



USF FEDERAL CREDIT UNION ESTABLISHES AIRTIGHT DISASTER RECOVERY WITH EVAULT AND SIMPLER-WEBB

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Initially chartered in 1959 to serve the needs of the University of South Florida’s staff and faculty, USF Federal Credit Union (USF FCU) has since grown to include students and over 29,000 members, with total assets over \$280 million. Located in Tampa, USF FCU has seen its share of hurricanes roll through the Gulf of Mexico over the years, often coming too close for comfort.

That’s one of the main reasons the credit union wanted a stronger disaster recovery plan—one that would enable the credit union and its members to continue operating, even from afar, if needed.

According to Jeff Billy, network security specialist at USF FCU, their tape-based backup process didn’t inspire a lot of confidence. Restores from both local and remote backups weren’t reliable, which made recent headlines about data breaches seem ever more ominous. Besides the loss of reputation those portended, the credit union faced potential regulatory sanctions because it didn’t consistently encrypt the member information it backed up.

“We formerly used a tape backup solution for all our critical member information and employee data. But, we didn’t have a good solution for encrypting that information,” admits Billy. “We also didn’t have enough faith in the reliability of tapes as a whole to be available for restoration in the event of a disaster.”

Working closely with Simpler-Webb, the credit union’s long-time managed services provider and integrator, USF FCU set out to locate a solution that would serve all its needs.

Goals

“One of USF FCU’s primary concerns was how they could better architect and administrate a DR strategy, knowing that they faced potential hurricane threats,” recalled Chris Cooper, senior account executive at Simpler-Webb. “They were taking backup tapes off-site and were under contract with a co-location facility. In the event of a disaster, they planned to fly their tapes out of state and restore their core banking applications from there.”

While the credit union still plans to work with the co-location facility, USF FCU

Customer Snapshot

Name

USF Federal Credit Union

Line of Business

Regional Credit Union

Location

Tampa, Florida

Product

EVault InfoStage™ EVault InfoStage DualVault, plus Agent plug-ins for Microsoft Exchange, Microsoft SQL Server and IBM AIX

Configuration

Six Microsoft Windows Servers, Two IBM AIX UNIX servers

Capacity

Over 400GB backed up each night

Core Processor

Symitar—Episys

Goals

- Achieve better security for member data.
- Improve off-site disaster recovery process
- Reduce reliance on tape-based backups
- Comply fully with federal/state regulations

Challenges

- Risky, unencrypted tape backup process
- Overly long recovery time objective (RTO) for disasters
- Insufficient plans for out-of-region disaster recovery

Solutions

Encrypted, automated disk backups with EVault InfoStage. Fast restores now possible from both local vault in Tampa and remote vault at Simpler-Webb facility (an EVault Platinum partner) in Austin, Texas.

Results

Security, compliance, fast restores, and peace of mind.

also realized their existing backup strategy wouldn't be protective enough to recover from a large regional disaster. "They were taking the tapes off-site, but not far enough. We also identified the unencrypted tapes as a vulnerability and aimed to provide a more comprehensive backup solution," said Cooper. With Simpler-Webb's help, USF FCU desired to:

- Encrypt sensitive member data during backup
- Establish a faster, more reliable off-site recovery process
- Reduce cost and effort surrounding tape-based backup and recovery
- Comply with federal and state regulations and industry best practices

"We wanted a solution that could be more redundant and accessible from different locations," said Billy.

Challenges

USF FCU regularly encountered the typical shortcomings of tape-based backup: tapes wearing out and becoming less reliable, the growing complexity and backup times as the amount of data and the number of servers increased, and the hassle of taking tapes off-site and bringing back the right ones to do a restore.

Although Simpler-Webb and the credit union began their search by exploring in-line solutions that could encrypt backup data as it went to tape, it wasn't long before their exploration expanded to encompass solutions that could enable USF FCU to improve its DR process. "They wanted to make their backup process more efficient without taking tapes off-site. They also wanted to be able to recover and have the backup data available not only at their local Tampa facility but also at their co-location site," said Cooper.

That's when Simpler-Webb raised the option of automated, disk-based backup with EVault InfoStage™. Chris Cooper described how an EVault InfoStage DualVault solution would let USF FCU host a primary backup vault locally in Tampa while Simpler-Webb hosted a secondary off-site vault for USF FCU at its Austin, Texas headquarters. Billy and his team quickly warmed to the idea. "The EVault solution was perfect," said Billy, noting it offered both the redundancy and multipoint accessibility USF FCU wanted.

Solutions

Working closely with USF FCU's co-location facility, Simpler-Webb was able to arrange a rapid connection to the facility that would be made available if USF FCU declared an emergency. This provided more assured restore capabilities in case of a disaster. Backed up data would stream "over the wire" to the co-location facility site from either the credit union's Tampa facility or Simpler-Webb's Austin site. Simpler-Webb could also stream backup data to USF FCU's Tampa site.

