Microsoft

Accounting firm optimizes PC environment with Windows®7 Enterprise and Microsoft® Desktop Optimization Pack (MDOP)

SOBERMAN LLP
CHARTERED ACCOUNTANTS

Overview

Country or Region: Canada
Industry: Financial Services

Customer Profile
Established in Toronto in 1958, Soberman LLP is ranked as one of the premier public accounting firms in Canada.

Business Situation
In order to simplify IT management and improve business continuity, the company began testing the Windows 7 operating system.

Solution
With Windows 7, Soberman has simplified IT management, enhanced security, and has experienced a significant boost in staff productivity.

Benefits
- Increased staff productivity
- Improved mobility
- Enhanced security
- Simplified IT management, increased efficiency

"Using Windows 7, we can actually spend our time focusing on processes that make our firm more productive in terms of going paperless and being more connected."

Sean-Jacob Peters, IT Manager, Soberman LLP

Established in Toronto in 1958, Soberman LLP is ranked as one of the premier public accounting firms in Canada. In order to simplify IT management and improve business continuity, the company began testing the Windows 7 operating system. With Windows 7 Enterprise, Soberman has simplified IT management, enhanced security, and has experienced a significant boost in staff productivity. After implementing Windows 7 Enterprise, users are benefiting from considerable improvements in speed, stability, and efficiency – which allow them to provide more customers with a high quality of service. As a result, Soberman is able to more efficiently manage its IT infrastructure and can focus on more strategic tasks.

Itergy

Microsoft®

Situation

Soberman LLP has been in business for more than 50 years and has built a strong reputation offering specialized services in accounting, auditing, business advisory and corporate bankruptcy. As one of the premier chartered accounting firms in Canada, the Toronto-based firm stands by a commitment to provide financial services that build client trust and generate strong value. Customers depend on Soberman for guidance in following good financial practices and the firm's team of chartered accountants helps organize, prepare and analyze business-critical financial information.

The current goal of the IT team is to streamline PC management and establish a high standard of business continuity for the lowest cost possible, according to Sean-Jacob Peters, IT Manager, Soberman LLP. As the largest single office, public accounting firm in Canada, Soberman needed to ensure that its computing environment – including more than 170 PC users – could meet the growing needs of both staff and clients. Soberman wanted to take advantage of the latest technologies to develop a more cost-effective and proactive PC management strategy.

"In the past, we were totally reactive when it came to our desktop management strategy. Moving forward, we want to ensure that we are being more strategic when thinking about desktop management and how best to use software in a way that boosts staff productivity," says Peters.

Accountants at Soberman rely on technology when working at the office and also remotely to meet the needs of their clients. Soberman's team includes more than 100 professionals that need access to not only Microsoft Office but the latest accounting and reporting software at any given time. Due to tax changes, changing government legislation and having to be able to access legacy files, documents and reports, staff members have to contend with using different and often conflicting versions of the same application software. From an IT perspective, the challenge was around managing these different versions of the software while deploying it in a secure, cost effective and timely manner.

"Our staff members tend to be working at client sites or working remotely. When you're trying to push this software through the network, it becomes a huge challenge for the IT department to make sure that the desktop experience is consistent and that everybody ends up with the right forms and the right software no matter where they are working," says Peters.

In addition, users increasingly expect to be able to access data and applications from a wider array of PCs and from an increasing range of locations. Using VPN clients, however, can be time consuming for mobile users because it takes multiple steps to initiate the VPN connection and then the user must wait while the PC is authenticated by the network. Looking for ways to better support its dispersed workforce, the firm wanted to upgrade from Windows® XP—which was running on all the computers — to better address key concerns around ease of use, remote connectivity to the firm's resources, security and application compatibility.

In order to maintain the level of service its clients have come to expect, the firm was looking for technologies that could best support its employees' ability to get more done in less time. This included standardizing on a single operating system in order to improve manageability, centralize application deployment and better support office and remote workers.

Solution

The firm relies heavily on Microsoft® technologies and has used the Windows operating system since 2002. To address its computing needs, in 2010, the IT team at Soberman, working with Itergy, a Microsoft technology expert, initiated a test deployment using Windows 7 Enterprise. Soberman also deployed Microsoft® Application Virtualization (App-V)—part of the Microsoft® Desktop Optimization Pack (MDOP)—to help virtualize solutions such as Microsoft® Office 2010.

As part of a new Windows Optimized Desktop management strategy, the firm is using MDOP to help reduce the cost of application deployment, to deliver applications as services and to manage desktop configurations. The company used the Microsoft Deployment Toolkit 2010 to help automate deployment of Windows 7 Enterprise, in combination with Windows Deployment Services, which enables remote deployment of the operating system over a network.

