

CSEA  
Palomar Chapter  
November 16, 2011



Practice Management:  
Technology and Your Office

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# Practice Management: Technology and Your Office

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## Learning Objectives

1. Have a better understanding of how the use of newer technologies can make your firm more efficient and profitable.
2. Get ideas on what type of technologies might work best in your practice.
3. Find out how implementing small changes can make big differences in your practice.

## Windows 7



### Introduction

Windows 7 has now been available for quite some time and is the successor to Windows XP and Vista. It is a smooth and highly engaging interface which is very stable. In most cases Windows 7 runs faster than its predecessors and does not require high-end hardware like Vista did.

The minimum requirements for Windows 7 are:

- 1 Ghz processor
- 1 GB Ram
- 16 GB available hard drive space
- DirectX 9 graphic card

Most PC and laptops that were manufactured in the last 7-8 years should meet these requirements. You can run the Windows 7 Upgrade Advisor from Microsoft to make sure your hardware (as well as your software) is compatible with Windows 7.

Some of the new features in Windows 7 include:

- An enhanced Graphical Interface including an updated taskbar, desktop gadgets, snap to resize a window, and Aero Shake.
- Better Search functions
- New alerts features
- Performance enhancements
- Better recognition and installation of new devices
- Better Power management for Laptops

### Can Legacy XP software Run in Windows 7?

Prior to Windows 7 Microsoft was very careful to make sure that their operating systems were backwards compatible. However, with Windows 7 they finally cut the ties and no longer will certain programs that ran in DOS or Windows XP run in Windows 7.

There are a couple of ways however in which you can deal with this. First, there is a compatibility database on Microsoft’s website ([www.microsoft.com/windows/compability/windows-7/en-us/default.aspx](http://www.microsoft.com/windows/compability/windows-7/en-us/default.aspx)) that lists all known compatible programs as well as compatibility issues. Also there is a work-around available in Windows 7 Professional and above which creates an XP compatible workspace that should be able to run most legacy software.

### Win XP Mode

This XP compatible workspace is called Win XP Mode. This process will only work for Windows 7 Professional, Ultimate, or Enterprise (not the Home versions). What this mode does is to create a virtual Win XP PC within your Windows 7 PC. The XP-compatible mode is not included with the software, you must first download and install two programs to get it running. You can get more information and download the programs at [www.microsoft.com/windows/virtual-pc/download.aspx](http://www.microsoft.com/windows/virtual-pc/download.aspx).

### Upgrading

Depending upon the operating system you currently have installed upgrading to Windows 7 may require a re-install of the application programs or simply an upgrade of the operation system. The chart below summarizes the different paths depending upon your current operating system installed.

Current Windows version	Upgrade or migrate to Windows 7 Home Premium?		Upgrade or migrate to Windows 7 Professional?		Upgrade or migrate to Windows 7 Ultimate?	
	32-bit	64-bit	32-bit	64-bit	32-bit	64-bit
Windows XP (32-bit, any version)	Migrate only					
Windows XP (64-bit, any version)	Migrate only					
Vista Home Basic (32-bit)	Upgrade or migrate	Migrate only	Upgrade or migrate	Migrate only	Upgrade or migrate	Migrate only
Vista Home Basic (64-bit)	Migrate only	Upgrade or migrate	Migrate only	Upgrade or migrate	Migrate only	Upgrade or migrate
Vista Home Premium (32-bit)	Upgrade or migrate	Migrate only	Upgrade or migrate	Migrate only	Upgrade or migrate	Migrate only
Vista Home Premium (64-bit)	Migrate only	Upgrade or migrate	Migrate only	Upgrade or migrate	Migrate only	Upgrade or migrate
Vista Business (32-bit)	Migrate only		Upgrade or migrate	Migrate only	Upgrade or migrate	Migrate only

Source: [www.winsupersite.com](http://www.winsupersite.com)

### Sticking With XP?

First off, support for Windows XP will end 4/8/2014 which doesn’t really mean a lot, as most people do not use Microsoft directly for support purposes, but security and other fixes to the software will cease at

that time. The most likely reason to upgrade to Windows 7 will be the purchase of new hardware, as Windows 7 is the only version of Windows software available from OEMs. For the die-hard users of XP who install the operating System on their PCs may find one day that they are unable to load XP on a new machine or that their programs will not run properly.

Windows 7 is the stable and efficient operating system that consumers have been waiting for from Microsoft, fixing most of the problems in Vista. Windows 7 should be the new foundation that can be the framework for office computing into the future. As to date, only about 30% of large corporations have even made plans to switch to Windows 7. Only 36% of all users are on Windows 7 while 41% are still on XP. However about 1.5% per month are making the transition to Windows 7.

The final results are that 94% of those who switch to Windows 7 are glad they did. The average payback period for the investment (excluding hardware) is estimated by Microsoft at 15 months, with an average user productivity increase of 14 hours per year (Source: Softpedia.com).

The only good reason to wait would be to ride-out the use of your existing hardware running XP. A smart move might be to begin the transition by replacing your aging hardware and upgrading to new PCs including Windows 7.



## Beyond Paperless

Becoming a paperless office is now easier than ever with the advances in scanning technology and the advent of new and improved software to make managing your documents easier than ever. There are huge benefits to going paperless including:

**Save Time:** Every time you have to move a piece of paper it takes time. A company can spend a lot of time moving paper from one place to another. When documents are stored electronically there is no need to store or archive the documents and retrieval can take just seconds.

**Increase Security:** Documents stored electronically can be easily backed up and taken off site so a copy of the documents always exists, even in the case of a disaster. Also, electronic copies can be more easily secured as they can be encrypted; password protected, and located more easily in a secured area while paper documents tend to be much harder to secure.

**Reduce Storage:** While electronic documents only take up space on your hard drive, paper documents can take up a tremendous amount of space—space that you could be using for more efficient purposes.

**Go Green:** Companies receiving and sending electronic documents together can save thousands of trees each year and also save on oil, energy, and landfill space—all a good reason to go paperless.

### **What you Need**

The first thing you need in a paperless office is a good scanner. There are many on the market and most are at a very reasonable price (between \$300-\$800). There are many types to choose from but you may want to check with your tax preparation software company to see if they have any recommendations, as many of the tax programs have an integrated Document Management System (DMS) and you want to make sure that what you purchase is compatible.

Most scanners on the market today are TWAIN compatible which will allow them to work with most software that can interface with a scanner, including most of the Microsoft Office programs and other document and publishing programs. Even many multifunction printers and copy machines have TWAIN scanners built into them that will interface to your PC—so check and see, you may already have one.

### ***OCR (Optical Character Recognition)***

If you are going to need to search through a document or a group of documents to find specific information you should make sure your scanning software does OCR. OCR allows you to search through the pdf document to find certain information within that document (just like you would search a Word documents or web pages).

