



Overview

Country or Region: United States
Industry: Pharmaceutical

Customer Profile

Berlex develops and markets diagnostic imaging agents, treatments in the areas of female health care and dermatology, as well as specialized therapeutics for life-threatening and disabling diseases in the fields of the central nervous and cardiovascular systems, oncology, and gastroenterology. Berlex has business operations in New Jersey, California and Washington.

Business Situation

Proactively seeking ways to improve its IT systems and applications, Berlex sought assistance in upgrading its desktop productivity applications to Microsoft Office 2003.

Solution

The tools and resources provided in the Microsoft Solution Accelerator for Business Desktop Deployment Enterprise Edition provided the framework for highly-automated Lite - Touch deployment or fully automated, zero-touch deployment.

Results & Benefits

With Berlex leveraging the new features and reliability of SMS 2003, The Henson Group developed a customized training plan targeted at operations personnel to streamline the transition to SMS 2003.

MAJOR US PHARMACEUTICAL COMPANY SEEKS TO REDUCE COSTS THROUGH IMPROVED SYSTEMS MANAGEMENT

Microsoft Business Desktop Deployment Services

“The Solution Accelerator for Business Desktop Deployment is an excellent resource for Berlex, because it represents the collective body of knowledge, tools, and best practices distilled from deploying literally hundreds of thousands of systems by thousands of organizations around the globe.”

Mike Baiano, Principal Consultant - Infrastructure and Security, The Henson Group, Inc.

Berlex was interested not only in securing enhanced functionality for the applications it implements, but the actual processes that govern how the technology is applied in its environment.

BUSINESS SITUATION

Committed to addressing unmet medical needs, Berlex, Inc., a US affiliate of Schering AG, Germany, develops and markets diagnostic imaging agents, treatments in the areas of female health care and dermatology, as well as specialized therapeutics for life-threatening and disabling diseases in the fields of the central nervous and cardiovascular systems, oncology, and gastroenterology. Berlex has business operations in New Jersey, California and Washington. (For more information on Berlex, visit <http://www.berlex.com/>.)

Considering the scope of Berlex’s operations, the organization has a complex information technology infrastructure, based largely on Microsoft’s technology products. As such, Berlex is constantly and proactively seeking ways to improve its IT systems and applications. Therefore, when Berlex began considering upgrading its desktop productivity applications to Microsoft Office 2003, it did not take such a migration lightly.

Berlex was interested not only in securing enhanced functionality for the applications it implements, but the actual processes that govern how the technology is applied in its environment. Therefore, during its internal evaluation of Office 2003, Berlex expressed interest to Microsoft in reviewing and improving its Business Desktop Deployment (BDD) protocols to determine if new Microsoft tools and software could be utilized.





The Henson Group currently offers a Microsoft Management Technologies Practice designed to provide expert-level services focused on the application of a core set of Microsoft technology products for managing Windows systems and infrastructures.

Enter The Henson Group. Microsoft approached THG to create a customized BDD workshop for this premier client, primarily due to the consultancy's status as a recognized "Go To" Gold Certified Partner for desktop deployment engagements.

The Henson Group currently offers a Microsoft Management Technologies Practice designed to provide expert-level services focused on the application of a core set of Microsoft technology products for managing Windows systems and infrastructures.

This practice area focuses on such technologies as BDD tools, Microsoft Operations Manager (MOM), Systems Management Server (SMS), System Center, and other technologies designed to optimize business desktop deployments and ensure the highest ROI for clients committed to the Microsoft platform.

THG's Microsoft Management Technologies Practice also reflects the scope and spirit of its participation in Microsoft's Dynamic Systems Initiative (DSI) and the focus on the effective management of enterprise IT systems.

This initiative unifies hardware, software and service vendors around a software architecture that enables customers to harness the power of industry-standard hardware, and brings simplicity, automation and flexibility to IT operations. The new breed of dynamic systems enabled by this software promises to streamline IT operations and lower costs for the enterprise datacenter and make datacenter capabilities accessible to a much broader array of businesses. The unifying software architecture centers on a System Definition Model (SDM) that provides a common contract between development, deployment and operations across the IT life cycle.

