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I. Case Study I: NetApp

NetApp Speeds Decision Making by 300 Percent with Collaboration Solution


[Source](#)

As NetApp, the maker of innovative storage management solutions, grew, so did the challenges of enabling its global workforce to find the information they need quickly and to collaborate effectively. The company replaced its decentralized information stores and lengthy e-mail exchanges with a comprehensive document management and collaboration solution based on Microsoft Office SharePoint Server 2007 and the company's own NetApp SnapManager for Microsoft Office SharePoint Server and NetApp fabric-attached storage system. As a result, business decisions can be made up to three times faster; new employees can be trained in 83 percent less time, and marketing activities and events can be tracked more effectively than before. Because the solution was deployed with virtually no customization, development costs were minimal, and the solution remains easy to manage.

Situation

When John Hanna became senior manager of Technical Marketing at NetApp, he was frustrated by the lack of a single place on the company's intranet to which he could go to find or share information relevant to his job. "There were pockets of information everywhere, but there was nowhere I could bring all the information together," Hanna recalls. Some of the information relevant to his product marketing role existed in shared folders on a variety of intranet sites; some existed only on the hard disk drives of personal computers. As documents were sent back and forth through e-mail, it became difficult to know who had the most recent version.

That decentralized system sufficed when NetApp was a small company. But the company—a maker of innovative information storage and data management solutions—had grown rapidly since its founding in 1992 and now had 8,000 employees and annual revenues of U.S.\$3.3 billion.

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difference.

John Hanna
Senior Manager of
Technical
Marketing, NetApp



Hanna's business unit—the Storage Management Application Integration Business Unit—exemplified this growth. The number of products managed by his organization soared from 7 to 17. Moreover, as NetApp created and expanded its operations in India, Hanna's staff expanded to include members there as well as in California, Massachusetts, and North Carolina. That required Hanna and his colleagues to chase down and send information not only across the intranet, but also to individuals working in significantly different time zones. The result was further delays in collaboration and information gathering. Hanna found himself continually resending the same policy and procedures information to new staff members. He and his staff had no effective way to track and share the status of marketing activities or deliverables for product launches. The old ways of doing business were not sufficient for running a global operation.

Meanwhile, this system was no more functional for the IT department at NetApp than it was for the business units, according to Dirk Wassenaar, IT Collaboration Services Manager, NetApp. "Business users often needed to host content and collaborate on project-related information, but there was no standard location for this. As a result, users relied on a mix of unmanaged shared drives, Web folders, and random network locations," he says. "In addition, user permissions to these locations were difficult to manage, so security became a concern. That put a significant load on our help desk. If we could enable our business units to share information and collaborate without needing as much support from IT, everyone would benefit."

Solution

In 2005, NetApp sought a new approach to document management and collaboration. It didn't have far to look. As part of its Enterprise Agreement with Microsoft, the company already had licenses for Microsoft® Office SharePoint® Portal Server 2003. NetApp considered that software the leading candidate for its new solution because of the ease with which it could adopt Office SharePoint Portal Server and integrate it into its desktop, production, and development environments, which were already based on Microsoft technologies. The company decided to try Office SharePoint Portal Server in a pilot deployment of an application server computer and database server running Microsoft SQL Server® 2005 data management software.

The Portal Setup

Wassenaar and his colleagues in IT decided that to prove the value of Office SharePoint Portal Server and encourage adoption throughout the company, they first had to try it themselves. The success of that proof-of-concept led to adoption of the solution by the company's sales organization, and then by the customer support organization and other business units. Today, the portal is used by approximately 6,500 authenticated users, or roughly 80 percent of all NetApp employees.

In response, NetApp expanded the document management and collaboration infrastructure by implementing three front-end servers—one for the application, one for indexing content, and one for the

database—that all boot from a NetApp FAS980C (fabric-attached storage) system (now the FAS6000 series), using the iSCSI protocol.

The solution now supports more than a million documents and is growing at an annual rate of 150 percent. To enhance the company's ability to implement automated workflows and, in combination with the Active Directory® directory service, to enable finer control of permissions—down to the level of a single document—NetApp upgraded its infrastructure to Microsoft Office SharePoint Server 2007 when that software became available.

NetApp also didn't have far to look for another key component of its new infrastructure. The company implemented two of its own storage and data management solutions, NetApp SnapManager for Microsoft Office SharePoint Server and the NetApp FAS system. The NetApp solutions back up all of the data in SharePoint sites to a storage-area device as frequently as every hour and mirror that data to remote locations. The result is speedy access to data and the ability to recover data rapidly, including restoring entire sites that may be accidentally deleted or damaged.

Portal Structure and Use

The IT department approves business unit requests for new "top-level" SharePoint site collections to ensure that they conform to the company's SharePoint site hierarchy and corporate governance requirements, and it uses the workflow capability in Office SharePoint Server to automate and expedite this process. Once a top-level site is approved, business users who have been assigned the appropriate Active Directory credentials can create their own subsites under it.

