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CUSTOMER SUCCESS

G&F Financial Group

Migrating 100 Percent of Archived Email in One Month with Solutions from Symantec, TransVault, and Bishop Technologies

G&F Financial Group wanted to migrate its email archive from a legacy platform to an archiving and eDiscovery solution from Symantec. The organization needed to ensure a quick and seamless migration, documented with reports to prove that no data was lost. The credit union engaged Bishop Technologies, Inc. to conduct the migration using an email archive migration solution from TransVault. Results include 100 percent of archived email migrated to the new platform in one month with no disruption to business; faster, easier, and more reliable eDiscovery; storage capacity reclaimed with optimized single-instance storage; and up to CA\$3,000 annual savings on licensing and maintenance.

Financial services with a local touch

Co-operative financial institutions, or credit unions, are gaining in popularity around the world. An account holder at a credit union is automatically a shareholder and member, and can therefore influence decision-making at the local level. This helps to foster a sense of community that appeals to many individuals and small-to-medium size businesses.

The concept has caught on particularly well in Canada, where approximately one in three citizens is a credit union member—the world's largest per capita credit union membership.¹ In the Vancouver area, more than 28,000 members rely on financial services from G&F Financial Group, a full-service credit union with over CA\$1 billion in assets under administration. With roots in serving British Columbia's fishing industry, G&F Financial Group has remained in touch with the values and needs of the local community.

"We differentiate ourselves by the breadth and quality of the services we provide to our members," says Dean Wutke, manager, IT infrastructure. The credit union's commitment to excellence has been recognized: In 2012, G&F Financial Group was inducted into the Burnaby Business Hall of Fame and was named one of British Columbia's top employers, according to the editors of Canada's Top 100 Employers annual rankings.²

ORGANIZATION PROFILE

Website: www.gffg.com

Industry: Financial Services

Headquarters: Burnaby, British Columbia, Canada

Employees: 190

SYMANTEC SOLUTIONS

Archiving

Discovery & Retention Management

Why Symantec?

- Recognized market leader in archiving solutions
- Cost effective, stable, and easy to use
- Good fit for a medium-sized business

Moving to a new email archiving platform

Email is a critical communication and record-keeping tool for G&F Financial Group. For years, the company archived its Microsoft Exchange-based email using Autonomy Enterprise Archive Solution3 (EAS). When the credit union was informed by the vendor that it would need to upgrade to a new version of the software or lose support, Wutke decided it was time to move. “Autonomy was phasing out the version we were using, and the new version seemed to be intended more for a large enterprise deployment,” he says.

G&F Financial Group would have faced increased support costs as well as infrastructure costs, since the new version required more servers to run. “The new solution that Autonomy was proposing really didn’t seem to be a good fit for a medium-sized business such as ours,” says Wutke. “It would have required two additional VMware virtual servers and two more Windows 2008 R2 licenses, which would have increased our costs up to CA\$3,000 per year.”

Wutke wanted to migrate to a widely used archiving solution that would be well supported and easy to administer. The company decided to deploy Symantec Enterprise Vault™ with Microsoft Exchange Mailbox Archiving. “We wanted to go with a solution from a company that is widely recognized as an industry leader in email archiving,” says Wutke. “We were confident that Enterprise Vault will be supported for many years to come.”

Partnering for a seamless migration

To ensure a successful migration from Autonomy EAS to Enterprise Vault, G&F Financial Group engaged Bishop Technologies, Inc., a Symantec partner certified in using TransVault™ Migrator for Symantec Enterprise Vault, a Windows-based software application that quickly and securely moves legacy archived email into Enterprise Vault. Developed under the Symantec Technology Enabled Program (STEP), TransVault Migrator enables direct, fully audited transfers that preserve data integrity. The migration tool ensures that

SOLUTIONS AT A GLANCE

Key Challenges

- Archive and retain email to enhance eDiscovery and compliance
- Keep Exchange mailbox sizes manageable
- Migrate quickly and seamlessly from legacy archiving platform

Symantec Products

- Symantec Enterprise Vault™ with
 - Microsoft Exchange Mailbox Archiving
 - Microsoft Exchange Journaling
 - Discovery Accelerator

Incumbent/Competition

- Autonomy Enterprise Archive Solution (EAS)

Symantec Services

- Symantec Basic Maintenance Services

Symantec and TransVault Partner

- Bishop Technologies, Inc.

Technology Environment

- Applications: Microsoft Exchange Server 2010, TransVault Migrator
- Server platform: IBM System x3650 running Windows Server 2008 R2 and VMware
- Storage platform: NetApp

email remains seamlessly accessible to end users and for compliance and eDiscovery purposes.