As this ideology applies to Berlex, advancements in gaining efficiencies in desktop deployment strategies are integral to DSI, while support for the architecture and SDM also can be expected in future releases of the Visual Studio developer tools, Microsoft server applications and management solutions.

To provide the actual workshop for Berlex, formulate deployment strategies, and deliver knowledge transfer and training, The Henson Group provided Microsoft Certified Systems Engineers (MCSE), many former Microsoft employees, specializing in staging, tuning, testing, and configuration services; planning, architecting, creating, maintaining, and testing corporate images; and packaging applications and provisioning images to new users and machines.

Based on The Henson Group's dedication to encouraging Berlex to authorize the upgrade, which represented substantial licensing fees, Microsoft decided to invest in subsidizing the deployment services.

Meanwhile, The Henson Group drew upon its experience having been consistently ranked in the top 10 US partners for desktop deployment services on Microsoft's Resource Directory (<http://directory.microsoft.com>). The consultancy also possesses both Microsoft's official Advanced Infrastructure Solutions Competency and the Networking Infrastructure Solutions Competency, is formally designated as a Microsoft Deployment Service Partners (DSP) in two categories (East Region and Enterprise Partner), and is a member of Microsoft's Mid-Market Desktop Deployment Program.

Furthermore, underscoring Microsoft's confidence in The Henson Group and dedication to encourage Berlex to authorize the upgrade, which represented substantial licensing fees, Microsoft decided to invest in subsidizing the deployment services.

SOLUTION

During the initial Discovery Phase, Berlex reported it possessed 2,500 supported users spread across its US operations. In regards to the environment, the majority of this infrastructure includes laptops/desktops that were running Microsoft Windows XP Professional with SP1 and Office 97 with SR-2B. The environment was running on a mix of Hewlett-Packard hardware, some of which are shared devices. Berlex utilizes Lotus Notes V5 and the Notes client for email. However, during this engagement, Berlex communicated that a migration to Exchange 2003 is also expected moving forward.

Schering AG's IT organization, headquartered in Germany, usually dictates the "base-build" process, group policy, and packages for all Berlex's operations, though English is the only language needed for Office applications in the US.

Microsoft Systems Management Server (SMS) 2.0 is currently deployed and used for software distribution. SMS 2.0 is also used for software/hardware inventory, deploying Windows security updates, and remote control of the desktop. For application distribution, Berlex reported 170 packaged applications and was in the process of packaging and additional 330 applications. (These applications are packaged using Wise Package Studio, a product from Altiris, Inc.)

Up to that point, Berlex focused the majority of desktop deployment efforts on two main tasks: fulfilling 1) New Hire PC Build Requests; and 2) Existing Hire PC Rebuild Requests. As such, Berlex followed the BDD process below:

For new hires, a series of remedy tickets were opened and assigned to the corresponding groups for hardware provisioning, AD and systems access, Notes Mail box, and applications. The tickets issued emails to the responsible parties and remain open until closed by the owner.

*"..THG has the experience, knowledge, and training to help [Berlex] effectively reduce the time and cost of maintaining the desktop environment while meeting their regulatory obligations."
- Baiano*

The typical duration to perform a bare-metal desktop build for a new hire or perform a desktop refresh for an existing hire was approximately 1.5 hours. It was estimated that Berlex US builds 50-60 systems per week with perhaps 20 PCs for new hires.

During its evaluation of Office 2003 and search for new Microsoft tools and software with the potential to enhance its BDD processes, Berlex sought to achieve the following:

- 1) Comply with an internal mandate handed down from Berlin requiring an upgrade to Windows XP SP2 within several weeks, bypassing the normal process of application compatibility testing and normal deployment change control.
- 2) Ascertain what processes, tools, and/or software could Berlex implement in the long term (4-12 Months) to significantly improve its BDD practices.

To successfully execute the deliverables detailed in a formal proposal delivered to Berlex and Microsoft, The Henson Group drew upon thousands of hours of BDD design and deployment experience. THG assigned Principal Consultant Michael J. Baiano to this engagement.

