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Newsletter of the AICPA
Information Technology Section

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HUMAN "RESOURCES" AND TECHNOLOGY:

A Double-Edged Sword

By Michael S. Kridel, CPA*/CITP, CFC, and Anne Stanton, CRM-MVP, MBA/ACC

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"We're all in this together" — *Unknown*.

Well, aren't we? Togetherness, spiced by diversity, defines one of the underlying management paradigms championed by corporate leadership, and, not coincidentally, human resource (HR) professionals. It is even catching on with information technology professionals. But is it true?

One of the most popular new television series is "Lost," a melodrama depicting survivors of a commercial airline crash on an unmapped island. As can be expected, the island is populated by unknown, unidentified, and (for the most part) unseen and threatening denizens.

"Lost" may be a metaphor for the often disconnected relationship between HR and Technology groups in many firms, regardless of size and independent of industry.

This "disconnect" can be traced to the 1950s, when scientific management was the predominant style and HR was called "Personnel." Increased efficiency, reflecting the previous decades of rising productivity in the Industrial Age, was the overriding goal of investment in technology, and yet, time proved that efficiency was not enough. Effectiveness was, and is, the key to profitability and worker satisfaction.

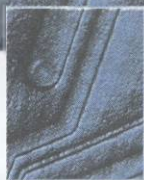
Technology and accountants began to develop an increasingly symbiotic relationship in the mid-1970s with the availability of affordable and available tools that, exemplified by write-up and income tax return service bureaus, allowed accountants to process work faster and more accurately. The emergence of personal computing, beginning with relatively affordable PCs, further transformed the accounting landscape. Yet, despite the experts' guarantees of more free time as a result of widespread technology, we don't have more time.

We have gone past the industrial age to a time of knowledge workers. A space where intellect drives profit; a place where new innovation creates a competitive edge, and the mindshare which generated that innovation is paramount to success. The assets within a



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firm, whether tracked or otherwise,
include the human components that gen-
erate the resulting services and products.

Given that each human is unique in his or
her own right, we are faced with not only
recruiting and retaining the best and the
brightest, but also determining *who* the
best and brightest is. A firm or business
must also nurture these living assets to
tap into the potential that exists.

Can technology help with this need? Is
technology *able* to help with this need?

TAPped Out in Life

We are all busier than ever and technolo-
gy is not mitigating it. Rather than reduc-
ing the time and attention our work
demands, older, current and emerging
technologies drive us to work harder and
longer to complete even more tasks. No
longer is response time measured in days;
rather, minutes seem to drag, while hours
drive us crazy. "Doesn't she *have* e-mail?"
is replaced by "Doesn't he *read* his
e-mail?"

We are busier ... because we can be and
because it is expected. Perhaps it is even
fun or awe inspiring, but what keeps us
busy? Completing our tasks and fulfilling
our core job functions? The incremental
time savings provided by technology
allows us to literally get more (mechani-
cal) work done in less time.

The potentially free time required to do
"grunt work" is filled with other, often
marginally productive, activities and, inter-
estingly, we are too often "TAPped" out.
We don't get as much done as we are
capable of doing because it is so easy to
fall victim to "Technologically Assisted
Procrastination" (TAP). Our incomplete or
partially completed objectives automati-
cally roll to the next calendar day, cour-
tesy of applications like Microsoft Outlook,
Lotus Notes or ACT! No fuss, no muss
and, interestingly, minimal personal
responsibility.

Changes in communications, too, have
made it possible, if not mandatory, to

work longer, if not harder. We are more
available and can work in more places
because of technology. Wireless technolo-
gies, such as WiFi, cellular broadband,
VoIP, pushed e-mail, GPS and satellite,
extend our workdays and workweeks, and
have pushed our offices into other loca-
tions. The RIM BlackBerry has become
the "CrackBerry" because it is extraordi-
narily addictive, appealing to our need to
feel connected and in control. Who *hasn't*
felt victimized by a mass of e-mail after
being out of the office for a couple of days
or, even worse, as long as one week?