### ***Document Management Software (DMS)***

The next thing you need is document management software; this can be as simple as having a copy of Adobe Acrobat (or some other similar program) on your PC which will let you create PDF (Portable Document Format) documents from your scans. Most scanners come with some form of software that will create a pdf document for you.

Once you have the scanner and the software you are ready to go. All you need to do is to create an organized repository for your electronic documents and you are on your way. Again, your tax (or accounting) software may already have a document management system that you can use which will organize your documents for you, but if not, all you need is an organized set of folders on a PC that all users have access to and you should be able to easily save and retrieve you documents quickly and easily at any time. (Note: Don't forget to back those folders up regularly!)

## *PDF Programs*



PDF documents now dominate the business environment and are the mainstay of archived documents. Most of us read pdfs with the free Adobe PDF Reader or have created pdfs with the Distiller (or some other integrated program) but to truly benefit from this “digital revolution” you must also be able to edit these documents.

The number of PDF Editors has exploded in recent years and prices can vary from free to several hundreds of dollars depending upon the features of the software (although more money does not always mean more functionality). A comparison and general overview of many of the PDF products can be found at

[www.notebookreview.com/default.asp?newsID=5792&review=Free+PDF+Editor+Software+Roundup](http://www.notebookreview.com/default.asp?newsID=5792&review=Free+PDF+Editor+Software+Roundup).

Some of the features that the editing software can perform include:

- Adding Text and Graphics
- Creating Forms
- Securing files
- Combining files
- Assembling groups of files into a portfolio
- Creating comments and markups
- Stamping a document
- Deleting information
- Creating Headers and Footers and Watermarks
- Inserting, extracting, replacing, moving, and deleting pages
- Cropping and Rotating
- Bookmarking pages

## *Specialty Products*

One very important aspect of PDF editing commonly used in tax practices is bookmarking. Bookmarking can make finding information within a pdf very quick and easy. However, the processes of creating proper bookmarks can be time consuming. There are, however, programs on the market that can make this process much more efficient and even take the process to new levels by scanning the document and identifying the specific known pages and organizing and creating the bookmarks for you. The two best known bookmarking products for tax practitioners on the market today are Trapezy ([www.trapezy.com](http://www.trapezy.com)), and GruntWorx ([www.coppanion.com](http://www.coppanion.com)) (also some tax preparation software has these functions built in).

Trapezy and GruntWorx, using different methodologies, will scan and identify your source and produced documents and automatically create bookmarks saving you time and money.

Another pdf tool made specifically for the preparer and review industry is Tic, Tie & Calculate ([www.acct1st.com/ticTieCalc.php](http://www.acct1st.com/ticTieCalc.php)). By installing this program a tool bar will be added to your Adobe Acrobat Version 7-9 which will allow many common functions that an accounting or tax return preparer or reviewer will find helpful. The tools that are installed greatly automate the common functions used by the preparer and provide solutions that were only available with a paper process.

### *Pdf Security*

It is important that when sending a pdf document with sensitive data over unsecured e-mail or other non-secured methods that the document be secured so that it cannot be easily opened if it falls into the wrong hands. The best way to deal with this is to apply a password to the document which will need to be entered by the client before the document will open. It is important to use secure passwords as there are programs on the market designed to open password protected documents via “brute force.”

In our practice we typically use part of the client’s last name and part of their social security number as the password (11 digits long) as it is very secure and is a password that only the client would typically know (Note: never put the password in an email to the client). There are other security options available in Adobe and other editing tools such as encryption, signing etc., but these can be difficult to implement and use for the user and the client.

### **Office Security**



We consistently hear about the importance of security and for good reason. In our business we are holding information about our clients that if in the wrong hands could cost our clients a lot of money and frustrations. While there is a lot to be concerned about, if you take some simple steps and follow the rules of safe computing you should be able to feel comfortable that you are on top of it.

There are two basic threats to your computer data: **Physical**-the risk that the data might be stolen or lost due to equipment failure and two: **Software**-the risk that your data might be compromised as a result of electronic intrusion, malware or viruses.

### **Four Things you Must Do**

1. Ensure that each of your computers in the office has the latest updates and patches and be sure the Windows automatic update feature is on (except maybe for the server).
2. Have up-to-date defenses including your firewall and virus and spyware programs.
3. Have up-to-date backups of all your critical data.
4. Practice safe computing – have an office computer usage policy including password protection on all computers having access to your network.

## Configuring Windows for Security

### *Windows XP*

If you are using Windows XP you can get an assessment of your security settings by clicking on Start/Control Panel/Security Center. Look at settings that show “Not Installed” or “Out of Date” and quickly resolve those issues.

To turn automatic updates on, right click on My Computer and select properties, then choose the automatic updates tab. Click the “Keep my computer up to date” check box and you should now automatically download and install any critical updates that are available.

### *Windows 7*

For Windows 7 users the security screen is found by clicking on Start/Control Panel/System and Security/Center/Action Center. Click on the Security Drop-down arrow and a list of all security related information will be presented for your review.

By default, automatic updates are turned on in Windows 7 but you can check its status in the security screen accessed above.

## Firewalls

There are two kinds of firewalls: software and hardware. Windows (both XP and 7) have built-in software firewalls that can help you keep unwanted intrusions away. Also, many virus software programs have move advanced software firewalls that will replace the Windows firewall. But to really protect your network you need a hardware firewall that sits between the internet and your office network. This firewall can be part of your Internet router or can be a standalone firewall, but either way it can be configured to protect your network and should be used in all cases.

Most firewalls will protect your network out-of-the box with minimal configurations but if you need to allow for communications into or out of your network beyond the normal protocols (i.e. web browsing, email, FTP, etc.) you will need to configure ports to allow for data to pass through the firewall for specific uses and computers.

## Anti-virus and Anti-malware Programs



There is a huge array of malware on the Internet including viruses, worms, Trojan horse programs, spyware and adware. While some of these programs are relatively harmless, many can inflict damage to your computer and its data.

It is really not too hard to get “infected.” You can open an attachment in your e-mail, visit certain web sites, or even by installing software. To stay safe you have to practice safe computing and make sure you have a good anti-virus + anti-malware program installed and running on every computer connected to your network.

Which anti-virus programs are the best? Here is a list of some of the top rated programs from PC Magazine:

- Ad Ware Pro
- AVG Internet Security (free version available for home use)
- Webroot Internet Security
- Viper Antivirus 4.0

Microsoft also has some free software called “Microsoft Security Essentials” which is available free at [www.microsoft.com/security\\_essentials](http://www.microsoft.com/security_essentials). The program gets a “B” rating from most reviewers. Just recently, Microsoft has released a new free tool called “Microsoft Scanner” which is an online, on demand tool that can be used to check your system. It can be downloaded at [www.microsoft.com/security/scanner/en-us/default.aspx](http://www.microsoft.com/security/scanner/en-us/default.aspx).

