

Building a Better Mousetrap



What is an Accountant?

Definition: *noun* – Someone who solves a problem you didn't know you had in a way you don't understand.

See Also wizard, magician

Value of an Accountant



I have no use for bodyguards, but I have very specific use for two highly trained certified public accountants.

— *Elvis Presley* —

AZ QUOTES

What we will discuss today:

- Technology Trends
- Keeping our clients data safe in this world of on demand information
- Microsoft's ongoing plan
 - Windows
 - Office 365
- Excel Pivot Tables

How can technology improve the life of an accountant?

- Find solutions quicker
- Keep you up on the latest changes
- Error checking
- Secure sharing of confidential data
- Save Time & Money



Best Technology for the job

- Software Specific
- Processor and Memory make all the difference
- To Cloud or Not To Cloud, that is the question
 - More and more programs are going to the cloud
 - Hosted Data / Hosted Exchange
 - Office 365



Multi Displays

Time Saver or Time Waster?

- More work across the computer desktop compared to more work across your physical desktop
- Less need to print or have a hard copy
- Utilize digital versions of work and have research at your fingertips
- Comparisons are made easier

Multi Displays

Time Saver or Time Waster?

- 10 years ago studies by NEC and other technology companies showed a 15% increase in productivity
- Current debate shows a 20% decrease in productivity
- Use it as a means of work not as a means of staying connected (Email, Facebook, Twitter, etc.)

To Cloud, or not to Cloud

Pros

- Collaboration made easier, more live data between you and your clients
- Nothing to install and everything is backed up automatically
- Software updates are automatic
- System administration costs are reduced

To Cloud, or not to Cloud

Cons

- No Internet access no data
- Need to research vendors heavily to ensure security is key
- Limitations to data access is based on vendor
- Customer Support can be hit or miss depending on the vendor
(loss of time waiting on a problem to be fixed)

Cloud based accounting

- QuickBooks online
- Xero
- Kashoo
- Sage One
- One Up
- Zoho Books
- AccountEdge Pro
- Fresh Books
- GoDaddy Bookkeeping
- FreeAgent
- Wave



Having the right answer just got easier

- Research sites provide articles and answers when you find those difficult challenges come up
- Many software vendors provide a Knowledge Base as well as skilled and knowledgeable staff that can help with questions
- Online access (Newsletters, Forums, Social Networks, CPA written articles)