"I was truly excited to have the opportunity to work with a client of Berlex's caliber," Baiano says. "Since I had years of experience in desktop deployment, management, and software packaging with several major pharmaceutical companies, I felt confident that my unique perspective would help Berlex achieve their goals of streamlining their BDD processes. In particular, leading drug companies such as this firm are required to meet the stringent requirements of the FDA's 21 CFR Part 11 and THG has the experience, knowledge, and training to help them effectively reduce the time and cost of maintaining the desktop environment while meeting their regulatory obligations."

As part of this process, The Henson Group implemented a methodology that identified key objectives early in the deployment process. Additionally, key decision-making milestones were scheduled at critical stages throughout the project cycle, ensuring that Berlex's executives had opportunities to weigh and approve important decisions.

Critical to the success of this engagement was enabling Berlex to take advantage of new technologies that simplify and streamline desktop deployment. For several years now, Microsoft has been investing substantially in developing what is now known as zero-touch deployment technologies. Zero Touch technology is designed to significantly reduce the cost of deploying and maintaining the business desktop across an organization.

The business desktop is defined as the corporate standard computing platform consisting of the Windows Operating

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System (OS) and core productivity applications such as Microsoft Office plus other line-of-business applications.

Essentially, zero touch technology is a collection of tools and best practices that utilize existing solutions and methodologies — including, but not limited to, Microsoft Systems Management Server (SMS), Microsoft Operations Manager, Microsoft SQL Server, Sysprep, User State Migration Tool (USMT), and the SMS OS Deployment Feature Pack for disk imaging to enable OS deployment, refresh, and desktop replacement operations with little or no user input required.

Microsoft subsequently released this technology, along with prescriptive guidance based upon ITIL and MOF deployment best practices, as the Solution Accelerator for BDD.

BDD — or deploying Microsoft Windows, Office, and other applications to client computers — is an essential task for organizations of all sizes. Using the tools and guidance contained in the BDD Solution Accelerator, business desktops can be deployed using several methods depending on the number of client systems involved, available infrastructure, and skill level of IT staff.

“The Solution Accelerator for Business Desktop Deployment is an excellent resource for Berlex, because it represents the collective body of knowledge, tools, and best practices distilled from deploying literally hundreds of thousands of systems by thousands of organizations around the globe of all sizes and scopes,” explains THG’s Baiano, a Microsoft-trained and certified desktop deployment specialist.

“Microsoft really listened to its customers, to understand and help alleviate their pain points around BDD with the end goal of reducing the time and cost of deployment and ensuring that organizations derive maximum benefit from their Microsoft solution,” Baiano adds. “This free but incredibly valuable prescriptive guidance clearly demonstrates Microsoft’s commitment to driving down the cost and complexity of BDD.”

In smaller organizations, the business desktop is typically deployed in a Lite-Touch scenario, referring to a hands-on, CD-based installation or purchase of systems with OEM versions of the operating system and applications already installed.

In larger organizations, such as Berlex, more advanced deployment processes and technologies can simplify and automate deployment; provide for remote configuration and management; and streamline disaster recovery.

In this scenario, human intervention can be virtually eliminated by leveraging Zero-Touch deployment methodology. By combining technologies such as MOM and SMS with the Operating System Deployment (OSD) Feature Pack and BizTalk Server, business desktop deployments, replacements,

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and refreshes can take minutes instead of hours and cost a hundred dollars per workstation instead of a thousand or more.

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Berlex falls into the category of a well-managed environment, typically including the infrastructure needed to take advantage of more automated deployment options, generally needed to reduce the time, cost, and effort of desktop deployment as much as possible.

As Berlex learned, the tools and resources provided in the Microsoft Solution Accelerator for Business Desktop Deployment Enterprise Edition provide an excellent framework for highly-automated Lite -Touch deployment or fully automated, zero-touch deployment.

During the initial phase of this engagement, dubbed Application Test Lab Development, Discovery was conducted to provide a detailed assessment of the current infrastructure and software. Current software compatibility testing and deployment methodologies were investigated to gain full and detailed understanding of the current software environment.

On completion of a Discovery project phase, THG and Berlex met to review the Discovery findings, explore concerns and, if needed, revise the project timeline. A Discovery Summary Email, including final timeline, was developed and presented.

