

Case Study:

UPGRADE TO WINDOWS XP

Challenge:

As of the end of 2004, more than 3,000 employees in this company used workstations equipped with the Microsoft Windows NT operating system. By that time, Windows NT was an obsolete operating system, having been superseded by Windows XP in 2001. The client wanted to upgrade these workstations to Windows XP for several reasons:

- Windows XP was needed to support many recent releases of application software and new kinds of peripheral devices.
- Windows XP was more stable and reliable, and it required less technical support.
- Windows XP made recovery from certain types of errors easier.

However, the software upgrade procedure was itself costly. A problem-free upgrade would take between 4 and 6 hours per workstation, potentially resulting in the loss of up to 2250 days, or about 10 years, of user productivity. And because the upgrade was extremely complex, there was a risk of additional downtime due to failures. Since employees in the business units affected are among the most highly paid and productive in the industry, the cost of downtime was potentially very high.

Objective:

The objective for the engagement was to upgrade more than 3,000 user workstations from Windows NT to Windows XP as quickly as possible, without causing user downtime.

Solution:

Careful planning was required to make the upgrade as problem-free as possible. In addition, we scheduled the process so as to perform as much work as possible when users were not at their desks.

In the first stage of the project, Design Strategy reviewed users' workstation configurations to see whether they would support Windows XP. A complete inventory of workstations was created in spreadsheet format, listing every piece of hardware installed. The inventory showed that about 60% of workstations lacked sufficient memory, CPU speed, or other specifications required to support XP.

We also surveyed users to determine what dates and times were most convenient for them and which applications were most critical to them. Users were instructed to back up local files before the operating system upgrade took place.

In the second stage, we upgraded hardware for the workstations that could be made XP-capable. We also replaced many other workstations entirely. As much as possible, these hardware changes were scheduled to minimize user downtime. New workstations and new parts were swapped in after users had left for the night.

In Stage 3, we upgraded the operating system for a few test subjects in each user group, in order to identify the problems that we would encounter. These tests took place after working hours. Technicians immediately addressed any workstation failures occurring during or after the test, in order to avoid user downtime the next day. We then analyzed the problems encountered during the testing for each workgroup.

In the final stage, once we were certain that the hardware was ready and the bugs in the procedure had all been fixed, we performed the upgrade for each workgroup, again working after users had left for the evening. We provided followup support the next morning, mostly to install printer drivers and create desktop icons. For about 10% of the users, locally installed software applications had to be re-installed from the original disks the following morning.

DSC worked closely with client personnel throughout the project. In-house personnel were assigned to reset passwords, move personal data, and fix problems with in-house applications that would not load or install after the upgrade.

Result:

With a project team varying from 3 to 20 technicians, we completed the project in a six-month period. The process went smoothly, and users experienced minimal disruption or downtime.

As a result, these 3,000 users now have up-to-date, stable, and secure workstations.

COMPANY NAME:
LARGE GLOBAL
FINANCIAL INSTITUTION

LENGTH OF ENGAGEMENT:
6 MONTHS

PROJECT COMPLETED BY:
JUNE 2005

ENGAGEMENT:

Design Strategy

Corporation upgraded

3,000 user workstations

in a global financial

institution from

Windows NT to

Windows XP

Professional.