

ConverterTechnology Provides Flexible Web-Based Solution to Streamline Office 2010 Migration



Client Background

The client is one of the largest banking institutions in the world with operations in Europe, the Middle East, United States and Asia Pacific. The bank provides a comprehensive range of private and investment banking services to commercial operations as well as institutional and private clients.

Client Challenge

Faced with a project scope of over 40,000 users spread across the world, this international banking operation is undergoing the transformation of updating all personnel desktops from Microsoft Office 2003 to Office 2010. With such a large infrastructure, even a phased rollout of the Office update is a huge undertaking and requires considerable planning.

As a part of the rollout, file compatibility was a key concern. The bank faced the daunting task of managing files for a large community of users with close to half billion data files to be reconciled for the Office 2010 migration.

The traditional approach of proactively scanning and identifying all user files for potential compatibility issues was simply not possible due to the magnitude of the data involved. Likewise, waiting for users to be upgraded and then suffer failure of critical files was also not an option. Thus, a pragmatic approach that engaged end users and enabled them to self-serve the selection and nomination of files for compatibility analysis was needed.

Client Solution

The approach involved not only taking into account the need for services dedicated to the regions affected by the rollout, but also ensuring that data security rules and regulations were adhered to. Regulatory restrictions required a carefully planned approach—particularly for users operating in the European Union where regulations require that data transmissions and access are stringently controlled.

By provisioning dedicated Web-based portals leveraging the ConverterTechnology Click2Fix solution, the bank was able to appropriately allocate environments to each division of the company. Since Click2Fix leverages the existing network domain access and

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Today—several months into the deployment—the Click2Fix portals are leveraged by users across multiple regions and business units. The organization has successfully provisioned a solution to rapidly respond to problems as the end-users are migrated to the new Office 2010 platform. The bank also eliminated the need for costly analysis of all user files in advance of the Office 2010 rollout and allowed end users to proactively identify concerns ahead of the deployment.

associated user membership, it was easy to restrict access to each portal system based on user profiles without incurring additional administrative overhead.

A proactive end-user engagement process was followed with communications from the supporting IT organization that clearly outlined how each user could engage and access the solution online. All that each user needs is a Web browser and the appropriate server address for the portal dedicated to their division. Furthermore, the Click2Fix solution provides for client configuration so notifications to end-users could be tailored to the requirements of the organization.

In the bank's case, the flexibility of the Click2Fix solution allowed the portal to be localized to the company requirements and provided detailed, company-specific guidelines built into the user experience. In addition, email communications were configurable such that clear instructions were incorporated for users. This eliminated the need for extensive end-user training.

Client Benefits

In day-to-day use, each user has access to a simple-to-use Web site where they can upload files that they have problems or concerns with for analysis and remediation. Upon submission of the files by the user, a notification is transmitted to the portal operators, alerting them that files are available for analysis.

As a part of the deployment, it was also determined that the operators would process data on a twice-per-day cycle so that users typically have to wait no more than four hours for their results. As files are processed, the results are automatically made available for users, and a notification is sent to alert them to the availability of the results. The users can then access the Web site, review the results, and download the remediated files as well as online reports for changes made to the files.

Integration services provided by ConverterTechnology also enabled the bank to automatically provision the portals from a centralized directory that stores all user-profile information and departmental associations. This allowed for the development of additional reports for determining the level of usage across departments/business units and other key statistics.

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ConverterTechnology, experts in data risk management for enterprises, provides an innovative suite of solutions that offer comprehensive coverage of enterprise data risks that can arise during document and application migration, and solutions for network monitoring – data leaks, anomaly and intrusion detection. Founded in 1997, ConverterTechnology has helped millions of users at Fortune 500 companies, global financial and pharmaceutical corporations, and the world's most renowned theme park. ConverterTechnology is headquartered in Nashua, N.H., with offices in Europe and Australia. For more information, please visit <http://www.convertertechnology.com>.