Dave McClure • May. 12, 2014

While tax and accounting professionals were feverishly trying to finish the 2014 tax season, Microsoft dropped two bombshells on the Windows Operating Systems.

On April 8, all support for the Windows XP system came to an end. On the same day, the company released the "Windows 8.1 Update" that may at long last enable users to dump the tiled, "metro" interface. Here is what you need to know, and need to do, now that tax season is safely behind you.

First Steps

have drivers to operate under more current operating systems, and certainly not under the 64-bit versions of the software.

Here are three basic resources:

- Which Windows Operating System Am I Running?
- What are the system requirements for Windows 7?
- What are the system requirements for Windows 8?

Armed with this information, you can decide what you wish to upgrade from and to. If you are running Windows XP or Vista, you will need to upgrade to Windows 7 or 8 (well, actually the Windows 8.1 Update, which appeared on April 8, 2014). If you are running Windows 7 you are under less duress, as you can remain there for a few years yet. There are, however, some good reasons to go ahead and make the upgrade to Windows 8.

Windows 8 has evolved a bit in the past two years, and with the April Update has become almost the operating system we want it to be. That is, there is now an option to boot directly to the old, familiar desktop, and better navigation with the mouse and keyboard. But this is just the starting point. Toward the end of 2014, Microsoft will release another free upgrade, Windows 8.2, and in April of 2015, a new Windows 9.0. Windows 9.0, for the record, is purported to be a complete re-write of the operating system.

Upgrade to Windows 8.1 Update

It only makes se4nse to make this the year that you upgrade to Windows 8.x – if for no other reason than free future upgrades and enhanced security capabilities that will comply with standards that are being re-written, more stringently enforced and audited.

Here are the steps:

management and client collaboration tools. For these, it is helpful to pick up the IRS Publication 4557, *Safeguarding Taxpayer Data: A Guide for Your Business* and Publication 4600, *Safeguarding Taxpayer Information: Quick Reference Guide for Business*, which summarizes Publication 4557.

- **Upgrade in late summer and early fall, but then hold.** While Windows 8.2 should be out at year's end, that is too uncomfortably close to next tax season to be making wholesale changes to equipment and operating systems. Do what you can until Thanksgiving, then wait until the following May to make further changes.

I have long been a critic of Windows 8, and am still not certain that Microsoft can pull off its planned smartphone/tablet/PC hat trick. But the signs are promising enough that I am using Windows 8 in its native mode in order to root out the changes that actually took place with the Upgrade. More on that as we have things to report.

Reality Check

A compendium of ideas, products, rants and raves from the viewpoint of the author. Not that the author has no financial interests in any of the products mentioned. Feel free to disagree, or to share your ideas by sending them to davemcclure@cpata.com.

Internet Site of the Month. **Windows 8.1 For Dummies Cheat Sheet. (http://www.dummies.com/how-to/content/windows-81-for-dummies-cheat-sheet.html).** I've long been a fan of the "for Dummies" line of books, and the one for Windows 8.1 is a mere $24.95. But if you just want a quick scan, there is a cheat sheet and a series of online courses that can help make the transition easier.

Nuance Power PDF Advanced. (http://www.nuance.com/company/news-room/press-releases/Nuance-Power-PDF.docx). Nuance, better known for their voice recognition software, has an active document management division that has

produced a viable alternative to Adobe PDF Creator. It's a version designed more for

the case, not the least of which is that the consumer version of OneDrive does not meet the security standards of either the Federal Trade Commission or the Gramm-Leach-Bliley Act, both of which are binding on accounting firms.

Backlit Ergonomic Keyboards. There are none. Apparently, keyboard manufacturers have decided that only teenage gamers need to see their keyboards late at night (which makes one wonder who prepares their taxes?). There needs to be a backlit ergonomic keyboard, and appears to be enough pent-up demand to justify at least an initial productions run. Perhaps when Microsoft stops trying to be Google, they will produce one. I will buy several...

Password Keepers. I've tried dozens of these things, and not one of them has worked well. Of course, there is a password storage system built into both the Windows and McIntosh X operating systems, but it is pretty rudimentary. On the other hand, most of the commercial products I have tested seem unfinished, crippled, or simply too complicated to do what they need to do. I welcome dissenting opinions.

USB 3.1 Type C. We barely had a chance to get used to the standard USB3.0 before the better, faster version came along, but this is one to approve of. Its major feature: it has no up or down, so when you are fumbling in the dark to plug in a smartphone or tablet...you can get it right on the first try. No more painting a dot on the correct side in glow-in-the-dark paint (though save the paint to dab on the connection point of the device, so you can find where to plug the cable into.

Firm Management

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