

Remote Connectivity Guidelines

Overview

There are several different remote access technologies available today, including cloud-based applications and systems. If your Agency Management System is not cloud based, we recommend the use of Microsoft's Remote Desktop application to securely and effectively connect a wahve's home computer to your network. Organizations can also use Virtual Private Network (VPN) software which will add another layer of protection. You will want to choose the method that best supports your management system and workflows.

Please keep in mind that your organization is responsible for obtaining and providing the proper software licenses (Remote Desktop, VPN, Microsoft Office, etc.) for each wahve as you would for a member of your staff. Please call us to discuss options if you have questions about the various software and configuration options. We do our very best to support our clients no matter what solutions they may employ. We are unable to support the installation, testing and usage of non-approved solutions. You may need to engage other organizations for consulting and support in order to make those types of configurations work for you.

Technologies

Microsoft Remote Desktop and Remote Desktop Protocol (RDP)

RDP is a proprietary protocol or language that the Microsoft Remote Desktop and Server Applications use to communicate and allow remote connections and control. This technology was originally developed by Microsoft and released in 2003. The Remote Desktop Server software (previously known as Terminal Services) has been available in all versions of Microsoft Windows Servers since Windows NT 4.0. All versions of the Microsoft Windows operating system come standard with the Microsoft Remote Desktop application.

Microsoft Remote Desktop Services provides system administrators with fine grained control over resources that can be accessed (shared files, local and network printers, and other devices), security and connection encryption. Please see the following link for details on Microsoft Remote Desktop: [Microsoft Remote Desktop Overview](#)

Clients can instead have a wahve connect to a host workstation on their network that is running a supported version Microsoft Windows. This can provide excellent RDP capabilities; however, the host workstation can only support one remote user at a time and cannot be used by anyone at the client's office while a remote user is connected.

Virtual Private Networks (VPNs)

VPNs or VPN tunnels are encrypted links between your device and another network that can allow secure access to corporate data, files, and systems. They routinely secure corporate data behind firewalls and encrypt data and, like Remote Desktop, require remote users to be "authenticated" (i.e., verified using security

protocols). All the functionality available to local users of a corporate network can be made available (or withheld) from those accessing the central system via a VPN.

As with the Remote Desktop options, VPNs offer secure access to routine office resources including remote files, printers, scanners, databases, intranets, websites, and Agency Management systems. Thus, routine tasks can be accomplished remotely just as readily as if the worker is in the office where servers and system administrators are housed.

There are several vendors who provide VPN client and server software and hardware. They include (Microsoft, Cisco, Citrix, OpenVPN and many others). To use a VPN software will need to be configured on your network as well as on the wahve's computer.

Amazon Workspaces

An alternative to having a wahve's computer connect to your network is to use Amazon Workspaces. Amazon Workspaces are cloud-based, on-demand Windows desktops as a service for end-users. They offer a choice of many bundles with a range of CPU, memory, storage, and a choice of applications. These Workspaces would be configured using the same type of remote connectivity options that you'd use if the wahve was connecting to your network directly from their machine. See (<https://aws.amazon.com/workspaces/>) for more information.

Other Remote Connectivity Alternatives

We have client firms using other remote connectivity solutions with some degree of success. Some of these solutions, such as GoToMeeting and LogMeIn, were designed for online meetings or remote technical support. We do not recommend these types of setups.

Recommended Remote Connectivity Solution

We prefer for our wahves to access our clients' networks using Microsoft's Remote Desktop application on their workstation in conjunction with Microsoft Remote Desktop Services running on the latest version of Microsoft Windows Server at the client. This combination of technologies and software provides the most secure and effective remote access solution available and simultaneously supports multiple users. Please note that we will support Microsoft Remote Desktop Services (or Terminal Services) running on Windows Server versions back to 2003 but prefer that our clients are on Windows Server version 2008, 2012 or later. ([Microsoft Support for Windows Server versions](#)).

Most of our clients want to maximize security and functionality (i.e. shared printers, etc.). We guarantee success with a supported configuration using Remote Desktop and/or VPN software for which we provide installation and testing services.

Licensing Considerations

Microsoft Remote Desktop Services

Microsoft Remote Desktop Services allows for up to 2 simultaneous remote connections with no additional license fees. There is a per-user license fee for more than 2 simultaneous remote users.

VPN Software and/or Hardware Solutions

License fees are required for most VPN client and server products.

Cloud and/or Website-based Services and Application Licensing

Several Agency Management systems are now available as cloud or browser-based products. If you are using this technology, you are responsible for the cost of licensing any additional software that may be required.

Hardware Considerations

Phones

If needed, wahves can be supplied with phones for handling client calls or internal communications. There are several options:

Voice over IP (VOIP) Phone

- VOIP phones are connected directly to the wahve's router and act like an extension on your switchboard/phone system.
- VOIP phones and systems vary considerably. Configuration is subject to vendor specific requirements. Please check with your phone system vendor for their required specifications.
- Wahve cannot guarantee IP phone connectivity.

Landline at the wahve's location

- Calls transferred or forwarded from the desk phone or switchboard

Cell Phone

- Basic cell phone designated for business use – calls transferred or forwarded (see above)

All costs for any of these options, including, but not limited to, required equipment and/or software upgrades are strictly the responsibility of the client.

Multiple Monitors

We recommend the use of a multi-monitor setup for the wahve. We find this to be an invaluable tool that increases the wahve's efficiency. We require our wahve to add a second monitor to their workspace setup. For Laptops the second monitor can be connected by HDMI or other adaptors, For a PC, two monitors can be configured by HDMI, or VGA as determined by the equipment's built-in ports or video card. We will assist in connecting a second monitor for your wahve prior to their start date.

Adding a third monitor may or may not be an option. Some home desktops and laptops do not support a third monitor, and not all remote connection software is compatible with three monitors. As an alternative, we can replace the standard sized second monitor with a wider model to be used with a split screen view.