

Alexander Forbes

Reporting on What Matters Most to Leading South African Financial Services Company



Compliance is the watchword at Alexander Forbes. This leading South African financial services company has deployed Veritas NetBackup™ software from Symantec in conjunction with Veritas CommandCentral™ Service software to meet its compliance requirements via proactive policy enforcement and remediation, a consolidated view of compliance to multiple regulations and standards, and automated evidence retention. This compliance pays dividends elsewhere too. By standardizing on this unified data protection and storage management solution, Alexander Forbes has been able to significantly improve the productivity of the staff involved in IT operations.

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Pierre Blignaut
Data Manager
Alexander Forbes

Leading Provider of Financial and Risk Services

Alexander Forbes is a leading provider of financial and risk services internationally. Through its significant network of subsidiaries and partners, the South African company has representation in Africa, Asia, Europe and Latin America.

Alexander Forbes has been a beacon of success in financial and risk management services. The volume of clients is growing, the channels they communicate through are multiplying and the services Alexander Forbes markets are expanding. All great news; apart from the fact that this organic growth brings with it more data. Terabytes of it, in fact. In the last few years, Alexander Forbes has coped with this at a local level. As data expanded in the Johannesburg, Durban, Cape Town, Port Elizabeth and other offices in South Africa, a local data protection solution was deployed, largely without integration with the other office sites

It was Pierre Blignaut’s job to sort it all out. Pierre is the data manager for Alexander Forbes, and he was aware that the array of different backup and restore solutions needed to be tackled. “Our backup is managed through the integration partner Dimension Data, and as more servers were deployed, we had an assortment of different backup and agent solutions at each site to support them. These included various versions of Symantec Backup Exec™, EMC® Legato® NetWorker® and a proprietary Oracle® backup solution.

ORGANIZATION PROFILE

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INDUSTRY

Financial Services

SOLUTION

Data Protection

Symantec helped meet compliance requirements, boost efficiency and optimize IT operations productivity.

“Compared with before where it was a time consuming exercise to monitor the backup process and success rates, now we simply log in and in a few moments we have a comprehensive view of the backup over the last 24 hours.”

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Cost-Effective, High-Performance Backup and Recovery

Of all the different backup solutions, Symantec Backup Exec had been the most effective: providing cost-effective, high-performance, and certified disk-to-disk-to-tape backup and recovery. Blignaut and his team took the decision to deploy an enterprise solution of the same grade: Veritas NetBackup software from Symantec. This high performance, enterprise-scale data protection solution provides Alexander Forbes with a single, unified solution for backup and recovery operations on more than 300 HP® servers, the majority running Microsoft® Windows® and the remainder Sun® Solaris®. Data is backed up to Overland® LTO-2 and LTO-3 tape storage. Microsoft Exchange® and SQL Agents have also been deployed.

Using NetBackup software, the team benefits from centralized management of the entire backup and recovery environment—including real-time monitoring, historical reporting, alert management, and troubleshooting. Unlimited scalability means that the NetBackup software adapts to the company’s growing demand for data.

Alexander Forbes is currently in the process of upgrading from NetBackup Version 5.1 to Version 6.0, and according to Blignaut it will make a considerable difference. “We have SQL clusters running on 64-bit technology and the latest version of NetBackup will be ideal for coping with this environment,” he explains. “The NetBackup Operations Manager also addresses our management needs, combining monitoring, administration, alert management, and troubleshooting assistance in one centralized web-based user interface. It means we can log into any of our sites remotely in one step.”

This centralized approach to backup and recovery wasn’t the only challenge Symantec solved. Prior to centralizing and standardizing on one backup environment, Alexander Forbes was struggling with its reporting. Blignaut explains, “Because we were backing up data using so many different systems across so many different sites, it was a time consuming exercise to monitor and report on our backup environment. We had to log into each server to check if the backup completed correctly.”