During the Development phase, THG developed and customized an Application Compatibility Test Lab solution to assist Berlex in conducting automated, repeatable, efficient application compatibility testing with specific emphasis on the deployment and interoperability of an Office 2003 productivity application suite. Specific tools and methodologies, including the Application Compatibility Toolkit, were recommended including the use of automated testing and deployment tools in a virtualized lab environment.

THG then utilized its experience in the Pharmaceuticals industry to develop a methodology that facilitates meeting the documentation requirements of validated systems as directed by Berlex's SOPs, under FDA 21 CFR Part 11 requirements.

RESULTS & BENEFITS

The Henson Group exceeded Berlex's expectations for devising a deployment methodology, while Microsoft was satisfied that a key client opportunity was realized with the assistance of an experienced Microsoft Gold Certified Partner.

This high-level briefing covered new methodologies for deploying core business tools, such as Windows XP and the Office 2003 application suite with fewer resources than ever before.

During the final stages of the engagement, The Henson Group developed a customized training plan targeted at Berlex's operations personnel to streamline the transition from SMS 2.0 to SMS 2003. Through a combination of both instructor-led and self-paced training exercises, attendees learned how to leverage the new features and reliability of SMS 2003.

THG delivered the customized SMS 2003 and BDD training session to targeted Berlex IT personnel focused on deployment and operation of the software distribution and management system.

And, during the development and delivery of the training THG provided continuous knowledge transfer of the technologies, training materials, and tools to Berlex's IT professionals throughout the entire process.

As part of this engagement, The Henson Group provided a three-day on-site Desktop Deployment Architectural Design Session (ADS) to provide training and a customized deployment plan to facilitate desktop deployment of Windows XP and Office 2003.

THG also conducted a one-day session targeted at business decision makers to both explain and highlight the value of the Zero Touch Desktop Deployment strategy. This high-level briefing covered new methodologies for deploying core business tools such as Windows XP and the Office 2003 application suite with fewer resources than ever before.

During the ADS, THG demonstrated how Berlex could quickly make key high-level desktop deployment design decisions that lead to a successful Windows operating system and Office 2003 deployment using the Zero Touch solution.

The main goals achieved during the Workshop were:

- A. Provided a high-level technical overview of Zero Touch deployment solutions available from Microsoft
- B. Established a common terminology for the Workshop
- C. Provided best practices based on years of desktop deployment experience and demonstrate the tools and technology used to make these practices a reality
- D. Shared established best practices and key learning gained from other implementations
- E. Made key design decisions on the basic Zero Touch infrastructure
- F. Berlex designated participants from critical IT departments, for example, Network/WAN, Desktop, or Applications development. This brought the "decision makers" together to make critical design choices within the time scale of the

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workshop. These results captured the discussions and design criteria that yield particular design choices, to reassess, or reaffirm decisions as requirements evolve.

Based on its findings, The Henson Group recommended that Berlex utilize several Microsoft tools and processes.

Subsequently, THG educated and trained Berlex engineers in the use of these tools, as well as providing assistance for implementing the processes. These tools included:

Application Compatibility Toolkit 4.0.1 (ADT): THG recommended deploying the ADT collector tool to assess which applications will have issues in upgrading to Windows XP SP2 or if any existing applications have issues with Windows XP SP1. In addition, in order to identify potential application issues, the ACT also provides recommended mitigation for each application, establishing a starting point to resolve the issue at hand. As an added precaution, THG recommended contacting any application vendor used by Berlex to verify no known issues with Office. For example, THG has seen virus-checking software (Norton) causing performance issues after a migration to Office 2003. More Info: <http://www.microsoft.com/technet/prodtechnol/windows/appcompatibility/default.mspx>

Converter Technology: The OfficeConverter tool checks for any compatibility issues on documents and can subsequently rectify any issues that are uncovered. For example, for Excel 97 spreadsheets, a number of Excel macros may need rectification of some kind of modification before they can be released for live processing in the newer version of Microsoft Office. OfficeConverter can manage this process and make many of the necessary changes. This will provide the safest way to test and convert Office 97 documents before migrating desktops to 2003. More Info: <http://www.officeconverter.com>

Microsoft Office Access 2003 Conversion Toolkit: In addition to OfficeConverter, THG recommended implementing Microsoft's Access 2003 Conversion Toolkit. This added precaution will allow Berlex to rectify compatibility with all Access 97databases for Access 2003. More Info: <http://office.microsoft.com/en-us/assistance/HA011401661033.aspx>

The processes included:

Deployment: THG recommended that a Microsoft Systems Management Server (SMS) 2.0 package is created and tested to deploy Office 2003. Additionally, THG recommended a secondary package be created and tested that deploys Office 2003 SP1 and additional hotfixes.

