

## Tropical Financial Credit Union

### Customer Snapshot

#### Name

Tropical Financial  
Credit Union

#### Overview

Credit Union

#### Location

Miramar, Florida with  
locations throughout  
Palm Beach, Miami-Dade,  
Broward, and Sarasota  
counties

#### EVault Product

EVault® Software with  
EVault Managed Services  
with EVault Replication  
and agents for HP-UX,  
Microsoft® Exchange and  
SQL Servers and Oracle

#### IT Environment

Multiple Windows  
2003-based servers  
across more than 18  
locations. Extensive use  
of virtualization. Local  
vault for primary backup,  
replicating to remote vault  
for DR. Fiserv Spectrum  
Core Processor.

### Tropical Financial Credit Union Uses EVault Software with Managed Services for Fast, Reliable Data Protection

Tropical Financial Credit Union is one the oldest credit unions in the United States, established in 1935. Headquartered in Miramar with branches in four Florida counties, Tropical Financial is a not-for-profit, member-owned and member-operated financial cooperative with a family of more than 65,000 members. It is dedicated to providing those members with the best services and education to help them reach their financial goals. Underlying that is the assurance of security and privacy of member assets and information.

#### Goals

Carlos Miro, Tropical Financial's Vice President, Technology, and Chief Information Officer described the credit union's data protection goals as falling into three main categories: reliability, cost, and operational benefit. Within those, two requirements—compliance with regulations and being able to assure members of information security and privacy—were key. A reliable means of backing up data was central to both requirements, and Miro acknowledged his prior solution's shortcomings. "We often found ourselves trying to restore data, and just couldn't," he says. "As a financial institution we couldn't afford that. We have a responsibility to keep records secure, and couldn't just keep crossing our fingers about it."

Cost and operational factors were significant as well, says Miro. "As our data kept growing we had to buy more and more tapes, maintain drives, and pay a vendor to store tapes. We needed to find a solution that cost the same or less than the current solution." Another factor: The time needed to restore data had a significant impact on the credit union's staff. In mid-2008, Miro and his team decided that the time had come for a change. They sought a solution that would:

- Cost-effectively eliminate tape, provide optimized backups and ensure reliable restores
- Seamlessly protect Fiserv Spectrum core processing system
- Comply with regulatory requirements and assure members of data security and privacy
- Reduce staff devoted to data protection while providing enhanced disaster recovery to ensure business continuity

## Case Study

Tropical Financial  
Credit Union

### Goals

- Cost-effectively eliminate tape and provide optimized backups and ensure reliable restores
- Seamlessly protect Fiserv Spectrum core processing system
- Comply with regulatory requirements and assure members of data security and privacy
- Reduce staff devoted to data protection while providing enhanced disaster recovery to ensure business continuity

### Solutions

Vault management outsourced to i365 EVault Managed Services

### Results

Simplified, faster, cost-effective data protection via EVault Software with EVault Managed Services covers Fiserv Spectrum core processing system and Windows environments with full regulatory compliance. Achieved savings of 41 percent over three years.

### Challenges

For years, Tropical Financial's traditional tape-based system had created trigger points for seeking a better method. "There were many things we could point to," says Miro. "One time we had to recover a particular set of emails for a legal case. It took us about a week to do that—it was ugly." The time required for backups became unacceptably long as well. "Whenever we did full backups, they would run through the weekend and into the following week," adds Miro. He emphasizes that the problems arising from tapes affected all his data protection goals.

A parallel challenge was maintaining state-of-the-art services. Since Tropical Financial competes in the financial arena with much larger companies, it's critical that its offerings give members the assurance that they're getting the very best—including data protection. "Tropical Financial is a member-driven organization," says Miro, "and we always look for solutions that keep member services levels up—they're one of the highest in the industry."

Tropical Financial serves its membership on a not-for-profit basis, so cost is a central consideration in all decisions. "We always look at things in a very conservative way," says Miro. "If there is no positive ROI, then we may look at other benefits." They recognized a disk-based approach would mean they could improve their disaster recovery position—and the associated regulatory compliance—by moving their backups to a remote site, far enough away to assure they were out of harm's way if a regional disaster, such as a hurricane, struck. Lastly, the capability to quickly restore large amounts of data was very desirable. Ideally, in its new configuration Tropical Financial would be able to recover hundreds of gigabytes at LAN speeds.

### Solutions

Tropical Financial surveyed the field of data protection vendors and did its due diligence. Among the final candidates were Iron Mountain and a service from Teramark, Tropical Financial's data center vendor. "We used intelligence from DATACORP as well—we outsource some services to them—and they recommended EVault, A Seagate Company," says Miro. After evaluating the three finalists, his team chose EVault Software with EVault Managed Services. "When we did the analysis, it was cash-flow positive" to go with software with a managed services solution from EVault, says Miro. "It didn't take much to convince the CFO."

Besides the clear monetary advantage, superior technology capped the decision. Hector Garcia, Tropical Financial's Manager of Development, says that a key point in EVault's favor was its integration capability. For example, "they didn't require a workaround to integrate UNIX."

In its custom-tailored arrangement with EVault, Tropical Financial owns both a local vault dedicated to data backup and recovery, and the EVault Software that administers data protection tasks and configures the hardware being protected. Tropical Financial's IT people are in charge of new hardware configurations and backup scheduling, while a dedicated vault manager on the EVault Managed Services team handles other data protection tasks for the credit union, including proactive monitoring and optimization of the system. Primary backups to the local vault at Tropical Financial's headquarters are replicated to a secondary offsite vault located in an EVault data center in Atlanta, for disaster recovery purposes. This scheme includes backups of Tropical Financial's Fiserv Spectrum core processing system data.

"This was a huge change for us, but once we saw the technology in action, our fears vanished."

**Hector Garcia**  
Manager of Development, Tropical Financial

## Case Study

Tropical Financial  
Credit Union

### Results

Implementation was nearly seamless. Says Garcia, "I have to give our EVault technician a lot of credit. He was very knowledgeable and professional, and walked us through the entire process. It was a complicated transition, but his experience added a sort of calm to it. And he stayed with us throughout and was available 24/7 for our questions. He made everything very, very easy." Adds Garcia, "This was a huge change for us, but once we saw the technology in action, our fears vanished."

The reliability, cost, and operational benefits that Tropical Financial sought have all come to fruition. "Backups are done every day, and throughout the day. We don't have to assign people to take care of it. We have a more reliable and cost-effective solution," says Miro. Secure, rapid restores, especially critical for large amounts of data, are assured. Miro cites an example: "We can actually do a full recovery of our core systems data in four hours without being onsite. Full database restores typically take 30 minutes or less, and single files less than five. In most instances our restore times have been reduced by as much as 95 percent."

Day-to-day backup operations have become routine. "We've had some minor issues along the way, but every time EVault's people stepped up and took care of them. I give EVault an A-plus," says Miro.

### Take the Next Step

To learn more about EVault storage solutions, call us at 1.877.901.DATA (3282), email us at [concierge@evault.com](mailto:concierge@evault.com), or visit us at [www.evault.com](http://www.evault.com).



**Headquarters** | 3101 Jay Street, Suite 110 | Santa Clara, CA 95054 | 877.901.DATA (3282) | [www.evault.com](http://www.evault.com)

**Netherlands (EMEA HQ)** +31 (0) 73 648 1400 | **France** +33 (0) 1 55 27 35 24 | **UK** +44 (0) 1932 445 370

EVault and the EVault logo are registered trademarks of EVault Inc.  
All other trademarks or registered trademarks are the property of their respective owners.

2011.12.0019\_CS (updated 12/06/2011)