There is a "soft" influence beyond the
"hard" technology stimuli for our
increased volume and, perhaps more
interestingly, increased intensity of work.
It is a fist in a velvet glove that is best
described as "nano-expectations." In
other words, those with whom we work,
and work for, learned that we have the
capacity to respond faster than ever. This
shortens the amount of time someone is
willing to wait before frustration sets in.
As a result, negative perceptions, some
justifiable and some not, bubble to the
psychic surface. As we all know, percep-
tion is reality. Technology, then, has
altered our perceptions, driving us to find
ways to meet those external expecta-
tions, regardless of the sacrifice in time
and privacy.

We can focus on the impact technology
has on work process, but technology
also has another role when it tracks the
knowledge within "living" assets and the
demands management and even tech-
nology places on staff. It is a tool that
can help track, and as a result, control
the response to these changes in expecta-
tions and demands. It is a tool that can
add in the changes needed for decision
making, from scheduling to setting various
expectations.

Another important positive paradigm
emerged from the push/pull drive of tech-
nology's influence on our time: the accel-
erating shift from a focus on efficiency to
effectiveness. Management in well-run
companies and firms — those author Jim

Continued on page 3

Collins refers to as “built to last” — realized that people cannot work harder or longer than they already do. This is particularly relevant when managing the younger generations of employees, whose focus is more lifestyle-driven than that of their predecessors. Efficiency generates profit, but effectiveness produces value.

Working Smarter Through Technology

Technologies that lend themselves to provide a bridge from efficiency to effectiveness come in all forms:

- **Remote connectivity**, such as Remote Web Workplace, PC Anywhere and thin client solutions, including Terminal Services and Citrix.
- **Wireless**, most commonly WiFi (both internal and hotspots) and cellular broadband.
- **Voice over Internet Protocol (VoIP)**, including standard phone systems and soft phones that can travel with people from place to place (see related VoIP article in this issue of *InfoTech Update*).
- **Converged devices**, led by the ubiquitous BlackBerry, PocketPC and Palm Treo.
- **Handheld and tablet devices**, giving employees the opportunity to access critical data and execute transactions on a reduced timeline in a lightweight portable format.
- **Paperless technologies**, fueled by document and content management applications, and affordable scanning systems.
- **Customer/contact relationship management (CRM)** systems allowing the enterprise to develop accurate, objective-driven data designed to enhance the entire buyer/seller relationship.
- **Evolving data formats and more widely distributed standards** designed

to enhance the meaning and meaningfulness of information, represented by XML, PDF and HTML. In addition, XBRL is, finally, beginning to come into its own.

- **Data security and authentication**, increasing the sense of virtual safety for employees and customers/clients.
- **HR software**, integrating people and financial management, allowing for more accurate and timely analysis of real return on investment (ROI).
- **Skills assessment systems**, forming the foundation for employee growth and training.
- **Video conferencing**, providing an opportunity for geographically dispersed employees and customers/clients to communicate in a “high tech/higher touch” environment.
- **Web-centric training, meeting and presentation technologies**, such as Microsoft LiveMeeting and WebEx.

A common thread throughout this list is the link between people and technology. It is this link — an intangible humanness — that is the foundation to enhanced organizational and individual effectiveness on every level. Organizational leadership must be willing, excited and committed to breach traditional maps of resources. It is this courage that will enable employees to identify and reach their individual goals. It is this courage that will give employees the confidence to invest themselves in their companies’ goals. Finally, it is this courage that will shepherd corporate leadership principles to true values-driven management.

This article started with a quote from an unknown source. It ends with another from an erstwhile philosopher, Lily Tomlin, who said, “We’re all in this together ... by ourselves.”

Or are we?

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“Given that each human is unique in his or her own right, we are faced with not only recruiting and retaining the best and the brightest, but also determining who the best and brightest is.”

EMERGING TECHNOLOGIES

VoIP: A Low-cost Alternative to Phone Service

By David Kirkpatrick

David Kirkpatrick is a freelance writer whose clients include USA Today, Business Development Outlook, Office.com and Oxford Intelligence.

