

Inventure Solutions Inc., a division of VanCity Group

Canada's Largest Credit Union Achieves Greater Productivity and Cuts IT Costs Dramatically

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Canada's largest credit union, VanCity, has 40 branches, seven subsidiaries throughout the province of British Columbia and operates Citizens Bank that provides services across the country. In 2002, the IT arm of VanCity, Inventure Solutions Inc., was faced with a complex IT infrastructure coupled with rapidly aging servers and operating systems. Microsoft Windows Server 2003 operating system was selected to replace its Microsoft Windows NT operating system and Novell, with the goal of simplifying overall management and creating greater productivity for VanCity. Since starting the deployment of Windows Server 2003, Inventure has been able to reduce hardware spending and consolidate over 25 servers to a centrally managed cluster of three. After a pause for RRSP season, the project is ramping up again and by summer, 65 servers will be consolidated to a cluster of five. The upgrade to Windows Server 2003 forms the basis for upgrades to desktops and a centralized messaging system for VanCity employees, while creating competitive advantage for the organization.

Situation

VanCity is Canada's largest credit union, with \$8.2 billion in assets, 286,000 members, and 40 branches throughout the province of British Columbia. VanCity owns Citizens Bank of Canada, serving members across the country by telephone, ATM, and the Internet, as well as seven other subsidiaries dealing with insurance, securities, and capital investments. Inventure Solutions is a wholly owned subsidiary of VanCity, which acts as the information technology arm of the VanCity Group and has 140 employees.

The multiple locations and subsidiaries within VanCity have resulted in a complex, mixed IT environment consisting of multiple technologies across the organization. In 2002, key Intel-based components of Inventure's existing IT infrastructure were reaching the end of their lifecycle, and the management team recognized that this upgrade of hardware and software provided the much needed opportunity to decrease the complexity of their IT environment. Inventure's overall goal in simplifying the underlying infrastructure of VanCity was to create an agile organization that could stay ahead in the highly competitive financial services industry.

Solution Overview

Customer Profile

VanCity is Canada's largest credit union, with \$8.2 billion in assets, 286,000 members, and 40 branches throughout the province of British Columbia. Inventure Solutions is a wholly owned subsidiary of VanCity, which acts as the information technology arm of the VanCity Group and has 140 employees.

Business Situation

Multiple locations and subsidiaries within VanCity have created a complex, mixed environment and much of the organization's existing IT infrastructure was reaching the end of its lifecycle. Inventure needed to upgrade to a solution that would simplify management, increase productivity, and position the company for future growth.

Solution

An upgrade from Microsoft® Windows NT® to Windows Server™ 2003 with a specific focus on Active Directory® directory services, IIS 6.0, and the Microsoft .NET connectivity software.

Benefits

- Greater efficiency through simplified management
- Reduced expenditures on new hardware
- Competitive advantage due to increased agility

Software and Services

Microsoft Windows Server 2003
Microsoft Consulting Services

Partners

DAI I&B

“Our overall business goal is to create greater efficiency and productivity for both the IT organization and VanCity employees over the long term,” said Rowena Liang, CEO, Inventure Solutions. “In contemplating the upgrade, it was clear that we needed to simplify and consolidate our IT environment to ensure that we were flexible, adaptable, and ready for future growth.”

Solution

Previously, Inventure was running a combination of Microsoft® Windows NT® and Novell and now wanted to upgrade their operating system to enable all of VanCity’s IT infrastructure to run on a common platform. Based on the Inventure teams’ existing IT skills, as well as their positive experiences working with Microsoft Windows NT®, the Inventure management team decided to standardize their operating system on Microsoft Windows® technology.

Another key driver for the move to Microsoft Windows Server™ 2003 was the goal of leveraging Microsoft .NET connectivity software, a set of Microsoft software technologies for connecting information, people, systems, and devices. Inventure’s vision in upgrading its IT environment was to create a truly agile organization. Enabling VanCity’s infrastructure to integrate, run, operate, and manage XML-based Web services and applications would enable it to be more responsive to marketplace shifts through the use of IT as a strategic asset.

