



## Software Firm Applies Structure to Content Management System for Greatest Value

### Overview

**Country or Region:** United States

**Industry:** Professional services—  
Software engineering

### Partner Profile

MetaVis Technologies, based in Philadelphia, Pennsylvania, develops software that helps customers better organize and manage their Microsoft SharePoint Server and Office 365 environments.

### Business Situation

MetaVis wanted to help customers take advantage of SharePoint Server 2010 to improve collaboration and information management.

### Solution

MetaVis developed software to help customers manage their SharePoint Server 2010 environments with enhanced metadata, migration, and content classification tools.

### Benefits

- Faster, more organized migrations
- Maximum benefits from document management infrastructure
- Increased flexibility, lower costs
- Higher opportunity for customers,

“SharePoint Server 2010 is an enterprise-ready solution. We’ve capitalized on its popularity, and because our tools have ongoing relevancy, we enjoy profitable, long-term customer success.”

Peter Senescu, President, MetaVis Technologies

MetaVis Technologies, a Microsoft Network Partner, wanted to help customers benefit from Microsoft SharePoint Server 2010 for enhanced collaboration and easier information management; to that end, it created tools for developing SharePoint Server information architectures, performing migrations, and classifying content. With the tools, customers experience faster migrations and achieve optimal organization of their environments, which leads to better search results and lower costs. For example, Pannone, a UK law firm, used SharePoint Server 2010 and MetaVis Migrator as the foundation of its document management system and now enjoys flexible, comprehensive management of critical documents—its key business assets—at a significantly lower cost than other systems. MetaVis has taken advantage of SharePoint Server 2010 popularity and innovation to expand its customer base by 800 percent.

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## Situation

MetaVis Technologies, a member of the Microsoft Partner Network with Gold ISV competencies, develops packaged solutions to help customers improve the organization and simplify the management of their Microsoft SharePoint Server environments. The Philadelphia, Pennsylvania-based company noticed the rising popularity of Microsoft SharePoint Server 2010, in particular, as companies increasingly chose it to replace content management systems from well-known vendors such as Documentum and OpenText. MetaVis agreed that SharePoint Server 2010 offered a mature, enterprise-level solution for collaboration and document management. “SharePoint Server 2010 has a superior security model to other document management solutions plus advanced features like managed metadata and search, and it relies on common Microsoft .NET development skills—all of which allows companies to build global information systems,” says Peter Senescu, President at MetaVis.

However, the company’s founders, who in their previous roles worked with large, enterprise content management implementations, recognized a need to help SharePoint Server customers create sound information architectures for their new SharePoint Server environments. “We thought we could add value by helping organizations migrate to SharePoint Server 2010 with a clearly planned information architecture and proper metadata tagging to easily find information later,” explains Senescu.

To capitalize on the migration trend toward SharePoint Server 2010, MetaVis developed a suite of complementary tools to do just this. The tools install quickly a user’s PC; and require no

server-side software; and feature graphical user interfaces and drag-and-drop functionality. Customers use MetaVis products to migrate to SharePoint Server 2010 and Microsoft SharePoint Online from older versions of SharePoint Server; from older enterprise content management systems; and from network file shares.

Recently, the Pannone law firm, a MetaVis customer based in Manchester, United Kingdom, wanted to enhance its document management processes for better version control, to reduce duplicated efforts by staff, and to improve search results. While Pannone relied on a case management system from LexisNexis to store and manage information related to practice areas where it followed highly standardized processes, such as Personal Injury, in other practice areas, such as Corporate Services, the firm needed a more flexible, efficient solution that could accommodate “fewer predefined paths and more unknowns as individual cases progressed,” explains Jon Taylor, Senior Business Systems Developer and SharePoint Administrator at Pannone.

