Roman Kepczyk • Nov. 01, 2007

By now, most firms are aware that one of the primary benefits of joining the Microsoft Professional Accountant's Network (MPAN), which is free, is access to the Microsoft Action Pack subscription. For an annual $299 fee, this subscription provides a slew of mission-critical Microsoft software for in-firm use, which is miniscule compared to the benefits received, particularly for firms with 10 or fewer members looking to upgrade their infrastructure. Firms should take the time to review the entire Action Pack offerings and incorporate these into their future IT plans and budgets, particularly with the upcoming transition to Office 2007 and Vista. The following is a summary of some of the more important applications that I feel will have an IN-FIRM benefit:

1. **Office 2007**
   The current Action Pack comes with 10 licenses of Microsoft's Office Enterprise 2007 version, which includes Word, Excel, Outlook, PowerPoint, Access, Publisher, Groove, OneNote and InfoPath.
   I predict that firms will transition to this version by the end of 2008 once the accounting vendors such as CCH and Thomson Tax & Accounting have completed
   their testing and remediation, particularly for transition issues with their audit engagement applications. The cost of these 10 licenses more than pays for the subscription when firms transition in the next year.
2. **Windows Vista**
   I feel that the security and usability capabilities of Vista will eventually drive firms to replace Windows XP, but tax and accounting firms will transition with extreme caution. I believe firms will complete testing and remediation of workstations by next summer and begin purchasing computers with this

operating

competitive accounting products, the firm must buy individual licenses for each person who will be concurrently using the accounting product, so there could be a huge potential savings in the cost of small business accounting applications in the future. MPAN provides one year of free support, but the Action Pack subscription puts any support calls into their priority queue for quicker resolution. For firms using the more robust Dynamics application for internal accounting, this software and 10 Client Access Licenses (CALs) are included.

4. **Small Business Server 2003/Server 2003**
   For firms running on the older version of the small business server, the new product has increased the overall capacity of Outlook accounts and improved overall manageability, so it is well worth the effort of transitioning from the old Small Business Server. Other firms that are looking to break off a trouble-causing application to its own server will find that the included Server 2003 license makes this transition more cost effective.

5. **Windows Terminal Server (WTS)**
   While many firms have utilized the integrated XP Remote capability of Windows XP to allow a handful of firm personnel to access their workstations from outside the firm, a more robust solution that also allows many more users to work remotely is WTS. This server license and 10 CALs are included, which will run all true Windows applications remotely for satellite offices, home users and personnel working away from the office via an Internet connection.

6. **Exchange 2007**
   In the next two years, I expect firms to transition to the latest version of Exchange as it will allow those personnel with administrative rights to look through ALL your personnel's Outlook accounts to search for e-mails and to centralize contacts much better. Top accounting vendors are already working to integrate the contact information from their Practice Management

of the existing intranet, but it also includes SharePoint Enterprise Server and 10 Designer CALs. I believe that SharePoint will be the future of knowledge management and business intelligence within tax and accounting firms as this tool is rapidly evolving to manage firm workflow processes, and the Action Pack subscription provides the tools for creating and maintaining your firm's intranet.

8. **SQL 2005**

   With more and more databases moving up to SQL, operating requirements will increase, and I anticipate that firms will split off applications such as practice management or document management to their own server to improve stability. Action Pack includes a SQL license to make the transition to such a server more cost effective.

9. **Virtual Server 2005**

   Virtual servers allow a firm to run multiple server instances within a single server so firms can leverage server hardware. For example, firms could set up four virtual servers on one box and run Print/File, Exchange, WTS and a SQL application without any of the four processes being impacted by the others. While this is an evolving technology, I feel that firms will pilot its use for testing software updates and particularly for cost-effect redundant servers in a separate location for disaster recovery.

0. **Live Communications Server 2005/Office Communicator**

   While I do not recommend that firms allow instant messaging (IM) to users outside of the firm (because I feel it is a distraction), having IM among the firm's various workgroups can be an effective tool to improve communications if managed and accessible within the firm and if personnel are properly trained on usage. Action Pack includes IM capabilities and integration of voice communications, as well.

Conclusion

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