

# Financial Services Company Relies on Trend Micro™ OfficeScan™ Release 8.0 to Protect Clients and Servers

Raymond James Financial is one of the largest financial services firms in the United States. To uphold its reputation as a respected, multinational company, the firm relies in part on technology and security solutions that enable and protect a mobile workforce of more than 4,600 financial advisors around the world.

## PROTECTING THOUSANDS OF BRANCH OFFICES

*“It is very, very easy to manage this product. Trend Micro OfficeScan 8.0 is clearly an enterprise-class solution—we get the protection we need along with streamlined procedures for deployment and support.”*

— Daniel Trimpey,  
Infrastructure  
Application Support, IT  
Raymond James Financial

At Raymond James Financial, more than 10,000 users do business at more than 2,200 branch office locations in the U.S., Canada, and overseas. The IT team must keep desktop systems, a large number of mobile laptops, and almost 2,000 servers operating and protected from the growing number of threats that could potentially disrupt business or compromise confidential customer information. Many offices consist of only a few employees while others operate from home-based offices. IT must support all locations—including novice as well as savvy PC users—out of the corporate offices and data center in St. Petersburg, Florida.

IT's task has become more difficult as the business has evolved to take advantage of many Web-based applications and processes. Users often operate “off network” for weeks at a time, perhaps accessing the corporate network or logging into a virtual private network (VPN) connection as little as once a month. Extending protection to the entire network—including these remote users—requires that IT deploy flexible, scalable security solutions that can be efficiently managed.



## KEY BENEFITS

- Saves time with automatic upgrades and integration with Control Manager
- Eliminates vulnerabilities by updating mobile clients over the Internet
- Improves spyware detection and removal with enhanced cleanup capabilities
- Protects the newest platforms with certified Microsoft Vista™ operating system support



**HIGH-LEVEL PROJECT GOALS**

- Continue to protect desktops, laptops, servers, and the network from security attacks
- Avoid disruptions to business, protect sensitive customer data, and meet governance requirements for financial institutions
- Enhance centralized support and management of security solutions
- Avoid vulnerabilities that could be introduced when mobile users access the network after weeks of operating without access to company-based update servers



**WHY TREND MICRO?**

*“It would be extremely difficult to conduct a manual upgrade of all of our clients, Trend Micro has done a great job of automating the upgrade process.”*

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Before Raymond James migrated to Microsoft Servers and domains, it was using a security solution that did not include the tools needed to centrally manage the deployment. An evaluation of alternatives led them to Trend Micro solutions, and the company gained a console and email alerts that allowed them to monitor the state of pattern updates across the network.

Through the years, as the company grew, the Trend Micro enterprise solutions evolved to provide the scalability and features required for comprehensive protection from the latest threats. Today, Trend Micro™ OfficeScan™ Client/Server Edition gives Raymond James Financial a single solution that extends to multiple systems. With OfficeScan deployed on various computing platforms, the company has had very few virus-related problems. Automatic updates and hourly checks for newly emerging threats keep the infrastructure up to date with the latest security solutions. The Trend Micro solution also allows IT to centrally verify that the clients and servers have the latest updates and patterns. The previous security solutions made it difficult to verify that all systems were updated.

**STANDARDIZING ON A SINGLE SECURITY SOLUTION**

The move to the latest OfficeScan 8.0 release has allowed the company to completely standardize on the Trend Micro solution—including replacing Trend Micro PC-cillin™ with OfficeScan on remote systems and home-office-based computers that operate in off-network mode most of the time. “The enhanced protection for laptops is crucial for our growing mobile workforce and home offices,” said Daniel Trimpey, infrastructure application support, IT, Raymond James Financial. “Now these users will be automatically updated over the Web and we won’t have to worry about them bringing in infections when they frequently disconnect and reconnect to our network. Trend Micro OfficeScan 8.0, with Vista Certification, allows us to easily manage security across all of our supported operating systems.”

## SIMPLE ROLLOUT OF THE LATEST RELEASE ACCELERATES PROTECTION

“The rollout of OfficeScan 8.0 has been very smooth, with no problems for new Vista clients,” said Trimpey. “The upgrade has been seamless—Trend Micro continues to offer solutions with exceptional quality, and we confidently introduce them into our environment as soon as possible after release.”

Rolling out a new software version to all 2,200 offices can take weeks of time. However, with OfficeScan 8.0, the updates are automatically distributed when systems come onto the network. In less than a couple of hours, IT can upgrade all 10,000 systems on the network. For example, to update the four central OfficeScan management servers takes approximately 30 minutes per server. All other servers and clients are upgraded automatically, taking only a few minutes to download and install the required software. According to Trimpey, “We have found that, left to end users, updates simply do not happen in 9 cases out of 10. By taking advantage of the automation, IT can avoid time spent on support calls with users who have malware problems, and make sure that isolated systems don’t introduce vulnerabilities into the network.”

IT is also looking forward to the enhanced spyware protection and cleanup capabilities since the company sees spyware and grayware on the increase. The company’s testing of the new release showed that everything is working incredibly smoothly. “It would be extremely difficult to conduct a manual upgrade of all of our clients,” said Trimpey. “Trend Micro has done a great job of automating the upgrade process.”

## SUPERIOR MANAGEABILITY INCLUDING MOBILE SYSTEMS

The number of home-based offices and other mobile end points is on the rise within Raymond James Financial, and OfficeScan 8.0 introduces a more streamlined solution for protecting and supporting mobile devices. Mobile systems can be configured to automatically check for and download updates when the mobile client is online.

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## CORPORATE PROFILE

### Raymond James Financial St. Petersburg, Florida

Raymond James Financial (NYSE-RJF) is a Florida-based diversified holding company providing financial services to individuals, corporations and municipalities through its subsidiary companies. Its three principal wholly owned broker/dealers, Raymond James & Associates, Raymond James Financial Services and Raymond James Ltd. have more than 4,640 financial advisors serving 1.6 million accounts in 2,200 locations throughout the United States, Canada and overseas. In addition, total client assets are approximately \$204 billion, of which approximately \$35.4 billion are managed by the firm’s asset management subsidiaries.

- **Industry/Vertical** Financial Services
- **Employees** More than 4,600 financial advisors
- **Infrastructure** Approximately 10,000 PC users; 2,000 servers at 2,200 locations worldwide.
- [www.raymondjames.com](http://www.raymondjames.com)

The management console for OfficeScan release 8.0 has also been enhanced to make it faster and easier to navigate through the features. Integrating OfficeScan with Trend Micro Control Manager™ is easier as well. Control Manager gives the IT team email reports on all deployed Trend Micro solutions, which currently include OfficeScan and ScanMail™ Suite for Microsoft™ Exchange. “We simply fill in the Control Manager server name in an OfficeScan screen and the software configures itself,” explained Trimpey. “No agents to install—just a click and the solutions connect with Control Manager. It’s very impressive and another example of how Trend Micro continues to make our jobs easier with new product enhancements.”

#### **TREND MICRO PRODUCTS**

- **Trend Micro OfficeScan Client/Server Edition**  
<http://us.trendmicro.com/us/products/enterprise/officescan-client-server-edition/index.html>
- **Trend Micro ScanMail Suite for Microsoft Exchange**  
<http://us.trendmicro.com/us/products/enterprise/scanmail-for-microsoft-exchange/>
- **Trend Micro Control Manager**  
<http://us.trendmicro.com/us/products/enterprise/control-manager/index.html>



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