Scot over Ma Bell, you have competition. Voice over Internet Protocol (VoIP) has been an emerging technology over a number of years and has officially arrived as a quality voice communications option for business. Simply put, VoIP is a form of telephony that allows voice traffic, such as telephone calls and faxes, over a computer or data network rather than a traditional telephone provider's landlines. Like any technology, VoIP has benefits and drawbacks, but the "upside" has reached the point where VoIP is a viable alternative to traditional phone service.

A major difference between VoIP and traditional telephone service is that the number, similar to cellular technology, is no longer tied to a physical location. For example, a VoIP user who travels abroad for a month would continue to receive calls dialed to the business's local number. That user can answer those calls no differently than would be the case if he or she were working out of the office; missed calls would go to voice mail for later retrieval.

The Financial Consulting Group, L.C. (www.gofcg.org), an organization of business valuation and litigation support firms, began using VoIP at its headquarters office in April 2005 and found the service solved a problem with the Group's remote offices. Its headquarters is in Los Angeles with remote offices in Portland, Ore., and Memphis, Tenn. Eva M. Lang, CPA/ABV, ASA, FCG's executive director who is based in Memphis, says, "The VoIP system allowed us to inexpensively give all the offices phone numbers with Los Angeles area codes so that we can present a unified one-city presence."

The organization has fully embraced the new technology. "FCG no longer maintains a landline in Los Angeles, but I have a single landline in the Memphis office that I have used on the few occasions when I needed a backup for the VoIP line."

The Good, Bad and the Economical

Virtual phone numbers using any available area code, as in the FCG example, and the ability to take the *entire* phone system with you when traveling, working outside of the office, or even to create a complete and portable "office" out of nothing more than a VoIP-enabled laptop, are several benefits of VoIP telephone service.

However, the most enticing lure for VoIP remains cost.

Operating costs for VoIP can be substantially lower than traditional phone service with its high maintenance infrastructure, extra fees for features, high usage costs and regulations. With traditional phone service, companies have to maintain networks

for voice *and* data traffic. VoIP merges these functions into the data network, thereby creating a single network. Some VoIP providers offer phone service at no cost when both ends of the call are using the same provider.

Even though the idea of saving money draws interest in VoIP, once the service is given more thought, a number of benefits become apparent. Lang explains: "We were initially attracted by the cost savings, but found that other features, such as number portability, the ability to listen to voice mail from any line online, and the ease of managing our lines from the Web, were clear advantages."

VoIP Benefits

Three benefits characterize VoIP's advantages:

- 1. Cost savings.** VoIP is typically less expensive than traditional phone service. Depending on the provider, it also often has features such as call-waiting, three-way calling, caller ID and others included with the service. In addition, long distance calls across a wide area (the Continental United States and Canada, for example) do not have an extra charge.
- 2. Portability.** With VoIP, the *entire* phone system is portable. The phone number travels with the system, so taking a VoIP-enabled laptop on business is the same as taking a traditional phone system on the road, plugging it in the hotel jack and receiving calls placed to the home office number. Portability also means that if the physical office moves, the phone system moves without the added cost of transferring the traditional phone line.
- 3. Productivity.** All messages can be received with one number through VoIP, rather than a landline office number and a mobile phone when traveling. And, VoIP numbers can often be set up to ring on multiple devices, such as a cell phone, along with the VoIP line. Most VoIP services allow voice mail and faxes be sent to an e-mail inbox, placing all incoming messages — voice, fax and e-mail — in one location.

"I am very satisfied with our VoIP service," says Lang, summing up her experience with Vonage. "The cost savings with VoIP can be substantial, and the quality of the calls is excellent. Because you are tied to the Internet, you will not be able to call out from your phone number if your Internet connection is down. However, our VoIP provider allows us to set up an alternative number for calls if there is an outage, so I have calls for my line routed to my cell phone, and as a result, have never missed a call."

Even with all the benefits, VoIP does have its drawbacks. Until recently, the red flag was the quality of service. Early VoIP required both users to be at a computer using the same service

Continued on page 5

in order to maintain the best quality transmission. Today's higher speed data networks, coupled with a highly evolved VoIP technology, puts the service on a close-to-level playing field with traditional phone service in terms of call quality.

