

Mexican retirement fund provider breathes new life into data protection.

OVERVIEW

Cost Savings, Improved Efficiency, and Much Faster Data Restores Through NetBackup™ Appliance and AWS Cloud Storage.

In providing retirement services, Profuturo Group gathers personal and financial information about workers throughout Mexico. Properly protecting this data is a key business imperative—the company must answer to federal regulators on questions of backup and recovery. Previously, Profuturo used a tape-based system to meet compliance requirements, but as the company grew, that solution became increasingly difficult and inefficient to manage. Moving to a Veritas™ NetBackup Appliance, with long-term data storage in the Amazon Web Services (AWS) cloud, has accelerated backups and data recovery, while also dramatically improving efficiency.

WHEN OPTIMAL DATA PROTECTION IS NOT OPTIONAL

Workers in Mexico prepare for retirement by contributing to individual accounts similar to 401(k) plans in the United States. The administrators of these accounts are private financial institutions called Administradores de Fondos para el Retiro (AFOREs), but by law, all saving for retirement must be administered by the government's Savings System for Retirement. Thus, the National Commission of the Savings System for Retirement (CONSAR) keeps a close watch over the AFOREs' investment policies, as well as their security practices around funds and data.

Profuturo Group is one of the leading businesses in this space. Administrator of nearly 12 percent of all Mexican workers' retirement accounts, Profuturo has a major obligation to keep customers' data secure.

"If we were to lose customer or financial information, we could lose our business," explains Mario Alberto Correa Fuentes, manager of production and changes for Profuturo Group. "We are required to keep client data for 10 years, even after the client has left our organization. CONSAR performs audits to be sure we are meeting this requirement."



ORGANIZATION PROFILE

Industry: Financial Services
Headquarters: Mexico City
Employees: approx. 4,000

KEY CHALLENGES

Mexican retirement fund administrator Profuturo Group had grown beyond the capacity of its tape-based data protection system. Incremental backups were failing to complete overnight, and slow data restores frequently resulted in fines from the government regulator.

SOLUTION

Profuturo implemented Veritas NetBackup™ Appliances for short-term data storage. Backups of client information, which the company must keep for 10 years, run through NetBackup CloudCatalyst for deduplication, then NetBackup uploads them automatically to Amazon Web Services (AWS) cloud storage.

BENEFITS

- 98% faster data restores (5 minutes vs. 4 hours previously)
- Significant reduction in CONSAR fines for slow data recovery
- Backups complete in 3-hour window, vs. previous failure to complete in 12 hours
- 1 FTE eliminated when retiring night-shift worker did not need to be replaced
- 50% cost savings on tape media and storage

"In addition," he adds, "if a customer initiates a claim requesting clarification on contributions or withdrawals from a decade ago, we have to be able to retrieve this information from our backups. If we failed in either scenario to produce the required backups—in other words, to demonstrate that we have adequately protected our data—then the government might revoke our authorization to do business."

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*Mario Alberto Correa Fuentes,
Manager, Production and Changes, Profuturo Group*

OUT-OF-DATE SOLUTION NEEDS TO BE RETIRED

In 1987, Profuturo implemented a tape-based system for backup and recovery after a magnitude 8.0 earthquake hit Mexico City. Until that point, the company had stored just one copy of each data set. The earthquake brought to executives' attention the risk inherent in this approach. A building collapse or other disaster might wipe out business-critical records, rendering the company unable to operate. Backups to tapes that were stored off-site solved this problem.

Three decades later, however, the tape-based approach to backups was sorely out of date. Like many businesses, Profuturo had seen its applications and data grow explosively, until the company ran around 200 different applications on 330 virtual and 120 physical servers across three data centers.

"We were running incremental backups directly from our servers to tape, and it was just too much information," Correa Fuentes says. "We had an employee on the night shift, but even running backups all night long, he did not have enough time to complete them." The incomplete backups put Profuturo data at risk. In addition, costs were high in the legacy environment. "Having so many tapes required a great deal of storage, which was expensive," Correa Fuentes says.

98% FASTER DATA RESTORES

After considering their options, the Profuturo data protection team replaced the legacy tape environment with a Veritas NetBackup Appliance in each of their data centers. Now, the company runs daily incremental backups to the appliances. After 90 days on an appliance, backups are transferred to tape.

The improvement over the company's legacy data protection environment is night and day—literally. "Before, these incremental backups took us all night and still were not completing," Correa Fuentes says. "Today, they take three hours. They are completed by 11 p.m. The gentleman who handled the night shift retired, and because our backups are so much more efficient, we did not replace him. So, we actually reduced our IT staff by one FTE [full-time equivalent]."

Recovery processes have accelerated even more dramatically. "Restores from tape in our prior environment would usually take around four hours, but sometimes they took as long as eight hours," Correa Fuentes says. "The NetBackup Appliance enables us to recover short-term backups in less than five minutes."

Being able to restore data 98 percent faster has both customer satisfaction and compliance implications. "Now, when customers ask for clarification, we can provide the information they need within minutes," Correa Fuentes says. "This is great for our image. The same capabilities also allow us to respond much more quickly when the government requests information. Often, CONSAR will give us a certain maximum response time, and if we take longer than that time, they will fine us. We have considerably reduced those fines since deploying the NetBackup Appliance."

50% SAVINGS BY MOVING LONG-TERM BACKUPS TO THE CLOUD

When planning their new data protection environment, the Profuturo IT team was curious about cloud storage, but they hesitated. "As a Mexican financial institution, we are very conservative," Correa Fuentes says. "We initially felt that storing backups in the cloud would be like opening them up to the whole world."

They worked with local cloud consulting firm Nubosperta to get a clearer view of the risks and benefits of integrating cloud storage into data protection. "Nubosperta served as mentors for us, in helping us truly understand the cloud," Correa Fuentes says. "They educated us about cloud security and helped us understand that

with cloud storage, our data protection environment could expand quickly without requiring us to buy more tapes or install new hardware. We also liked the idea of accessing our information from anywhere."

Profuturo decided to run a full backup to tape each weekend, then upload to the cloud all files that require 10-year storage. Those long-term backups pass through NetBackup CloudCatalyst before being automatically transferred to Amazon Web Services (AWS) S3 cloud storage. "The deduplication and compression in CloudCatalyst make it possible to back up to the cloud," Correa Fuentes says. "AWS and NetBackup work very well together. The partnership between Veritas and Amazon opened the door for us to migrate our data protection to the cloud."

Ultimately, the move proved well worthwhile. "Using the cloud for our long-term backup storage is generating significant cost savings," Correa Fuentes says. "We used to have around 800 tapes. Now we have 400. We have cut by about half our costs for tape media and storage space for those tapes."

"More important, our new environment has improved the reliability of data protection processes at Profuturo," he concludes. "We can guarantee the recovery of information, and we can recover in less time."

BUSINESS PARTNER

Nubosperta provides infrastructure services that support clients in the journey to public cloud adoption, including migration services for all kinds of workloads based on IT service management (ITSM) standards and strategies. With more than 30 years of experience in IT management and operation services, Nubosperta can advise on best practices for applications that support business-critical processes. Nubosperta is an AWS Advance Consulting Partner. The firm supports Google and Azure workloads as well.



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FOR MORE INFORMATION

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