State of California Franchise Tax Board Turns to Quest to Solve Taxing Storage Problem

The State of California Franchise Tax Board is responsible for administering two of California's major tax programs, as well as the Homeowner and Renter Assistance (HRA) program and certain non-tax collection programs, such as delinquent vehicle registration and court-ordered debt. For better insight into its current data storage use and its future storage needs, the Franchise Tax Board turned to Quest Software.

The Challenge

The Enterprise Storage Management group at the Franchise Tax Board is responsible for all of the organization's SAN attached storage, which totals about 350 terabytes. But managing that storage—and determining when to purchase and deploy more—was difficult because staffers were unable to see how much storage was actually being used.

"As storage administrators, we provision storage to a server," explained Jose Lopez-Alvarez, storage administrator at the Franchise Tax Board. "But, for the arrays, we couldn't determine how much of that storage was actually being used without logging on to the server itself and taking a look. That was not an option because of the separations of duties we have here. So we didn't have insight into what was on the other side of the storage array."

In addition, tracking storage use was done manually through Excel spreadsheets. And because this process was time-intensive, it was difficult to keep the spreadsheets up to date. Plus, forecasting future storage needs was next to impossible.

The Franchise Tax Board needed a powerful, automated solution to provide both high-level and detailed insight into its storage usage. "We wanted to see the storage usage across the entire array," said Lopez-Alvarez. "But we also needed to be able to drill down to the individual host, look at all of the SAN LUNs presented to that host, and see their utilizations as well."

In addition to providing current utilization information, the solution needed to offer true capacity management and trending to predict when full capacity will be reached. And it had to do all of this without the need to install agents on the servers.

The Quest Solution

Since California has standardized on EMC arrays, the Franchise Tax Board began its search for a capacity management solution by looking at EMC's StorageScope. However, that tool was too costly, and it required agents on the hosts—preventing even the completion of a meaningful trial. Then, at the Storage Decisions conference in San Francisco, the Franchise Tax Board staffers heard many positive reports about Quest Storage Horizon®. They investigated further, and began a proof of concept.

"With Storage Horizon, we will be able to track how much SAN storage we are using each year. I will be able to predict when any particular array is going to run out of storage, so I can get the ball rolling in advance to purchase more storage. And when I do need to get additional storage, I will know how much to request, and I'll have the quantitative data to back it up."

— Jose Lopez-Alvarez,
    Storage Administrator,
    State of California Franchise Tax Board

OVERVIEW

State of California
Franchise Tax Board

Headquarters

Sacramento, California

Services

Administering tax programs and certain non-tax collection programs

Critical Needs

To understand current storage utilization and predict future storage needs

Solution

Storage Horizon

Results

- Provided insight into current storage utilization, preventing unnecessary storage allocations and purchases (cost avoidance and deferral)

- Reduced administrator workload by eliminating manual tracking of storage use

- Enabled prediction of storage growth for sound planning of future storage purchases

Quest Storage Horizon provides a unified view of current and projected storage capacity usage, providing the insight necessary to maximize the utilization of existing and future storage assets. Storage Horizon correlates storage devices to file system usage to determine the actual usage of storage systems. Its lifecycle-oriented methodology projects when an organization will need more storage, how much more will be needed, and where it should be deployed. The agentless architecture and flexible reporting capabilities automate data collection and predictive analysis, making the product fast and easy to deploy.

"Storage Horizon had all of the key features we were looking for," said Lopez-Alvarez. "It is agentless on the host, and it provides us with storage utilization data as well as predicts when capacity will be reached. Moreover, during the proof of concept, we received excellent technical support from the people at Quest—even before we bought the product."

The Bottom Line

With Storage Horizon, the Franchise Tax Board expects to have a much better understanding of both current and projected storage usage, which will enable the organization to plan storage allocations more effectively. "With Storage Horizon, I can track the storage utilization at the array level—something we have not been able to do until now," explained Lopez-Alvarez. "When a server administrator comes to me and asks for more storage, I will be able to actually look at the current storage use on the host and determine whether additional storage is actually needed. We won't be allocating more storage than necessary."

Plus, tracking of storage utilization is automated with Storage Horizon, which saves significant administrator time and effort, and ensures accurate statistics. "Trying to maintain an Excel spreadsheet across four or five different arrays was simply not practical," said Lopez-Alvarez. "Storage Horizon tracks and records the storage utilization for us, eliminating all that manual effort."

In addition to providing an accurate picture of current storage use, Storage Horizon also gives the Franchise Tax Board the trending information it needs to track storage use over time, so IT staff can plan future purchases. "Even though the cost of storage is dropping, an array has only a finite number of slots," explained Lopez-Alvarez. "Once all the slots are allocated, if somebody wants another gigabyte of storage, I can't give it to them because I don't have a slot to put that next drive in. Since purchasing another storage array is expensive, having advance warning is very important for management."

Storage Horizon's trending reports provide that advance warning, and enable IT staff to make a sound business case when more storage is required. "With Storage Horizon, we will be able to track how much SAN storage we are using each year," explained Lopez-Alvarez. "I will be able to predict when any particular array is going to run out of storage, so I can get the ball rolling in advance to purchase more storage. And when I do need to get additional storage, I will know how much to request, and I'll have the quantitative data to back it up."

The Franchise Tax Board has found Storage Horizon's reports very useful and easy to customize. "I was surprised how simple it is to modify the canned reports and queries that come with the product," said Lopez-Alvarez.

The Franchise Tax Board is very happy with its investment in Storage Horizon. "Prior to having Storage Horizon, I really had no way of accessing usage data," said Lopez-Alvarez. "Now I do. Storage Horizon is an auditing tool for future storage requests at the host level, and it also is a purchasing mechanism for additional storage at the array level."

About the State of California Franchise Tax Board

The primary function of the State of California Franchise Tax Board is to administer two of California's major tax programs, Personal Income Tax and the Corporation Tax. The Franchise Tax Board is also responsible for administering the Homeowner and Renter Assistance (HRA) program and certain non-tax collection programs, such as delinquent vehicle registration and court-ordered debt. For more information, visit **www.ftb.ca.gov**.

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