When working in those other practice areas, users saved files such as contracts, agreements, memos, and other legal documents to network file shares and shared them as email attachments, with no versioning or check-in/check-out system. The network shares also lacked a common hierarchical structure, as users named and categorized files and folders according to personal preference. Further, the firm did not have a comprehensive system for applying descriptive tags to documents, or advanced search capabilities. All these factors together contributed to poor search results and version confusion

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when users tried to locate specific information. Pannone wanted to make it easier for users to manage documents by simplifying and automating these processes.

Pannone didn't want to ask its users to dramatically change their work processes, however. “We wanted to create a better environment for storing, controlling, and retaining documents, but we also wanted to ensure that users would accept it—we wanted to preserve their work in an environment that they understood, were comfortable with, trusted, and could easily navigate,” says David Griffiths, IT Director at Pannone.

### Solution

In 2010 Pannone evaluated several different document management systems, including its existing case management system. “We considered adapting the LexisNexis system to handle more unstructured information such as matter management, but we needed a more flexible environment for creating taxonomies and performing advanced search,” says Taylor. Pannone also evaluated third-party document management systems from several well-established vendors. “But to deploy an entirely new infrastructure would have resulted in much higher hardware, licensing, and administration costs,” he says.

Pannone also evaluated Microsoft SharePoint Server 2010, which it decided was the best fit. The firm was familiar with the technology because it used Microsoft Office SharePoint Server 2007 as the foundation for its intranet and client portals. “We chose SharePoint Server 2010 because we were attracted by features such as managed metadata, enterprise search, document sets, and

enhanced records management capabilities,” says Taylor. “We also found that it was more cost-efficient to expand on our existing technology than to implement an entirely new system that required additional infrastructure and a steeper learning curve.”

### Implementing a Document Management System

Pannone conducted a proof-of-concept implementation in which it deployed the solution to a pilot group of 20 users in its Corporate Services practice. “Before this, we had proposed to our users a scaled-down version of the LexisNexis solution, but they found it too rigid and rejected the idea,” says Griffiths. “When we proposed a solution based on SharePoint Server 2010 and custom add-ins developed by the Pannone team, the response was very positive. But in terms of the actual migration of content, we did not want to simply move a massive file store to SharePoint Server 2010. We wanted to find a more efficient way to transfer and organize the information that made sense to our users.”

As the firm began to develop and implement the SharePoint Server 2010 environment, it also evaluated content migration tools and discovered a solution from MetaVis. “We chose MetaVis because its suite of products offers a nondisruptive migration process. It allows us to maintain our existing metadata and reclassify it as we migrate—all in one easy step. Furthermore, the MetaVis presales service and support was fantastic, and the price was significantly lower than other solutions,” says Taylor.

Pannone uses MetaVis Migrator (which is client-based software that does not require a server component) to move

content from file shares to SharePoint sites. Pannone users drag and drop files from the old environment to a target folder structure in SharePoint Server 2010 that is based on client and matter names and topics. While the original document metadata is preserved, users are automatically prompted to enter additional descriptive tags to enhance search results, including content types, which in SharePoint Server 2010 describe a collection of metadata and, as such, can be used to initiate automated workflows, and manage security and viewing rights for large numbers of files. Pannone also uses content types with Content Query Web Parts in SharePoint Server 2010—a tool that can be used to aggregate relevant information on a SharePoint site page. Pannone customizes these web parts to show its users information specific to their clients from any page in the SharePoint Server 2010 environment.

With MetaVis, users can also load files in bulk to SharePoint Server 2010 through a customizable and reusable template that automatically maps content to the appropriate target destination. “All of the accompanying metadata is preserved, and users can assign content types as they move them to the new environment,” explains Taylor. “It’s literally a matter of loading up the mapping template, and with two mouse-clicks, all files are imported to the SharePoint site.” In this environment, users can see their old files and folders, and their relationship, in columns marked by descriptive metadata, to the SharePoint documents library. “This gives users the confidence their documents will not disappear without trace into the new system.”

