADM command-line tool in their test environment, it was agreed that a more robust solution was necessary.

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#### Customer Location

Washington, DC

#### Industry

Economic Development, Finance

#### Platform

Microsoft Office SharePoint Server 2007

#### Critical Needs

- Granular and full fidelity data protection with out-of-place restore capabilities
- Centralized administration for multiple farms
- Real-time replication with business-rule aware conflict resolution
- Migration of expansive legacy data from File Systems to MOSS
- Auditing to track SharePoint usage and prevent productivity loss

#### AvePoint Solution

DocAve Backup and Restore  
DocAve Replicator  
DocAve SharePoint Administrator  
DocAve File System Migrator  
DocAve Compliance Auditor

#### Results

- Data Loss reduced to zero
- Improved end-user confidence and accelerated SharePoint adoption
- Dramatically reduced time and resources required for granular restores

“STSADM is a very convoluted way of doing backups and restores,” said a senior consultant. “Given the critical importance of their data, our client needed something more reliable, more granular, and with more powerful scheduling capabilities.”

### **Dexterity**

Of equal importance, network administrators needed to nimbly move content and configurations within and across farms. When Site Collections, Sites, and other SharePoint objects developed in a testing environment were needed in the production environment, administrators required a tool that could execute full-fidelity “out-of-place” restores both on-demand and according to a customizable schedule.

### **Real-time Replication**

Given the organization’s multi-farm architecture, administrators needed the capacity to perform real-time and granular synchronization between their multiple development/testing farms and their production farm. Replication of individual Items, Sites and Site Collections across the client’s disparate farms was necessary to streamline training processes and mitigate redundant work.

### **Migration of a 64 Year Legacy**

As a result of the organization’s previous reliance on File Systems to store business-critical data, administrators required a robust and stable migration tool to import their over 500GB of File System data into MOSS. Administrators understood that a prerequisite to accelerated end-user adoption of the new platform was convenient access to legacy data. They needed a solution that not only imported data with full-fidelity both in-bulk and granularly, but also provided for flexible scheduling of migration jobs and business-rule aware targeting of migration data. With such voluminous content to be migrated, administrators required a means of content-filtering by both file-type and file-name attributes. “Flexible scheduling and targeting of import jobs was vital for us, since we did not want to perform the whole migration at once,” said the consultant. “The client has over half a terabyte of data, so we needed the flexibility to migrate according to an organized schedule.”

### **A Clear Window Into Platform Usage**

Finally, administrators needed the tools to maintain a concise understanding of how end-users were utilizing the MOSS platform. To observe the organization’s strict access and approval protocols, administrators needed a system to analyze content usage and end-user patterns in real-time. When accidental deletions took place, administrators required a way to discern how and why the event occurred. When ownership and access conflicts arose, IT staff needed the means to evaluate the underlying causes in order to rectify the conflicts and proactively address future issues.

The organization’s administrators and the consulting firm working with them recognized that the tools native to MOSS would not meet their needs. Without a robust solution set, the organization would not be able to satisfy agreed upon SLA’s and, most importantly, instill end-user confidence in the new platform. Reliance on native tools was simply not an option.

Consultants analyzed the third-party solutions available on the market. Several attributes were considered requisite as they evaluated their options:

- The solution had to be stable, reliable, and not adversely affect overall system performance or conflict with existing network configurations.
- The solution’s architecture had to provide true 24x7 fault tolerance.

- Ideally, the solution should provide a single, integrated toolset able to not only satisfy the organization's current infrastructure management needs, but also be flexible and robust enough to address future needs and scaling requirements as they arose.

## The AvePoint<sup>®</sup> Solution

The client needed an enterprise-strength, scalable solution that provided granular backup and restoration, reliable real-time replication, truly centralized content and configuration administration, comprehensive auditing, and schedule-enabled migration. After investigating the products available on the market and talking to industry colleagues, consultants decided to test DocAve because of its reputed reliability, its fully-integrated "mix-and-match" modular architecture, its user-friendly "single-pane of glass" interface, and its minimal disruption to the existing IT environment. They downloaded a fully-enabled trial version of DocAve provided by AvePoint's enterprise-sales team, and following a short evaluation period deployed several DocAve modules:

**DocAve Backup & Restore** delivered the granular and flexible control over data the client needed. Utilizing DocAve's *Smart Backup Plan Builder*, administrators scheduled a regime of off-peak full daily backups and hourly incremental backups. Leveraging DocAve's enterprise-strength compression, data-coalescing, and instant reporting/notification capabilities, administrators developed a backup schedule that efficiently utilized storage space and kept staff informed of variances in real-time. Employing the module's out-of-place restore function, staff was able to relocate metadata-rich content – from collections down to an individual item version – throughout and between their various testing, development, and production environments.

**DocAve File System Migrator** provided the client the means to truly centralize its 500 GB of legacy data in MOSS with confidence and precision. Administrators developed and initiated an ongoing migration schedule based upon business-criticality and usage. As automated migration jobs were executed, administrators stayed informed of progress in real-time via the module's activity reports and email notifications.

