



Timbercorp Grows Effective Document Management with Centralized Portal

Overview

Country or Region: Australia
Industry: Financial Services

Customer Profile

Timbercorp is Australia's largest agribusiness investment manager. The company has 180 staff and 18,000 investors around the country.

Business Situation

Timbercorp was struggling to manage information across numerous business units using an outdated document management system and intranet. Documents were difficult to find and version control was a problem.

Solution

The company installed Microsoft Office SharePoint Server 2007 as an integrated intranet to replace its document management system.

Benefits

- Single, centralized source of information.
- Scalable platform to meet future needs.
- Enhanced document management and search functions.
- Improved system performance and uptime.
- Increased credibility of IT department.

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Philip Faure, Applications Development Manager, Timbercorp

Investment manager Timbercorp was finding it difficult to manage information across siloed business units and disparate applications and databases. Staff rarely used the company intranet and there were no guarantees as to the quality or accuracy of information. In 2007, the company engaged Professional Advantage to help implement a centralized portal and document management system based on Microsoft Office SharePoint Server 2007, supported by a Microsoft SQL Server 2005 clustered database. Office SharePoint Server 2007 made it fast and easy for staff across the business to search for and locate information, eliminated version control issues, and increased staff satisfaction. Such has been the success of the initial rollout that Timbercorp is now planning to use the SharePoint Server 2007 platform for new projects in areas such as business intelligence, workflow, and reporting.

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Luke Johnson, IT Services Manager,
Timbercorp

Situation

Established in 1987, Timbercorp is Australia’s leading agribusiness investment manager. The company finds, funds, and manages high-quality, large-scale agribusiness projects for its 18,000 investors around the country.

Since 1992, Timbercorp has managed more than A\$1.7 billion in funds. It has 180 staff and is responsible for another 1,500 employees and contractors throughout regional Australia.

Timbercorp developed and now manages 12 per cent of Australia’s eucalypt plantations, producing woodchips for export to Japan. The company manages the world’s largest single-site olive grove and the largest almond orchard estate in the Southern Hemisphere. Timbercorp also has interests in citrus, table grape, mango, avocado, and Timbercorp’s operations are managed by approximately 10 different business units. Each of these had operated on siloed systems and applications, which made it difficult to share and manage information across the company. Timbercorp’s document management system was outdated and no longer able to provide all the required functionality.

“Information was stored as a mixture of flat files on file servers and across different databases,” explains Luke Johnson, IT Services Manager, Timbercorp. “People created their own information, which was then duplicated between different departments. This made it difficult to ensure people were looking at the correct version of a document or that the information they were accessing was still up to date and accurate.

“The real difficulty was that this data was used to generate reports for management. Because the underlying data was unreliable,

reports often contained conflicting information.”

“With staff working in siloed units, and information stored across multiple locations, there was no way to search across all systems for the information you needed,” adds Philip Faure, Applications Development Manager, Timbercorp. “You had to know where something was to be able to find it.”

The company’s intranet, which included its existing document management system, was another area of concern. Based on manual processes, it only offered very basic content management functionality. As a result, the intranet never got the backing of the business and uptake was poor.

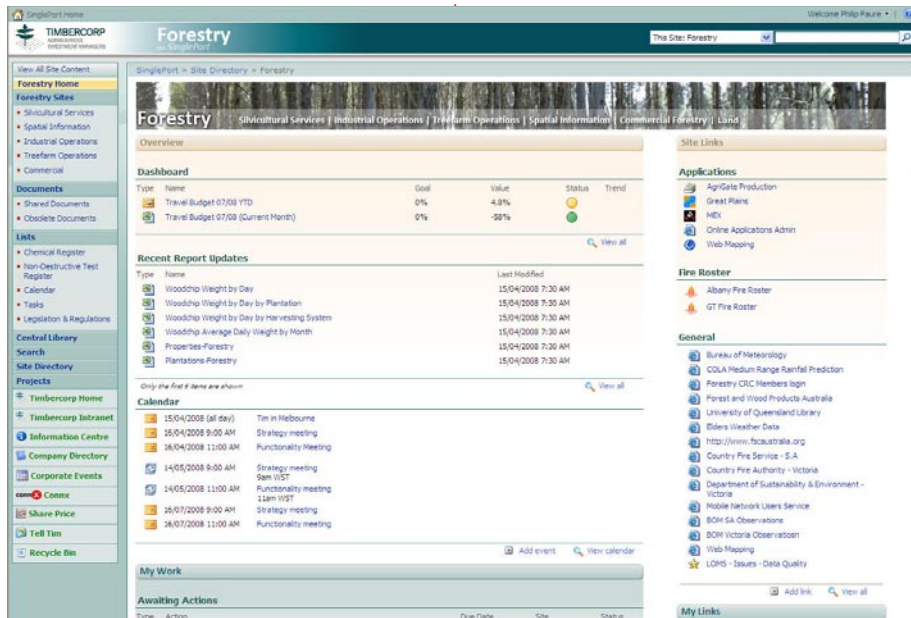
“Staff didn’t consider the intranet a reliable source of information,” says Johnson. “In addition, the infrastructure behind it was just a single server with a single database, which resulted in poor uptime.

“The state of our intranet and document management systems was damaging the credibility of the IT department within the business.”

Timbercorp’s IT department decided it needed to implement an integrated online portal that would act as a secure intranet and provide a managed, single view of information across the company. It also required superior document management capabilities that would give staff the ability to find any document, no matter where it was housed or which business unit created it.

Solution

In early 2007, Philip Faure attended an information session on Microsoft Office SharePoint Server 2007 and realized the product had all the functionality Timbercorp required in a single platform. The company decided to implement Office SharePoint



Timbercorp: SharePoint Screen

Server 2007, and selected Microsoft Gold Certified Partner Professional Advantage to help.