Within the new environment, Pannone can also take advantage of a similar SharePoint Server 2010 feature called Document Sets to manage multiple documents with shared attributes as one item. For instance, all files related to a particular case can be part of one document set, and Pannone can configure unique document set content types to automate related workflow, retention, and other business processes. The firm is also developing dashboards in SharePoint Server 2010, which provide contextual client- and matter-related information such as time and billing targets. The dashboards provide users with convenient, consolidated views of data to minimize the need to switch among applications to find information. Finally, Pannone finds great value in SharePoint 2010 Search, which offers metadata-driven refiners to help users quickly narrow results and find the information they need.

Pannone plans to make the new, SharePoint Server 2010- and MetaVis-based environment available to all of its users by the fourth quarter of 2011.

### **Customizing and Enhancing the System**

Pannone is using multiple capabilities in SharePoint Server 2010, including prebuilt site templates for its document management environment and intranet (which it is also in the process of upgrading to SharePoint Server 2010). It uses Microsoft SharePoint Designer 2010 to customize the site templates.

Pannone is also evaluating Microsoft SharePoint Online, which is delivered online as part of the Microsoft Office 365 subscription service. Microsoft Office 365 is a set of cloud-based email, calendaring, collaboration, and

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conferencing services combined with web-based versions of the popular Microsoft Office programs. In a proof-of-concept implementation, Pannone is experimenting with the hosted service to provide its commercial clients with easy, online access to information, reports, documents, and other case-related items. “SharePoint Online can be a great alternative to constructing a more costly, on-premises environment with additional hardware and higher administrative overhead,” says Taylor.

MetaVis products are compatible with Office 365, which means customers can migrate information to the hosted environment without installing server-side components. The migration process is identical to an on-premises migration. “Office 365 and SharePoint Online are huge advancements that will help companies cut costs while taking advantage of all of the great features of SharePoint Server,” says Senescu. “MetaVis tools can be used to move data to the cloud automatically, without manually copying each document and the associated metadata.”

### Benefits

By using SharePoint Server 2010 and MetaVis software, MetaVis customer Pannone is establishing a document management system that users readily accept, and that allows the law firm to take advantage of the solution’s many productivity- and collaboration-enhancing features. Migrations happen rapidly, and the new environment will result in lower costs and higher flexibility for Pannone. For MetaVis, customers like Pannone that are looking to optimize their content management with SharePoint Server 2010 or Office 365 represent expanded business opportunities.

### Faster, More Organized Migrations

Had it not used the MetaVis Migrator, Pannone would have spent much more time manually mapping file shares to SharePoint sites, importing files, and customizing workflows to automate the population of metadata and classifications such as content types. Pannone estimates that it saved approximately 50 percent of its time in the migration process by using MetaVis software. It also helped ensure that users would accept and readily adopt the new system. “The MetaVis folder views—in which users can see their old folder and file structures, and how they map to and relate to the metadata driven-structure in the SharePoint libraries—have helped enormously with user acceptance of the project,” says Taylor.

MetaVis Migrator provides a report of all files moved, and Pannone relies on these auditing capabilities to ensure that all necessary files are included. “MetaVis Migrator helped us quickly take advantage of SharePoint Server 2010. It also reduced the possibility of leaving files behind,” says Taylor. “We cannot afford to lose critical documents; these are the key assets to our business.”

### Maximum Benefits from Document Management Infrastructure

MetaVis software helps organizations ensure that they derive the best results from their SharePoint Server 2010 and SharePoint Online investments. “If you create a well-organized SharePoint Server environment, with an over-arching corporate taxonomy, you can take advantage of all of the features—such as managed metadata, content types, document sets, and more—that help users achieve better search results, more effective document management, and efficient collaboration,” says Senescu. “All

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of the great features that companies need exist in SharePoint Server 2010. We just help them organize the environment to achieve the best results.”

Taylor concurs, as Pannone has found great value in SharePoint Server 2010 enhancements, including managed metadata, document sets, and streamlined development. “We were pleased with our Office SharePoint Server 2007 environment, but SharePoint Server 2010 provides even more features to enhance productivity and streamline business processes. Each requirement we established is met with the features that exist in the newer version.”

