



South African Financial Services Giant Sanlam Engages Intervate and DocAve® to Effectively Govern Microsoft® SharePoint® Deployments for 10,000 Users

Customer Location

Cape Town, South Africa

Industry

Financial Services

Platform

Microsoft SharePoint 2010

Critical Needs

- Customised, automated reports on SharePoint deployment
- SharePoint user activity auditing
- Migration of data from Lotus Notes and network file shares to SharePoint

AvePoint Solution

DocAve Administrator
DocAve Auditor
DocAve Migrator
DocAve Report Center

“DocAve is the industry’s leading SharePoint toolset.”

- Naz Parker – Manager of SharePoint Shared Services, Sanlam

Success Highlights

- Furnished customised reports on SharePoint deployment – including site performance, site usage, user content contribution, and storage trends – to the business in order to enforce governance policies and auditors to meet compliance objectives
- Saved four hours per month for IT staff through automated reporting
- To date has migrated 3.6 gigabytes (GB) of data from Lotus Notes to a team workspace within two hours and 23 GB from network file shares to SharePoint team sites within three days, saving 86% of the three weeks that would have been required without DocAve

Customer Profile

Sanlam is a leading financial services group listed on the JSE Securities Exchange and the Namibian Stock Exchange. The South African-based Sanlam Group conducts its business through Sanlam Limited, the corporate head office and four business clusters—Sanlam Personal Finance, Sanlam Emerging Markets, Sanlam Investments, and Santam. The Group operates in South Africa, Botswana, Malawi, Nigeria, Ghana, Kenya, Swaziland, Tanzania, Uganda, Zambia, Namibia, India, and the United Kingdom. It also has business interests in the USA and Australia. Sanlam provides financial solutions to individuals and institutional clients across all market segments. These solutions include personal financial services such as individual, group, and short-term insurance, estate planning, trusts, wills, personal loans, savings and linked products, business fitness assessment and insurance investment management, investment management, stock-broking, risk management, employee benefits, and capital market activities. Established in 1918 as a life insurance company, Sanlam has grown into a diversified one-stop financial services group. Headquartered in Bellville, Cape Town, the company has offices throughout South Africa and more than 10,000 employees worldwide.

The Situation

Sanlam employees utilised Lotus Notes and Novell GroupWise as a communication platform for approximately 15 years. As the company began to shift its email services to Microsoft Exchange 2010, it was also decided to implement Microsoft SharePoint

2010. With the platform, employees could collaborate and share information using corporate intranets, departmental sites, and team sites. Within the first year of its deployment, Sanlam gradually rolled out SharePoint functions to approximately 5,000 employees throughout the company, with plans to have all business units on board by March 2013.

The Challenge

As a service provider to the business, Sanlam IT Infrastructure Shared Services (ITISS) saw the importance of properly planning its deployment for the organisation. “We have one large, stretched high availability farm, and each business has web applications on that farm,” said Naz Parker, Sanlam Manager of SharePoint Shared Services. “Governing that shared environment is important to ensure the farm stays healthy and that our clients are protected.”

The company engaged AvePoint partner Intervate, a specialist provider of Enterprise Information Management solutions improving productivity and collaboration, to create a governance plan for the organization. “We advised Sanlam to pull together a team that included not just IT, but also business users,” said Marc Fletcher, Intervate’s Cape Town Sales and Marketing Director. “This helped them make decisions that would work on a group level.”

In the process of creating Sanlam’s governance plan, it was clear that IT would need to provide regular reports to the business to analyse use of the platform as well as performance and availability. “We needed a toolset that could manage and report on SharePoint over and above what the platform could do out-of-the-box,” Parker said. “SharePoint captures data, but does not analyse it in the way we needed.”

The AvePoint Solution

After investigating multiple solutions, Sanlam selected DocAve Report Center, part of AvePoint’s DocAve Software Platform. DocAve Report Center presents administrators, business stakeholders, and content owners with a comprehensive understanding of their SharePoint platform or site’s usage, topology, performance, and storage trends while generating customisable reports and alerts. “DocAve is the industry’s leading SharePoint toolset,” Parker said. “We evaluated others, but decided on DocAve because of AvePoint’s

dedication to making the best tools for SharePoint, its second-to-none customer service, and its great support.”

Intervate supported this decision and helped Sanlam implement DocAve for the company’s deployment. “AvePoint assists Intervate to do what it does best: To deliver solutions that have meaningful impact, drive growth, improve productivity, and reduce costs,” Fletcher said.

With DocAve, Sanlam administrators were able to run automated reports on site performance, site usage, user content contribution, and storage trends. Audit reports give Parker insight on who has received elevated permissions from site collection administrators to ensure that these individuals are properly trained as per Sanlam’s governance policy. The reports are given to the business on a monthly basis to plan and govern the deployment as well as auditors regularly in order to satisfy compliance objectives. “DocAve enables us to gather the information we require to deliver SharePoint as a service to our business and satisfy audit requests,” Parker said. “By delivering automated reports, it also frees up at least four hours per month for my staff.”

Parker also utilized DocAve Migrator to migrate more than 25 GB of its data, including meeting minutes and agendas, from Lotus Notes and network file shares to SharePoint team sites. With DocAve, all folder structures, document properties, and associated metadata were retained with full fidelity, ensuring that all migrated content looks and performs as it did in Lotus Notes and the file shares. “DocAve migrated data from Lotus Notes and network file shares to SharePoint within three days, which saved 86% of the three weeks that would have been required without it to accomplish these tasks” Parker said.

The Bottom Line

As Sanlam’s environment continues to grow and evolve, the company will implement additional AvePoint products. In order to manage a new SharePoint extranet environments accessed by clients, DocAve Deployment Manager will automate the process of deploying customizations and configurations within the farms. “Aside from the fact that DocAve is a fully integrated platform and eliminates the need to acquire additional toolsets in the future, the appeal of AvePoint to our organisation is the attitude and its people,” Parker said. “When we need help, AvePoint’s staff doesn’t just tell us to do something – they do it with us.”

About AvePoint

AvePoint is a global technology company and proven software leader. Since its founding in 2001, AvePoint has become the world's largest provider of enterprise-class governance and infrastructure management solutions for Microsoft SharePoint. Propelled by the world's largest SharePoint-exclusive research & development team, AvePoint helps more than 10,000 customers – including many Fortune 500 companies and government agencies – meet their specific business objectives utilizing the SharePoint platform.

AvePoint, Inc. is headquartered and maintains its principal operational centre in Jersey City, NJ, with wholly owned operational centres in the USA, Canada, Australia, South Africa, United Kingdom, France, Germany, Netherlands, Switzerland, Japan, Singapore, and China. AvePoint is a Depth Managed Microsoft Gold Certified Portals and Collaboration Partner and Gold Certified ISV Partner as well as a US Government GSA provider via strategic partnerships.

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About Intervate

Intervate is primarily focused on the development and implementation of Enterprise Information Management solutions within the key competency areas of Intranets and Portals, Social Platforms and Collaboration, Enterprise Search, Compliancy and Records Management, Imaging and Capture, and Web Content Management. Each of these solution offerings is central to the aim of delivering improved productivity and collaboration for clients. As a Microsoft Partner with four Gold Competencies, namely Gold Content Management, Gold Digital Marketing, Gold Portals and Collaboration, and Gold Search, Intervate holds expert Microsoft skills and provides a range of add-on products and solutions for the Microsoft platform.

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