“We considered doing the migration ourselves—either manually moving the data into PST files or importing the entire 400 gigabyte archive into Exchange and then archiving it back out onto the new platform—but that would have been a daunting task,” says Wutke. “So we decided to encapsulate it all into one project with Bishop Technologies and TransVault, because we needed to make sure it would be done accurately and efficiently. We have to maintain our records, and we didn’t want any email to go missing.”

BUSINESS RESULTS AND TECHNICAL BENEFITS

Archiving, Discovery, and Retention Management

- Mailbox sizes appear unlimited to users due to archive shortcuts
- Faster, easier eDiscovery
- Up to CA\$3,000 annual savings on licensing and maintenance
- Storage capacity reclaimed with optimized single-instance storage

Email Archive Migration

- 100% of archived email migrated from legacy archiving platform in one month
- No disruption to business or users during migration
- Migration success documented with detailed reports

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Dean Wutke

Manager, IT Infrastructure
G&F Financial Group

Bishop Technologies used TransVault Migrator to move the entire archive over the local area network, documenting the migration with detailed reports. The migration took one month to complete and validate, during which there was no disruption to business or users. To enhance user productivity, TransVault converted legacy EAS inbox shortcuts into shortcuts that work with Enterprise Vault, ensuring a seamless experience in the new archive environment.

“Engaging Bishop Technologies and using TransVault to migrate our email archive worked well for us,” says Wutke. “Using engineers with extensive archive migration experience helped ensure accuracy. The reports were especially helpful—we had something we could put on file for compliance reasons, and just for peace of mind. The migration would have taken months longer if we had done it on our own.”

Virtually unlimited mailboxes for users

To keep Exchange mailbox sizes manageable, email messages older than one year are automatically moved into the Enterprise Vault archive. This also optimizes mail server performance and minimizes storage requirements. However, archiving is transparent to users. Mailboxes appear unlimited because users can access archived email directly from Outlook using shortcuts, just as if the messages still resided on the mail server. After two years, the shortcut is removed as well. “This way we don’t have stubs going back 10 years,” Wutke explains. “We felt two years was good because users can always open Enterprise Vault and search if they are looking for something older than two years.”

Compliance is enhanced using Enterprise Vault Microsoft Exchange Journaling, an add-on feature that copies all email messages sent and received and retains the copies for the appropriate period of time. “We continued to journal during the migration using Exchange, and then switched over to Enterprise Vault journaling,” says Wutke. “No email was lost during our migration.”

Faster, easier eDiscovery

Wutke and his staff have been impressed with the user friendliness of Enterprise Vault. “Autonomy was more complex than what we needed,” he says. “It was obviously geared toward much larger environments. Enterprise Vault has been easier for our IT staff to learn and use.”

To extend the basic search functionality of Enterprise Vault, G&F Financial Group uses the Discovery Accelerator feature, which provides a powerful and efficient search capability, configurable enforcement of items during litigation holds, and flexible export capabilities to simplify production. “We need to find certain emails from time to time for legal and other reasons, and eDiscovery is very quick using Discovery Accelerator,” says Wutke. “It’s faster, easier, and more user friendly than the old Autonomy tool. It’s easier to find what we’re looking for now.”

A better way to go

G&F Financial Group could have used the native archiving capabilities of Microsoft Exchange Server 2010, but the company decided that Enterprise Vault provided more functionality and flexibility.

“The Exchange version that was out when we were migrating didn’t have anywhere near the functionality that Enterprise Vault had,” says Wutke. “Granted, this was a while ago, but from what we saw, Exchange 2010 only offered very basic archiving capabilities. Different options weren’t available, and there were storage limitations.”

Overall, Wutke is happy with his decision to migrate to Enterprise Vault. “It scales well for a medium-sized business,” he says. “It’s cost effective and meets our needs better than what we had before. We’re very happy with the product.”

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About TransVault Software (www.TransVault.com)

TransVault Software is a leader in email archive migration and PST content management. TransVault Migrator is proven to handle the largest and most challenging Enterprise Vault migration and upgrade projects, both on-premise and in the cloud. It offers support for many different archive formats and platforms, offering robust operation and sophisticated rules-based migrations to help organizations protect the future of their email records.

About Bishop Technologies, Inc. (www.bishopit.com)

Bishop Technologies specializes in delivering and supporting customized solutions for data migration, information security, and pervasive information governance to large enterprises, government agencies, and SMBs. Bishop provides expertise and solutions for email, Web, and social media archiving, enterprise search and eDiscovery, archive migrations, information management consulting, and enhanced support services—all to enable organizations to mitigate risk and protect the value of the information contained in their communications and collaboration infrastructure, both on-premise and in the cloud.

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1. Bailey Reutzel, “Lessons From Our Northern Neighbor,” www.creditunions.com, March 27, 2012.

2. G&F Financial Group press releases: February 8, 2012 and November 15, 2012.

3. The Autonomy brand has since been acquired by HP.