

# CASE STUDY



## Enterprise Wide SharePoint Rollout

### Summary

Our customer is an 18,000+ employee enterprise and a leading provider of voice & data network communications and managed services. The company provides voice and data communication to residential and commercial customers in over twenty one states in the US.

The customer's existing collaboration platform was built on SharePoint 2007. However this was sub optimally utilized to the extent that file shares and stores were in some cases executed through a FTP system. The resultant collaboration system was not utilized effectively thus impacting collaboration within the organization and an investment that was not utilized to its potential. With our customer's organization growing at a fast pace, it became important to ensure the collaboration system supported this growth. The decision to implement a SharePoint 2013 environment was driven by a need to have a robust system that supported easy collaboration, advanced search, document management and a single repository for content and document store.



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Vertex Computer Systems pitched in for the requirement and carried out a detailed, end-to-end analysis of the existing system and proposed a phase wise approach for addressing the customer's requirements.

## **Business Challenge**

The rapid growth in the business resulted in increased workload, and for handling these large scale operations multiple new functions and teams were created. These various departments in the customer's organization had issues in collaboration as there was a lack of a standard single platform for communication and file sharing. In some cases the important and confidential documents were being misplaced which increased the risk of unauthorized access due to lack of security. The document storing and retrieval had also become a challenge unmanageable as there was no effective way to search the required documents as and when required.

To eliminate the challenges faced by our customer, Vertex proposed a new Enterprise Content and Collaboration Management system on SharePoint 2013 environment with an upgraded Farm Architecture on which the advanced features and workflows were to be built, and the security settings to be configured for various departments in the organization along with an advanced Enterprise Search.

## **Vertex Solution**

Technologies Used: SharePoint, SQL Server 2012, Metalogix for Content Migration, Nintex to build forms & Workflows.

Vertex consultants conducted a detailed analysis of the customer's existing system and formulated a three phased approach for addressing the requirements.

### **Phase 1:**

A series of meetings were held between Vertex consultants and the customer's SharePoint team.

Through these meetings, the required upgrades/enhancements as per the customer's needs were discussed and the necessary recommendations for the required infrastructure changes were finalized.

### **Phase 2:**

The SharePoint 2013 upgrade was carried out in this phase taking into consideration the recommended Infrastructure.

After the SharePoint upgrade, the site architecture for all the departments in the customer's organization was reconfigured. Furthermore, for ensuring the confidentiality of the data handled by the HR and Legal departments in particular, additional security layers were configured. These departments also needed custom forms and workflows which were created using Nintex. Also, an organization wide Intranet was developed for the internal collaboration of these departments with different security settings as per the customer's specification.

A help center was created with videos and text documents for training the users to get accustomed to the new environment.

### **Phase 3:**

Vertex developed a custom theme for the customer in accordance with their brand and applied it across all the sites and sub-sites. We also developed reusable templates within the site for all the departments.

A PowerShell script was created, which enabled verification of the content to ensure the authentication, once it was run. Following this, the content was migrated from various sources to the new SharePoint 2013 environment.

Separate Site Collection was configured for the search function so as to leverage the SharePoint Enterprise Search feature without overloading the system.

## Vertex Solution Highlights

The solution addressed the key customer requirements for Security, Workflows, Verification and Site Collections.

### Key Solution Highlights:

- **Folder Permissions** – the Site architecture was designed as per the requirements of the folder structure for each department.
- **Workflows** - Automated workflow created using Nintex sends automated e-mails for approvals from external vendors and continues the work flow process as an e-mail response is received.
- **Custom Solution for Migration** – PowerShell based solution enables verification of the content prior to the migration process.
- **Security** – Custom security features are enabled for different departments of the Organization, which ensures high security for confidential departments like HR and Legal.
- **Enterprise Search** – Separate site collection for search leveraged Enterprise Search of SharePoint thus eliminating the system to be overloaded with multiple processes.

## BUSINESS VALUE

- The customer has an enhanced, easily scalable and highly user friendly, branded collection of sites.
- The customer have Department specific templates that will enable them to recreate as many number of sites as they want and scale-up their sites collection without any further help from Vertex.
- Automated workflows reduced manual effort.

## About Us

Vertex is a CMMi Level-3 IT consulting organization that engages with its customers at a strategic level and provides 'thought leadership'. Vertex's team of Solution Scientists craft innovative solutions, with a holistic view, that make businesses smarter. Vertex acts as an advisory partner, aligning its offerings with the business goals and objectives of its customers.



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