“Professional Advantage had a strong infrastructure team and offered in-depth knowledge of the SharePoint Server platform,” says Faure. “They were also able to meet with us, get engineers on site, and have the project up and running in a timely manner, something other providers we talked to couldn’t guarantee.”

The implementation took place between March and July 2007. As well as implementing SharePoint Server 2007, Timbercorp built a clustered database environment on SQL Server 2005.

The SharePoint Server 2007 portal replaces Timbercorp’s old intranet application. All documents that were stored in the old document management system were migrated to SharePoint Server 2007.

The infrastructure was built across two front-end, load-balanced web servers and one application server running SharePoint Server indexing and query services. The application server also provided Microsoft SQL Reporting Services and Rights Management Services to plantations. SharePoint databases were housed on a two-node Microsoft failover cluster and all the servers were housed in a Hewlett-Packard blade chassis.

“The platform was designed to provide highly scalable performance as well as hardware redundancy across all servers, LAN switches, and network cards,” according to Eben Illingworth, Senior Technical Consultant at Professional Advantage.

SQL Server Integration Services makes data stored in critical line-of-business systems accessible across the company through the SharePoint Server 2007 portal. SQL Server Analysis Services extracts data from these line-of-business systems. SQL Server Reporting Services takes the extracted data and makes it available in a variety of useful forms such as reports and dashboards.

Benefits

SharePoint Server 2007 has provided a centralized source of information that made it easy for staff to locate documents. Uptake of the intranet has improved, and with it the credibility of the IT department. In addition, SharePoint Server 2007 provides a platform on which Timbercorp can build new projects.

Single, reliable source of information The advanced document management capabilities in SharePoint Server 2007 provide a central place where staff from across the business can find the information they need. Storing all information in one location also helps create a ‘one company’ mindset and improve the consistency of communications and branding.

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Philip Faure, Applications Development Manager, Timbercorp

“Staff can now be confident that the version they’re using is the most current one and that the information it contains is accurate,” says Faure. “We’ve also removed the issues we were experiencing with data duplication and discrepancies.”

“Having a single information repository has had a positive impact on the company as a whole. It means that business units in different geographical locations, as well as different departments, no longer have their own version of ‘the truth.’”

Removing the liability of a single-instance, single-server, single-database environment has also provided the redundancy Timbercorp required and increased application availability.

“Implementing the SQL Server cluster and the load-balanced SharePoint front end allows us to ensure users receive as much uptime as possible, as well as quick restoration in the event of a failure,” explains Johnson.

Fast reliable searches

Using metadata to classify information and create logically structured document libraries makes searching for information fast and accurate.

“Document libraries are the most used feature on SharePoint, together with the features around them,” says Faure. Previously we had no central reporting tool. Now we can provide reports to each division on the company.

“In particular, we have regular financial reports that we deliver to Excel, and we have developed some interesting trend reports with alerts that are gaining traction with the business.

“We are also aggregating reports from three separate databases, so, for example, we can

get a snapshot of the status of entire landholdings. This will tell us business users how many hectares we have under crops and when they are due to be harvested.”

Fast, reliable searches

In addition, the enterprise search capabilities in SharePoint Server 2007 mean searches are not restricted to information stored on the intranet, but can be integrated into other line-of-business systems.

“SharePoint Search is enormously powerful because it searches through all the libraries. Staff are already using it heavily,” says Faure. “We have had thousands of documents loaded onto SharePoint since implementation, but our business users tell us they have no difficulty finding what they need. Staff are also impressed with the speed.”

“Another quick win for Timbercorp was integrating their online growers’ database into SharePoint’s search and dashboard capabilities,” says Tim Wragg, Microsoft SharePoint Product Manager, Professional Advantage. “This allows designated Timbercorp staff to search and access grower information as well as centrally manage key aspects of this system all through their SharePoint intranet. This was done using the Business Data Catalogue, which is a very powerful SharePoint integration feature.”

Scalable platform to meet future needs
Timbercorp plans to continue building on the basic SharePoint Server 2007 platform to add more functionality and address other business requirements.

“Timbercorp implemented SharePoint Server 2007 based on its collaboration and search features, but can now continue to add functionality as required without any additional software investment,” says Wragg. “This makes SharePoint Server 2007 a very

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cost-effective investment that Timbercorp will leverage for years to come.”

“We are confident we’ll continue to derive value from SharePoint Server 2007 for years to come,” says David Landry, Chief Information Officer, Timbercorp. “We’re already starting to look at using the platform for more advanced reporting functionality, as well as business intelligence. We’re also using some of the workflow features within the IT department and are keen to roll this capability out to the rest of the business soon.”

Increased system availability

Moving the portal’s back end to a clustered SQL Server 2005 environment has increased uptime, and improved application availability and system performance.

“We’re now operating on a far more reliable platform and are providing users with loads more functionality and features,” says Johnson. “Users are very satisfied with the new system, and uptake of the intranet has increased dramatically since we made the change to SharePoint Server 2007.”

Increased user satisfaction with IT department

Because Timbercorp already had Microsoft applications on the desktop, users were immediately comfortable using the new SharePoint Server 2007 platform.

“We didn’t have to retrain users in how they navigate or use the system,” explains Wragg. “Staff were already familiar with the look and feel of the platform and so were comfortable with the additional layer of management and control we added to that.”

Providing a stable and effective intranet and document management platform has, in turn, improved the credibility of Timbercorp’s IT department.

“Solving this problem for the business has certainly improved the IT department’s standing within the company,” comments Faure. “We’re seen as a team that can use technology to provide a solution to a business problem, which is the way it should be.”

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