### **Practicing Safe Computing**

The most dangerous and most unpredictable component in practicing safe computer usage is the operator—yes you! Today’s software can eliminate most of the automated attacks but the problems caused by users are more difficult to address.

To practice safe computing, make sure you do all the things listed above, but also don’t open attachments from people you don’t know, don’t go to “iffy” websites, and don’t believe e-mails asking for information or money, including the IRS. And most important, if your software is giving you warnings, pay attention and take immediate action. For more information on how to stay safe online check out these places. [www.pcworld.com](http://www.pcworld.com) and [www.thewindowsclub.com](http://www.thewindowsclub.com).

### **FTC Safeguard Rules**

The Federal Trade Commission states that accountants and tax preparers must ensure the security and confidentiality of their client’s data. Failure to comply with the FTC Safeguard Rule subjects us to a number of issues including:

1. Possible unlimited liability from our clients
2. Sanctions and fines from the FTC
3. Possible sanctions from regulatory bodies including states
4. Possible issues with malpractice insurance
5. Possible legal issues with the states if disclosure of breaches are not properly communicated to clients

The government’s requirements are listed as such. Each business must:

1. Designate one or more employees to coordinate its information security program;

2. Identify and assess the risks to client information in each area of the business’s operations, and evaluate the effectiveness of the current safeguards for controlling the risks;
3. Design and implement a safeguard program, and regularly monitor and test it;
4. Select service providers that can maintain safeguards, make sure your contract requires them to maintain those safeguards, and oversee their handling of client information; and
5. Evaluate and adjust the program in light of relevant circumstances, including changes in the firm’s business or operations, or the results of security testing and monitoring. (Source: [www.ftc.gov/bcp/edu/pubs/business/idtheft/bus54.shtm](http://www.ftc.gov/bcp/edu/pubs/business/idtheft/bus54.shtm))

Note that this program is mandatory and must be in writing, and there is more—the FTC also makes “suggestions” of policies and procedures that would be necessary to comply with the rules.

1. Checking references or making background checks on employees.
2. Having each employee sign a confidentiality agreement and acknowledgement of security standards.
3. Limiting access of client information to those that have a need to know.
4. Controlling access to data requiring passwords on each computer, and using password-activated screen savers.
5. Requiring strong password that are changed on a regular basis.
6. Having policies to protect laptops, PDAs and other mobile devices.
7. Training employees to maintain security, confidentiality, and integrity of client information.
8. Establishing measures for telecommuters.
9. Preventing terminated employees from accessing client information by immediately changing passwords.
10. Store all client information securely.
11. Take steps to ensure that all client information transmitted electronically is secured.
12. Disposing of client information in accordance with the FTC’s Disposal Rule, which requires the burning, pulverizing, or shredding of client files.
13. Use anti-virus and anti-spyware that updates automatically.
14. Maintain up-to-date firewalls.
15. Use appropriate procedures to detect improper disclosure or theft of client information.
16. In the event of a security breach, if the breach poses a significant risk of identity theft or related harm:
  - Notify Clients (as may be required by State law).
  - Notify law enforcement

The consequences of failure to comply with federal and state law can be expensive and tarnish the image of your company. Fines can range from \$50,000 upwards. The FTC has an excellent video “Protecting

Personal Information: A Guide for Business,” that leads the viewer through the steps in establishing a compliant plan at [www.ftc/infosecurity/](http://www.ftc/infosecurity/).

## Backups



How to best backup your data has changed dramatically over the last few years as high-bandwidth Internet access and high capacity and low cost storage devices have become prevalent. The backup decision will consist of three primary factors: Media selection, nature of data recovery being planned for and the character of the application software being used. There are three basic reasons we keep backups: 1. Disk crashes, 2. Destruction by earthquake, fire, etc. and 3. Theft.

### What Should Be Backed up?

As important as “why we back up,” is the kind of backups we make. Traditional backup programs will back up data but you should also back up the following on each computer:

1. Operating System: So that you can restore the OS on your PC in case of a hard drive failure (Windows Recovery Disk).
2. Registry Files: So that you can get your computer and applications back to the same settings before the crash or loss.
3. Drivers: So you can easily have your computer function correctly after a recovery.
4. Applications: So you can reload the software in case of a system crash or failure.

### Media Selection

There is a wide verity of media that you can now back up to. Below is a listing of many of them and their pros and cons:

#### CDs/DVDs

Pros: Price and very compact

Cons: Limited amount of data will store on a single disc and can take a lot of time to burn to the disk

#### Online Storage Services

Pros: Easy to maintain and implement

Cons: Entrust your data to a stranger whom you have no control over

#### USB Flash Drives

Pros: Cost effective and portable

Cons: Limited storage and easy to lose

## External Hard Drives

Pros: Can hold huge amounts of data at very affordable prices. Portable

Cons: Durability issues and prone to theft

## Tape Drives

Pros: Large amount of storage and portable

Cons: Data reliability issues, slow processing, high costs

## Dedicated Backup Devices

Pro: Plug and play and come with software. Can be off site

Con: High cost (but coming down), high technical difficulty

## Backup Software

Each user's backup needs are different so no one backup solution will work for all users. However, there are certain requirements that most people agree upon when choosing backup software.

- Easy to use for backing up and restoring
- Can do incremental backups
- Can create an unlimited backup in file size (> 4GB)
- Can backup over different drives and over the network
- Can create and run automated backups
- Can compress the data
- Provides backup verification
- Can back-up to multiple time-stamped backup sets
- Backups can be encrypted
- Can back up the backup media you have selected to use
- Warns of backup failures
- Can restore an individual file from the backup
- Backs up quickly

Backup software applications can range from free to hundreds of dollars. Here is a list of some of the current software available:

- Acronis True Image: \$74 per workstation, Windows Server \$853 ([www.acronis.com/homecomputing/products](http://www.acronis.com/homecomputing/products))
- Norton Ghost: \$70 ([www.buy.norton.com](http://www.buy.norton.com))
- Genie Backup Manager: \$60 ([www.genie9.com/business/genie\\_soft\\_business\\_solutions.aspx](http://www.genie9.com/business/genie_soft_business_solutions.aspx))
- Synchromagic: \$40 ([www.gelosoftware.com](http://www.gelosoftware.com))
- Personal Backup: FREE (<http://personal-backup.rathlev-home.de/index-e.html>)

## What We Use

In our office we have nine workstations and one Server. Our backups are done automatically every night from the server to removable media so the data can be stored off site. Here is what hardware and software we use.