Lang does point out one significant issue — when the data network is down, the VoIP line is down. For example, if a firm or business's Internet service is disrupted for any reason, whether it is a malicious attack, virus, equipment failure or other reasons, the VoIP line will not work.

As a result, network security becomes even more important with VoIP implementation. Lang believes proper security precautions should be adequate. "We already have a high level of security," she says. "We already have firewalls and anti-virus on our system, so we didn't see any necessary additional steps to take with VoIP."

One other potential issue with VoIP is that 911 emergency calls will not be automatically routed to the physical address. This drawback is obviously the other side of the portability benefit, but it's an important fact to remember if the need to dial 911 from a VoIP system ever arises.

The Technology

Although most VoIP systems are plug-and-play, it never hurts to understand some of the underlying technology. A number of protocols are employed in the service, and many providers' services operate under proprietary protocols, but the technology rests largely on these three: Real-Time Protocol (RTP), H.323 and Session Initiation Protocol (SIP).

Real-Time Protocol is used by almost every device in the world to transmit audio and video between computers. Like all Internet protocols, RTP is defined by the Internet Engineering Task Force (IETF) through a series of numbered Request for Comments (RFCs). These define the specs that address packet order, delay and security concerns. RFC 3711 defines "secure RTP," an important consideration for VoIP use because it provides for encryption, authentication and integrity of the data packets sent and received over VoIP.

H.323 and SIP are both solutions to the problem of how two computers begin the process of communicating to exchange audio and video streams. The two protocols are different, and although both are used for VoIP service, H.323 is more commonly used for voice transit, particularly for international calls. H.323 is a binary protocol and is strongly based on legacy communication systems. SIP is an ASCII-based protocol and did not arise from many legacy system elements.

Although H.323 and SIP are different protocols, they each are "intelligent endpoint protocols" where an integral aspect of the protocol is the intelligence to locate the destination device and then establish a data stream between local and remote devices — in the case of VoIP, these are "phones." The other class of protocols used in VoIP include H.248 and media gateway control

VoIP Providers

Two of the best-known providers are Vonage and Skype. Here is a comparison of the two services.

Vonage — Service ranges from \$14.99 per month for the basic plan to \$49.99 for the small business unlimited plan. The more expensive plan offers unlimited calls in the Continental United States and to Canada, as well as more benefits. The basic plan offers 500 minutes with about \$0.04 for each additional minute. Other charges apply for calls outside the Continental United States and Canada.

Skype — Calls are free from Skype user to Skype user. Other calls are subject to SkypeOut rates. SkypeOut Global covers most of the United States, Europe, Russia and the Pacific Rim, and runs about \$0.02 per minute. Calls to areas not covered by SkypeOut are subject to larger fees. Local Skype to non-Skype calls are also subject to SkypeOut rates. At the time of this writing, Skype released Skype 2.0, with new features.

For a comprehensive list of VoIP providers, a Web search will give you many possibilities. A great place to begin is www.voipproviderslist.com.

protocol (MGCP), a.k.a., "device control protocols." The third class of protocols is the non-standard proprietary protocol created and implemented by individual VoIP providers.

Plugging in

VoIP sounds great. It saves money, has many productivity advantages and revolutionizes how telephone service is viewed. How do you get it?

The first, and most important step, is a high-speed or broadband Internet connection; the high-speed connection is the key component. With a high-speed connection, all that's left is to choose a VoIP provider (see sidebar). Most providers offer systems with very little set-up requirements beyond the computer, phone and an additional piece of hardware to get up and running. Lang describes FCG's implementation: "We did it ourselves and it was pretty straightforward. Your VoIP provider sends you a router. You plug the phone line into the router along with two Ethernet cables, one to connect the modem and the other to connect to your computer — and you are set."

After scooting over for VoIP, Ma Bell better hope she's not relegated to the back seat before long. Lang explains why. "Look at the numbers. VoIP typically offers many more features for substantially less. In addition, I found service from our VoIP provider to be far superior to the service we received on our landline."

