

## CASE STUDY



### Customer Location

Omaha, NE

### Industry

Financial Services

### Platform

Microsoft SharePoint 2010

### Critical Needs

- Copy site templates while maintaining custom site and workflow configurations
- Accelerate site creation based on established templates
- Gain insight into user activity within SharePoint

### Solution

DocAve Content Manager  
DocAve Report Center

**“Since we implemented DocAve, it has made getting new SharePoint sites up and running so much easier than before.”**

**- Ray Gering,  
Federal Tax Consultant,  
CFO Services**

## CFO Services Copies Customized Microsoft® SharePoint® Site Templates 80% Faster with DocAve®

### SUCCESS HIGHLIGHTS

- Easily copied SharePoint site templates with full fidelity – including custom workflows – improving IT efficiency and reducing operational costs
- Reduced time to copy a site from templates by 80 percent – from five hours to less than one hour
- Gained ability to audit and report on external user activity across specific sites and documents, providing accountability to clients

### CUSTOMER PROFILE

CFO Services provides compliance services related to tax incentives and credits available at the federal, state, and local level.

### THE CHALLENGE

CFO Services uses Microsoft SharePoint to help its customers annually file tax credits and store necessary documentation. Every year, the organization’s IT team creates individual sites for each of its clients to store documents, review data, and keep track of projects.

The team also implemented a third-party tool to create custom workflows that help automate calculations using data in SharePoint lists. “We create site templates to make site creation faster as we take on more clients,” said Ray Gering, Federal Tax Consultant at CFO Services. “It was pretty easy at first to create the new sites and get them up quickly, but copying the custom workflows was a major challenge for us. There was no out-of-the-box SharePoint functionality that would allow us to keep those workflows attached to our lists.”

Since workflows were crucial to business productivity, and because IT wasn’t able to easily copy the workflows from templates to the new sites, administrators had to spend much more time on manual setup. “If I had to create a new site, I essentially had to start it from scratch,” Gering said. “Using native SharePoint capabilities, it would take at least half a day to create a new, functional site with the necessary workflows in place.”

In addition to simplified site duplication within SharePoint, CFO Services sought to go beyond SharePoint’s native auditing functionality.

With these needs in mind, CFO Services began researching third-party solutions.

## THE AVEPOINT SOLUTION

After evaluating different solutions, CFO Services chose to implement DocAve Software, AvePoint's fully integrated platform for SharePoint migration, management, and protection. "DocAve was the only solution we could find that did exactly what we wanted it to do," Gering said. "It allows us to copy our site template bit for bit, with our customized workflows attached to the right lists."

With DocAve Content Manager, IT is able to copy its master site templates with full fidelity, something it was not able to do with native SharePoint capabilities due to the complexity of the workflows. Instead of having to manually recreate and configure its workflows in the new sites, DocAve allows Gering to create exact copies of its template much faster than before. "It took a lot of work to copy over web part pages and re-link web parts," Gering said. "Now, in a couple of clicks, I can set up a job and create a new site in less than an hour. It used to take up to five hours. I have to set up at least 20 sites per year, so that's a huge time saver for me."

DocAve allows the organization to not only save time, but also costs. By reducing the time needed to manually configure sites, CFO Services can maintain a small IT team and continue to manage its environment internally – meaning the team can keep up with the growing business, boost productivity, and take on more clients. "Most of our infrastructure is managed internally," Gering said. "If we didn't have DocAve, we'd still be creating sites one by one and would have to hire someone specifically for that purpose. That process was taking a lot of time away from my other tasks."

CFO Services also relies on DocAve's SharePoint reporting capabilities to ensure the organization is accountable to clients. Specifically, Gering uses the user lifecycle compliance

report available through DocAve Report Center to track when and how specific users are accessing documents. "DocAve allows me to generate reports based on user-specific activity on a site," Gering said. "Being able to track this activity has been invaluable during an access review. We allow those users access to a portion of a client's SharePoint site to review any requested data or project documents. If we ever get a duplicate request, we have the ability to run a report and see whether they've already accessed the available documents, which prevents us from unnecessarily doing more work and keeps us in good standing with our clients."

## THE BOTTOM LINE

By deploying DocAve, CFO Services is able to copy its customized site templates more easily and efficiently than with native SharePoint functionality. Instead of spending hours manually recreating a new site from a highly customized template, the organization's IT team can now allocate that time to other tasks. "DocAve has become an instrumental part of my work," Gering said. "AvePoint's technical support was really great in working with us and guiding us through setup. Since we implemented DocAve, it has made getting new SharePoint sites up and running so much easier than before."

## ABOUT AVEPOINT

AvePoint is the Microsoft Cloud expert. Over 15,000 companies and 3 million cloud users worldwide trust AvePoint to migrate, manage, and protect their Office 365 and SharePoint data. Founded in 2001 and headquartered in Jersey City, NJ, AvePoint is privately held and backed by Goldman Sachs.

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