Banking on a Dependable Backup Solution

"We found no other company that met the individual needs of the customer like UltraBac Software. They treat every customer like they are special."
                              - Andrew Bono, Network Administrator, Monterey Credit Union

The Challenge

Founded in 1968, Monterey Credit Union (MontereyCU) has more than 20,000 members from the surrounding communities of Monterey, California. With five full-service branches, MontereyCU offers many of the same services to its members as a traditional bank. These include checking and savings accounts, online bill-pay, consumer loans, ATM banking, financial advice and investing, and many other banking products.

Due to the nature of the banking industry, large amounts of business data are created, stored, and added to MontereyCU's systems daily, at more than 100 terminals. In the event of a disaster, file corruption, or accidental deletion, ensuring this data is backed up and recoverable is the most crucial job for the IT staff of MontereyCU.

In addition, MontereyCU must meet compliance regulations. Insurance auditors routinely inspect and investigate the organization's ability to protect, store, and restore mission critical data. Choosing a dependable, powerful, and easy-to-use backup solution was a must.

The Situation

A few years ago, MontereyCU IT staff were using a competing backup solution from a well-known company when a situation arose that required a database to be restored. The software program was designed to work by first creating an index of the files at the time of the backup. This index was vital, as the backup could not be restored without it. When the IT staff initiated the restore, the backup software could not find the index. The solution had failed and the backup tapes were rendered useless. The hunt was then on for a truly dependable backup solution.

Because MontereyCU staff wanted a solution that could be customized to meet their needs, the solution had to be full-featured, flexible, and reliable.

MontereyCU's Network Administrator, Andrew Bono, was first introduced to UltraBac Software at an industry tradeshow. Bono briefly discussed his organization's backup and recovery needs and quickly determined that UltraBac appeared to be the solution they were looking for. Having faced the prior failure of a competing backup solution, he wanted to play it safe. He took an evaluation copy of the software back to the data center to thoroughly test the new found solution.

"We installed UltraBac to fully evaluate it for our needs. We tried to break it while excecuting various backups and restores," said Bono. "UltraBac did not require an

index of the backup so that was a huge plus and this also reduced another point of possible failure."

The Solution

After extensive testing to ensure that UltraBac met MontereyCU's flexibility, dependability, and ease-of-use requirements, seven servers were licensed with UltraBac's backup and disaster recovery software.

"The flexilbility we found in UltraBac was remarkable and their tech support was great. Not every company meets the individual needs of the customer like UltraBac Software," said Bono.

Although UltraBac Software provides both image-based and file-by-file backup solutions, MontereyCU was primarily interested in the latter. Bono was also particularly attracted by UltraBac's built-in scheduling capabilities, insuring selected data could be backed up at specific times.

MontereyCU installed UltraBac on nine Compaq servers to back up the financial institution's data to five tapes. An existing HP tape library was also incorporated to create a fully automated backup solution for the Compaq servers.

All 100 terminals in the credit union's branches access and save data to the seven servers in MontereyCU's data center. MontereyCU uses UltraBac on these servers to back up this crucial data on a daily basis. UltraBac's scheduling capabilities are fully utilized to orchestrate the timing of these backups. Mission critical, rapidly changing data is backed up daily, whereas other data is backed up according to an automated weekly or even monthly schedule. For example, the UltraBac Exchange Agent is used to back up the Exchange server nightly, while file-by-file backups also occur depending on the rate of new data generation on the target servers.

UltraBac's Media Library Module saves the backups to five tapes that are stored using the HP tape library. If the tape library is down, backups can be sent to another storage media such as a local or networked hard drive. The tapes are secured in a fireproof bank vault every night.

"The ability to schedule backups directly with UltraBac is a key feature. The scheduling capabilities are all encompassing, ensuring the right data is backed up at the right time.

"Because we have highly customized our installation, we have had the chance to interact with UltraBac's tech support. Our experience is that their staff sticks to a challenge until it is resolved. They have great communication skills, know what they are doing, and have the technical knowledge to go straight to the issue," said Bono.

The Benefits

Since the installation of UltraBac, insurance auditors have carefully reviewed MontereyCU's ability to store, protect, and restore the data vital to the operation of the organization. The auditors were "quite satisfied" with UltraBac's use as the cornerstone of the solution.

MontereyCU also had an opportunity to fully trial UltraBac Software's UBDR product. UBDR is a comprehensive image-based disaster recovery solution.

"We had a server blue screen on us and immediately thought about UBDR Gold's imaging capabilities. We worked with UltraBac staff to use this as an opportunity to test UBDR Gold. We recovered the data and had it accessible within a few hours – it was very impressive."

Based on this recovery, MontereyCU licensed UBDR Gold to supplement their file-by-file backups.

A few weeks after subsequently rolling out UBDR Gold for image based recoveries, MontereyCU purchased a new phone server system to handle the entire organization's automated phone answering and messaging. The system was extensive, handling approximately 100 user accounts and automated call routing, including dial-by-name functionality. Installation and configuration took several days for an integrator to perform.

"Upon inspecting the hardware configuration of the new server I noticed there was no RAID array or redundant media in case of a hardware failure," said Bono. "When I inquired with the integrator as to what the backup of the server would be, the technician initially said that we'd need to purchase a redundant server for $25,000. IBM support later said that it was possible to add RAID 5 so we made plans to add this functionality. However, not having a backup to such a critical solution from day one was unacceptable so I immediately integrated the server into our UBDR Gold backup schema to create regularly scheduled image backups of the 120GB hard drive to another local server."

Within the first three months of service the phone server's hard drive failed. This was to be the ultimate test for MontereyCU's experience with UBDR Gold.

"Losing the hard drive on our phone server brought our communications to a standstill," said Bono. "Having backed up the image of the server with UBDR Gold I knew a complete restore should be only minutes away. After obtaining a replacement hard drive, I walked into the data center and booted the machine from CD. Once booted, the server took less than three minutes to fully restore. The phone system was already back up and running when my supervisor inquired as to the progress of the recovery. Neither of us could believe the simplicity or speed of the restoration."

Bono concluded by saying, "You never want to be right when predicting and preparing for potential catastrophes, but they happen. UBDR Gold saved us countless days of work to restore the server. UltraBac Software products work — we've had the opportunity to prove it time and again."