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LEARNING AND TRAINING

Web Seminars are Powerful Business Tools

By Sandra Wiley

Sandra Wiley is COO and senior consultant with Boomer Consulting, Inc., in Manhattan, Kan. In her 10 years with Boomer, she has worked with clients to strengthen their firm's human capital using Strategic Planning, and Kolbe Index processes and procedures. Wiley also assists in the facilitation of the *Boomer Technology Circles™* and is a facilitator at *The Annual Human Capital Symposium™*, as well as the *Annual Training Symposium™*.

At the AICPA Tech 2005 Conference, I had the privilege of speaking to a group of professionals about the benefits of using Web-based seminars and conferencing as a strategic tool for their firm. Just to be clear, a Web-based seminar is created with a tool that uses the Internet to deliver information to clients, staff or prospects without having to physically be "face to face."

While Web-based seminars are becoming more popular in our industry, we need to start our journey of evaluation with one simple formula: Research + Processes + Creativity = Success.

Ways to use Web Seminars

Let's first explore the ways you can use Web seminars in your firm:

- **Sales and Marketing** — One of the most popular uses of Web conferencing is in sales and marketing. The best chance of a prospect hearing your message is to couple the spoken word with the written word and visual presentation. If you want to make the sale, a Web conference might be the tool that is right for you. In the past, your options for selling to a prospect were limited to meeting with them face to face, using a teleconference, or relying on written or e-mailed materials. In today's world, you can add Web conferencing to this list.
- **Education and Training** — As firms try to find ways to build their learning and training culture, they are looking for tools that will allow staff to get the information they need in a timely, cost-efficient method. Web conferencing gives the internal trainer a phenomenal tool to assist in getting a program to different offices, allowing more staff to attend training.
- **Help Desk/Training Applications** — Web conference applications give staff the ability to show a co-worker exactly what is going on, as well as complete on-the-spot training as help desk tasks occur. Again, connecting the visual and the spoken word in the communications increases the success of the help desk function.

- **Corporate Communication** — Whether you have one office with staff that travel, or multiple offices where communication is sometimes lost in the miles, connecting the staff through Web conferencing is becoming a tool imperative to keeping everyone connected.
- **Interview Prospective Employees** — As locating staff becomes more difficult, finding ways to tell potential prospects about your firm, and at the same time, finding out more about *them*, is getting trickier. A well-scripted, defined Web conference allows you to have the first interview in a timely, efficient manner without inefficiently using either your time or the candidates' time.
- **Review Proposals and Contracts** — You are away from the office with a proposal or contract that must go out. You also know that you need to work with a team at your home office to ensure you have everything in place before it goes to the client or prospect. A Web conference will allow you to interact with the team from anywhere in the world.

Research for Proper Planning

When you have identified the reasons your firm will use Web conferences, it's time to conduct your research. This is an important step and should not be taken lightly. Ask yourself, or better yet ask your team, the following questions:

1. How many people will participate in your Web conferences?
2. Will your Web conference needs remain constant or will they change as your market changes?
3. How many meetings will you hold and how often will they occur?
4. What kind of content will you produce and generate?
5. How much interactivity will happen in your sessions?
6. What tools do you need? Options include application sharing, mood indicators, audio conferencing, live polling, meeting lobby, live chat and operator assistance.
7. What is your budget?
8. What security considerations do you have?

It may seem as though you have a multitude of questions, but it will be well worth the time it takes to answer all of these questions up front, and not wait until you start the implementation stage to answer them. Planning is imperative to the success of your project.

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Choosing the Vendor

When it is time to select the vendor, they are certainly not all created equal. You will need to research a group of services, but only after you answer the following questions about your needs:

1. What are the prices for your chosen number of participants and meeting frequency?
2. Will the system handle the type of content you would like to show or use?
3. Is the system easy to use?
4. Will there be bandwidth limitations for either you or your clients?
5. What services will be involved in your sessions? Do they cost extra through the vendor? For example, many vendors offer voice conferencing for an additional cost.
6. Does the vendor offer services that could grow your company's Web conferencing options?
7. Is the company reliable? Have they been around a while?
8. What does the vendor offer in the way of technical support?
9. What purchasing options are available to your firm? Don't be afraid to negotiate when looking at the various vendors.