Package Changes: After reviewing the SMS package to deploy Office 2003, THG recommended making the following changes:

This high-level briefing covered new methodologies for deploying core business tools such as Windows XP and the Office 2003 application suite with fewer resources than ever before.

Patch management for SMS: Berlex was using SMS to discover missing Windows Security patches. THG recommended that they also deploy the Office Security patch scan tools.

Application Lifecycle Management: There was no application lifecycle management at Berlex. THG recommended implementing such a management system to track and retire/upgrade software, based on a predetermined schedule. This would allow Berlex to better predict costs and spread the scheduling of upgrades of applications out, as opposed to executing them at every OS upgrade cycle.

Naming Conventions of SMS Packages: With more than 200 packaged applications and an additional 200-300 expected, THG recommended that Berlex implement a standard naming convention for SMS packages. Currently, no standard exists at Berlex, with some packagers naming applications by vendor and others by product. This added to the time required for system builders to sift through the packages available and install applications.

Test Lab: Because there are legitimate bugs in all software, including Office 2003, THG recommended that Berlex build a test lab. Considering the emergence of new testing methods devised exclusively for Office XP and Office 2003, fewer serious bugs shipped with Office 2003 than with any previous version of Office.

Reviewing Berlex's current planned test lab procedures, THG offered the following recommendations:

- 1) Remove Office 97 and Install Office 2003
- 2) Install Office 2003 on top of Office 97
- 3) Clean install of Office 2003 with no preexisting version of Office.

These three scenarios covered the installations that THG anticipated Berlex would encounter. Therefore, the only necessary information to add to the test lab plan was to create a detailed test plan for each Office program and Berlex template. Additional topics to cover in the test lab included using opening and verifying any documents converted using OfficeCoverter or Access 2003 Conversion Toolkit.

Once the core testing was completed pertaining to Office documents, THG recommended that Berlex inventory and test all applications that currently install add-ins to Office 97, such as Adobe.

And, THG did not recommend installing Office 2003 to a computer with anything less than a 500 Mhz processor with at least 256 meg of RAM running either Windows 2000 or Windows XP. THG also recommended implementing a hard

About The Henson Group

Founded by former Microsoft engineers in 2000, The Henson Group is an award-winning Microsoft Gold Certified Partner specializing exclusively in deploying Microsoft technologies, official product training, and strategic consulting for overcoming today's business challenges.

The preferred solution provider for many major US and international corporations, The Henson Group is designated an official "Go To" partner for most major products, consistently ranked within the top three consultancies in Microsoft's partner directory (found at: <http://directory.microsoft.com>), holds a seat on the national Microsoft Partner Advisory Council, has direct ties to the product groups, and offers a price guarantee that assures the highest quality service at an unbeatable value.

drive with plenty of space on it, such as a 40 gigabyte drive with at least 20 gigabytes of free space available.

THG recommended temporarily enabling the XP System Restore. The System Restore can restore a PC to a state of a previous good configuration, without deleting any data files and can return to the damaged configuration Berlex last had. THG also recommended that the restore disk space usage be set to 1GB if possible. Once Office 2003 is deployed and running without issues for 30 days, the service can be disabled.

THG's Long Term Recommendations

Lastly, THG recommended that Berlex utilize several Microsoft tools and processes, including:

TOOLS:

- PXE Nextwork install so no CD is needed
- SMS 2003 Migration for checkpoint restart and bandwidth throttling
- SMS 2003 OS Feature Pack for SMS for "Zero-touch" deployments
- USMT for Rebuilds
- SPS/WSS for Document and Collaboration
- RMS for Document Security

PROCESSES:

- Roaming profiles with Document and Favorites redirection
 - Windows 2003 Migration to take advantage of XP specific GPOs
 - MIIS to automate user provisioning and de-provisioning
- About The Henson Group, Inc. (THG)