### Hardware



We backup to Western Digital Passport removable hard drives. They are fast, small and very reliable. We use four 250GB drives. The first three get rotated for service each day, that way we always have the last three days of data available in case we need to recover a file from more than the prior day. We use the fourth drive as a monthly backup so that we always have data from the prior month. All but the drive in use is taken off site each day and brought back each morning so that we always have the data available in case of fire or theft.

### Software

For our software we use the free Personal Backup (<http://personal-backup.rathlev-home.de/index-e.html>) software. It works really well for our needs. We back up a tremendous amount of data every day so we need something that can back up very quickly. We also wanted something that would back up our data in a non-proprietary format, meaning that we could access the data directly from the backup media without any additional software needed, and this program does all we needed. It knows what has been backed up on the backup media so it only backs up files that have been changed since the last backup. So instead of backing up all of the data every night, it only backs up data that has changed from the last backup on the backup media, thus it backs up very quickly.

Also, it allows automatic scheduling so all we need to do is put the new drive in place each morning and it takes care of the rest. If we need to restore a file we just plug in the drive we want to restore from, browse to the file we want and copy it back to the source—and we are done.

### Encryption

Since we are taking our clients sensitive data off site, it is imperative that this data be protected. Therefore all data written to these drives is encrypted so that the data cannot be recovered without the proper credentials. Once encrypted these drives cannot be read by any other computer other than the server that created the backup or a computer which has the encryption key imported into it. We have another designated computer in the office with the encryption key imported so that we can restore data from that PC, and we also have the encryption key backed up to a CD so that in case all PCs are lost we can still recover the data. For more information on data encryption visit:

<http://windows.microsoft.com/en-US/windows7/Encrypt-or-decrypt-a-folder-or-file> .

## Multiple Monitors

How many monitors do you have attached to your PC? Two is becoming the most popular answer and we are seeing even three, four and more. Why? One reason is that monitors are very inexpensive nowadays and in our business it can be really useful to have more room for on-screen client source data, tax or accounting programs, data entry screens, reference materials, etc., all within sight, opened, and ready to use.

In order to use multiple monitors you need a few things: One, you need the monitors, and two, you need the proper display adapter(s) and cables to drive them. You will also need some way to mount the monitors, so a stand may be necessary depending upon your configuration.

## Monitors

With the paperless office, it is now more important than ever to be able to display your source documents, work papers, and other information on your computer monitor. Using papers on your desk just won't cut it anymore—so you need more monitor space—so what monitors should you buy? There are thousands of monitors available in the marketplace with varying sizes, resolutions, response times, etc. One sure thing is to always buy wide screen monitors with a resolution of at least 1920 X 1080 (HD).

How many monitors do you want? Two, three, or more? Do you want one bigger monitor and one or more smaller ones? Do you want to mount any of your monitors vertically so they can better display a full page? How much desk space do you have available? These are all questions that you will need to answer before selecting the best solution for you. However, for a two or three monitor solution this is what I would recommend (make sure you have enough space on your desk for this configuration):



One larger central monitor (mine is 32 inches) and one or two smaller (mine are 21 inches) monitors mounted vertically so that you can view a full page at one time on the screen. With this configuration you have plenty of room to have all of the documents and programs you need to do your job efficiently open so that you can easily and quickly complete your tasks as well as stay in touch via your e-mail.

## Display Adapters

To drive these displays you will need the correct displays adapter. Many of the newer PCs now come with a display adapter that can drive two monitors, so if your PC is a newer model you may be all set for two monitors. If you want more than two, or if you have a PC that does not have an adapter that can drive more than one monitor you still have several options. Also, make sure that you have the correct cables to attach from your display adapter to your monitor (there are many connection types available with HDMI being the best) and that the adapter can drive your monitors at the resolution that you want, preferable no less than 1920x1080..

**Option 1.** Add another adapter: Many times you can purchase another display adapter and install it into your PC and you are ready to go. If you want to have three monitors then make sure you get an adapter that can drive at least two monitors. You can buy internal display adapters that can drive up to four monitors at a time.

**Option 2.** Replace your current adapter (Recommended): Sometimes it is simpler and makes more sense to just replace your current display adapter with a new one. That way all of your monitors are being driven by the same adapter and can all be configured the same. Also, in many cases the new adapter may provide more features and be more efficient than your current adapter. (Note: if your current display adapter is built into your motherboard make sure you disable it when you install the new adapter card.)



**Option 3.** Add an external display adapter: If you are not the type to open up your PC to add a new adapter card (they can be a little tricky to install) then this is the perfect solution. You can purchase an external adapter that you plug into any USB port of your PC and you can then attach another monitor to your computer. Basically it is plug and play. You can add as many of these external display adapters as you like. Just make sure they can drive your monitor to the resolution that you want.

## Monitor Stands



Depending upon the configuration you choose, you might need to have a stand to display your monitors. If you just have two monitors side-by-side you may be able to use the stands they come with. But if you have more than two, or if you

want one of your monitors to be mounted vertically, then you will need a stand that will meet your configuration needs.

There are many places you can purchase monitor stands and they come in many different variations, so look around and see what works best for you. One thing to look for in a stand is if it can free up some of your desk work space that would be typically used to place the monitor. With the right stand sometimes you can add more monitors and still end up with more desk space than you had before.

### How to buy?

There are two basic ways you can purchase your new monitor(s). You can add on to what you have if your monitor(s) is still suitable for your needs but you just want to add more, or you can scrap what you have and start with a whole new set-up. If you prefer the second option there are companies where you can purchase the whole system including monitors, stands, display adapters and cables. The nice part about this option is that you know that all of the components work together and you will have all of the parts (including cables) to make the system work. Here a couple of places that can provide complete systems for you:

- PC Illuminate ([www.pckillimate.com](http://www.pckillimate.com))
- Cinemassive ([www.cinemassivedisplays.com](http://www.cinemassivedisplays.com))
- Digital Tigers ([www.digitaltigers.com](http://www.digitaltigers.com))

### Client Portals

*By: John Higgins, Strategic Advisor of CPA Crossings LLC.*



Are you concerned about the amount of confidential information in your organization that is being delivered via e-mail attachments? Is it being delivered securely? Is it being delivered to the proper recipients?

If you're not comfortable with your answers to these questions, then it's time to give serious consideration to deploying a portal in your practice.

So what is a portal? Well, it is a term that is very broad in scope and meaning. Let's begin with a basic definition of a portal as it relates to accounting and tax professionals: It is a gateway to a collection of electronic information and files that is accessible over the Internet via web browser.