Presenting the Presenter

Once you have a plan and a vendor, it is time to look internally for the presenter. Remember that the one thing the audience will not have when attending a Web conference is a face to put with the voice, so the voice should have a "personality." Select someone that has a lively voice, is an excellent "telephone" communicator, and can ask open-ended questions easily and without prompts. Once the presenter is selected, the next step is to set up a successful conference. A few tips to remember are:

- The presenters should arrive 15 minutes early to the conference to ensure everything is working well and the program is ready for the participants.
- Presenters must have a quiet environment, so shut the door and put a sign out that you are on a Web conference.
- Presenters should have a speakerphone or quality headset. Have your hands free to write notes and control the Web conference.
- Attendees should mute their phones. Just like the presenter needs a quiet environment, so do the attendees of the conference. It can be very disruptive to have phones ringing, people talking and other noise in the background when participants are trying to listen. Just ask everyone to mute the phone until they have a question.

- Point out the features of the Web conference site and have a helper on hand to work on the technical issues. Pretend that you are "live" and always have enough people to help run the meeting smoothly.

The benefits of Web-based seminars are clear. If you apply the simple formula of Research + Processes + Creativity, you will assist your company in developing a strategy for Success.

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Contact Sandra Wiley at
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“While Web-based seminars are becoming more popular in our industry, we need to start our journey of evaluation with one simple formula: Research + Processes + Creativity = Success.”

INFOTECH UPDATE PROFILE

John Seale: Small Town Prophet With Big City Influence

By Scott H. Cytron, ABC

When John Seale says he's from Greensburg, Ind., the first question he usually gets is, "Where in the world is that?"

Greensburg is located in Southeastern Indiana between Indianapolis, Cincinnati and Louisville — major metropolitan areas considerably larger in scope and size than Greensburg's mostly agricultural community of about 25,000. While it's not ironic to find an accounting and consulting firm such as RBSK Partners and its 28 staff in a town this size, what is somewhat unusual is to discover a division totally devoted to technology, known as RBSK Technology Consulting.

As partner in charge of the firm's consulting business, John manages four technicians and one administrative support person. He also wears another hat as director of Accounting and Audit Services for the firm, an organization named for the four RBSK shareholders: Vincent Rettig, Robert Blankman, John Seale and Ron Knueven. RBSK also serves clients in Ohio and Kentucky, and has offices in nearby Batesville, North Vernon and Brookville.

Within technology consulting, John's group offers fairly traditional services, including working in networks; hardware procurement, installation and maintenance; Internet services; and break/fix — "rapid response." Even though it might seem as if there is nothing unique about these offerings, John says you must keep in mind the proximity of the firm, the specialized focus on the community and the firm's 360-degree approach to doing business.

"I think the number one reason our clients and prospects consider us for their technology needs is that we are a CPA firm that enjoys "Trusted Advisor" status

with them," he says. "Our dedication to planning, problem solving and the service clients enjoy from the tax and accounting divisions carries over to the technology side of our business."

John says that while the firm has many clients just in the IT arena who are not in tax or accounting, he manages the IT division with the same concerns over product quality and client care that the firm has "always exercised as CPAs. It is great to serve the accounting *and* tax needs, along with the IT area, but that also makes us perform equally well in *both* areas — the alternative is that we would jeopardize our reputation in one or the other."

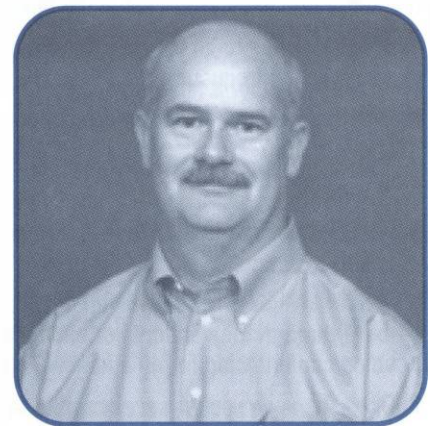
John and his group also have differentiating qualities that distinguishes them from other providers. For example, clients want the firm to be more "independent" in its recommendations for services, hardware or software, a trait inherent in a CPA technology firm that may not exist in non-CPA firms.

