

Credit Union Builds in Protection at Multiple Points

Trend Micro endpoint, messaging, and gateway security guard customer privacy, promote professionalism, and save IT time.

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— Eric Erickson, Vice President, Information Systems, Liberty First Credit Union

EXECUTIVE SUMMARY

Customer Name: Liberty First Credit Union

Industry: Financial Services

Location: Lincoln, Nebraska

Web Site: www.libertyfirstcu.com

Number of Employees: 55 to 60

CHALLENGE:

- Protect sensitive customer financial information
- Promote a professional, efficient work environment
- Minimize the IT time required to manage security

SOLUTION:

- Multilayered Trend Micro security, including endpoint, messaging, and web gateway protection

BUSINESS RESULTS:

- Excellent system performance to enhance user productivity
- Less IT effort expended on security today
- Better protection from web threats, data loss, and potential damage to company reputation
- Improved visibility of employee behavior and overall security

Challenge

In 1935, Liberty First Credit Union opened its doors as a credit association, and a decade later became a state chartered credit union. Today, the medium-sized business competes with larger financial institutions by focusing on personalized service and maintaining high professional standards. Technology plays a vital role, and security is a top priority. “As a financial institution, we have to be sure we protect our members’ information,” explained Eric Erickson, the vice president of information services for Liberty First. “We do all we can to prevent data compromises, and through the years we’ve continually evaluated solutions in terms of their abilities to block the latest threats and help us evolve a multilayered security solution.”

Building and managing a commercial-class infrastructure with a small IT staff has presented many challenges for Liberty First. A few years ago, the in-place antivirus software on PCs and servers was slowing system performance, and the deployment of updates was becoming more cumbersome. The IT team also recognized the need for more granular control of messaging security. The firm’s outsourced email filtering service was only scanning incoming email; outbound and internal communications were not scanned. The scanning of incoming email was prone to false positives and offered little visibility into blocked messages, resulting in substantial time spent on the phone trying to track down lost email. Increased reliance on the Internet raised further concerns that the company needed to build in better security to block web threats.

Solution

To address escalating security threats, Liberty First has phased in an integrated, comprehensive security solution. Three equally important priorities have driven product evaluations and selections from the start:

- Maximizing the protection of member information and, simultaneously, the organization’s professional reputation
- Minimizing complexity to avoid overloading the IT team
- Maintaining high levels of employee productivity by discouraging inappropriate online activities on the job

Switching to a Better Endpoint Security Solution

Liberty First began its relationship with Trend Micro a few years ago when IT was considering replacement alternatives for its previous antivirus solution. “Our desktop security was impacting users, and was also difficult to keep up to date,” said Erickson. “I started to research endpoint security offerings. Trend Micro had been around for quite some time, and had a respected name in the industry. When I first looked at the Trend Micro endpoint solution, I was impressed with the demos and the ease of managing the solution across desktop systems and servers. Since the switch, we have become so comfortable and confident that we have continued to add on other layers of Trend Micro security.”

Last year, Liberty First upgraded to the newest version of the Trend Micro™ OfficeScan™ product, the primary client component of the Trend Micro™ Enterprise Security for Endpoints solution. Powered by the Trend Micro Smart Protection Network™ system, this security solution delivers superior end-to-end malware-protection to endpoints by combining conventional security with highly innovative in-the-cloud, correlated threat intelligence. New file reputation technology has allowed IT to avoid pushing pattern file updates to every endpoint, keeping network bandwidth of branch offices free, relying instead on central scan servers to offload both endpoints and the network. “Starting with OfficeScan, I have been pleased with each Trend Micro solution we’ve added,” said Erickson. “The success with each gave me confidence to try the next one.”

Building in Layers of Messaging Security

Liberty First uses Microsoft™ Exchange for mail server security, with filtering of viruses and spam from incoming email previously handled by a service provider. However, the outsourced service did not give them user access to quarantined files and IT did not receive any reports indicating the results of the filtering. Additionally, Liberty First had little control over the aggressiveness of filtering. The lack of granular control, slow response to support inquiries, and the level of spam still reaching users’ inboxes led them to consider a switch to Trend Micro messaging security solutions.

“We initially added Trend Micro™ ScanMail™ Suite for Exchange to take care of anything that made it through our outsourced prefiltering,” said Erickson. “ScanMail also allowed us to scan outgoing email and internal emails, for better protection of our members. The content filtering rules allowed us to prevent social security numbers or credit card numbers from being accidentally sent out in emails. The new templates in the latest release of ScanMail have made it easy for us to further protect our reputation. With ScanMail in place, we can make sure that our employees’ email communications are very professional.”

Liberty First recently turned on the “all countries” template and monitored the results. Erickson explained, “The new templates definitely pick up some inappropriate content. It allows us to review the items being filtered and make adjustments to our policies. Some email we unquarantine and pass along; other times, we can go back to the employee and remind them of our policies for safe handling of customer information. Our main concern is protecting members, but Trend Micro’s expression templates will also help us with regulatory compliance.”

