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The world remains stunned when it comes to disasters and planning for the inevitable.

Between man-made terrorism and natural disasters that came about over the last decade, the attitude changed from “If a disaster occurs” to “When a disaster occurs.”

While Hurricane Katrina, World Trade Center bombings and other disasters taught us to be ever watchful, disaster recovery and business continuity planning seems to be mostly out of sight and out of mind for businesses ... until something happens. That's just the way we're wired ... but not the way we need to react.

We've come a long way from focusing on system backups or emergency call lists. Thanks to technology, it's easier now, more than ever before, to prepare your firm and your clients for the worst possible scenario. Here's how:

INTEGRATION IS KEY

David Callery, a Business Software consultant for [Coe & Company, LLC](#) in New Orleans, La., considers himself an expert in disaster recovery, and he should. Amidst the aftermath of Hurricane Katrina, Callery was ready and able to assist not only his firm, but also his clients using Microsoft, Sage and Intuit solutions.

“I believe there still needs to be a shift in the way businesses look at technology; many companies, especially smaller ones, tend to make the

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“A change by one typically demands a change by all in operating the compatible software elements. While the cost for normal technology maintenance is another business expense to deal with, it is far less costly than the three- to five-year replacement/upgrade plan businesses adopted in the past.”

Callery sorts his disaster recovery solutions into three buckets: updated software, replaceable hardware and backups. And although all three areas relate to technology, they are not too highly technical to understand. Take, for example, installed software. Common sense is a big part of pre-planning.

“You want to make sure the installed software is accessible through a backup,” he says. “All companies do not maintain the installation disks of their software in a readily accessible location, and the applied service packs associated with the currently installed software on servers and workstations are not always included in the backup process.”

Because it is difficult to find the appropriate software level version on the Internet for older software — and if the installation is not at the exact level of the database — incompatibility issues will not allow the system to run.

“You also want to make sure you are on a supported level of software and it is compatible with your current operating system. Software publishers will transition a version of software off of their support list about every five to seven years. For example, if you have Microsoft Office 97, you will probably not be able to get support directly from Microsoft. This is the same with any application and, most importantly, with the vertical market software companies that support manufacturing, project cost, distribution packages and other functions.”

Next comes hardware. If a company loses its hardware during a disaster, two

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seven- to 10-year-old software.”

Older programs will not install on the new operating systems, and even if the company still has the original operating install programs, Callery says they will not install on the newer machines. This was quite a dilemma for some companies that did not maintain current levels of software.

“Printers are also a major issue. You may need to consider special forms and documents you print on a unique printer. Older printers will no longer be available on the market, and if you were able to find a used printer, the drivers will probably not be available.”

BACKUP TO BACK DOWN

Even though backups seem rudimentary, they are a huge, necessary component of disaster recovery and business continuity planning.

“Most firms are not fully prepared based on current backup trends, and only a select few are really taking advantage of the newest in disaster recovery and business continuity solutions, especially the smaller firms who are traditionally the worst with regard to a reliable disaster recovery plan,” says Matthew Hahn, MCSE, directory of IT Services for SWK Technologies, Inc. in Livingston, N.J. “These firms use tapes and have a very small retention window, and backups and restores are rarely tested unless an emergency occurs. As a result, a test of whatever system that is in place usually isn’t properly put through the restore paces.”

SWK, a reseller of software and provider of consulting solutions, offers its own BDR (Backup Data Recovery) solution for synchronization of all data, leveraging onsite and offsite encrypted data storage solutions. In the event of a local

disaster, data is resident at not one, but three secured, encrypted server farms,”

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‘bring up’ a virtual image of a production server,” says Hahn.

“If your physical server fails, we can, within a small timeframe, have a virtual copy of your failed server available for your business to continue.

Our solution also meets various compliances and encryption requirements. All data stored locally and transferred offsite is totally encrypted and secure. This eliminates the human error element to a backup plan.”

Callery agrees that virtual machine installations are definitely worth a look because firms can run multiple servers on one machine to minimize the hardware cost.

“Running in a virtual environment will enable the company to simply copy an image of the server to another machine, and you are back in business,” he says. “Setup and management of a virtual environment can be a bit more complex since you are typically running multiple virtual machines on one physical machine. Setup of the environment will need to consider physical size of the machines, as well as resources allocated to the various virtual machines.”

Callery says the discussion on a firm’s tape backup should never be overlooked or dismissed simply because the technology isn’t new.

“Companies need to ensure they are actually backing up everything they need,” he says. “For example, with traditional tape backups, add-on features are typically required to actually back up a SQL database, but these add-ons are not part of the base package purchase. Instead, there are other methods you can use that function within the database itself to create backup files a traditional utility will find as part of a normal backup.”

The Internet is another option, in which services will log in to the system remotely via the Internet to back up large amounts of data to remote locations.

Data is then accessible to restore through the Internet, but a firm must consider

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solution that has become popular and affordable for companies that have multiple locations, with at least one of the locations in another geographic location.

“Typically, a company can put in a low-end server, and replicate files and database changes to that machine during normal work hours,” notes Callery.

“Utilities such as Shadow Copy and SQL Replication enable this process to successfully occur, and you can set the time lag on the replication. You may lose 30 seconds to a minute of data, but you can effectively turn off a server in one location, turn on the backup server and be up and running within the hour.”

Callery also offers three pieces of advice:

1. Consider redirection of current workstation settings to the backup server for production processes.
2. Consider a new workstation environment with same software installation as current production environment settings.
3. Consider hardware consistency, such as printers and scanners, that may interact with the installed software to minimize configuration changes if a temporary relocation would be necessary.

For more than 20 years, Scott H. Cytron, ABC, has worked with CPAs and accountants, providing public relations, marketing and communications services. Author of The CPA Technology Advisor's online exclusive MarketingWorks column and regular contributor to the CPATechViews.com blog, he works with firms and companies in professional services, including accounting, healthcare, legal, financial planning, collections and debt, and high-tech. He can be contacted at scottcytron@cpata.com.

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