

Bank Finds Right Balance for Security-Personalization in Challenging Windows 10 Virtual Desktop Environment

“Liquidware’s solutions have been a time saver and a life saver simultaneously. ...The ROI is there. We got almost the full value out of our software investment within the first month.”

– John Ferrini, Systems Engineer
Umpqua Bank

Organization:

Umpqua Bank
Portland, OR

Virtual Desktop Infrastructure Environment:

Approximately 225 (and growing)
Windows 10 non-persistent
virtual desktops in a hybrid
environment

Products:

ProfileUnity™
Stratusphere UX™

Overview

A pilot project was undertaken at the largest Oregon-based bank with more than 300 branches in Oregon, Washington, California, Nevada and Idaho. The goal was to improve overall desktop management and help developers get better virtual desktop performance, and it led to many unexpected use cases and benefits.

The Challenge

“We needed something that worked,” explained John Ferrini, systems engineer at Umpqua Bank. Though this statement is quite simple, it didn’t quite describe the challenge he faced after he was tasked with managing the organization’s virtual desktop infrastructure. The bank had tried several management products and techniques, but none had been especially effective.

Umpqua Bank’s infrastructure was not large, but it required more than its share of support. The standard configuration was a persistent virtual desktop running Windows 7 on Nutanix hardware. Umpqua uses Citrix Machine Creation Services (MCS) to create its virtual desktops and runs them under a VMware hypervisor. Active Directory was the primary avenue used to manage user settings and desktop configurations. That setup didn’t provide great performance or convenience for Umpqua’s offshore developers in India, who were the main virtual desktop users.

“Visual Studio is a particularly daunting piece of software to virtualize, and our developers check a lot of code in and out,” noted Ferrini.

“They also have a ton of user data. That’s not a good combination for persistent desktops.”

The Solution

Ferrini evaluated several options and decided to pilot Liquidware’s ProfileUnity user environment management solution as well as Stratusphere UX, Liquidware’s user experience monitoring and diagnostics solution. Ferrini intended to use the new software for general monitoring and troubleshooting, but he found many more use cases – and benefits – than he expected.

The welcome findings included:

- Using ProfileUnity to capture user settings and otherwise prepare migrations from physical to virtual desktops.
- Using ProfileUnity for migrations from Windows 7 to Windows 10, regardless of whether the user has a physical or virtual desktop.
- Converting all VDI users from persistent to non-persistent desktops.
- Introducing follow-me printing so users no longer must find and log on to printers near their location. "ProfileUnity made it easy for me to manage printing, which is the hardest thing to manage in any desktop environment," said Ferrini.
- Quickly onboarding and migrating new virtual desktop users, which expanded the virtual desktop user base from 45 to more than 225 employees.

When we started using Liquidware solutions, we stumbled onto a boom," said Ferrini.

The use of Stratusphere UX to monitor and troubleshoot the environment as well as ProfileUnity to manage user desktops had the intended effect – delivering improved desktop performance to developers. But it also provided much more. The biggest impact for Umpqua Bank was its new ability to convert from persistent to non-persistent desktops.

"Liquidware's solution enabled us to go non-persistent. Now we can give users highly customized, high-performing virtual desktops," Ferrini explained. "We can capture all of a user's settings and individual files – and we can even put code that developers checked out back into their desktops, so it will be there the next time they log on. ProfileUnity captures everything – everything I tell it to."

"Being able to save user data, mimic the user environment and do other things that we couldn't do with Active Directory has been great," Ferrini said.

He emphasized that it is now much more convenient to change settings and policies on virtual desktops with less chance of error. That takes away a barrier to more frequent updating. "Without ProfileUnity, it would be an ITIL nightmare to change settings in Group Policy."

Stratusphere UX has also helped with Umpqua Bank's physical assets. When some services unexpectedly stopped running on physical PCs, the IT team used the solution to diagnose the problem, enabling the team to fix the issue the same day. "Stratusphere UX is a great troubleshooting tool. In this case, it didn't save us hours, it saved us days or weeks."

Another benefit gained was improved performance for developers and business users with company-issued laptops: "Our laptops can handle much more of a workload now because everything is running in the virtual infrastructure, not on the device," Ferrini added.

Other employees have noticed and have started asking for their individual desktops to be virtualized. That trend began with a few users in several departments, but now requests come regularly, and the IT team quickly accommodates them. "It's literally a five-minute job to get someone ready to migrate from a physical desktop to a virtual one. ProfileUnity captures everything we need," Ferrini noted. "And Windows 7 to Windows 10 migrations have been painless."

Umpqua Bank had intended to use ProfileUnity and Stratusphere UX for a three-month pilot, but the IT staff decided long before the end of the pilot period that they no longer wanted to manage desktops without it.

"Liquidware's solutions have been a time saver and a life saver at the same time," Ferrini concluded. "The amount of time savings produces a huge cost savings. The ROI is there. We nearly got the full value of our software investment within the first month."



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