

CASE STUDY

Casper Secure™ Server Edition

H&R Block Franchise Uses Casper Secure™ Server Edition to Prevent Costly Downtime



» Summary

A Central Indiana based H&R Block franchise relies on Casper Secure Server Edition to ensure that its offices never experience costly downtime should a server fail, particularly during the height of tax season. With each server able to support up to eleven workstations, a failure at any one of the locations could cost at least \$16,000 in lost revenue alone.

» The Situation

H&R Block is a tax service provider with franchises operating throughout the United States. Since the franchisees work with confidential customer financial data, the company requires them to use PGP® Whole Disk Encryption on the local servers to keep that data secure.

Lee Lincoln is the Franchise Manager for three offices located in Central Indiana. Each office has a server that supports six to eleven workstations. Two years ago, Mr. Lincoln began to worry that an aging server would fail. Although individual tax returns are backed up over the network to a corporate H&R Block server, Mr. Lincoln said that his franchise's supporting data associated with those returns as well as the other data and applications running on the server are not. Additionally, Mr. Lincoln understood that corporate IT could not remote in and fix things for him should the server go down.

Mr. Lincoln began looking for a more complete backup solution but couldn't find one that worked with PGP encryption. So, he created a backup process in which he would sync data files to an external drive. However, there were two problems with this process. Firstly, it was problematic as it required several steps to implement. For example, the files backed up were unencrypted and it was difficult to encrypt them on the external drive. Often the backup files he thought he had encrypted actually were not encrypted. Secondly, under this method, only the data files and not the whole server was backed up. Thus if the server failed, an office would be down for at least a day as Mr. Lincoln restores the server and the data.

Mr. Lincoln continued to look for a backup solution that met all of his requirements: (1) the backup had to work easily with PGP encrypted servers; (2) the backup had to be encrypted; (3) the backup had to clone everything on the server; and (4) the backup had to be fully functional and not compromised by faulty equipment.

Key Challenges

- The backup solution had to create a complete backup of everything on the server, not just files.
- The backup solution had to work easily with PGP whole disk encryption.
- The backup had to be encrypted to comply with H&R security requirements.
- A solution involving more than one step would be too cumbersome and time-consuming.
- The solution needed to provide the franchisee with confidence that the backup was fully functional and ready when needed.



Maintaining Data Security During the Backup or Recovery Process Has Never Been Easier

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» The Solution

Mr. Lincoln researched sixteen software programs and tested eight of them before discovering that Casper Secure Server Edition met all of his requirements.

Casper Secure Server Edition is a disk cloning solution designed for use on Windows® server based platforms that have been encrypted with Windows BitLocker® or PGP Whole Disk Encryption. With one click, Casper Secure makes a fully-encrypted backup of the server including the operating system, applications, settings, and all of the data, in its original encrypted state.

In the event of a hard disk failure, the backup created by Casper Secure can be used as an immediate and permanent replacement for the failed hard disk or hardware RAID array. Since Casper Secure does not store the data in a proprietary format, there is no special rescue disk or lengthy data restoration and re-encryption process required for recovery. In fact, since it maintains the original encryption of the server, there is no new passcode to remember nor a new encryption technology to vet.

Casper Secure's Automatic Copy Verification™ technology ensures that the backup is fully functional. For added peace of mind, a Casper Secure backup can be tested immediately by simply configuring the server to boot from it.

Casper Secure creates complete backups without leaving Windows; so there is never a need to interrupt a server's operation to create a backup. In addition, features such as integrated scheduling and SmartAlert™ technology permit backups to be performed completely unattended in the background.

About Future Systems Solutions, Inc.

Future Systems Solutions develops and markets innovative software solutions for the PC. Further information may be obtained by calling 800-272-5457 or by visiting the FSS website at www.fssdev.com.

"Anyone who appreciates how server downtime will affect his business needs a viable backup plan. These plans become complicated when PGP WDE is used. However, with Casper Secure, making a backup of a server that retains the original PGP encryption can be done with one step. And, since the backup is bootable, encrypted recovery from a server failure is immediate."

Lee Lincoln
Franchise Manager
H&R Block Central Indiana Franchise

» The Results

Mr. Lincoln installed Casper Secure Server Edition on each of the servers and is thrilled with its performance: "With Casper Secure, I have a one-step, complete solution. Casper Secure backs up everything on my servers and the backup maintains the original PGP whole disk encryption so that we remain 100% compliant with corporate security policies." He plans to create several backups of each server and rotate them throughout the week.

As the Casper Secure backup is immediately bootable, Mr. Lincoln can test the backup to ensure it is complete and ready for use should a server fail. Casper Secure brings him confidence that he will be able to quickly and fully recover from a server failure.

According to Mr. Lincoln, "if a server went down in one of these offices during peak tax time when all workstations are busy, our franchise could lose at least \$16,000 in revenue each day it is down in addition to losing unhappy customers to our competition in future years." Without Casper Secure, Mr. Lincoln estimated it would take at least a day to rebuild the server and additional time to reinstall the data and encrypt the drive in order to get an office back to work. Now, each office can get back up and running within minutes if a server fails.

Mr. Lincoln commented, "Often times, franchisees think that they are protected from a server failure because the servers have RAID arrays. Although these arrays provide redundancy to keep the server up and running, they are not a backup. If one drive is corrupted, the other is corrupted also. I recommend Casper Secure to ensure they have a complete backup plan."



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