

Case Study

Vitale, Caturano & Company

"Covisia has developed our remote-access solution to the point where we rarely have to think about it. It has become a consistently-performing component of our overall daily business operations."

Jonathan Holmes, Manager of Technology for Vitale, Caturano & Company

THE CHALLENGE

The nature of their business dictates that accountants at Vitale, Caturano & Company spend most of their time working at client locations. But to keep business operations running smoothly within this model, VCC must employ a consistently-performing remote-access strategy. 24x7 access is critical to ensure accountants don't have to spend extra time away from home to synchronize data on their laptops. They must be able to work at remote offices, at home, and at client sites, just as though they were in the office, while adhering to compliance standards.

"We don't want our staff uploading and downloading info when they get home after a long day," said Jonathan Holmes, Manager of Technology for VCC. "That type of activity delays the exchange of client information, is not secure, and is not good for employee morale. We also needed an efficient way to rollout new applications to our 300 users. It's not practical to have them all come into the office every time we have an IT upgrade."

To support its 300 employees, VCC employs an internal IT staff that capably handles the day-to-day issues faced by end users as they work remotely using Citrix technology. "But with new technologies emerging on a regular basis, and to ensure we run our system as optimally as possible, we wanted to partner with an experienced company that could evaluate our network on a regular basis, respond to emergencies, and help us implement new technologies," Holmes said.

THE SOLUTION

When VCC first partnered with Covisia in 2002, a Citrix solution was already in place, but VCC wanted to improve the system and make it easier for the staff to access applications. Since coming on board, Covisia has taken VCC through software and hardware upgrades that allow users to access applications more simply through the company's web site from any location.

"When users go to our web site, it automatically creates a VPN session and opens up a Citrix session," Holmes said. "Covisia has made it much less complicated for users and IT administration. Once users get to the home page, they can work as though they're in the office."

Key Benefits of Covisia's Access Solution

- Field personnel have 24x7, secure, remote-access to all corporate applications.
- Anytime-access eliminates need for employees to work extra time from home to download and upload information.
- IT can rollout new applications to field personnel from one central server in minutes versus days.
- The SSL VPN solution allows for strict security adherence during transfer of confidential client financial information.
- The access strategy model helps the firm adjust rapidly when office access is limited by external events.

About Vitale, Caturano & Company

With 300 employees Vitale, Caturano & Company (VCC) is the largest Boston-owned accounting firm in New England, providing CPA, business advisory, wealth-management and technology consulting services. In 2005 the Boston Business Journal named VCC as one of the "Best Places to Work" in Massachusetts while Accounting Today named the firm one of the "Top 50 CPA Firms" in the country. VCC is an independent member of Baker Tilly International, a network of independent accountancy and business service firms committed to providing the best possible service worldwide.

Covisia's arrival in 2002 has helped VCC adapt as the firm has grown rapidly from 150 to 300 employees in 2006. "Over that time, Covisia helped us rebuild the environment on the back-end, but at the same time we have not had to change how it looks from the user perspective. Application performance and ease-of-use have changed, but our users still access applications in the same way. This has helped maintain day-to-day continuity in the services we provide to our clients. Our accountants have not been bogged down learning a new system."

THE BENEFITS

The primary benefit that Covisia delivers is a Citrix solution that VCC does not have to think about. "Covisia makes sure things run smoothly," Holmes said. "We don't have to think about the system very often. Instead we focus on our primary objective — providing accounting and financial services to our clients." In addition to maintaining a consistently-operating remote-access solution for VCC, Covisia also helps the accounting firm react to unusual circumstances such as the National Democratic Convention that took place in Boston in 2004. "Our office is just around the corner from where the convention took place," Holmes explained. "About a month before the convention, it became clear that with all the streets being closed down, most of our staff were not going to be able to make it to the main office."

At the time, the remote access solution VCC had in place was not designed to properly handle that level of remote activity. But Covisia responded quickly with a solution design that would allow VCC to add the necessary system bandwidth. Covisia then installed the solution quickly so that VCC was ready by the time the convention started. This access solution has also given VCC more flexibility in working with business partners. "For sales calls, we use an outside company that needs to access our CRM database," Holmes explained. "We want to give them access to our system but only to a limited amount of information. We need to make sure outside entities can't access confidential data, and Citrix is the perfect solution. Anything else would have required building firewalls and opening ports, but Citrix is a much easier application to provide access to partners while maintaining system security."

Covisia recently designed a solution for VCC that allowed the firm to give users access to certain applications via a VPN. "We have some applications that perform properly only in a VPN environment," Holmes said. "We had an older, IP-SEC VPN solution that a lot of our clients are now blocking. When a user was at one of these clients, they could access e-mail but not any other applications. They had to upload their work from home over their cable modem. But with the VPN now in place, they can access all of our applications from client sites all the time."

Holmes plans to expand the Citrix environment in the future to give access to more vendors as well as clients. VCC may establish a portal for clients where they can approve tax returns before VCC files them electronically. "Covisia gives us peace of mind," Holmes concluded. "We can handle most day-to-day issues, but we always have Covisia for back-up, designs, upgrades, major issues and maintenance. When we call for help, they consistently respond quickly and with helpful actions to take."

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About Covisia Solutions

Covisia Solutions is a full-service IT solutions provider focused on helping organizations align their IT operations with their business to improve information access and security, reduce complexity and cost, and manage technology to meet the needs of competitiveness, growth and change. Whether your need is improved information access or greater security, a network upgrade or strategic planning, Covisia Solutions can help your IT organization deliver for business.