Hanna began to create subsites for his organization in 2007. Using out-of-the-box features in Office SharePoint Server, he created a subsite in which he and his staff could share contacts, links to frequently used intranet sites, and best practices. He quickly found that Office SharePoint Server was a more efficient way to communicate with his staff than using e-mail. For example, Hanna posts information about his organization's policies and practices in Office SharePoint Server announcement lists. Team members can use RSS links to receive notifications of new announcements or go directly to the list to find previous announcements, eliminating the need for Hanna to resend e-mail messages every time someone needs the information. Team members can also synchronize their Microsoft Office Outlook calendars on the SharePoint site to facilitate joint scheduling of activities.

Hanna also uses Office SharePoint Server to track all customer calls and visits, product demonstrations, sales support, training, and executive briefings. It's easy for him to configure the software's events list to reflect the specific marketing activities he wants to track. He and his staff enter information about marketing activities and can create links to collateral, schedules, or other documents or files associated with the information.

Similarly, Hanna now has a single place in which he and his staff can track their deliverables for product launches. He uses the task list in Office SharePoint Server to create a list of goals for a product launch, and then he and his staff enter progress achieved on those goals, including links to the deliverables they create.

Hanna and his staff use team discussion sites in Office SharePoint Server to discuss the best way to use marketing resources. They also use wikis to collaborate on content creation, and blogs to record changes they make to product demonstrations.

Benefits

“As I started to explore Office SharePoint Server, a light bulb went on over my head,” says Hanna. “I realized this wasn’t just a document management system. It was a full application framework that would enable me to quickly and easily build what I needed to manage our business.”



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Among the benefits that NetApp sees from its use of Office SharePoint Server are better and faster business decisions, faster gathering of data and faster orientation of new employees—all without having to invest heavily in custom development or maintenance. This infrastructure design eases and simplifies IT administration, leading to improved service delivery and reduced IT operations and management costs.

Better Business Decisions in One-Third the Time

Hanna has seen his productivity and that of his team rise by 200 to 300 percent as the result of collaborating and sharing information through Office SharePoint Server 2007.

“With Office SharePoint Server, we reach decisions in half the time—or less—that it used to take,” says Hanna, “because we have faster access to the right information and can exchange viewpoints more quickly, regardless of the number of time zones between us.”



For example, Hanna points to online team discussions about the use of the technical marketing labs, in which product demonstrations are created. Formerly, his staff could have effective discussions about how to use lab resources only during once-a-week 90-minute meetings. Now, using Office SharePoint Server, his staff holds those conversations online whenever needed—so decisions about lab use get made up to a week earlier, an important benefit when the team is racing to produce new demonstrations for a product launch.

“Before Office SharePoint Server, we were meeting expectations, but in a minimal fashion,” says Hanna. “Now, not only are we exceeding expectations, we also have the time to drive new initiatives—which are themselves facilitated by the use of Office SharePoint Server.”

Centralized Information Minimizes Time to Gather Data

Hanna now has an immediate and accurate view into the status of his team’s major projects and

marketing activities, thanks to Office SharePoint Server. "For the first time, I can bring together status and project information from a variety of sources into one place and see how they relate to each other and to our goals," he says. "The first time I realized the power of this, I was bowled over."

Hanna puts this information to use in several ways. For example, his monthly business reports to management formerly required him to spend days querying his staff for information, and then three hours to compile the results. Now, using Office SharePoint Server, the information he needs is available immediately in the software's task list, and he spends only one hour to analyze the information and create his monthly report.

Hanna's managers aren't the only ones who see the results generated from Office SharePoint Server. Team members generate their own reports showing what they achieved over the previous quarter or year, and how that compares to the goals and tasks they were given. The results are used in personnel performance reviews and help to determine annual compensation bonuses.

Backup and Recovery Simpler for IT

The IT department is also seeing benefits from the solution. With SnapManager for Microsoft Office SharePoint Server, portal administrators can recover single documents or entire portals without the help of backup administration. This has improved the IT department's ability to deliver service to corporate end users of the Office SharePoint Server service while decreasing the total cost of ownership.

New Employee Training Time Reduced by 83 Percent

With Hanna's staff tripling in size over the last few years, the issue of getting new employees oriented and productive as quickly as possible became increasingly important. He estimates that it used to take about six months for a new staff member to learn the policies and best practices of the marketing organization, as well as to discover the sources of information needed for the job and to become fully productive. Now, with all of that information aggregated in Office SharePoint Server, the process has been cut by 83 percent, to one month.

"We didn't have any way to drop people into the organization and have them be productive right away," says Hanna. "Now we do. It makes a big difference in our ability to keep up with the increasing marketing demands of the company."

Ninety-Five Percent of Functionality Deployed Without Customization

The benefits of this information sharing and collaboration could have come at a high price. Fortunately for NetApp, they didn't. Beyond the licensing savings that the company achieved by using software—Office SharePoint Server—that was already included in its Enterprise Agreement with Microsoft, the company achieved further savings by being able to use the product essentially out of the box—configuring the software to its needs, but without the time and expense of custom development. Wassenaar estimates that 95 percent of the capabilities that NetApp uses are standard product features.

