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From the January 2009 Issue

For technology personnel, each New Year brings exciting IT opportunities to evaluate and plan for the year ahead. And 2009 will be no different ... except that the economy will make most firms proceed a little more cautiously and require more justification for those items that are needed to improve future production. In that light, here are my 10 technology visions for accounting firm automation for 2009:

1. SaaS

Software as a Service will make a big splash in the accounting profession this year with CCH's highly anticipated release of its ProSystem fx Practice Manager (formerly CPA Software Visual Practice Management) that offers integration into the vendor's engagement, audit document container, document management and tax applications. The Thomson family will continue to see success with its virtual office suite of products. Firms will take a serious look at SaaS as the cost and frustration of supporting their own IT environments increases. For firms with a mixed vendor suite of applications, there will be an influx of specialized accounting firm co-location facilities being driven by the tax and accounting firm associations and knowledgeable vendors such as the Xcentric Group, Right Networks and Insynq.

2. Windows 7 Halts Vista Adoption

With the leaked release of Windows 7 being targeted for 2009, firms that were considering Vista adoption will decide to stay with Windows XP and pay the "downgrade tax" for another year. The small fee is inconsequential when compared to lost productivity caused by retraining and possible conflicts with existing accounting applications and firm equipment. With the expected

belt-tightening of 2009, firms will decide that stability is the key to success,

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Google Desktop will be seen as a viable competitor to Office, and clients in other industries will take a serious look to control costs for their word processing, spreadsheet and e-mail collaboration. While tax and accounting firms will continue to standardize on Microsoft Office suites, the surprise within these firms will be that more and more research will begin in Google than in the traditional research products for which firms pay significantly, and firms will go to these other pay-for-services to verify any questionable items.

5. Apple Makes Inroads

No doubt about it, Apple has been successful with its PC vs. Mac commercials and gained market share ... just not in accounting firms. This will change in 2009, but not in the way firms think it will. While the additional cost and configuration of Apple workstations will block adoption within accounting firms, the added features of the company's iPhone will spark interest. In areas where AT&T is the strongest data provider, firms will consider the iPhone as a smart phone alternative, particularly once "tethering" is announced early in the year. For a flat fee, users can have phone minutes, ActiveSync with their Outlook, and eventually Internet access for their laptop. The iPhone is definitely the coolest phone around, and firms will be willing to pay a little extra to keep their staff happy and on the front edge. Now if Apple could just extend the battery life of the iPhone.

6. Virtualization Solidifies

As firms look to replace their servers, their IT people will promote consolidation in a virtualized environment, which should increase reliability of the network infrastructure. Virtualization will be the name of the game in 2009, and outsourcing of entire network infrastructures (SaaS) will take advantage of this. While the cost to implement may be more, firms will find ways to justify this, including "green" computing angles since

the accounting profession's history of paper consumption has not been

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...tapes, firms will transition to archival on network-attached storage devices and even offsite backups via the Internet. Low cost and highly reliable broadband connectivity makes this option even more attractive, and firms will use external services for this purpose. Individuals can experience this solution for personal home use via services such as HP Upline, Mozy, and Dell DataSafe before promoting them for the firm.

8. Portal Standard

With continuing security concerns of personnel e-mailing client files in an unprotected format, firms will drive adoption of client portals that are externally designed and managed to ensure the security of their client's data.

Portals that are integrated directly with the document management products will be the easiest to use and adopt for both web-based and firm-managed applications.

9. Laptops Become "Dumb Terminals"

With ongoing security concerns hovering around data that is housed on laptops, firms will begin to make the decision to only allow access through secured remote access to the firm, including Citrix, MS Windows Terminal Server, Virtual Private Networks and other remote desktop tools. For this to work requires 100 percent Internet access availability, which will mean adoption of more digital cellular air card services and mandating Internet availability provided by clients outlined within engagement letters.

10. Battle for Front-End Scanning

Accounting vendor tools for front-end scanning such as CCH ProSystem fx Scan, SurePrep 1040Scan, Intuit Document eSort, Copanion GruntWorx and Thomson GoFileRoom

ScanFlow will make strong inroads this year for creating standardized and bookmarked PDF files. Firms will begin to pay particular attention as the automatic capturing of scanned data fields into the tax returns becomes stabilized.

Beware that resistive tax personnel will find all kinds of excuses to keep

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through tough issues to be inundated by the ongoing stream of negative news from the commercial media outlets. This ignorance will provide a breath of positive air to our clients, and we will become the catalyst for a great economic recovery in 2009!

Technology

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