"We concentrate more on service delivery versus product sales," says John. "We also offer 'practical' or proven solutions to IT situations, and it has always been our intent not to use or sell any technology to a client that we haven't used in our own CPA firm first."

The "Fast Response" referred to in the firm's service component is one of the most valued traits.

"We respond to client calls and emergencies *Now*," says John. "This has been one of our best distinguishing features over metropolitan IT firms, somewhat enhanced by our unique location between Cincinnati and Indianapolis."

As the firm continued to grow, it deployed a variety of technology solu-



John Seale, CPA

tions over the last several years, some necessary and some strategic. Necessities included replacing desktop PCs with wide-screen laptops and changing the way the firm backed up its systems.

In the strategic sense, the firm looked at the Internet and the paperless office. Three years ago, when RBSK leased space on a 225-foot tower located across the street from its Greensburg office, it installed wireless antennas to broadcast 5.8 and 2.4 GHz frequency Internet service. At the time, Greensburg had no available high-speed Internet service available.

"We held a meeting at a local hotel conference room and took subscriptions for service," says John. "This technology enabled us to provide Internet service to individuals and businesses who were starving for access, as well as greatly expanding our client base for all our other IT services when most of these customers started to call on our IT staff for network and PC needs."

RBSK also moved into the paperless arena, purchasing Creative Solutions' File Cabinet Solution and Engagement

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Solution — improvements that enabled the firm to send tax returns and financial statements directly to a well-organized storage location, as well as converting all audits to paperless audits.

"We are in our third year of evolving to a paperless office, and starting with the 2006 tax season, we will no longer be storing *any* client paper records more than two years," he says. "With the system, access and retrieval of records is outstanding, along with the ability to e-mail documents within seconds."

John says the firm also uses Engagement Solution for all of its other year-end tax and accounting engagements, creating "packages" of workpapers and checklists that are the foundation for starting any engagement.

"For example, when a staff person is assigned to work on a typical year-end client, the person accesses Engagement Solution, opening the client and the current year-end package. This package includes the Workprogram, Standard Tax Workpapers, and various checklists and processing forms. The process enables us to set up quality control documents in a very systematic manner that ensures each engagement is being administered the same. This process also standardized the look and feel of each engagement between offices, making it very easy to reassign jobs between staff and offices."

In the future, John says the firm will explore even more enhancements to its offerings and current solutions, including dual monitors and desktop scanners.

"With dual monitors, we are going to experiment with our 1040 preparers in tax season to see what efficiencies are gained; we think that tax preparation may benefit the most from this technology. Although desktop scanners are not new, we are issuing Fujitsu ScanSnaps to all our professional staff — an effort to complete the paperless office process and ensure that all documents of importance make it into the system."

Citrix Remote Support is also on the radar for the future.

"We have already started to use remote access software to provide IT support to our clients," says John. "We are now starting to use this technology to serve accounting clients as well, especially those with accounting software we support. We expect this service to grow; it is especially useful due to our location and distance to some clients."

John takes the knowledge he learns through technology deployment to his work as a member of the AICPA's Information Technology Executive Committee, where he is actively working on projects for the IT-Member Section and the Top Technologies project. In the meantime, you may find him at Greensburg's local downtown diner trading stories with the locals — a high-touch attitude tinged with a high-tech mind.

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John and his group also have differentiating qualities that distinguishes them from other providers. For example, clients want the firm to be more "independent" in its recommendations for services, hardware or software, a trait inherent in a CPA technology firm that may not exist in non-CPA firms.



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E - B I T Z

E-BITZ focuses on practical applications of various technologies to enhance a practice or business.

E-BITZ WITH SUSAN BRADLEY

This Cell Phone Rocks!

It's about 4 inches tall and about an inch-and-a-half-wide. It's a secretary, connector, reminder, task manager, media player, can surf the Internet and connects to my network. It contains Microsoft Word docs, MS Excel spreadsheets and even PDFs.

