



Cascadia Capital

EMC provides a long-term solution for simplifying compliance, speeding backups, and addressing growth

A provider of investment banking services in the areas of corporate finance, mergers and acquisitions, and strategic advisory services, Cascadia Capital caters to both public and private companies operating in high-growth environments. Known for its extensive expertise, exceptional client service, and proven track record, the organization's growing roster of clients come from a diverse range of industries including: information technology, communications, security and defense, healthcare, industrial, new media and Internet, and consumer and retail.

As a member of the National Association of Securities Dealers (NASD), Cascadia Capital must abide by NASD rules and regulations as well as those of the Securities and Exchange Commission (SEC). In particular, rules governing e-mail now require six years of retention—with the most recent two or three years readily available and easily searchable.

To facilitate simplified and more cost-efficient retention and management of its rapidly growing Microsoft Exchange e-mail archives, and to improve lengthy backup windows for its Microsoft Exchange, SQL Server, and Office environments, Cascadia Capital began to research possible alternatives to an outgrown, direct-attached storage-to-server environment and backup-to-tape processes.

A high-performance, easily scaled, and cost-efficient 2.4-terabyte EMC® CLARiiON® CX300i-based SAN supported by cutting-edge EMC EmailXtender®, EmailXaminer®, and PowerPath® software was selected from among the industry's top midrange networked storage offerings. The complete EMC solution, including installation, was provided through EMC partner, MTI Technology Corporation.

"We had already deployed multiple gigabit Ethernet cards to every server so iSCSI made the most sense over Fibre Channel as far as flexibility and a lower-cost storage infrastructure for our company," says Christopher Bettin, director of IT. "From a product and features standpoint, the CLARiiON CX300i system combined with the EMC software gave us the exact solution we were looking for."

Compliance, investment protection, and streamlined audits

Today, every e-mail that comes into or out of Cascadia Capital is automatically captured by EMC EmailXtender in its original form and then securely and reliably stored within a centrally managed EMC CLARiiON CX series-supported archive. The unique, single-instance storage functionality of EMC EmailXtender ensures duplicate messages are

eliminated. Combined with the software's data compression capabilities, these features enable Cascadia Capital to maximize the preservation of EMC CLARiiON CX series storage for extended investment value.

The EMC CLARiiON CX series system is also attached to a server that runs EMC EmailXaminer which evaluates all e-mail stored in EMC CLARiiON CX series archives. Based on company settings for internal and external compliance, EMC EmailXaminer helps identify those e-mails that need to be reviewed by the company's compliance officer. Audit logs are then kept for external inspection.

"Regulatory auditors who have come in since the deployment have been impressed with the compliance options, record retention, and detailed reporting our EMC solution makes possible," says Bettin. "They liked the fact that we were able to produce audit logs of the e-mail we've looked at. We were even able to show them our auditing process and the criteria we use to select the e-mail that we review."

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EMC PowerPath path management software is also a key component of the EMC solution. It has enabled Cascadia Capital to create redundant paths to the EMC CLARiiON CX series system from the EmailXtender server for added reliability and business continuity.

"If one of our Cisco 4506 switches or essentially any piece of hardware were to fail, PowerPath enables us to immediately use a redundant path to help ensure that there is no downtime."

Improved performance

In addition to simplifying and ensuring compliance for e-mail retention, the solution also enables the organization as a whole to more optimally manage e-mail across the enterprise. Because a copy of all e-mail resides on the EMC CLARiiON CX series system, users are now more likely to delete e-mail and attachments they no longer think they will need. This helps reduce the size of mailboxes on the company's Microsoft Exchange information store for improved performance. If an instance requires a specific e-mail to be retrieved, it can be quickly and easily searched for and recovered.

"If you run over a two-gigabyte mailbox in Microsoft Outlook, you're going to see performance degradation," says Bettin. "Because people no longer have the same amount of information stored on their local computer and on the Exchange server, we're seeing performance improvements in both areas. We can now effectively add mailbox quotas and wipe out .PST files without altering user retention preferences."

Streamlined backups, faster response to legal discovery requests

EMC CLARiiON CX series storage is also being used as a disk backup system with a portion of its capacity reserved for backing up Microsoft Exchange e-mails and Office files, as well as storing, running, and backing up the organization's Microsoft SQL Server database.

Prior to the deployment of the EMC CLARiiON CX series platform, e-mails residing on the company's Microsoft Exchange server were archived directly to tape nightly which took

roughly 12 hours. Today, that same process takes 56 minutes. Backups of the company's Microsoft SQL Server database and Microsoft Office documents, now stored on the EMC CLARiiON CX series system, have been streamlined as well.

Although tape-based backups are still made, which are now drawn off the EMC CLARiiON CX system, the company's convenient access to online backups has proven its worth in providing more rapid response to legal discovery requests which come up several times a year. Disaster recovery testing has now become a routine test with the increased online storage capacity and speed.

"In the past, it could take up to 40 or 50 hours to go through the tapes and search for large chunks of e-mail or specific e-mail items for our legal counsel," says Bettin. "Now, that we have online access to these records, we can often pull up everything they need within two to three hours."

Deployment in three days

A rapid and successful implementation was achieved with support from MTI Technology Corporation. Within three days, the MTI team assisted Cascadia Capital in deploying its EMC CLARiiON CX series system, setting up EMC PowerPath, and implementing EMC EmailXtender which was used to migrate all of the company's e-mail from a variety of sources including hard drives, tapes, and DVDs to the new EMC CLARiiON CX series platform. Once that process was complete, EMC EmailXaminer was deployed.

"MTI helped us set up all of the parameters that we needed to check e-mail," says Bettin. "Their experience with archiving and their knowledge of compliance in our field was invaluable."

Flexibility, compliance, and less administration for the long-term

Since deployment, the EMC CLARiiON CX series platform has lived up to its promises and given Cascadia Capital something it didn't have before: a flexible, economical, and consolidated storage solution able to meet the company's expanding needs for the long term.

"We knew we were buying into a solution that was going to be around for awhile, came with good support, and had a pretty good track record," says Bettin. "We also knew with the CLARiiON platform we could start at a reasonable price and easily add disk enclosures as we grew. We found that the cost structure on scaling the CLARiiON was a lot lower than some of the other products we considered."

Combined with the state-of-the-art features and functionality of EMC EmailXtender and EmailXaminer, the EMC CLARiiON CX series has also provided Cascadia Capital with a simpler and more cost-efficient way to become fully compliant—with every e-mail in the company now automatically indexed and archived.

"In comparing products, the differences between the feature sets of EmailXaminer and EmailXtender over the other products offered were considerable," says Bettin. "We had the choice to go with several less expensive products, but we wanted to go with something that had all of the features that would move us from a gray area in compliance to one where we were absolutely sure we were in compliance."

Information management has also been streamlined on many levels.

"Between compliance, backup, managing .PST files, and troubleshooting e-mail, our EMC solution has saved countless hours," says Bettin.



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Customer Profile
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