For accounting, tax and financial professionals, the most prevalent application is a portal that provides clients with secure, online, self-service access to their information. It's the information that you deliver

via your portal that ultimately determines its value. The information that can be provided on a client portal can range from simply posting static (PDF) copies of tax returns and financial statements at one end of the spectrum to robust ways of receiving and deploying information in real time on the other end. The quality of the information you publish on the portal and the ease of access are the two key value drivers for your clients.

### **One Way or Publishing Portal**

This is the most common form of portal being deployed by accounting and tax firms today. The nature of this portal type is to post electronic documents and files such as tax returns and financial statements that can be accessed securely and confidentially by clients.

The driving force behind the increased deployment of this portal type is the corresponding increase in the deployment of document management systems (DMS) in accounting and tax practices as they work through the transformation to a digital (paperless) practice model. The publishing portal is a natural extension of the DMS, and the value becomes more apparent as the volume of electronic documents and files continues to expand exponentially.

### **Two Way or File Transfer Portal**

This is a portal that allows your clients the ability to securely and confidentially upload electronic documents and files for your retrieval. The classic example is to upload a QuickBooks data file instead of sending it via e-mail attachment, CD or flash drive.

Actually, this type of portal has been deployed for many years in the form of an FTP (file transfer protocol) site that allows files to be uploaded and transferred back and forth between the accountant and the client. The primary difference with this model today is the design of more user-friendly html (hypertext markup language) web pages to navigate the file transfer process.

### **Picking your Portal Technology**

Once you have established the form and content of your portal model, selecting the appropriate technology solution will be a more strategic process. You will know what you want and be better prepared to participate in vendor presentations of their solutions. Many different options are available for your portal technology.

You can deploy a “home grown” solution based on a portal development platform such as Microsoft SharePoint. Alternatively, you can utilize an accountant-centric portal designed specifically for tax and accounting professionals. Most of the accountant-centric portal solutions are delivered in an ASP (application server provider) model, which means that the vendor provides both the portal software and the hardware/infrastructure platform via remote access to a secure data center. For most small firms, this is my recommended strategy since you are unlikely to have the depth of IT infrastructure and personnel to develop, deploy and administer the portal in-house.

A vendor-managed portal provides for a much simpler deployment and will generally provide a more secure platform via the data center model, as well as a more cost-effective solution through a “shared services” model. On the other hand, if you are a larger organization with state-of-the-art infrastructure and a qualified IT services team, then developing your own in-house portal solution may be a viable alternative. The primary benefit of the “in-house” approach is that you can design the portal to your individual specifications.

The supply of vendor portal solutions is expanding with the market demand. I am a proponent of the accountant-centric portal solutions that are offered by vendors who provide accounting, tax, practice management and document management solutions designed for the unique needs of accounting and tax professionals. You should take a thorough look at three to five solutions to gain a better perspective on the range of functionality available. If you have deployed a DMS, your provider should be at the top of your list of potential portal solutions.

The integration between the DMS and the portal is key to controlling the efficiency of managing your published portal content. Also, integration with your tax and accounting software will allow you publish tax returns and financial statements directly to the portal. Regardless, you have to establish a structured process for posting information to your portal, along with the appropriate policies to control the quality and security of the information.

It’s important to remember that the portal is most likely the first time in which you are providing clients with direct, self-service access to your electronic information, so you should proceed with caution.

## **Benefits of Portals**

I’ve discussed how a portal can be used to exchange information with your clients. This is a good point in the article to articulate the benefits to help you appreciate the value of a portal for your organization.

### **Security**

In my opinion, this is the number one benefit of deploying a portal. Since most electronic information is exchanged via email attachments, you are subject to two key vulnerabilities — sending confidential information to the wrong person and having the message intercepted by an unauthorized third party during transmission. The latter is why we have seen increased regulations prohibiting the transmission of personal data via e-mail., i.e. social security number.

From a practical perspective, sending the email to the wrong person is the much more probable breach of the privacy of the email communication. With a portal, you can significantly reduce the amount of email attachments you send.

### **Client Self-Service**

We are knee deep into the area of self-service access to electronic information. Since accountants are responsible for some of the most critical and confidential information that businesses and individuals rely

on, they cannot afford to ignore the growing trend towards using portals to give clients control and options to access information on their own initiative at anytime, from anywhere.

### **Firm Value**

I firmly believe that deploying an effective portal solution for your clients can have a direct and positive impact on the value of your firm. The reason is that as you establish an “electronic link” to your clients via the portal, it becomes an important supplement to the personal relationships you have with your clients. Your firm’s identity with your client will be strengthened by the fact that whenever they interface with the portal, your firm’s brand and the value of the services you provide them will be continually reinforced. The more you can enhance your client relationships via automation, the more you increase the value of your firm to a potential suitor.

### **Efficiency**

Many firms are beginning to realize that using email as the primary method of exchanging electronic documents and files can be very inefficient. Generating an e-mail to transmit a file requires composing a message and navigating through your network storage to find and attach the file. And you have limited ability to track the access.

Deploying a portal that is directly integrated with your tax, accounting and DMS software can eliminate many of the labor-intensive steps required to exchange information with your clients, particularly if you consider sending printed documents through the postal system. Just stop to think about what’s involved in sending a client a paper copy of their tax return in comparison to posting it to your portal.

### **Firm Brand**

A more indirect benefit of deploying a client portal is the impact it has on enhancing your firm’s image in the marketplace. Make no mistake about it; the evolution to a more virtual marketplace for the exchange of business information is going to expand rapidly in the near term. A portal demonstrates that your firm understands the importance of this characteristic of the 21st century business model. That will help you attract young entrepreneurs as clients as well as young staffers entering the profession.

## **A Roadmap for Developing Your Portal Strategy**

Hopefully, I’ve provided you with a meaningful perspective on the value and role of a client portal for your practice. If you think this is an initiative you want to pursue, the following guidelines will help you develop your portal deployment strategy.

### **Determine Your Portal Content Requirements**

Analyze the nature of information you exchange with your clients to determine where the greatest opportunities exist to share that information via portal technology. Also consider the opportunity that a portal provides to share information with clients that may not be practical under traditional methods.

One example is to post a copy of an organized file of supporting tax return documents in PDF format so that the client has access to copies of their K-1s W-2s, 1099s, etc. Give some thought to expanding the scope of your portal information a few years out, after you have developed a track record.

### **Evaluate Portal Solutions**

Develop a short list of potential portal vendors. I recommend that you focus on accountant-centric solutions that are developed by vendors who target the accounting profession such as many of the other vendors listed here. Schedule a demonstration with each vendor of their portal solution to learn about their unique features and functions and to provide you with a base of comparative information.

### **Develop a Portal Deployment Plan**

Once you have procured your portal solution, it is imperative that you spend the time to establish the processes that you will use to publish information to the portal. I recommend that you conduct a CRP (conference room pilot) whereby you gather a sample set of client files and documents and walk through all of the procedures necessary to get the information on the portal.