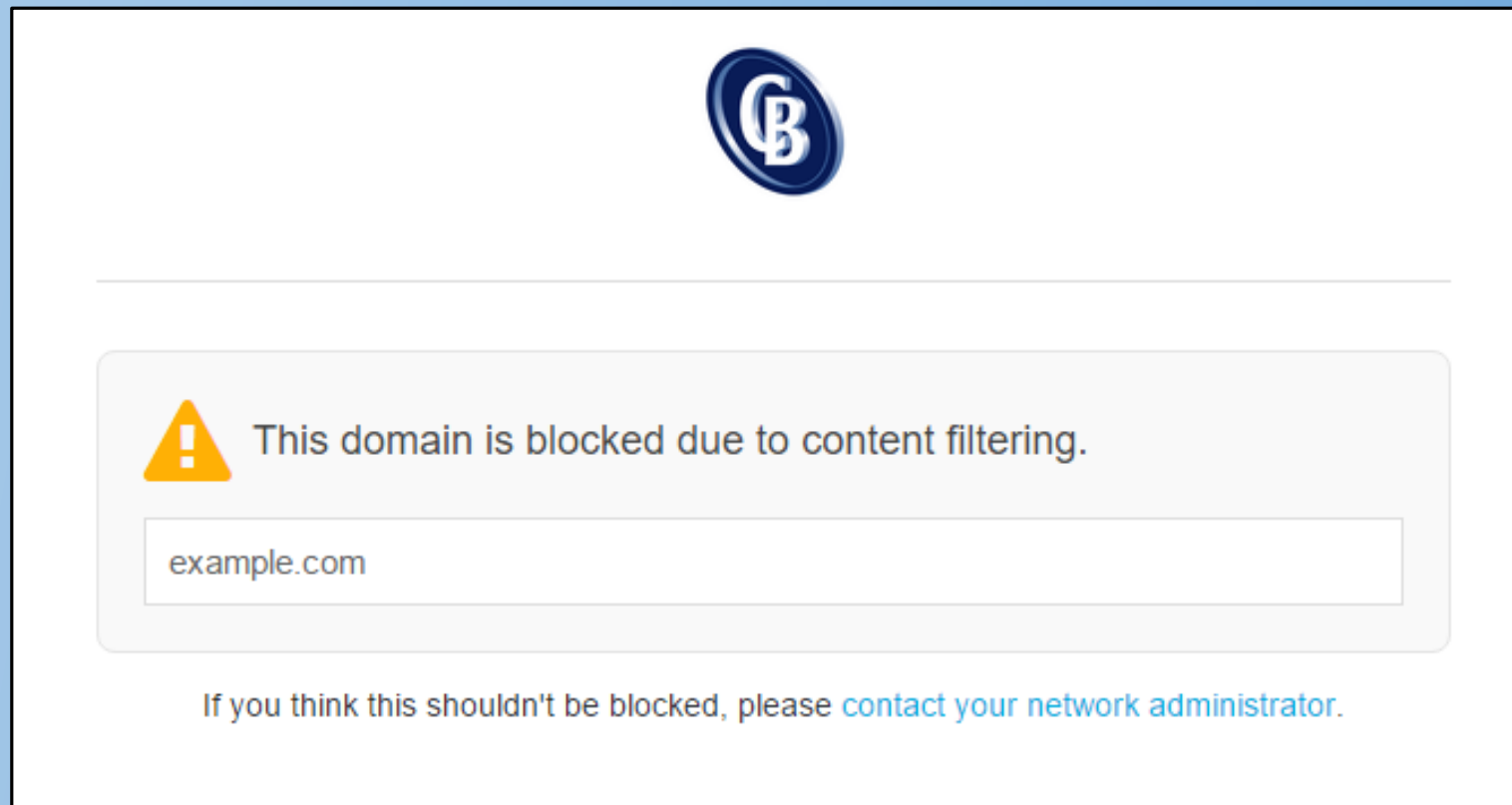


Protect yourself and your clients

- **Firewall** – Protect access from unwanted sources; enforce policies
- **Anti-Virus** – Protect from viruses, malware and other software attacks
- **Passwords** – use complexity and do not use the same password for all
- **Email Scans** – Keep private info private, use encryption or a form of secure communication when dealing with client information



OpenDNS helps to minimize hitting an infected site



Be-ware

Every week we seen new versions of *Spyware*, *Malware*, and *Ransomware*

- Check email sender
- Double-Check Content of the message
- Refrain from clicking links in emails (visit the site directly)
- Keep Software up to date
- Make sure you have good backups of important data
- Implement an email policy
- Add Blacklist/Whitelist utilities
- Have good firewall and antivirus solutions in place
- Block certain email attachments (.exe, .bat, .jar, .jrs, .zip, etc.) that could be run as an executable

Hovering Cursor over hyperlink will display path

Use in the Firefox 1.5 alpha, responses should still display correctly on modern browsers that support HTML5 and CSS3.



<http://www.newsmail.com/tracks/url/5705b356-5124-4584-8835-0864d8e6f13b/96fe7053-f286-412d-823e-b67b332ccea4/624dcb42-d39f-4d87-894e-dd9433d085f5>

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This Week in History: Windows 3.1 Released



On April 6, 1992, Microsoft released Windows 3.1, priced at \$149. Microsoft sold three million copies over the following two months.

Windows 3.1 added multimedia extensions that introduced support for sound cards, MIDI, and CD Audio, Super VGA (800 x 600) monitors, and increased the speed of modem it would support to 9600 bps. For many it was the first version of Windows that they actually used, as previous versions

See more about PSPINC Newsletter.



Practice Task Timer



Office 2013



Work Files



Building a Better M...



PSPinc Newsletter ...

Blacklist/Whitelist

Blacklisting and Whitelisting can be done either by Software, Hardware or through a 3rd Party Provider. At our firm we utilize Sendio for our email filtering.

- ORF Fusion – Vamsoft
- Barracuda SPAM Filter
- TitanHQ
- Sendio



Secure Email

Keeping client data secure should be your top priority, so when sending private information via email utilize tools that help to keep it secure.

- **Secure File transfers** – Encryption, 3rd party sites
- **Secure the text in your emails** – Never send SSN or EIN Numbers in an email
- **Verify email addresses before sending**



ShareFile

Our firm uses Citrix ShareFile as a secure way to send and receive attachments from clients. This ensures that if an email were to be intercepted the attachment is not actually part of the message and is instead uploaded to the ShareFile where it sits securely awaiting the recipient to log in and download it.



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ShareFile Security Features:

- SSL/TLS protocols to protect client authentication, authorization and file transfers
- Files in transit are secure with no less than 128-bit encryption
- HMAC authentication code to ensure the integrity of intra-system communications. ShareFile verifies file size and file hash to ensure integrity.
- Links are uniquely and randomly generated using strong hash-based authentication to protect from guessing attacks.
- SSAE 16 Type II accredited or ISO 27001 certified datacenters store the data.
- Files are stored at rest using AES 256-bit encryption, a FIPS encryption algorithm



Future of Windows

Windows 10 is officially the last version number of Windows, according to Microsoft. What they are focusing on now is Windows as a Service.

What does that mean?

Instead of big releases there will be regular improvements and updates.



Microsoft Office 365

Subscription based Office that provides a local and online version of the Office suite for PC/Macs along with online storage for use with online collaboration as well as access to files when on the go.

Packages vary from \$12.00 per month per user to \$35.00 per month per user depending on the features you need.

When a new version of Office comes out you get it instantly.

Office 2016 vs Office 2013

Top Comparison Items

- Real time typing allows you to see others edits as they make them
- Improved Version History
- Share button added to the Ribbon
- You can use Skype functions from within you document (IM, Screen Share, talk or video chat)
- Take office anywhere with Office Mobile Apps
- Outlook Clutter – creates a low priority folder you can train messages to go to
- See most recently used documents in Outlook for faster access to files for attachments
- One-Click forecasting
- New Chart Types
- One Drive & Windows 10 create a more secure way to share and access files
- More Outlook Security features for IT Admin
- Outlook is more responsive on unreliable networks
- Reduced download time for messages and display list after hibernation

Excel Pivot Tables

Benefits of Utilizing Pivot Tables

- Easy to use
- Easy Data Analysis
- Easy Summary of Data
- Find Data Patterns
- Quick Report Creation
- Don't affect the original data



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Thank You!!!

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