

MetaVis Case Study: Winter Park Construction

Business Overview

Founded in 1974, Winter Park Construction (WPC) specializes in the renovation, multi-family, hospitality, commercial, student housing, military housing and senior living markets. WPC has completed projects throughout the United States and Mexico. As one of the nation's most respected construction management/general contracting companies, WPC has completed over one billion square feet of construction work. WPC's clients include The Kemmons Wilson Companies, Starwood's Vacation Ownership, Bluegreen Resorts, The Berkley Group, Lincoln Properties, Equity Residential, and Hilton Grand Vacations to name a few.

Migrating to SharePoint 2010

With employees and construction sites across the country, WPC needed one central location to manage and store all project communications. WPC created a portal site using SharePoint 2007 to help manage project documentation such as building specifications, daily tracking documents and email communications.

With the announcement of SharePoint 2010, WPC planned to immediately move to the new version and became early beta users. By the end of 2009, WPC was using SharePoint 2010 beta as its new portal site. In doing so, they needed to plan an effective migration strategy from the beta release to the full production release which was available in May 2010.

Unfortunately, Microsoft did not offer specific upgrade paths for beta users to the production release of SharePoint 2010. This meant that WPC would need to do it manually or evaluate third party tools. It took WPC over two weeks to migrate one site to SharePoint 2010 with the out of the box migration tools provided by Microsoft. However, this method did not preserve the integrity of the site content – meaning that valuable information such as document authorship was not maintained. After contacting Microsoft support for advice, WPC learned they would need to re-enter metadata information manually. Microsoft did not offer any tools or strategies to address this problem. With 50,000 documents and 23 sites to migrate, the manual process would take months to complete and would delay the company's SharePoint implementation.

Problem solved:

Migration and Classification in SharePoint 2010

Products:

MetaVis Migrator

MetaVis Classifier

MetaVis Information Manager

Success Factors:

Ease of Installation

Ease of Use

Preserves Content Integrity

Empowers Users to Tag Content

WPC knew it needed to explore third party migration options that would allow them to easily and quickly migrate to SharePoint 2010.

Decision Factors

WPC evaluated one migration product but quickly realized it would not fit the organization's needs. The product was too costly and would have eaten up a majority of the company's SharePoint budget for the year.

WPC downloaded a free trial of MetaVis Migrator and immediately began testing its capabilities. Migrator was cost effective and allowed WPC to quickly move its SharePoint 2010 beta sites to the production server and preserve the content's integrity. Migrator included robust classification capabilities with MetaVis Classifier that allowed WPC to tag content in bulk and organize content during the migration process.

“It was clear to us from the beginning that MetaVis Migrator was the right tool. The MetaVis support team made it feel like we were partnering with them - not just purchasing a product with limited support. They listen to us and are very receptive to discussing what capabilities will benefit users and incorporating those features into the product.”

William Henderson, IT Director, Winter Park Construction

Project Highlights

WPC was able to download MetaVis Migrator and MetaVis Classifier directly from the MetaVis web site. The company did not have to install any components or agents on the server making it easy to use MetaVis on any workstation. WPC was able to move all documents from 2010 beta to the production version with corresponding libraries and classify or reclassify objects as needed during the migration. Because MetaVis preserves the data's integrity, WPC is able to migrate without the need to do much reconfiguration. WPC's is also able to move objects in bulk saving valuable time and resources.

With SharePoint 2010, WPC was eager to take advantage of new features including Managed Metadata, Document Sets and Term Stores. Previously WPC used subdirectories and folder mapping to organize content however, users would put documents in folders making it hard to track versions and retain metadata. With SharePoint 2010 WPC uses managed metadata tags which are easier to manage and maintain.

Using Document Sets, WPC can group related documents to be versioned or sent through workflow processes as a single piece of content. The challenge for WPC was copying the data between 2010 sites. MetaVis Migrator supports Document Sets and Managed Metadata allows

WPC to efficiently copy Document Sets using specific SharePoint 2010 features between SharePoint 2010 sites.

With the migration complete to SharePoint 2010, WPC implemented MetaVis Information Manager for SharePoint 2010 to provide users with the ability to bulk tag and classify content directly from the SharePoint ribbon/interface. Users no longer have to individually tag documents, which was a time consuming and tedious process. Users can select documents in bulk and tag metadata columns or assign new ones. With Information Manager, WPC has the flexibility to change or add new metadata making documents easy to search across sites. WPC can also preserve the content's authorship and eliminate the need for users to go back into the content to add new tags.

“MetaVis Information Manager has given our users control over organizing their content in SharePoint. Plus it has freed up IT by giving more power to users. Information Manager's seamless integration makes it appear as part of SharePoint.”

William Henderson, IT Director, Winter Park Construction

Results

Prior to the use of MetaVis, WPC had spent a few months on their migration project without making any progress because data integrity was not preserved. That all changed with MetaVis Migrator, Classifier and Information Manager. MetaVis has allowed WPC to migrate their SharePoint 2007 and SharePoint 2010 beta sites to the production version of 2010 in days.

MetaVis has allowed WPC to move forward with their SharePoint 2010 project by helping them complete the migration of content in a timely fashion. WPC is able to keep their content well organized and easy to search by incorporating metadata management and classification technology. When WPC experiences bugs or problems with their SharePoint sites, they are able to quickly recreate libraries and move content to a new library. What could be a very unpleasant process is done in a matter of a day.

“We were at a roadblock on getting our SharePoint sites migrated properly and there were no easy strategies coming from Microsoft. MetaVis saved us months of migration work. We could not have completed the project without MetaVis Migrator and Classifier. More importantly, these products have become an instrumental part of our day to day SharePoint management.”

William Henderson, IT Director, Winter Park Construction