Making the Move to Windows Server 2003 with Microsoft Consulting Services

In 2002, Inventure started to work with Microsoft Consulting Services to map out a plan to make the move off Windows NT. Originally, the Inventure team was looking to upgrade to Windows 2000. As Inventure was working with the Microsoft team on the design scenario, Windows Server 2003 was released to beta. As a result of the great working relationship between Microsoft Consulting Services and Inventure staff, the team immediately recognized the significant advantages of moving directly to Windows Server™ 2003, as the new offering would provide them with ease of management, greater security, as well as the scalability they required to meet its future IT needs.

The Microsoft Consulting Services team has more than 100 offices and just under 4,000 consultants worldwide. Microsoft Consulting Services worked closely with the Inventure team on the documentation and design scenario for VanCity’s new server infrastructure. The consulting organization worked as part of Inventure’s technical team to define the vision and provide the skills required to ensure a smooth upgrade directly to Windows Server 2003.

“In working with Inventure and carefully assessing VanCity’s long-term infrastructure needs, we immediately recognized that their requirements were aligned with the capabilities of Windows Server 2003,” said Alex Nicol, Principal Consultant, Microsoft Consulting Services. “We were able to collaborate with Inventure on this project, which ultimately has enabled us to deliver the best possible solution for VanCity’s immediate and long-term business agility.”

As part of the production and testing process for Windows Server 2003, Microsoft Consulting Services enlisted the assistance of Vancouver-based QA Labs to address the need for application compatibility as part of the upgrade. QA Labs was added to the project as they are experts in application testing and they played a critical role in the move to Windows Server 2003. QA Labs provided independent verification of the design scenario and how the deployment would impact VanCity’s operations.

“Initially we looked at moving to Windows 2000, but as we determined our requirements over the longer term, it became clear that Windows Server 2003 was the right choice for VanCity,” says

“By reducing the amount of time and effort to manage our servers, we are better able to meet the needs of credit union staff and enhance service to credit union members. We are now able to be more responsive to our customers, which has resulted in a 25 percent increase in our overall efficiency.”

Tony Fernandes
Vice President of Technology
Infrastructure
Inventure Solutions

“We were able to buy just a few new servers and reduced our hardware spending by more than 80 percent. Any way you look at it, not buying 50 new servers is an immediate cost savings and significantly reduces our overall hardware spend.”

Rowena Liang
CEO
Inventure Solutions

Chad Montgomery, Infrastructure Specialist, Inventure Solutions. "As we worked on the documentation and design scenario for our new environment with Microsoft Consulting Services, we gained the confidence that they knew the product intimately. The addition of QA Labs to our team was seamless, and the powerful combination of Microsoft [Consulting] Services, QA Labs, and Windows Server 2003 had delivered not only the functionality and capabilities from a product perspective, but also the vision we required to achieve our business goals."

Centralize and Consolidate Using Active Directory

The move to Windows Server 2003 and roll out of the Active Directory® directory service will help VanCity to improve productivity throughout the organization by reducing time spent on overall IT administration and management, meaning IT staff can focus their time and effort on proactive tasks. Inventure will now centralize and consolidate server management between all 40 VanCity branches, as well as a multitude of departmental, head office, and subsidiary servers, reducing the total overall number of servers and eliminating the need for a server in each branch. As part of the consolidation, Inventure will start delivering intelligent file and print services from a central location and will cluster servers to ensure fail over across distances.

The administration of complex network directories is simplified by using Active Directory and makes it easy for users to locate resources on even the largest networks. Windows Server 2003 provides numerous ease-of-use improvements to Active Directory and new features, including cross-forest trusts, the ability to rename domains, and the ability to deactivate attributes and classes in the schema so that their definitions can be changed.

Focus on Security with IIS 6.0

In deploying Windows Server 2003, Inventure is leveraging the security focus of Internet Information Services (IIS) 6.0 to support VanCity's need for increased system security. In Windows Server 2003, IIS 6.0 includes preventative measures to make it out-of-the-box secure, meaning that administrators have greater control over security within their organization and individually decide what functionality to enable. Further enhancements to IIS 6.0 ensure fault tolerance and increased application capacity.