Compliance is an Overriding Consideration

As with any financial services organization, compliance is an overriding consideration in data protection—and Alexander Forbes needed to be certain almost immediately that the backup was happening successfully. It was a theme which was close to Blignaut’s heart as he has day-to-day responsibility for the Group’s risk management in terms of data recovery. This is where Veritas Backup Reporter™ software from Symantec comes in.

Following on from the successful launch of NetBackup, Veritas Backup Reporter software has been deployed to provide Alexander Forbes with advanced backup reporting to help the company align its backup and recovery operations with its business goals. The software tracks backup job success against targets set by the IT team to ensure backups occur within SLA parameters. Aggregate historical data is used to identify growth trends and effectively plan backup resources. “Compared with before all we do now is log in and in a few moments we have a comprehensive view of the backup over the last 24 hours,” he says.

According to Blignaut, Backup Reporter software has changed the entire way the IT Backup Operations team runs. When the team meets early in the morning, they use the customized data views and reports from Backup Reporter software to determine the agenda for the day. If a particular backup domain or application failed, they can immediately schedule someone to resolve it. Previously, several hours would have been lost locating and isolating the problem. Moreover, when a problem is identified by Backup Reporter software, the team can send an acknowledgement to the relevant line of business of the problem existing and that they are working on a rectification.

Reporting to the Business Users

The reports are also valuable elsewhere. “At 8am, we email eight reports to business users,” says Blignaut. “It explains what happened on their backup—were the payroll servers backed up successfully last night, for example? It ranges from zero and one as successful to any number greater than one for there being a problem. Besides helping the company to adhere to the Service Level Agreements agreed with the lines of business, the automated reporting also means the Help Desk receives less enquiries from the lines of business about their backups.”

Importantly, CommandCentral Service software also helps Alexander Forbes achieve a higher level of backup service level compliance, providing a consolidated view of compliance to multiple regulations and standards, and automated evidence retention. “We can track all of the backups over a particular historical period since we installed NetBackup. When the auditors come in, they can immediately examine that the data is securely protected,” he adds.

And finally, there is an inevitable cost saving to this advanced backup reporting solution. Blignaut explains, “We have been able to restrict the growth of the backup team through the adoption of this standardized data protection and storage management solution from Symantec. Who says compliance has to come at an exorbitant cost?”

SOLUTION AT A GLANCE

Business Drivers

- Provide the ability to ensure the continuation of business through fast and efficient data restores
- Ensure organization complies with current and emerging compliance legislation
- Increase efficiency
- Align IT more closely with the needs of the business

Technology Challenges

- Streamline and enhance backup and recovery solutions
- Provide business users with faster, more analytic reporting
- Reduce volume of enquiries to Help Desk concerning data protection

Solution

Flexible, integrated data protection and storage and server management solution comprising Veritas NetBackup and CommandCentral Service software

Symantec Products

- Veritas NetBackup
- Veritas Backup Reporter
- Symantec Enterprise Vault
- Agents for Microsoft Exchange, Microsoft SQL and Oracle

Technology Environment

- More than 300 HP servers
- Servers running a combination of Microsoft Windows and Sun Solaris
- Overland® LTO-2 and LTO-3 tape storage
- Microsoft Exchange and SQL environments

Symantec Partners

- Dimension Data

BUSINESS VALUE AND TECHNICAL BENEFITS

Compliance

- Assisted the company in meeting its compliance requirements via proactive policy enforcement and remediation, a consolidated view of compliance to multiple regulations and standards, and automated evidence retention

Efficiency

- Helped to increase staff productivity in IT operations
- Reduce volume of enquiries to Help Desk regarding backup and recovery

Productivity

- Helped reduce the time taken to determine backup situation across the business
- Ability to restore certain types of data on the fly due to onsite duplication and storage using Symantec Enterprise Vault software

Customer Satisfaction

- Allowed IT to provide the business with regular, accurate and detailed reports on the data protection situation