Fortis Bank Reduces Risk of Downtime with New Graphical Interface

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Fortis Bank, an integrated financial services provider active in the fields of banking and insurance, has deployed Microsoft® Office Visio® Professional with Microsoft SQL Server™. This integrated solution has given the company an easy-to-understand map of server dependencies. When Fortis Bank needs to upgrade its systems, it now has a clear view of which areas of the network will be affected and what steps can be taken to avoid unnecessary downtime. This reduction of downtime in mission-critical applications increases security and improves employee productivity. The solution also speeds up the decision-making process, as the clear view of server dependencies allows employees who are not server experts to make informed upgrade decisions quickly and easily.
Situation

All businesses want to avoid computer downtime on mission-critical applications, but a secure, reliable network is exceptionally important for financial institutions. Banks and building societies handle vast quantities of sensitive data and provide vital services to both business and private customers. Such financial institutions face the challenge of providing a responsive and reliable service to customers using a complex technical infrastructure.

Banks must be able to capture, organise, and structure key information and critical dependencies of core infrastructure components in order to facilitate prompt identification of issues and effectively recover from systems failures. This information is also essential to ensure that critical infrastructure moves and changes are successful.

These challenges are widespread in the industry. Small organisations can evade these issues if they have only a handful of servers, a relatively simple infrastructure, and staff stability. However, medium to large-sized organisations and banks with a wide variety of activities need to adopt a more structured approach to achieve stable service provision to ensure successful implementation of changes.

Fortis Bank is one such institution. The company is an integrated financial services provider active in the fields of banking and insurance, offering a comprehensive range of products and services to its private, business, and institutional customers across the globe. With total assets of €523 billion (U.S.$648.38 billion) and shareholder equity of €11.9 billion (U.S.$14.75 billion), Fortis ranks among the 20 largest financial institutions in Europe.

In the U.K., the bank operates in nine business areas from commercial banking to stock lending and borrowing. The company employs 500 staff located in eight offices, with the U.K. Head office based in the City of London.

Fortis Bank U.K. relies heavily on technology to deliver its services and maintain its competitiveness in terms of operational efficiency and business effectiveness. A robust, responsive, and flexible information technology (IT) service provision is core to the company’s business. In 2003, the company needed to replace its entire network infrastructure with new technology. The potential for business disruption if such a critical upgrade was poorly managed was significant. Fortis Bank needed a solution that would ensure minimal technical disruption and ensure negligible business disruption during the move.

To achieve this, Fortis Bank needed to create a systems dependency database. On top of the identification of the basic server attributes of a server, such as Internet Protocol (IP) addresses, location, and operating systems, the company also required a map of server dependencies. This would also be of considerable value in correcting server failures.

Ade Bajomo, IT Director, Fortis Bank, says: “At the time, the process of identifying all the dependencies on a server required a highly experienced technical member of staff, whose time could be far better spent on higher value activities. Failing to identify those dependencies carried the risk of downtime in unforeseen areas of the system. Obviously, as a bank, this is something we can’t afford. We needed to be able to map out the dependencies of all our servers in a format all our support staff could easily understand, not just experts.”

Solution
Fortis Bank turned to its long-standing technology partner, Premier Computer Solutions (Premier) to deploy a solution which would give support staff a simple view of the infrastructure. Over the past five years, Fortis Bank and Premier have successfully collaborated on a range of different development projects and training sessions.

Bajomo says: “Premier really understands our business and has shown itself again and again to be capable of meeting the most difficult requirements.”

A number of different technologies were considered for the new systems dependency database, but most products available in the market were either too inflexible for the company’s requirements or designed for much larger infrastructures.

After researching the market, Fortis Bank decided that Microsoft® SQL Server™ was best because of its scalability, robustness, and the fit with the company’s existing pool of in-house expertise. After consulting Premier, Microsoft Office Visio® Professional drawing and diagramming software was selected as the front-end interface. Visio is a diagramming program that enables the creation of business and technical diagrams that document and organise complex ideas, processes, and systems. Diagrams created using this program enable users to visualise and communicate information more clearly, concisely, and effectively.

Rizwan Ahmed, Technical Support Analyst at Fortis Bank, says: “Using Visio was the obvious choice to link to our SQL [Server] database to visualise our data. We’d already been using it to create network diagrams so our staff were already familiar with it. As a Microsoft Premier Visio Partner, Premier is well equipped to help us gain the most benefit from this software. Furthermore, Visio and SQL [Server] are an excellent combination because they integrate so well.”

Premier managed the technical design and implementation of the database and the Visio component and at the start of 2003, Fortis Bank populated the SQL database with information on all of the bank’s servers. The SQL database now holds Server, PC and Router details for the entire bank and went live in 2003. The solution has proved invaluable in the daily IT Infrastructure service provision and for managing ongoing moves and changes.