Success with ScanMail led IT to switch from the previous email prefiltering service to Trend Micro™ Hosted Email Security. “The Trend Micro hosted service gives us so much more control than our previous vendor,” said Erickson. “We can view everything in quarantine, see how many messages are being blocked, and quickly check out any user issues. The web console puts us in control, and we no longer have to place phone calls and wait for replies from the vendor. We are even considering giving our members control of their own quarantined messages. With Hosted Email Security, we don’t get anywhere near the amount of spam and junk emails that we were getting before. It catches the bulk before it reaches our email server, and then ScanMail carries out additional filtering based on our content rules. This is the way it should be!”

By switching to Trend Micro, Liberty First’s IT group spends less time managing email. Adding new users or changing email addresses no longer requires contacting the outside vendor. “I had to contact our previous email filtering vendor more than I liked,” said Erickson. “Right now, with Hosted Email Security, we are managing our own email issues and spending a lot less time doing it.”

DEPLOYMENT ENVIRONMENT

- 3 sites
- 90 PCs and servers
- Microsoft VCenter
- VMware ESX servers
- Trend Micro Enterprise Security for Endpoints 10.0
- Trend Micro ScanMail for Microsoft Exchange 10.0
- Trend Micro InterScan Web Security Virtual Appliance 5.0
- Trend Micro Hosted Email Security

Company Profile

Liberty First was originally chartered as the Burlington Employees Cooperative Credit Association in 1935 and served the employees of the Chicago, Burlington & Quincy Railroad. In 1943, the credit association became a credit union. Today, Liberty First Credit Union is unique in the financial services industry. The member-owned, not-for-profit financial cooperative exists solely to provide its members with affordable financial services; and members work together to achieve their financial goals. As its membership has grown, Liberty First has continually expanded its range of financial products and services to provide members with the services they desire.

Web Protection at the Gateway

In the past, Liberty First employees had unrestricted access to the web. “Users were on the ‘honor system,’” said Erickson. “But we ran into situations over the years, with employees visiting inappropriate sites. This drew me to Trend Micro™ InterScan™ Web Security Suite solution and we set it up at the gateway to restrict web access. Much like our email communications, we want our employees’ web behavior to be professional and keep our environment clean. InterScan Web Security lets us do that.”

Liberty First originally deployed the InterScan Web Security Suite software on a gateway server. This year, they switched to the virtual appliance configuration. Trend Micro™ InterScan™ Web Security Virtual Appliance has been integrated into the company’s Microsoft VCenter environment, and will eventually be migrated onto a VMware ESX™ server. Erickson explained, “Virtualizing our servers has made our life easier, and Trend Micro security solutions have made it very easy for us to push out whatever we need to those virtual servers. Plus we’ve been able to reduce by two-thirds the number of servers being managed.”

Protection in the Cloud

Liberty First takes advantage of the correlated web, email, and file reputation technologies built into Trend Micro™ Enterprise Security for Endpoints, ScanMail, and InterScan Web Security solutions. “By having access to Trend Micro in-the-cloud reputation intelligence, I feel our network is more protected and we are not faced with cleaning up infections—or worse. It has been quite a while, in fact, since we had to deal with threats.”

Results

The multilayered Trend Micro security solution at Liberty First has resulted in many benefits to users, IT, and the company as a whole:

- **Better performance**—Trend Micro solutions take up less network bandwidth today, and the latest endpoint security lightens the load on desktop systems too. “Users always let me know if they have any performance problems,” said Erickson. “Since upgrading to the latest OfficeScan release, I’ve not had any calls. I can definitely see the improvement.”
- **Less IT time required**—“We spend less time on security today,” said Erickson. “I found it very easy to set up and configure Trend Micro solutions. With preset items, I felt very secure from the beginning. Then it was easy to turn on or off the features we wanted. The process of adjusting content filtering has also been very easy. Now that we have everything set up, we really don’t have to do much, which is nice. We are not having to spend a lot of time managing Trend Micro solutions, and we have so much more information available to us compared to what was provided by previous vendors.”
- **More control of policies**—InterScan Web Security Virtual Appliance allows IT to protect its professional image and corporate assets. “We have the ability to track employee web activity,” said Erickson. “It gives us very good reports—with comprehensive traffic and activity information. We lacked this visibility before.”

Trend Micro solutions have also proven to fit smoothly into the Liberty First infrastructure. “With Trend Micro solutions, we are protected on so many different levels and it is all easy to manage,” said Erickson. “We now know what is going on all the time. The time we spend on security is minimal, and yet it is changing employee behaviors. It sets boundaries—once people know what those are, they don’t have to think about them. We keep our environment professional and friendly. Trend Micro makes our job easier—it just keeps protecting us. As a financial business, that is very important to us.”

Trend Micro Security

- **Smart Protection Network**
<http://www.smartprotectionnetwork.com>
- **Enterprise Security for Endpoints**
<http://us.trendmicro.com/us/products/enterprise/security-for-endpoints/index.html>
- **ScanMail for Microsoft Exchange**
<http://us.trendmicro.com/us/products/enterprise/scanmail-for-microsoft-exchange/index.html>
- **InterScan Web Security Virtual Appliance**
<http://us.trendmicro.com/us/products/enterprise/intercan-web-security-virtual-appliance/index.html>
- **Hosted Email Security**
<http://>