An integral part of the process is establishing each client's secure portal access account. Throughout the CRP process, you should focus on identifying all of the issues that need to be addressed and deal with them. An extension of the CRP is to select a representative sample of clients and do a pilot deployment of the portal for them. This will allow you to walk through the entire process and get a good sense of the types of issues clients will have when accessing the portal.

The more you can refine this process before you roll out the system to all of your clients, the better prepared you will be to avoid costly and potentially embarrassing false starts with the deployment.

### **Training**

Once you have established your portal policies and procedures, train your staff on the proper usage of the portal and address any questions or issues that they identify. Inevitably, your staff will identify issues that you missed in the planning process.

### **Marketing**

Use the deployment of the client portal as an excellent opportunity to reach out to your clients and let them know you're enhancing the services your firm offers them. Consider scheduling a client briefing in your office to demonstrate how the new portal can benefit them. This will give you the chance to expand your client's awareness of the entire array of services your firm offers and to meet the staff that they may communicate with on a regular basis but rarely have a chance to meet in person. One firm I am aware of promoted their portal as an integral part of their "green" initiative, which is at the top of mind for many people these days.

## Portal Administration

Be sure you assign responsibility for administering the portal to the appropriate person(s) in your office. Someone needs to have responsibility for managing the information being posted, administering client accounts and login info, and troubleshooting client problems. Don't underestimate the importance of this role. The last thing you want is to post a file to the wrong client portal account.

## Remote Computing



Accessing a computer from a remote location has been an available technology for some time now but with the advent of the Internet and browser technology it has become much simpler to implement.

There are many different methodologies for remote computing and some of them are free and some have fees associated with them. The key here is to deploy an easy to use and secure method. Note that these solutions can also

be implemented to allow access to your client's computers, but beware of security issues.

One of the free ways to accomplish remote computing is by using Microsoft's Remote Desktop that comes built in to Windows XP Pro, Vista, and Windows 7. However, be aware that the setup and configuration, while simple, can have its roadblocks and at times can be difficult to implement. Also note that to truly make this implementation secure you should set up a Virtual Private Network (VPN) between the remote computer and the host computer which can also be a bit complex, but does simplify the Remote Desktop implementation. For more information about VPNs see <http://www.intranetjournal.com/foundation/vpn-1.shtml> and for information on Window's Remote Desktop see . <http://windows.microsoft.com/en-US/windows-vista/Connect-to-another-computer-using-Remote-Desktop-Connection> .

Other non-free options include web based solutions such as LogMe In ([secure.logmein.com/products/hamachi2](http://secure.logmein.com/products/hamachi2)) at \$199 per year (they also have a free version), and GoToMyPC ([www.gotomypc.com/remote\\_access/gotomypc\\_pricing](http://www.gotomypc.com/remote_access/gotomypc_pricing)) at \$99 /year.

## Smart Phones



Now that smart phones are so prevalent it may make sense for certain people to have access from their mobile phone to their office computer. While it can be a bit difficult to

do any “real” work on such a small screen, it is possible to gain access to files and reports and have them e-mailed to yourself or to a client or maybe you need to take a look at your work calendar, check on a the status of a server backup, restart a computer on the network, or many other possible functions.

One of the most popular programs for this is by Wyse called Pocket Cloud. It runs on most Android and iPhone devices. It allows complete access to your PC and has special tools for navigating your desktop. The cost is less than \$10 per phone for the application and you can find out more about it at [www.wyse.com/products/software/pocketcloud/index.asp](http://www.wyse.com/products/software/pocketcloud/index.asp) .

Anyway you accomplish it, having the ability to work from home, another location, or on the road from your phone can gain a big boon to productivity and make your business run smoother and more efficiently.

## Cloud Computing



Cloud Computing is just a word for using the Internet as part of your computing experience. Within it there are a wide range of possibilities which can allow you to work anywhere and anytime as long as you have some form of computing device and Internet access. Some of the services we have already discussed are considered cloud computing such as the use of client portals and on-line backups.

Here are a few other things that can be done with Cloud Computing:

1. Keeping your e-mail and calendar in the cloud so you can access it from anywhere.
2. Using Internet based applications so that you don't have to load and maintain software on your computers and you have access to the applications anywhere and anytime.
3. Load applications on the cloud so that you and your clients can share the application.

## Internet Based Applications

There are many sites now that offer free or near free tools and applications that can be used via the Cloud. These applications and tools can improve workplace productivity as well as reduce overhead costs.

### Google Docs

Google Docs is a workspace on the Internet which is accessible by you through your Google account when you sign in. You can share folders with others (thus collaboration) as well as create documents on the web. These documents can be Word, PowerPoint and Excel compatible documents. Google also offers a huge number of other Cloud based applications and tools including Calendars, Translators, Business Solutions, Alerts, Search products, and on and on. All of these options can be seen at [www.google.com/options/](http://www.google.com/options/).

### Microsoft Office 365

Office 365 is a service comprised of cloud-based versions of Office 2010. It includes Word, Excel, PowerPoint, Outlook, and OneNote. The costs run from \$6 to \$24 per month. You can find additional information at <http://www.microsoft.com/en-us/office365> .

### Online Accounting

Many accountants have persuaded their clients to use an online accounting solution so that information can easily be shared between the accountant and the client. Some of the more popular accounting solutions are: QuickBooks Online, Zoho, Netsuite, Brightpearl, Xero.com, Freshbooks, Nolapro, and Waveaccounting (free/ad based) and AccountantsWorld Power Practice ([www.accountantsworld.com](http://www.accountantsworld.com)).

### Online Tax Preparation

Many of the larger tax preparation software providers have Cloud based solutions, however, depending upon the number of preparers you have the solution can be expensive. Another option is to have a hosting service such as Cpasitesolutions ([www.cpasitiessolutions.com](http://www.cpasitiessolutions.com)) host your application on their server. Another hosting option is Cloud9 Real Time which offers the same types of services ([www.cloud9realtime.com](http://www.cloud9realtime.com)) including hosting any version of QuickBooks.

### Payroll Online

Again, there are many Cloud based payroll service products available, a few are listed below:

- Intuit: [www.intuitfullservicepayroll.com](http://www.intuitfullservicepayroll.com)
- Paycycle: [www.paycycle.com](http://www.paycycle.com)
- Paychex: [www.paychex.com](http://www.paychex.com)
- ADP: [www.adp.com](http://www.adp.com)
- AccountantsWorld: [www.accountantsworld.com](http://www.accountantsworld.com)

There are dozens of these services and the IRS has a list of payroll service providers that have passed the IRS assurance testing service. The list can be found at [www.irs.gov/lists/0,,id=101120,00.html](http://www.irs.gov/lists/0,,id=101120,00.html) . For a basic review of the top 10 payroll providers you can visit [www.toptenreviews.com](http://www.toptenreviews.com) .