When working on client accounting files, staff members rely on Office Excel spreadsheets, which over the years, have been created using different non-compatible versions of Microsoft Excel and various iterations of often conflicting accounting and reporting software from vendors DIVORCEmate Software Inc., CCH Canadian Ltd. and CaseWare International. "MDOP is offered as a subscription for Client Software Assurance customers. The tool features six technologies designed to help improve desktop management via improved application deployment and compatibility," said Riyaz Lalani, Senior Account Manager, Itergy. "App-V enables the IT team at Soberman to simplify application life cycle management by transforming the firm's tax applications into centrally managed virtual services that are never installed and because of that don't

conflict with each other." Being able to run these diverse solutions while ensuring application compatibility is a huge plus, notes Lalani.

The virtualization capabilities of App-V help make it possible for Soberman staff to access their software and personal settings from any computer on the network, regardless of location. When staff upgrade their PCs or use different computers throughout the day, it can become complicated to install and manage all the applications different users may need wherever they are. App-V helps to ensure application compatibility and that every user has on-demand access to the right applications regardless of which PC the user logs in to.

"For us, it just made sense to adopt MDOP to develop a flexible application environment, particularly from a licensing perspective. Using App-V, applications now take less time to manage, which allows us to be more responsive to the computing needs of our staff," says Peters.

Soberman has also deployed Windows Server® 2008 R2 so that employees can take advantage of DirectAccess, a new feature in Windows 7 Enterprise. By using DirectAccess, employees will be able to securely connect to the company network via the Internet, rather than through a traditional virtual private network (VPN).

Standardizing on Windows 7 Enterprise enables Soberman to manage application compatibility more efficiently—particularly for its accounting software applications previously running on different versions of the Windows operating system. By upgrading to Windows 7 Enterprise, the firm is looking to help reduce the volume of troubleshooting issues, protect sensitive

data and improve infrastructure performance. The firm is taking advantage of Windows 7 Enterprise to help provide stronger support for its offices.

Benefits

With Windows 7 Enterprise and MDOP in place, Soberman is realizing a host of benefits. The Windows Optimized Desktop platform helps make users more productive by providing access to data and applications from anywhere, and by helping staff complete everyday tasks faster and easier.

Soberman is taking advantage of the new Windows 7 environment to assist in boosting the productivity of its mobile workforce, enhance PC security and control total cost of ownership.

Increased staff productivity

In general, all staff can be more productive using Windows 7 Enterprise– benefiting from a more powerful, responsive, and easy-to-use system that helps them work more efficiently and effectively. One of the biggest improvements using Windows 7 Enterprise was speed in all areas: shutdown, boot-up, hibernation and application processing. The firm now estimates that PC boot-up time was reduced by up to 55 per cent with Windows 7 Enterprise.

"We are focused on making several changes to the work environment this year such as going paperless and adopting new ergonomically designed workstations. Windows 7 is allowing our team the freedom to focus on more strategic business goals such as boosting staff productivity and efficiency."

Improved mobility

Today, Soberman is using Windows 7 Enterprise to expedite daily tasks and provide timelier, more thorough service to their increasing client base.

Mobile workers need to be able to connect to the corporate network easily and wherever they are; Peters notes that mobile workers also benefit from DirectAccess, which enables users to connect directly to the company network through the Internet, which simplifies network management by eliminating the need for a dedicated VPN connection.

Enhanced security

Windows 7 Enterprise includes built-in security features such as BitLocker To Go™ and the ability to control what users can do with their computers through Group Policy, which helps keep enterprise-wide desktop configurations up to date, enabling compliance with corporate policies. The firm is using the BitLocker feature in Windows 7 Enterprise to help protect data on PC hard disks and external USB storage devices. Using built-in data encryption functionality of BitLocker and BitLocker To Go means that unauthorized users can be restricted from accessing sensitive data.

The IT team is also using AppLocker, says Peters, to block certain software applications from being downloaded by employees, which helps to ensure stronger application compliance.

Simplified IT management, increased efficiency

Soberman has experienced significant performance improvements with Windows 7 Enterprise and the firm is reporting that migrations of existing computers have been up to 90 per cent faster than in the past. The firm expects to improve application management with App-V so Soberman can quickly prepare its physical applications to run in a virtual environment. With App-V in place, Soberman is in a

For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers in the United States and Canada who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to:
www.microsoft.com

For more information about Soberman LLP products and services, visit the website at: www.soberman.com

For more information about Itergy products and services, visit the website at:
www.itergy.com

better position to improve the efficiency of IT management, optimize deployment processes and control the total cost of ownership.

"For example, if an accountant from our tax department requires a particular software version for client work, we just push it through the network and give it to him for a week. When he's done, we can revoke the software back and then give it to somebody else. That's the type of proactive environment that we have here using MDOP."

Partner	Software and Services
• Itergy	• Windows 7 Enterprise
	• MDOP
	• Microsoft® Application Virtualization

Microsoft®