

## **Hermes Fund Managers Ltd**

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Hermes Fund Managers Ltd gets to work with remote access

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Hermes is a multi boutique asset manager with a truly long-term and responsible approach to delivering investment returns. As a multi boutique, Hermes offers its clients the best combination of specialist investment teams and products along with a robust operating platform from which to run them.

Hermes offers investment solutions which range from alternative strategies such as fund of hedge funds, commodities and engagement focus funds to real estate, private equity and specialist equity products. Hermes invests assets on behalf of 205\* clients across these product areas and has £31.2bn\* under management.

(\* As at 30 September 2008)

## The Challenge

Hermes is undertaking significant investment to enhance its capabilities as a multi boutique asset manager and also in the development of its pension fund management service for its owner the BT Pension Scheme.

To deliver against this ambition, planned changes largely centre on enhancing their core infrastructure and extending this to improve the computing experience offered to staff – this plan will entail a multi-million pound restructure. This impacts the user base, front, middle and back office functions, as well as support systems driven out of the data centre.

Consequently, every element of the project, known internally as Genesis, require careful planning, development, testing and delivery to ensure day-to-day activities can continue whilst upgrades take place.

One critical aspect of Project Genesis is the requirement to implement a company-wide remote working access capability, in line with the firm's desire to operate in the vanguard of modern business practice.

The context is self explanatory. Previously, it would take three to five days to configure a laptop to connect via a traditional VPN, the only remote capability available prior to the implementation of the remote working solution. Whilst users working offline would cause conflicts when they uploaded shared documents to the corporate LAN.

Moreover, issues of security are of paramount importance and corporate data must be secure with no sensitive information left on laptops. Hermes also needs to be entirely satisfied that in the event of a disaster the solution would be robust and provide the necessary recovery according to company and regulatory requirements.

Meanwhile, key functional requirements include users having access to everything they need, wherever they are in the world, so that the experience is identical to that they would expect in the office. It also has to be quick and easy to manage and deploy, supporting up to 200 additional PCs and around 80 laptops, with no additional staff resource.

Last but not least, it has to be cost effective.

On a practical level, the plan to implement remote working required the creation of a steering committee, chaired by Hermes IT director, to ensure that all business requirements would be met. Hermes subsequently asked Kelway to assist with its decision making process.

*"By providing our staff with 24/7 secure access to our network, irrespective of their location, we are best equipping them for the challenges of working within the complex and global financial services sector."*

**Jamie Dewar - Manager - Technical Services, Hermes Fund Managers**

# The Solution

Kelway has worked with Hermes for approaching seven years, largely focused on providing technology procurement support. This has most recently included advising Hermes on the virtualisation of its server estate and the delivery of the (Windows) technology that underpins this solution.

Running alongside the virtualisation project, and leveraging the capabilities of its proof of concept laboratory, Kelway presented a number of options for the remote working project. This included Citrix and VMware, with assistance on making a decision based on its needs and legacy systems.

Following a highly successful virtualisation project for testing and development, Hermes elected to host virtual PCs using

VMware infrastructure, with high performance HP servers sharing HP Enterprise Virtual Array storage. Additionally, a Leostream Connection Broker provides the interface between the virtual PCs and the end users. This is arranged by department, in order that when an individual user connects to the system they are recognised and provided with access to the specific applications they require.

Hermes in-house IT team subsequently installed the chosen solution, backed up by Kelway advice, where required. This involved a project team of three Hermes technical analysts who completed the design in December 2007, with the project live by June 2008.

# The Technical Specifications

Two hundred virtual PCs have been built within VMware's ESX infrastructure to be presented as physical PCs on Hermes' network. Each is custom-built and tailored to every key department's requirements. Software upgrades, security patches and antivirus applications are controlled centrally, as part of normal maintenance services. The solution is also within Hermes' data recovery site - so it is always available.

Users requiring access from home install two small applications, the VPN client and Leostream. The VPN is further secured using RSA tokens. The user is then offered a selection of suitable PCs which may be connected using the remote desktop.

Those travelling can access the remote network via a laptop - which also has boot protection and hard disk encryption. In addition to wireless capability, Hermes also provides BT 3G modems in order that a user can connect from any location. Additional security measures include Calyx Netadmin, which

centrally manages laptop security. In the event of the loss of a laptop, its content can be remotely and permanently wiped from the device.

The storage capabilities that underpin the remote access project, involved Hermes procuring HP's EVA 4000, subsequently upgraded to 6000; a second 6000; and a 4400. Kelway provides updates, patches and performance diagnostics as part of ongoing maintenance services - as an HP accredited provider.

Hermes takes disaster recovery very seriously and has located its remote working solution outside of London. In the event of a crisis, Hermes can relocate a number of key staff where all necessary data is replicated, whilst the virtual desktop infrastructure is available to all other professional staff. This includes those without remote access, who can be back to work within two days having been sent the VPN and Leostream clients, in addition to the RSA token.

# Key Benefits

Hermes now benefits from a centrally managed and controlled virtual desktop infrastructure that has provided the remote access capability it required for its end users. Remote working has been straightforward and simple to achieve, whilst the design of the system is easy to deploy and manage with unique images for several groups of users agreed as a standard, supporting up to 200 additional PCs and around 80 laptops, with no additional staff resource.

From a security perspective, the corporate LAN is secured against unauthorised access at home or via a stolen laptop, whilst only screen shots, using the RDP solution, are passed across the VPN to the home PC. Moreover, no data ever leaves the corporate network, which is also backed up on the disaster recovery site.

As applications are accessed remotely, the laptops do not need to be high-performance models, saving further potential cost. The solution only requires five servers and one disk array, minimising its power requirements and enhancing its green IT credentials. It also leverages the power of the existing storage area network.

Jamie Dewar, Manager - Technical Services, Hermes Fund Managers, said "The remote working solution is one important component helping to overhaul the way in which Hermes operates, as part of its technology led programme of change, called Project Genesis.

"By providing our professional staff with 24/7 secure access to our network, irrespective of their location, we are best equipping them for the challenges of working within the complex and global financial services sector. In terms of increasing productivity and improving profitability, the feedback from end users has been overwhelmingly positive, whilst the return on investment is difficult to overestimate."

Mark Byrne, Business Manager at Kelway, said "Kelway has assisted Hermes Fund Managers in its selection of a remote working solution that is as effective as it is secure, in addition to being cost efficient to implement and manage. Our knowledge of VMware solutions, backed up by the highest available HP accreditations for storage solutions, underpin the success of this implementation."

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