### Online Fax

The objective of the online fax providers is to eliminate the physical fax machine and the paper it produces. Faxes received are converted to pdf files and sent to the user via email. On the send side some of the services allow users to upload documents which are then sent as a traditional fax. The cost for this service is from \$4 to \$10 a month. You can get a review of some of these services at [www.toptenreviews.com](http://www.toptenreviews.com).

There are many other services which can be accessed on the cloud which can be useful for your practice, and many of them are free. Online Research ([www.irs.gov](http://www.irs.gov), [www.legaslbitstream.com](http://www.legaslbitstream.com)), Historical stock prices ([www.bigcharts.com](http://www.bigcharts.com)), Home values ([www.zillow.com](http://www.zillow.com)), Calculators ([www.tcalc.timevalue.com](http://www.tcalc.timevalue.com)), and

Document storage ([www.box.net](http://www.box.net)) just to name a few. Check it out, you may find a whole lot of new services that you can use in your practice to make your business more efficient.

## Networking



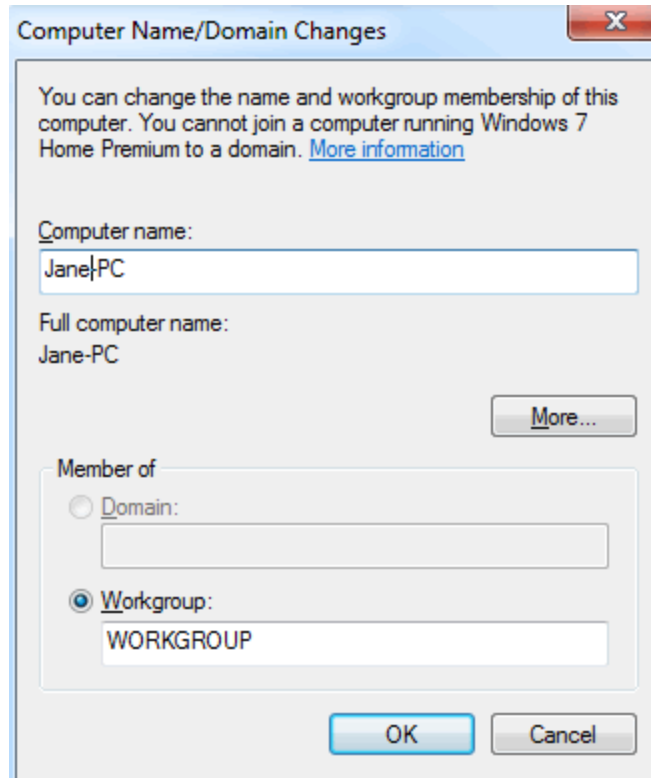
Networking allows computers in your office to communicate together by sharing files and printers and also allowing applications that can run over the network to be installed on a “server” and then accessed from any of the “workstations” in the office. This “server-workstation” relationship allows programs to be installed on only one PC (the server) which makes installation, updates, and maintenance much easier. It also allows all of the data across all of the users to be stored in one location, which makes sharing the data much more efficient as well as data backups much easier.

There are different types of network installations, but for most practitioners a peer-to-peer network is the best choice—it is simpler to install and maintain and less expensive and should provide all of the networking capabilities needed in a small office environment. Networks can be tied together using cables or can be wireless or a combination of both. Just make sure you have the proper equipment in place depending upon which type (hardwired, wireless, hybrid) you wish to have.

## Windows 7

Windows 7 has made hooking up a new computer to your peer-to-peer network very simple, just make sure that each computer has a unique name and that each computer on your network has the same workgroup name. If you need to change the name or workgroup in Windows 7 here are the steps:

1. Click Start / Control Panel
2. Select System and click on the “Change Settings” button. The System Properties dialog box appears with the Computer Name tab displayed.
3. Click Change. The Computer Name/Domain Changes dialog box appears, as shown in Figure below.
4. Type the computer name.
5. Select the Workgroup option and type the common workgroup name.
6. Click OK. Windows 7 tells you that you must restart the computer to put the changes into effect.
7. Click OK to return to the System Properties dialog box.
8. Click Close. Windows 7 prompts you to restart your computer.
9. Click Restart Now.




### Mixed Networks (XP and 7)

If you have a mixed network of Windows XP and Windows 7 PCs they can still communicate together on the same network but you may need to change the settings on the Windows 7 PC so that the two different operating systems can communicate over the network. Here is a typical configuration in Windows 7 so that it can communication on the network with Windows XP PCs (Control Panel/Network and Internet/Network Sharing Center/Change advanced sharing settings –Home or Work Profile):

## Change sharing options for different network profiles

Windows creates a separate network profile for each network you use. You can choose specific options for each profile.

Home or Work (current profile) 

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Network discovery

When network discovery is on, this computer can see other network computers and devices and is visible to other network computers. [What is network discovery?](#)

Turn on network discovery  
 Turn off network discovery

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File and printer sharing

When file and printer sharing is on, files and printers that you have shared from this computer can be accessed by people on the network.

Turn on file and printer sharing  
 Turn off file and printer sharing

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Public folder sharing

When Public folder sharing is on, people on the network, including homegroup members, can access files in the Public folders. [What are the Public folders?](#)

Turn on sharing so anyone with network access can read and write files in the Public folders  
 Turn off Public folder sharing (people logged on to this computer can still access these folders)

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Media streaming

When media streaming is on, people and devices on the network can access pictures, music, and videos on this computer. This computer can also find media on the network.

Media streaming is off.  
[Choose media streaming options...](#)

---

File sharing connections

Windows 7 uses 128-bit encryption to help protect file sharing connections. Some devices don't support 128-bit encryption and must use 40- or 56-bit encryption.

Use 128-bit encryption to help protect file sharing connections (recommended)  
 Enable file sharing for devices that use 40- or 56-bit encryption

---

Password protected sharing

When password protected sharing is on, only people who have a user account and password on this computer can access shared files, printers attached to this computer, and the Public folders. To give other people access, you must turn off password protected sharing.

Turn on password protected sharing  
 Turn off password protected sharing

---

HomeGroup connections

Typically, Windows manages the connections to other homegroup computers. But if you have the same user accounts and passwords on all of your computers, you can have HomeGroup use your account instead. [Help me decide](#)

Allow Windows to manage homegroup connections (recommended)  
 Use user accounts and passwords to connect to other computers

## Using Windows 7 as a Server

If you want to use a Windows 7 PC as an application or data server it is important to note that the operating system does not come tuned for server use when you install it. In fact, there is no simple way to change it from the workstation tuning it comes with out of the box to a server tuned PC (Microsoft wants you to buy their more expensive and complicated Server operating system). However, once “tuned” for server operation, Windows 7 works fine as a server for most small office use (we have a 10 PCs network in place with a Windows 7 server, but make sure your hardware is up to the task).

