

## RAYMOND JAMES

*"This is the best product I've found for virtualized environments, hands down. There are a number of great licensing options, making it a low-cost solution. I haven't seen any other solution that is as easy to use as Double-Take Availability. It allows me to do everything I'm doing today."*

Eric Wright, Systems Architect, Raymond James Ltd.

### Business Profile

Company Name:  
Raymond James Ltd.

Headquarters:  
Vancouver, British Columbia, Canada

Industry:  
Investment Dealers

Business Size:  
Approximately \$15-billion (CDN) in  
assets under administration

Employees:  
More than 1,000

Business Environment:

- Full-service investment dealer—a heavily regulated industry.
- Requires a business continuity plan (BCP) that provides complete recovery of critical applications and data within 48 hours after a disaster.
- Needs a disaster recovery solution that works in a variety of physical and virtualized environments.

Vision Solutions Product:  
Double-Take Availability

Implementation Team:  
Raymond James Ltd. and  
Double-Take Software, Inc.  
(now Vision Solutions Inc.)

### Critical issue

Regardless of the industry, best practices require all organizations to have a business continuity plan (BCP) that allows operations to resume quickly after a disaster or other incident shuts down important business systems or destroys data. For financial services firms, having a rigorous BCP is more than just a good business practice, it's often required by industry policies or government regulations. As a result, Raymond James Ltd. needed a BCP to ensure that its critical applications and data could be recovered within 48 hours.

### Results

- Recovered quickly and completely from two unplanned physical server failures.
- Simplified planned server migrations, with minimal downtime.
- Was able to recover 450 GB of file storage in less than 15 minutes.
- Can rapidly recover accidentally deleted data.
- Incurs little or no day-to-day administrative burden.

### Technologies

#### Software:

- Double-Take Availability
- VMware ESX
- Windows 2003 and Windows Server 2008
- Document management and infrastructure applications

#### Hardware:

- HP servers, virtualized with VMWare
- HP EVA storage area network

### Business Challenge

Raymond James Ltd., a leading full-service investment dealer, is the Canadian subsidiary of Raymond James Financial, Inc. The parent company, which is publicly traded on the New York Stock Exchange under the symbol RJF, has a market capitalization of approximately \$4-billion US. The firm has corporate offices in Vancouver, British Columbia, and Toronto, Ontario. It also maintains 100 branches located across Canada.

Raymond James Ltd. uses an IBM document management system to store and manage documents that are critical to its business. The company also depends on Microsoft Exchange Server and Microsoft SQL Server to run its operations.

If the company's key systems and data were rendered unavailable, essential business activities would cease or would at least be negatively impacted. This was a condition that could not be allowed to continue. In fact, the company is required to have a BCP that facilitates complete recovery of its tier-one (critical to business operations) systems and data within 48 hours. Any such outage could prove to be extremely costly for the company.

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## Solution

Raymond James Ltd. considered a few options, but needed a solution that could operate across all of the company's physical and virtualized environments. Ease of use was also critical since the solution would ultimately be implemented and maintained by a small team. Although there were other solutions, Double-Take Availability was chosen for its ability to protect VMware ESX guest machines, and because it provided a versatile and effective method to protect and recover a complex, multi-server environment. Double-Take Availability also offered simplified deployment and management capabilities, trusted protection and low total cost of ownership.

Installation and set-up took only about four hours. Despite needing to transmit data between Vancouver and Toronto, a distance of almost 2,100 miles (almost 3,400 kilometers), Double-Take Availability created a full, new replica of the 1.5 terabytes of data in about four days, without impacting production operations.

In the file-serving environment alone, Double-Take Availability replicates approximately 1.5 terabytes of data on a number of standalone and SAN-attached servers in Vancouver to a single repository in Toronto. The same protection is implemented for production data in Toronto, which is protected using Double-Take Availability for folder and volume level protection to a repository in Vancouver. If a server in Vancouver goes down for any reason, operations can be switched quickly to the corresponding Toronto server utilizing the local copy of the data.

When the topic of system and data recovery comes up, people think of disasters, but that is not the most frequent recovery requirement. Human error is a more common source of problems. A large number of data recovery requests received by the company's IT department are not driven by disasters. Instead, it is much more common for someone to request the restoration of only a small portion of the company's data, such as a single file that was accidentally deleted. In the past, this sort of recovery task required the recall of an offsite backup tape. This resulted in long recovery times and the expenditure of considerable human resources.

To solve this problem, Double-Take Availability allows deletes to be replicated to offsite storage and saved for a specified period of time. Raymond James Ltd. chose to retain these files for 30 days. This way, if a file is mistakenly deleted it can be recovered from the replica almost immediately. The previous protocol required a backup tape to be recalled from offsite storage, searched for the required data and then restored back to the client. This was time-consuming and could delay the restore for hours, and potentially for a day or more.

Raymond James Ltd. also uses the Double-Take Application Manager feature in Double-Take Availability to protect a multi-server Microsoft Exchange 2003 environment, a shared Microsoft SQL Server environment, and it will soon protect its critical BlackBerry Enterprise Server.

Double-Take Availability has proven itself as an exceptional solution to protect many of the systems operated by Raymond James Ltd., and it will continue to be a major part of the BCP infrastructure going forward.



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- ◆ High Availability
- ◆ Disaster Recovery
- ◆ Systems and Data Management
- ◆