Recalls Cooper, "In this situation, EVault offered a lot of benefits that competitors

EVault Partner Profile

EVault Drives Opportunity, Expanded Services for Simpler-Webb

When Jeff Simpler and Andy Webb set out in 1993 to meet clients' needs by helping them leverage and manage both new and existing technologies, little did they know their company would grow to encompass six continents and offer such a range of technology consulting and managed services for clients — many of them in the financial sector.

According to Chris Cooper, senior account executive, one key to Simpler-Webb's success is its ability to identify strategic partners whose products truly deliver the industry's best solutions to meet the needs of their customers. In that, he says, Simpler-Webb has succeeded where others fail by being selective.

"Simpler-Webb has historically been very conservative about the products we represent and partnerships we engage in," he said. "We're not a Value Added Reseller (VAR) that signs up every product on the market that gains any buzz. We do our own research and testing. We're very cautious and selective about the strategic partnerships we undertake because it's our duty to provide proven solutions to our clients. In my mind, EVault exemplifies that."

Over a few discussions with EVault, both Cooper and CEO Jeff Simpler began to feel EVault would be a good fit for both Simpler-Webb and the needs of clients like USF Federal Credit Union.

"It became evident to us, when looking at the various players, that EVault is a leader in the backup and recovery space. It is also one of the most mature and easiest to manage," said Cooper. "When we engage in discussions with our clients regarding a solution, it's our goal to help them discern what makes the most sense for them from a long-term technology perspective. We look at a variety of factors, as in the case of USF FCU, including outsourcing a portion of their management or new paradigms like disk-to-disk backup and consolidated storage."

in the space couldn't match." He especially liked how easy the system was to manage and its ability to backup and restore multiple "retentions" in a compact data store. Citing EVault's Delta Pro™ technology, which sends only block-level changes over the wire, Cooper lauded the fact that the changes-only approach made backups faster while maintaining a fully backed-up data set at all times.

USF FCU also liked EVault's end-to-end encryption process: Data is encrypted as it is being backed up, and remains that way during transmission and in storage. Said Billy, "The encryption process has been pretty seamless. You couldn't really tell it's being encrypted, but it is."

As part of its service, Simpler-Webb now oversees the EVault InfoStage backup process for USF FCU, manages the two vaults, helps perform restores where needed, and performs two annual DR tests.

Results

Since implementing EVault InfoStage, things have gotten a lot easier — and a lot more comfortable — for USF FCU. "Our nightly backup routine's a lot easier. We don't have to worry about switching tape out anymore," said Billy, also noting that backup speeds are faster, especially with the help of EVault Delta Pro. Restores are also a simpler proposition. "Since we no longer have to search for a particular tape, the restore process has been a lot quicker as well."

Computer Support Specialist Jeff Wiles doesn't miss tape, either. "You don't have to figure out which tape has the data on it that you want. With the EVault servers, you have everything right there on a list. You just go find the date and data you want and start the restore from there," he said.

The credit union also feels better about its regulatory compliance. "From an auditing standpoint and a federal requirements standpoint, it definitely helps solidify our position in disaster recovery. EVault has given us the ability to encrypt backups and store them in a location that's far enough [away] in the event of a disaster," said Billy. Encrypting backups from the credit union's IBM AIX UNIX system used to be a challenge, but no longer. "That's been a great addition with our EVault system."

"We knew we needed something better than tape, especially with the push for encryption. EVault came along and it was a good solution for us," said Billy. "Our experience with EVault has been very positive." Billy reiterates the sentiment. "It looked promising when we first saw it and it's done everything it claimed it would do."

In terms of disk-to-disk backup, Simpler-Webb found EVault and its multiple delivery options an excellent way to adapt an organization's current infrastructure to a disk-to-disk backup focus. Since becoming an EVault partner, Simpler-Webb has implemented multiple EVault InfoStage "vaults" for clients — with a growing number now maintaining a second, out-of-region vault at Simpler-Webb's Austin headquarters.

So far, results of the partnership have exceeded Simpler-Webb's initial expectations. Cooper credits EVault's support for much of the partnership's success. "It's been a dedicated effort on both parts. We sent our engineers out there for training and got steeped in the technology so we could understand and articulate it better," he said. "At EVault, everyone — from engineering to professional services— has been outstanding in their desire to get on calls and support us in our efforts to bring this great solution to our clients."

Cooper believes partnering with EVault includes all the ingredients needed for success. "EVault brings a very robust and dynamic solution to the table that can be custom-fit to the organization, scaling well from very small to very large installations. And, there's good opportunity for both the end-user and the partner to achieve lasting value," he said.



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