The solution, In-Fortis, caters to the requirements of all the Fortis Bank IT departments, including Helpdesk, Electronic Banking, Software Development, Operations, Project Management Server Support, and Networking. Each department is using this versatile solution to meet their differing needs.

For example, the Operations Manager might need to know the impact of a power failure in a server cabinet. Using the Microsoft Office Visio interface they can easily view which servers and business units of the bank will be affected, and address the issue more quickly thanks to an instant understanding of all the dependencies. Similarly, a Helpdesk Manager might need to identify all the servers that are impacted by the failure of a key router and map out the affected business lines, assess the impact, and then advise bank technicians accordingly.

Benefits

Faster, Smoother, More Informed Change Management

The IT department can now forewarn managers about system downtime, and can provide details of when it will occur together with its full impact. Users can plan ahead and avoid system maintenance from impacting on business performance. IT support staff have
a better understanding of server dependencies and the implications of making system changes, so the risk of downtime on mission-critical applications is minimised. This means a better service for internal users, and also for customers. Fortis Bank can now make better-informed decisions about upgrades, and make them more quickly.

Ahmed says: “The system has improved our change management and fault resolution processes by providing timely and holistic views of each critical infrastructure element that may be impacted by a change or during an operational fault. This means we know what’s happening within our infrastructure at all times, allowing us to run our business without interruption.”

No Training Needed
With its Microsoft Office Visio interface, In-Fortis is very user friendly and requires minimal training. Visio displays the servers and dependencies in a simple, graphical form, as well as detailed server information such as IP addresses and cabinet locations. Users can then click on a dependent server and Visio makes that the new central shape and displays all the dependencies on that server.

Ahmed says: “Visio is a great tool to use with new joiners to the IT department, as it gives them a quick and clear picture of our systems and how they interoperate with one another. By using a graphical, easy to understand interface like Visio, we have made complex systems easier to understand for more people. So it reduces training overheads across the board by providing insight into network structure.”

This also means any user, not just specialists, can make maintenance decisions, freeing up the more highly-trained staff for higher value IT activities.

Ahmed says: “The ability to visualise data that Visio provides empowers every member of our support staff to perform higher level tasks more easily. It’s now a simple matter to interpret critical dependencies on a given server before implementing changes to the system and making the relevant updates on both the primary and dependant systems. In a company with more than 200 different systems, this is invaluable. Our staff can now share and interpret data far more easily.”

Better Return on Technology Investments
In-Fortis does not just provide data; it makes it easy to make decisions based on that information. Because the solution integrates fully with other Microsoft applications it is a simple matter to transfer information on servers and their dependencies into programs like Microsoft Excel. Users can transfer reports to Excel at the touch of a button and then share that information easily.

The organisation considered alternative solutions. Bajomo states: “All of these would have cost in excess of €29,000 (U.S.$36,000). Add to that 15 per cent annual maintenance, configuration, consultancy, and training costs. The In-Fortis solution was developed at a lower cost and with little or no ongoing maintenance.

“…the return on investment in terms of minimising risk impact and improving overall quality of changes was well under a year.”

Bajomo says: “We’re getting more value from existing investments in Microsoft technology thanks to the integration of In-Fortis. The solution facilitates knowledge sharing and will improve decision making across the organisation.”

Partner Expertise Ensures Quick and Effective Deployment
Premier doesn’t only understand the bank’s business goals and infrastructure; it has also demonstrated a high level of Visio competence. As a Microsoft Certified Partner and a Microsoft Premier Visio Partner—one of only a handful worldwide—Premier has tailored the solution to meet Fortis Bank’s needs exactly.

Ahmed says: “While we had some previous experience using Visio, Premier has impressed us with the power and versatility of the software. The solution offers us the ability to input and extract data quickly and reliably. With Premier’s assistance, we now have a facility where inputting information is simple to do yet comprehensive. The display of relevant information couldn’t be easier.”

Fortis Bank is more than satisfied with Premier’s performance and plans to further expand the solution in the future.

Ahmed says: “The system was delivered on time and within budget. I think the secret of this success is that we had a clear understanding of what we wanted to achieve and were able to communicate this to Premier, whose staff are highly competent and experienced. We’re now hoping to expand the system so that all items can be tracked. For example, if a cabinet containing a number of servers had a power failure, the system would not only identify where the cabinet was located in the building, but exactly which server was down. Having access to this kind of detailed information will enable our IT department to ensure an even more reliable internal service.”

James Price, Director, Premier Computer Solutions, says: “Once again, we have been able to use the graphically rich features and versatility of Visio to create a serious business tool to meet clients’ needs.”

Richard Smith, Visio Business Manager at Microsoft U.K., considers that the approach taken at Fortis Bank is an excellent example of how to best utilise the skills of the Microsoft partner network.

Smith says: “Employing the specialist skills offered by Premier helps to reduce risk during the implementation phase of a new solution as well as maximising the return on investment by realising benefits earlier than might otherwise have been the case.”
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