#### **Increased Flexibility, Lower Costs**

By using SharePoint Server 2010, Pannone achieved a significant IT cost avoidance. “Had we invested in a third-party document management system, we would have incurred additional licensing costs, made additional hardware expenditures, and spent more on management and administration,” says Griffiths. “Not to mention, we would have had to invest in training users on a new system. With SharePoint Server 2010, we have realized a significant cost avoidance. That is the beauty of an extensible, consolidated system—you can use it for multiple purposes while minimizing overhead.”


Pannone also believes that it has more flexibility with SharePoint Server 2010 than it would have had with other systems. “We didn’t want to have to adhere to the structure and rigidity of other systems we evaluated,” says Taylor. “With SharePoint Server 2010, we can build our own web parts and deliver services in a way that works the best for our users. SharePoint Server 2010 lets us do things our own way.”

Pannone also finds that development costs for customizing and modifying its environment are lower with SharePoint Server 2010 than if it had chosen one of the other systems it evaluated. “With Visual Studio 2010 and SharePoint Designer 2010, the development process is more accessible. We no longer have to rely on external firms, and we also find that all of our developers—from less skilled to highly skilled—can make important contributions to SharePoint Server projects and overall, we can achieve greater control of our application configuration,” Taylor says.

Finally, Pannone and other MetaVis customers will experience lower help-desk costs with SharePoint Server 2010 and MetaVis. “The joint solution will help us reduce the number of calls from users to the help desk,” says Taylor. “Administrators will experience great ease and control when migrating content, which means they don’t have to call IT staff.” Furthermore, the organized nature of the migration, which captures critical metadata, will result in faster, easier, more effective searches—and consequently, fewer calls to the help desk from users who can’t find the documents for which they are looking.

#### **Higher Opportunity for Customers and Solution Provider Alike**

Pannone envisions a bright future with SharePoint Server 2010. “There are so many features we have yet to take advantage of,” says Taylor. For instance, the law firm plans to use Microsoft Business Connectivity Services (BCS) and PerformancePoint Services for SharePoint Server 2010 to draw on raw data in other systems, such as LexisNexis Axxia Desktop Case Manager and InterAction CRM, to create visual dashboards for each employee in the



firm. "We can display time targets, tasks, urgent matters, billable hours, and so much more, with these business intelligence capabilities," says Taylor.

The firm also plans to implement the SharePoint Server Records Center and in-place records management to ease its compliance efforts. "SharePoint Server 2010 has the potential to be our firm's master system. Through it, we can store, manage, share, and aggregate all kinds of data and information. We would have had to implement many additional systems to get all of the capabilities that SharePoint Server provides in a single environment," says Taylor.

MetaVis has expanded its own business opportunities by providing solutions for SharePoint Server 2010 and SharePoint Online. The rapid uptake of the collaboration and document management infrastructure has helped the company expand its customer base by 800 percent since the launch of SharePoint Server 2010. Customers use MetaVis software to prepare for migrations, to migrate, and to organize and manage their environments on an ongoing basis.

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## For More Information

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[www.microsoft.com](http://www.microsoft.com)

For more information about MetaVis Technologies products and services, or to download trial software, call (610) 717-0413 or visit the website at:  
[www.metavistech.com](http://www.metavistech.com)

## Microsoft SharePoint Server 2010

Microsoft SharePoint Server 2010 is the business collaboration platform for the enterprise and the Web.

For more information about Microsoft SharePoint Server 2010, go to:  
[www.microsoft.com/sharepoint](http://www.microsoft.com/sharepoint)

### Software and Services

- Microsoft Server Product Portfolio
  - Microsoft SharePoint Server 2010
  - Microsoft SharePoint Designer 2010

- Technologies
  - PerformancePoint Services for SharePoint

### Third-Party Software

- MetaVis Migrator for SharePoint