“Because we didn’t have to invest in a significant development effort to deploy Office SharePoint Server, we were able to benefit from it immediately,” Wassenaar says. “The reliance on out-of-the-box features also means that we can extend and upgrade the solution more easily over time; that we can decentralize the process of subsite creation; and that demands on the help desk are down, because business owners can manage more of the collaboration process by themselves.”

II. Case Study II: Vallourec Mannesmann Oil and Gas UK

Oil Company Halves Paper Consumption with Document and E-Mail Management System

[Source](#)

Vallourec Mannesmann Oil and Gas UK supplies pipes and equipment to companies working in the North Sea. In the past, almost all the company’s communications—and its extensive archives—were paper-based. But a commitment to environmental sustainability led the company to work with Microsoft Gold Certified Partner Sysnet to develop a fully integrated document and e-mail management system, and cut its paper consumption by more than 50 per cent.

Business Needs

Vallourec Mannesmann Oil and Gas UK supplies oilfield country tubular goods to energy companies operating in the North Sea. It deals with hundreds of documents every day, including order forms, invoices, certificates, and drilling sequences. In the past, personnel sometimes found it difficult to keep track of crucial information because of a lack of systems integration. Sales managers had to work hard to stay up-to-date with the latest client information, because the company’s complex lines of business often involve many manufacturers, suppliers, and customers.



“ The Microsoft technology has helped us reduce the amount of paper we use by more than 50 per cent.

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Scott Findlay
IT Manager
Vallourec

Mannesmann Oil and
Gas UK



Scott Findlay, IT Manager, Vallourec Mannesmann Oil and Gas UK,
says: "Our sales people had to create and maintain a tracking
spreadsheet for each customer to keep relevant documentation

together. They also had to monitor incoming e-mail traffic for information relating to their clients. It took a lot of time, so we wanted to create a system that would store new information in the correct place and notify the right people automatically."

The company's administrative processes were mostly paper-based. Even when orders came in electronically, staff printed the documents, copied them, and sent them on to the appropriate people. Says Findlay: "We were posting information between our three sites around Aberdeen and Glasgow, so people often had to wait for crucial documents to arrive. Most importantly, though, we were using too much paper. We wanted to cut our usage to reduce our impact on the environment."

Document storage was another challenge. The company has to keep extensive records of the pipes and joints it manufactures, to make sure that it is prepared in the event of a critical supply line failure. But because all the documentation was in hard copy, this meant that large archives and filing systems built up over time, and information became harder to retrieve quickly.

Solution

In early 2007, the company began looking at ways of consolidating its communications. "We decided to create an electronic document and e-mail management system, but we didn't have the skills to develop it in-house, so we started looking for a partner that could help," says Findlay.

After researching the options, Findlay's team decided to work with Microsoft Gold Certified Partner Sysnet. "We talked to the people at Sysnet about the problems we were having, and we were impressed by their understanding and expertise," says Findlay.

The team at Sysnet developed a solution based on a range of Microsoft technologies. At the heart of the system is Microsoft Office SharePoint Server 2007, which is used to create custom Web Parts and draw information together from other elements of the system, such as Microsoft Office Outlook 2007 messaging and collaboration client, and Microsoft Exchange Server 2007.

Deployed in the company's sales department, the system helps account managers keep track of information more effectively. Susan Young, Contracts Manager, Vallourec Mannesmann Oil and Gas UK, says: "With SharePoint sites, each person on the team accesses the services they need with a single sign-on. When they log on, they see three default views with the latest information about the current orders, purchase orders, and works orders with which they're dealing. And they use the Enterprise Search feature to quickly find any information they need."

When the company receives an e-mail message with order information, such as a dispatch note from a manufacturer, the system identifies the order number and automatically sends the message to the right folder, as well as notifying the relevant account manager.

The solution integrates with the company's existing enterprise resource planning system, so crucial business documents are automatically sent to the correct folders on the company's servers. Employees now scan all the paper documents the company receives to create archived electronic copies, and the system sends these to the correct locations too.

Benefits

The company saw immediate benefits after deploying the Microsoft solution. Account managers now have an intuitive interface with all the information they need readily available. They save time, because they are notified as soon as the company receives e-mail messages relevant to their clients, and they use the Enterprise Search feature in Office SharePoint 2007 to find information fast. Most importantly, the company has radically cut its paper usage, significantly reducing its impact on the environment. Findlay says: "The Microsoft technology has helped us reduce the amount of paper we use by more than 50 per cent." Personnel no longer need to print out and copy e-mail messages, because the system automatically sends them to the right people. And documents received in hard copy are quickly scanned and added to a comprehensive and easily navigable electronic archive.

The company has reduced the amount of paper used in its sales department from 45 reams in the first quarter of 2007 to 20 reams in the first quarter of 2008, a saving of more than 50 per cent.

Contract managers work more efficiently because they have a personalized view with all the latest information about their clients.

Employees find information faster using Enterprise Search.

Staff send documents between the company's three sites electronically, eliminating postage costs.

Employees retrieve older documents more easily because they are electronically archived and searchable.

Findlay and his team plan to roll out the scalable system to two other departments, making further savings.