

# BANKING ON A TECHNOLOGY MIGRATION TO LEAD AND THRIVE IN THE MARKETPLACE

## PHASE 1

### THE SITUATION

A century-old financial institution with multiple locations throughout the Midwest is celebrated for its service to customers and communities. Yet in order to continue leading in the space, a technology evolution was essential. By rethinking their approach to mobility, data security and compliance, they could benefit from an environment consisting of the complete VMware ecosystem, utilizing global load balancing, high availability and automatic failover for disaster recovery to be prepared for anything.

### GOALS

1. Build and upgrade the mobility environment across multiple data centers to achieve 100% uptime.
2. Provide secure access from an internal Microsoft Exchange environment to mobile devices on external networks.
3. Complete the strategic migration from an antiquated BlackBerry infrastructure to Workspace ONE UEM.
4. Enable accessibility of corporate resources, including applications, email, network shares and internal websites, to newly deployed iOS and Android mobile devices.
5. Minimize system administration via workflow synchronization between multiple production platforms.
6. Elevate the end-user experience for mobility.

# THE SOLUTION

Tech Orchard initiated this engagement by gathering the client's key stakeholders, communicating high-level goals, assigning resources and outlining anticipated results. These items were documented in a formal project plan, which was distributed to both the Tech Orchard engineering team and client stakeholders for validation of alignment with the client's "best practices" for their environment.

The first item that needed to be determined was the migration strategy, with decisions regarding internal communications and procedures falling within the institution's responsibility. Tech Orchard assisted with employee communication, as well as process development and execution regarding new device procurement and enrollment. Tech Orchard also identified resources that would need to be accessed using mobile devices to establish use cases, and provided explanations of how Workspace ONE UEM components secure network traffic and provide access to internal corporate resources.

In the meantime, additional scheduled working sessions were conducted with the client's assigned resources. Detailed discussions were conducted to diagram the proposed topology of the Workspace ONE environment. Task lists were delegated to the client's resources and Tech Orchard accordingly, ensuring uninterrupted access to corporate resources by:

- Utilizing global load balancing across two data centers
- Configuring high availability for each Workspace ONE UEM component, per data center
- Configuring automatic failover to each datacenter in the case of a full datacenter outage

Integration of the client's on-premise Active Directory (AD), certificate authorities, WiFi broadcasts and other

administration platforms with Workspace ONE UEM allowed for:

- Successful AD authentication during the enrollment process
- Automatic deployment of applications and profiles according to AD security group membership
- Automatic WiFi connectivity after enrollment process were completed
- Segmented administration of the environment utilizing role-based access controls (RBAC)
- Simplified procurement, enrollment and deployment processes allowing for efficient onboarding

## RESULTS

1. The Client was able to successfully migrate their mobile environment to VMware's Workspace ONE UEM platform within the proposed time frame provided by IT Management, while decommissioning the BlackBerry environment for significant O&M cost savings.
2. Because single points of failure were eliminated, 100% uptime could be achieved.
3. Stakeholders could securely access email using the Secure Email Gateway, file shares using the Content Gateway and internal websites using the Universal Access Gateway. Corporate certificates were deployed to devices to provide authentication.
4. Multiple levels of IT support were configured for segmented administration of the VMware Workspace ONE UEM environment (RBAC). First-level support roles were created to provide end-user assistance when required. Infrastructure administration roles were created to give IT administrators access to fully maintain the environment. Report viewer-only access roles were created to give specific administrators read-only rights to download configurable system and user reports.

## PHASE 2

# THE SITUATION

With the arrival of the COVID-19 pandemic, the way in which the institution needed to operate quickly changed. The client sought Tech Orchard's support to enable their remote workforce's access to Horizon desktops to control, manage, and protect all of the Windows resources needed, at the speed they expected, with the efficiency business demands.

## GOALS

1. Integrate existing VMware Horizon environment with VMware Workspace ONE.
2. Provide Horizon access to devices on external networks utilizing conditional access rules.

# THE SOLUTION

Tech Orchard configured the Workspace ONE Access portal with an on-premise connector to establish conditional access rules for accessibility. This allowed for multiple device platforms (iOS, Android, Windows) to access the portal resources (applications and virtual desktops) only when all specific conditional access rules were met.

## RESULTS

1. Users were able to access Horizon virtual desktops and published applications from external Workspace ONE UEM enrolled devices without compromising security protocol.
2. By engaging in Tech Orchard's ongoing support, the client was able to provide a user-experience for its workforce that was very similar to an on-campus environment and minimize disruption for its clients.



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