# PPS MEETS AUDITORS DEMANDS BY ADHERING TO DISASTER RECOVERY COMPLIANCE

**CUSTOMER**
PROFESSIONAL PROVIDENT SOCIETY (PPS)

**WEB SITE**
WWW.PPS.CO.ZA

**INDUSTRY**
FINANCIAL SERVICES
• Location: Johannesburg, South Africa

**KEY CHALLENGES**
• Manual DR process
• Danger of failing compliance audits
• No user or DR testing possible

**SOLUTION**
PPS replaces manual intensive DR system with VMware Site Recovery Manager, fully automating DR and enabling it to reduce time to recovery, stabilise the environment and meet with compliance needs.

**BUSINESS BENEFITS**
• Fully automated DR
• Time to DR met
• Compliance audit passed

To align its disaster recovery (DR) procedure with the latest trends and technology, PPS decided to implement an automated solution that will ensure that with growing demand, it can still comply and meet the four hour recovery point objective (RPO) set by business. As a leading financial services business for professionals PPS took to upgrading it's environment, eliminating manual processes and replacing them with a fully automated DR solution that would ensure compliance and meet its automation imperatives.

The Professional Provident Society (PPS) is the only mutual financial services company in South Africa focused exclusively on graduate professionals, providing tailor-made insurance, investment and healthcare solutions to its members. Founded in 1941 the company works with these graduate professionals, to offer insurance benefits and a range of financial services to members, their families and associates.

## The Challenge

As PPS has grown as a business, so too has its DR needs, which left the company challenged to complete the entire process in the time allocated for performing DR backups and time to recover.

"Our DR process had gotten too big for the allocated four hour RPO we needed in place in order to meet with compliance. We had to do something in the environment to help us move away from these key dependencies that were stifling the process. As an example, with our previous manual process we managed to start the business systems in four hours, but did not have enough time to do both DR or user testing which put the business at risk," states Derik Scheepers, Head of IT Operations at PPS.

The process and systems instituted by PPS were exceptionally challenging and resource intensive. The DR process documentation itself was more than 70 pages long, and according to Scheepers, unless it was followed to the letter by the people responsible, it would fail.

"It was all so manual and time consuming, we got to a point that the only way to test that DR was done properly was to shut production down. This meant a huge impact to our customers and our brokers, even shutting it down over a weekend was not an option as we are an always-on business."

"We had to get to a point where we didn't need the support of the IT team to invoke DR.," adds Scheepers.

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"VMware Site Recovery Manager suspends around 70 non critical machines without intervention, this is of massive value to the team"

DERIK SCHEEPERS
HEAD OF IT OPERATIONS
PPS

**VMWARE FOOTPRINT**
• VMware Site Recovery Manager Standard Edition 5.8
• VMware vSphere (Enterprise Plus)

**PLATFORM**
• Tintri T850 (DR)
• Tintri T880 (production environment)
• Tintri 5080 (production)

**PARTNER**

## The Solution

As a long-time client of VMware, PPS consulted its business partner the IT Consulting Hub, who suggested they look at VMware Site Recovery Manager to solve their problem as it was a logical extension of its existing VMware framework.

"We needed to meet the recovery time objectives ascribed to us and VMware Site Recovery Manager ticked the right boxes. We have several customised applications with a lot of dependencies, so we couldn't rely on manual processes and interventions. If they failed, DR failed.

"VMware Site Recovery Manager was a strategic architectural decision providing us with seamless integration to our VMware vSphere 5.5 virtualization environment. It all slotted in perfectly. It wasn't the cheapest route, but the best seldom is. And the fact that it supported full integration, would enable automation, as well as facilitate the automatic change of IP addresses for DR, it was the right move," states Scheepers.

With the deployment of VMware Site Recovery Manager, PPS was able to automate the entire DR process. Previously there were 50 VMs in its stack all being manually configured for DR. Communication between databases and its business applications was also delayed and while it was meeting compliance – auditors had raised concerns that it was cutting it too fine.

"Since rolling out VMware Site Recovery Manager, we now have two sites, our production environment at our head office as well as our DR site which is hosted offsite at Internet Solutions (IS). We have a mirrored production site at IS so we can move in the event of a failure. The production environment is made up of six hosts and between 300 – 400 virtual machines (depending on demand), of which 50 are critical," says Scheepers.

Making use of Tintri in the environment, the Tintri systems are scheduled to snap shot the data every 15 minutes and VMware Site Recovery Manager manages the failover of the Virtual Machines automatically.

## Business Results & Benefits

"VMware Site Recovery Manager gives us the ability to prioritise which servers come up first and specify and automate DR sequencing. It has also enabled us to standardise the process and make it repeatable, putting policies in place to dictate how DR is conducted," says Scheepers .

VMware Site Recovery Manager automates every aspect of executing a recovery plan in order to accelerate recovery and eliminate the risks involved with manual processes, PPS can now suspend non-critical machines – something the business says is a significant benefit. "VMware Site Recovery Manager suspends around 70 machines without intervention, this is of massive value to the team."

In addition, 90% of the VMs now pool the IPs they need by themselves, without having to be manually assigned. PPS has also been able to allocate which five machines are the most critical and then ensure that the right IPs are assigned to these – without human error or intervention.

"With VMware Site Recovery Manager we have been able to dramatically reduce the possibility of human error, the previous 3-4 hours needed to just start the VMs is now completed in 45 minutes. Cleaning up after a DR test and removing test VMs used to take us four hours, SRM does it in four minutes. The whole DR process is now done well within time limits, with time to spare."

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The company also needs fewer DR specialists to complete the DR process, and any of its certified VMware personnel can invoke DR. In the past it had 10 resources managing the system, now it just has two.

"If our systems go down the reputational damage would be hard to come back from. Our data is exceptionally sensitive and a disruption of any form would mean we would have a huge compliance problem. VMware Site Recovery Manager has taken that fear away completely. The first external audit on the system to ensure compliance, was a huge success."

"VMware Site Recovery Manager has allowed PPS to standardise and automate their DR process. Non-disruptive testing as well as failover and failback procedures have significantly reduced the administrative overhead to IT, and auditing compliance is regularly assessed and proof (reports) is automatically generated by the system. The flexibility of the solution has allowed us to broaden the scope of what is possible through such orchestration, to the point where a copy of the production environment can be stood up in a matter of minutes so software upgrade testing or troubleshooting is dramatically simplified," states Ian Yates, VMware Consultant at IT Consulting Hub.

## Looking Ahead

PPS says its future strategic plans are hinged around automation and will further unpack the capabilities of VMware Site Recovery Manager to support this. As it is now able to create multiple protection groups, it is testing the ability to script DR for customised applications.

"We want to start to create and test recovery plans at a granular / business vertical level now. We are in the process of upgrading our VMware vSphere environment and with that VMware Site Recovery Manager at the same time, we also have VMware Operations Manager in a PoC," ends Scheepers.

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