Here are the changes to make to turn your Windows 7 workstation PC into a server:

**WARNING:** If you use the Registry Editor incorrectly, you may cause serious problems that may require you to reinstall your operating system. Use Registry Editor at your own risk.

1. From Windows Start, type “regedit” to open the Registry Editor
2. Navigate to the:  
HKEY\_LOCAL\_MACHINE\SYSTEM\CurrentControlSet\Services\lanmanserver\parameters\size
3. Change the Value of the size parameter to “3” which is Maximize Throughput for File Sharing and Maximize Throughput for Network Applications
4. Navigate to the: HKEY\_LOCAL\_MACHINE\SYSTEM\CurrentControlSet\Control\Session Manager\Memory Management\LargeSystemCache
5. Change the Value of the LargeSystemCache to “1” which is Maximize Throughput for File Sharing
6. Reboot the PC

Your Windows 7 Workstation will now perform like a server.

### **Access for your Clients?**

Do you ever have a client bring his laptop in and want to connect to the Internet to look up some information? If you have a wired or wireless network in place, do you let them connect to your office network? If you do you might want to reconsider as this is most likely a violation of the Federal Trade Commission’s Safeguard Rules. So what to do?

The best solution to this problem is to put in place a Demilitarized Zone (DMZ) in your network. A DMZ is separate router (or can be part of your current router if it has DMZ capabilities although not as secure) that exists between your Internet provider and you office network router. It allows access to the Internet but not your business network.

For ease of use I would recommend a wireless implementation where the client sees the available network on their laptop or tablet and connects with a password you provide to them. Don’t forget to implement the DMZ with security unless you want everyone around you to be using your Internet bandwidth for free.

This relatively inexpensive (typically under \$100) solution can make you and your clients life a lot easier by allowing them access to their data in your offices without compromising your network security.

## Utility Software



Most of the time when we think about our computers and what they do for us we focus on the major applications we use every day—our tax preparation software, our accounting software, office suites, etc., but it is important not to overlook the small utility programs which can make your life so much easier.

### Clean-up Utilities

Windows operating systems tends to get “cluttered up” over time which degrades the computers efficiency, so it is a good idea to clean it up periodically. There are some tools available with the operating system such as File scan and Disk de-fragmenter but these don’t do a complete job. Here are a few programs that can help you clean up your PC and maybe gain back some of the performance you have lost over the years:

**CCleaner** ([www.filehippo.com](http://www.filehippo.com)) [FREE] is a very good, free and small program that runs on a weekly basis and will help keep your computer free from junk. There are other more comprehensive cleaners on the market but for most users this program works great.

**Registry Mechanic** ([www.pctools.com](http://www.pctools.com)) [\$30 for three PCs] is an outstanding product to clean, tune, and back up your registry. The registry is an internal Windows file that keeps all of the internal settings for the system as well as installed programs and as it gets bigger and full of unused settings your system slows down and can behave erratically.

### Performance Boosters

These programs can help make your computer run faster and more stable by fixing the registry, cleaning up junk in the file system, defragging the hard drive, and checking for spyware or malware. Here are a couple of good ones:

**Glary Utilities** ([www.glarysoft.com](http://www.glarysoft.com)) [FREE] A one-step optimizer that has a lot of performance enhancers.

**IOBit Advance System** ([www.iobit.com](http://www.iobit.com)) [FREE or \$20] This program is also very good at cleaning and optimizing your PC to make it run faster.

### File Recovery

It happens all the time. You delete a file, empty the recycle bin and then realized that wasn’t the file you wanted to delete. What do you do? Not much you can do unless you have this utility that can restore the file for you.

**Recover My files** ([www.recovermyfiles.com](http://www.recovermyfiles.com)) [FREE] This utility program will allow you to recover your files even if you have deleted them from the recycle bin.

## PDF Encrypter

**PDF Tools** ([www.sheelapps.com](http://www.sheelapps.com)) [FREE] This easy to use program makes it super simple to encrypt and decrypt pdf files.

## Large File Transfers

If you need to get or receive a large file (like a QuickBooks backup file) to or from a client there are now several free services which can be used to transfer large files (make sure the files are password protected or encrypted).

**YouSendit** ([www.yousendit.com](http://www.yousendit.com)) offers a portal like service with various account types ranging from free to full corporate accounts but for most the free version should work fine. The way it works is that you download and install a small application that runs on your PC which allows you to send a file to the YouSendit servers. The recipient then receives an e-mail announcing that they have received a file. They then log on to the service and download the file.

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## Acknowledgements

Much of the information from the Windows 7, Office Security, Backups, Remote Computing, Cloud Computing and Utility Software sections is from the *Gear Up 2011 Technology 2.0 Seminar Practice Guide* by Carl Heintz, CPA and Rick Oelerich, EA, LPA.

The Client Portal section is a reproduction of an article published by John Higgins, Strategic Advisor of CPA Crossings LLC.

# About the Speaker

## Richard Rogers, EA



Richard Rogers was born and raised in California; he has lived in the San Diego area for over 40 years. He attended the University of California at San Diego and continued on to San Diego State University where he graduated with top honors and earned his business degree in Information Technology.

Rich's professional career started by working at his mom's tax and accounting practice while attending college. He was licensed by the state of California to prepare tax returns and did client write-up work specializing in not-for-profit fund accounting. He also started a computer consulting business which worked with small businesses to help them use technology to become more efficient and profitable.

After six years working as a tax practitioner and consultant Rich took the job as the Chief Information Officer of a San Diego based software development company, and also taught Information System courses at San Diego State University. After 12 years as the CIO the company was purchased by 3M and Rich went back to work in the tax and accounting field.

Rich became an Enrolled Agent in early 2008 and started employment at Mother Lode Bookkeeping, Inc. which is located in downtown Encinitas. Mother Lode Bookkeeping, Inc. is a full service company specializing in tax, bookkeeping, and payroll services. Rich's main duties were income tax preparation where he specializes in business returns and finding ways to use technology for the benefit of the company and its employees.

In January of 2011 Rich purchased Mother Lode Bookkeeping and now runs the business with eight other employees.

Professionally Rich has served as the President of the San Diego chapter of the California Association of Independent Accountants (now CSATP) as well as the Treasurer for the state.

Rich has been married to his wife Deanne since 2001. They currently live in Blossom Valley with their two sons Reese (age 6) and Riley (age 2).