What is this "office in a pocket?" A cell phone, of course. A few months ago, one of the partners in my office had a cell phone that was losing its charge. Faced with buying a new battery or a new phone, we did what every self-respecting technical person does ... we bought a new one. However, the phone we selected had to have three requirements:

1. It had to be a phone. None of this slide-out keyboard stuff; we just wanted a phone.
2. It had to provide synchronization with MS Outlook. His previous phone did not sync.
3. If it had e-mail ability, preferably without needing to purchase any additional software or needing to have a workstation left on while away from the office.

We found the solution in an Audiovox 5600 phone (www.audiovox.com), a true phone-sized device that operates on a version of Windows-embedded software and natively provides the ability to synchronize with the firms' Exchange server without any additional software. Since our firm uses the Windows Small Business Server 2003 platform, all we needed to do was run a wizard or manually deploy the self-signed security certificates to the devices to get them to use SSL-based active sync to replicate back to our server.

The benefits are many. For example, if a secretary changes a calendar date in the office, within minutes the phone will synchronize back with the office. With the addition of ClearView Word and PDF readers (www.westtek.com/smartphone), I can read and respond to documents sent from the office as well. While some may want a more "Blackberry"-sized keyboard for e-mail (offered in other Siemens-based models), I prefer to carry a more traditional-looking phone device.

Future editions of these phone models will be able to be more controlled from the server, allowing administrators running Exchange 2003 on Service Pack 2 to remotely control and wipe devices if the phones get lost or stolen. Given that these devices include domain authentication information, this is a feature to consider when deploying these devices.

When we purchased the first device, we succumbed to a condition I'll refer to as the "Wow" factor. You've seen it. Someone will walk in with a new gadget and you'll go "oh, wow" and suddenly just *have* to have that item. As a result of one person buying the phone and really enjoying its features, we now have *four* people in the office with the same phone.

The advantage I have now is the ability to be the "phone wrangler" in the office. As the firm's administrator, I help in most of the technology issues, and quite frankly, phones are pocket-sized technology. As a result, if there are questions, issues, or on extremely rare occasions, problems with the devices, all I need to do in order to keep the phone with me for monitoring, is to reset the device to factory settings, take out the SIM chip, swap them, and within about five minutes, re-sync the phone to our server. Because the information is all nicely saved and backed up on the server, it's a minor issue to swap devices and have everything move over. The bottom line is that standardizing phone models has helped tremendously in tech support and troubleshooting.

Think you are a small office and can't do this kind of server installation? Guess again. With the new Microsoft Accountant's Network, a CPA firm is eligible to sign-up for membership and purchase server, desktop and MS Office software (all worth about \$10,000) for a \$299 annual fee. Called the "action pack" software, you can start the sign up process at www.microsoft.com/accountants and then find a Small Business specialist who is trained in supporting small businesses. You might also find that the specialist is interested as well in teaming up with you to help other small businesses install small business network software and accounting packages in their organizations.

What's the greatest thing I like about deploying these mobile devices? The additional mobility and flexibility inherent in the phones have enabled my employees to stay connected via voice and data to the office; they won't be tempted to log into e-mail using hotel or kiosk computers that could introduce risk back into our network. While I'm not able to do remote wiping on these current devices, my employees are instructed to inform the office should a device get stolen. We can quickly and easily change the password before someone could attempt to brute force the password on the device.

Continued on back page



We enjoy the fact that these are solid phones, display good layouts, have key features and are just the right size. Some of the accessories we've added onto the phone include additional cigarette lighter adapters and chargers' blocks to keep at the office and at home. The devices do need charging more often than our old phones, but as long as we have chargers in both locations, it's not a bother. We've also added a spare memory chip for photos. Even though photo phones carry with it a set of security risks to an office, in our case, due to our size, this is not an issue. We do find that when we are out at client engagements and a digital camera would come in handy, having the camera phone is perfect for our needs.

All in all, we've been very pleased with our "unofficial deployment" of Audiovox 5600 phones. We're not quite to the point where everyone in the office has them, but I'm hoping peer pressure and "Wow" factor is wearing the rest down.

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