"As a financial institution, security is one of our biggest concerns," said Chad Montgomery, Infrastructure Specialist, Inventure Solutions. "The enhancements in IIS 6.0, such as the default installation of 'locked down' have been easy to implement, and we're currently consolidating IIS into a three tier model with load balancing and fault tolerance. The deployment is going very well."

Benefits

By upgrading to Windows Server 2003 and eliminating aging technology, Inventure has been able to achieve a number of benefits to date, which will help create long-term value for VanCity through cost savings, greater efficiency, and driving the complexity out of its IT infrastructure.

Greater Efficiency Through Simplified Management

With Windows Server 2003, Inventure will be able to consolidate 65 servers to a cluster of five. With the consolidation using Windows Server 2003, each branch no longer needs to have its own server as all servers can now be centrally managed using Active Directory. The ability to centrally manage creates increased productivity and efficiency by reducing the overall time spent on the management and support of the IT infrastructure, enabling Inventure staff to focus on proactive initiatives.

Through simplified management, VanCity's branch staff will also achieve productivity benefits. With a decentralized model, branch staff was responsible for managing the daily server backups. With the centralization of servers comes centralized backup administration, and branch staff can refocus these efforts back to providing service to credit union members.

"By reducing the amount of time and effort to manage our servers, we are better able to meet the needs of credit union staff and enhance service to credit union members," said Tony Fernandes, VP of Technology Infrastructure, Inventure Solutions. "We are now able to be more responsive to our customers, which has resulted in a 25 percent increase in our overall efficiency."

Cost Savings: Reducing Total Hardware Spend

The upgrade has immediately resulted in cost savings related to the purchase of new hardware. Instead of needing to upgrade more than 60 servers, Inventure has needed to purchase only five new servers to continue providing existing services. "We were able to buy just a few new servers and reduced our hardware spending by more than 80 percent," said Rowena Liang, CEO, Inventure Solutions. "Any way you look at it, not buying 50 new servers is an immediate cost savings and significantly reduces our overall hardware spend."

"In addition to the significant savings achieved in addressing the aging fleet of Windows NT-based and Novell servers, the centralized approach provides ongoing savings through a not insubstantial reduction in technology costs associated with adding new branches and subsidiary locations," said Tony Fernandes, VP of Technology Infrastructure. "Add to this the higher availability and redundancy provided by a Microsoft cluster solution as well as reduced data backup risks from a centralized data management strategy, and it is easy to see why we are so pleased with the results."

Agility for Competitive Advantage

Upon completion of the rollout of Windows Server 2003, one of VanCity's primary goals is to be able to extend its infrastructure as they add new branches and potentially manage IT services for new organizations. Additionally, Windows Server 2003 will help ensure that VanCity is .NET ready, and can forge new connections with customers and partners as it expands.

"VanCity now has an infrastructure we can build on as the organization grows," said Tony Fernandes, VP of Technology Infrastructure, Inventure Solutions. "We will be able to easily and securely connect with other organizations based on Active Directory and the [Microsoft] .NET Framework. Windows Server 2003 is empowering Inventure with the agility we need to maintain our competitive advantage."

Building for Tomorrow

Once the deployment of Windows Server 2003 is completed in the coming months, VanCity is looking to take full advantage of its centralized IT environment. Currently, the plan is to upgrade all users within VanCity to Windows XP and deploy a centralized messaging system using Microsoft Exchange Server 2003. Windows Server 2003 provides a powerful platform for these upgrades that significantly improves productivity of information workers across the VanCity Group of Companies. Furthermore, the investment in Windows Server 2003 enables Inventure to ensure that VanCity's network is and continues to be a strategic asset to the company's continued growth.

The Microsoft .NET Framework is an integral Windows® component that supports building and running the next generation of applications and XML Web services.

For more information about the .NET Framework, go to:
<http://msdn.microsoft.com/netframework/>

Microsoft Windows Server 2003 enables you to create a highly productive platform for powering connected applications, networks, and Web services. Windows Server 2003:

- Helps you deliver a reliable, secure, scalable platform for applications and network services
- Makes it easy for you to deploy, manage, and use
- Empowers you with a complete server platform to quickly build connected solutions
- Enables you to maximize business value by leveraging the largest partner solution ecosystem

For more information about Windows Server 2003, please visit:
<http://www.microsoft.com/windowsserver2003/>

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