**DocAve SharePoint Administrator** empowered IT staff with universal control over their enterprise-wide SharePoint landscape. Administrators could easily view, search, manage, report, and replicate configurations, security, and content of SharePoint objects – individually or in bulk – throughout their entire MOSS deployment. They readily applied rule-based searches across their environment, and deployed configuration and security permissions changes to these search results both in bulk and selectively. Utilizing the module's graphical server topology display – IT staff could both review deployment architecture and monitor individual server relationships, roles, services, and health.

**DocAve Replicator** let the client synchronize multiple farms in real-time with rule-based conflict-resolution and deletion-resolution governance. With mirror-matched farms, end-users could work with the confidence of knowing they were accessing the most up-to-date and valid content. While infrastructure limitations such as bandwidth restrictions were not an immediate concern for the client, the module's customizable throttle-control and byte-level differencing ensured minimal network traffic deltas.

**DocAve Compliance Auditor** – a module within the DocAve Compliance Solutions Suite - gave the client the ability to audit and review SharePoint usage and proactively anticipate end-user issues. Deleted sites, unexpected transfers of

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site ownership, and unforeseen access rights changes could be tracked and identified quickly and with ease. Such incidents could be anticipated and prevented, minimizing costly productivity disruptions and end-user disturbance.

**Enterprise-Strength Service.** Shortly after installation, the client took advantage of AvePoint's Enterprise Services Program, a full-service training program for new enterprise-class clients. The consulting firm wanted to ensure that their client's administrators were aware of DocAve's capabilities and would fully utilize them. For two days, an AvePoint Technical Liaison worked with administrators at the client's headquarters in Washington D.C. to analyze the organization's infrastructure, discuss the full capabilities of each DocAve module, and assist the client in the determination of "best practices" with regard to SharePoint infrastructure management.

## The Bottom Line

Using DocAve, the client is able to protect, organize and monitor mission-critical SharePoint infrastructure and content with agility and confidence. Leveraging DocAve's fully-integrated management tools, the organization is able to satisfy SharePoint-related SLA's and has enjoyed significant business benefits:

- Valuable Resources once dedicated to performing on-demand STASADM backups via the command line have been re-tasked.
- Time once dedicated to scripting STSADM "out-of-place" restores – often up to 4 hours – are now scheduled in seconds and executed in minutes.
- Migration of legacy data is executed in an organized, granular manner according to usage needs and business criticality. With approximately 20% completion as of early 2008, migration commences as content is required.
- IT staff time and energy necessary to perform global content and configuration changes have been dramatically reduced.
- Production-loss events have been considerably reduced as IT staff proactively review access, usage, and deletion behaviors to anticipate future interruptions.
- End-users distributed across disparate farms experience increased productivity with real-time access to synchronized SharePoint content.

Going forward, the client anticipates taking further advantage of its existing DocAve solution set:

- As the organization expands its MOSS platform to additional staff working outside its headquarters, DocAve Replicator's one-to-many, bi-directional, and throttle-controlled synchronization will be more fully leveraged.
- As overall end-user adoption increases, requests for granular, full-fidelity restorations will likely become more frequent.
- With more end-users accessing and amending SharePoint content, usage analyses will grow more vital to ensure maximum productivity and staff confidence.

As business-needs dictate, the client anticipates deploying additional DocAve modules to meet expanding SLA's. Currently, the consulting firm is working

## About AvePoint

Since 2001, AvePoint has been a global leader in enterprise-strength infrastructure management solutions for all Microsoft SharePoint Products and Technologies. Propelled by one of the world's largest SharePoint-exclusive development teams outside of Microsoft, AvePoint's award-winning DocAve Software Platform delivers comprehensive and flexible infrastructure support for backup and recovery, geo-replication, migration, administration, deployment management, archiving and compliance solutions for Microsoft SharePoint.

AvePoint's globally recognized pioneering technology pilots the products of OEM partners such as NetApp and IBM. Headquartered in Jersey City, NJ, AvePoint serves over 3000 enterprise customers, including many Fortune-500 companies, across 6 continents, via offices in Jersey City, San Jose, Los Angeles, Chicago, Washington D.C., Atlanta, and Dallas, USA; London, UK; Melbourne, Australia; Tokyo, Japan; and Changchun, Dalian, China. Winner of the *Best of Tech Ed It Pros* award for "Best SharePoint Product" in 2008, AvePoint is a Managed Gold Certified Microsoft Partner and GSA Certified Provider.

**AvePoint US Headquarters:**  
**3 Second Street**  
**Jersey City, NJ 07311**  
**800-661-6588**  
**www.avepoint.com**

with AvePoint to determine appropriate archiving protocols, and expects to soon deploy **DocAve Extension Archiver** to provide an archiving solution with business-rule aware functionality and granular recall capacity without user-experience variation. As with all of DocAve's solution modules, Extension Archiver will be fully-integrated into the DocAve user interface, work seamlessly within the client's SharePoint architecture, and deliver the industry's most robust enterprise-strength solution.

"Working with AvePoint and using the DocAve product have been excellent experiences. The people at AvePoint are knowledgeable, professional, and exceedingly helpful. It's been a very positive experience overall," concluded the senior consultant.