

SOLUTION OVERVIEW

INDUSTRY

Financial Services

KEY BENEFITS

- Highly Available Fault Tolerant Exchange 2007 Messaging Environment
- Cost Reduction utilizing Hyper-V Virtualization
- Increased hardware utilization with Hyper-V Virtualization

TECHNOLOGY USED

- Microsoft Server 2008
- Microsoft Server 2008 Hyper-V
- Microsoft Exchange 2007
- Microsoft System Center Virtual Machine Manager 2008

STATERA PRACTICE AREAS EMPLOYED

- Infrastructure
 - Messaging Systems
 - Virtualization

VIRTUAL EXCHANGE MIGRATION

Company Profile:

CoBiz Financial, Inc. is a \$2.7 billion diversified financial company serving businesses, business owners and high-net-worth individuals with a diverse menu of banking and financial services. CoBiz also provides investment banking, employee and executive benefits brokerage, fee-only investment services, and property and casualty insurance.

Our focus is on serving the needs of our clients at all stages of their lives, from planning (loans and depository services, or capital planning) through preservation (trust, investment management and wealth transfer services). We continue to look for new and exciting opportunities to grow our company and introduce our services to new customers and audiences.

The Challenge: Upgrade From Exchange 2000 to Exchange 2007 and Leverage Virtualization for Server Roles

CoBiz's Exchange 2000 organization had no fault tolerance or redundancy. CoBiz was at risk for a failure that could cause email outage for their users in an Exchange datastore or the entire organization. Another issue was the fact that Exchange 2000 was no longer supported by Microsoft. CoBiz needed to migrate to a supported messaging platform with fault tolerance and disaster recovery capabilities built in. They also wanted to take advantage of new and improved features and functionality within Exchange 2007, such as Outlook Web Access and Outlook Anywhere.

The Solution: Deploy Exchange 2007 on Windows Server 2008 Virtual Servers running on Hyper-V

Statera designed a new messaging platform based on Microsoft Exchange 2007. This design incorporated Cluster Continuous Replication (CCR) in the Denver datacenter to provide fault tolerance for the Denver mail users. The design also called for two Hub Transport and Client Access servers in the Denver datacenter to provide redundancy for these highly important messaging roles. In the Phoenix datacenter, a single Mailbox server and separate Hub Transport and Client Access server was designed and implemented. Regulatory requirements require that CoBiz journal all email messages in their environment. To properly implement journaling another dedicated mailbox server was required. To ensure that the messaging system would survive a disaster in either Denver or Phoenix, Standby Continuous Replication (SCR) was designed to replicate the mailbox databases between the sites. SCR replication target mailbox servers were required in each site to ensure that site failover would not impact mailbox servers already in each site.

CoBiz required a highly available system that called for numerous servers to be deployed. Statera worked with the CoBiz technical staff to introduce virtualization into the design and ensure that the client was comfortable with the idea of going virtual. Statera reduced the physical server count from nine to five utilizing Microsoft Server 2008 and Hyper-V virtualization.

The Result: Considerable Cost Reduction for Hardware and Increased Functionality Using Hyper-V

CoBiz saved over \$27,000 on hardware costs and a yearly estimated savings of \$4,000 on power and cooling costs. With Exchange 2007, CoBiz realized their goal of utilizing a highly available messaging environment that can withstand both server level and site level failures and continue to function effectively.

With the success of Hyper-V in the new Exchange 2007 environment, CoBiz wanted to extend virtualization to facilitate server consolidation and further reduce hardware costs. Statera guided CoBiz in designing and implementing a three node Hyper-V cluster. This new cluster was designed to support up to 60 virtual machines. The majority of the virtual machines to be deployed on this new cluster are current physical servers that are being converted to virtual machines using System Center Virtual Machine Manager 2008. Another added benefit of this Hyper-V cluster is that it now allows CoBiz a test environment to evaluate new technologies and prepare for software upgrades of their core applications in a safe and isolated environment without the need of additional server hardware.

The Feedback:

“Virtualization with Microsoft Hyper-V was a ‘no brainer’ for us as we used virtualization as part of our upgrade to Exchange 2007. This project allowed us to utilize a smaller server footprint with significant redundancy not possible with our non-virtualized environment. Once this project was complete, we saw the potential of virtualization and determined to take a fast track approach and employ virtualization with every application possible in our infrastructure. We hope to reduce our server infrastructure by 35% or approximately 40 servers by the end of this year. Many of our servers are at or near their end of life so the cost savings of not having to purchase additional hardware is significant. In addition, it allows us to do our part for a ‘greener’ environment by reducing our carbon footprint and energy consumption.”

- **David Pass, EVP and CIO**
CoBiz Financial

For more information on Statera’s capabilities, please visit www.statera.com or call 720.346.0070

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