NSI DEVELOPS PC STANDARDIZATION PLAN FOR A NATIONWIDE FINANCIAL INSTITUTION

Overview

A Nationwide Financial Institution, that encompassed 28 states and a corporate complex, approached NSI for assistance in upgrading their installed base of legacy desktop computers. At the time, the client had an estimated 5200-6500 with a blend of Windows 98/2000 PCs across their network. These were primarily non-standard clone machines, using legacy application versions, such as Microsoft Office 97/2000, and many lacked antivirus software. Also, due to the limitations of Windows 98/2000, the client was not leveraging its investment in Windows Active Directory.

The Challenge

The client had little control over the PC environment, so the conditions of most of the systems were undiagnosed, and the Company lacked both an inventory and an ability to provide remote support for these computers. Thus, the company's relatively small IT staff was overwhelmed supporting these unstable systems and the majority of the user population was discontent with the condition of their computers. The C-Level wanted to purchase new computers for the Company, but there was no plan in place for how to deploy them, and there was no IT department time available to manually configure and install them across the organization.

Methodology

To gain control of the situation NSI immediately recommended that the client begin a PC Standardization project with the goals of both deploying the new PCs quickly and efficiently and of ensuring that through standardization the condition of the new PCs would not devolve into the unmanageable mess that currently existed. The first phase of the project was to develop a company-wide PC standard and a process for deploying it. NSI would then test this standard and the process in a small but statistically representative pilot test, before moving forward with the purchase and mass deployment of thousands of new PCs. This process included the following procedures:

- Assess and inventory the legacy PC to be replaced

- Automate the installation and configuration of the PC operating system and base application suites
- Configure per-user settings (e.g. email profiles, printer settings, etc.)
- Migrate user data from legacy PC to the network
- Physically deploy the new PC to the classroom
- Perform Q/A Testing
- Provide support as-needed

This strategy was to become the basis for the first phase of the PC Standardization process; however, the client could not afford to replace all existing PCs at once, nor did they expect to have the means to do such large scale upgrades in the future. So NSI proposed a plan for the staggered replacement of one third of the total PCs for the first three years and an ongoing hardware refresh plan thereafter.

Solution

At the client's request, NSI began work on the first phase of the proposed PC Standardization project. The NSI team first met with representatives of the client's IT staff and other stakeholders to identify the requirements for the new PC standard. By working together and getting input from all those involved, the team identified a standard hardware platform and a standard software image, as well as several existing client standards and conventions that would be incorporated into the new system. NSI also solicited client input for the use of management tools and methods of deploying non-core applications across the organization before making a final recommendation for the use of NSI's Service Center and Onsite Manager. To deploy the standard PC "image" to new systems, NSI selected Altiris, an industry leading tool for cloning a prototype PC configuration onto new computers. This allowed for the Windows XP operating system and all core applications to be installed at once, in about 10 minutes, as opposed to individually performing each installation. To transfer data from legacy PCs, NSI utilized the "personality capture" feature in Altiris, which is an automated script, which scanned the local Windows 98/2000 hard drive for selected files and file types and uploaded them to a file share on one of the client's servers. Additional Altiris tools used in the process automated the installation of critical

security updates for Microsoft products, and Symantec Antivirus Corporate Edition, a centrally managed antivirus solution. Microsoft Defender was also used, for spy ware protection. NSI also utilized Active Directory Group Policies to support and control the new PCs. This took advantage of desktop Folder Redirection, which is intended to encourage users to store all of their data on the network, rather than on their local PCs, which are not backed up.

Result

The pilot test was successful and resulted in few substantive changes to the originally designed image and process. At the conclusion of the pilot, NSI delivered a detailed, 35-page “PC Standardization Plan” document outlining every aspect of the process in detail. The process created by NSI is now being used to deploy the first wave of approximately 2500 new PCs.