

**CalCPA Tech Committee Draft Minutes  
Friday-Saturday, April 29-30  
Adobe Systems Inc. (Albertus conf room)**

Webcast: [my.adobe.acrobat.com/calcpa](http://my.adobe.acrobat.com/calcpa)  
Phone: 1-866-244-8528; ID#846155

8:30–9 a.m./Registration and continental breakfast  
9–10 a.m./Adobe Corporate Overview  
10–11 a.m./Adobe Connect overview & training  
11–11:15 a.m./Break  
11:15–12:15 p.m./Acrobat Capabilities session #1 (Patti Sokol)  
12:30–1:15 p.m./Lunch  
1:15–2:15 p.m./Creative Suites overview (Patti Sokol)  
2:15–3:30 p.m./Acrobat capabilities session #2; “Ask the expert” section (Patti Sokol)  
3:30–4 p.m./Closing comments & wrap-up (Pat Rogan; Carl Steffens)

**Attendees**

Joanne Bender  
Dale Bender  
Charles Burak  
David Cieslak  
Jim Counts  
Ilene Eisen  
Woody Fox  
Bob Gaby  
Bruce Gray  
Linda Heineman  
Barry Hensick  
Ted Humphreville  
Peter Ianonne  
Jeff Lenning  
John Musuraca  
Vic Republicano  
Pat Rogan, Chair  
Larry Russell  
Jim Sanders  
Terry Seiberlich  
Michael Thompson  
Lynne Walline  
Aldo Maragoni, Staff Liaison

9 a.m. Meeting called to order and introductions.

Woody Fox introduced as 2011–13 Tech Committee chair.

Carl Steffens provided Adobe overview.

10 a.m. Connect training: committee joined a live in-house Connect training session.

Members can sign in at Adobe for 30-day Connect trail and then sign up for webinars and resources.

Acrobat.com: Connect Now. Free version to sign up for that provides a meeting room similar to CalCPA webcast meeting rooms. Free version only allows a maximum of three participants.

11:15 a.m.: Patti Sokol, Adobe solutions consultant

Acrobat 10 presentation

Three areas to Acrobat 10, each w/increasing features: Reader (can only view, search, print, notes, highlights, SharePoint), Standard, Pro, Suite (get Reader, Standard and Pro, plus Photoshop, Captive (turns PPT to SWF), Presenter, Media Encoder)

- Combine multiple PDFs into one PDF binder
- Combine multiple files (PDF or other) into one PDF portfolio
- Create fillable forms and collect data
- Collaborate using shared reviews
- Secure PDF docs to restrict viewing/editing
- Digitally scan PDF docs
- Export from PDF to Word or Excel
- Redact document content
- Add headers, footers, watermarks
- Create PDF from webpage
- All Flash video that will play within PDFs
- Add interactive buttons/links

Adobe representatives walked members through various features of Acrobat 10.

- Insert/delete/rearrange pages
- Save to PDF/save from PDF to Word or Excel
- Select columns/rows from Excel and create PDF AND select rows/columns from PDF and export to Excel or Word
- Comment and review/shared review (can send to group of people via acrobat.com so they can review/comment. All those participating must have acrobat.com account (free). All people can see/comment on everyone else's comments. All people must have Acrobat Reader 9 or Acrobat 9 or higher. People can be in same document at same time and see the real-time comments. Acrobat.com: file sharing, work collaboration, etc.

• Acrobat.com: Can set up a workplace, and provide certain people access, and use the workspace to load documents, etc.

• Form discussion:

Tools ---> Forms ----> Create: Place boxes around the areas of the form that someone needs to fill out to better show the info needed.

- Safety/security:

- redact info: Protection ---> Black out and Remove Content ---> Mark for redaction: then select the text you want redacted (FOIA has specific codes that speak to why certain info is redacted). Once select text, then must hit "Apply."

- can search for specific terms w/in PDF and redact

- once hit apply to redact, it's gone for good. Once save, it'll save a copy with the stuff redacted

- Reviewed Action Wizard (equivalent to Excel Macros)

- Encrypting documents (open document ---> protection ---> encrypt: save and close doc for change to take effect)

- w/password

- w/digital signature

- w/Adobe LifeCycle Digital Rights Management (on server and strongest protection)

- Sign and Certify documents:

- open doc ---> Sign & Certify window ---> Sign document: follow prompts to create and/or place your digital sig

- PDF Portfolios (available only in Pro): combining various documents to one file or combining multiple PDFs in one zip compression file

- Can send portfolio to people to review (need at least Reader 9 to view)

- Creative Suite (CS5)

- Overview of CS5 suites

- Production Premium: for those into video

- reviewed how to create newsletters, webpages, etc and what tools available w/in CS5

- Flash

- CS Bridge ---> Camera Raw

- place to adjust color corx, etc on photos

- Learning resources:**

- Adobe TV ([tv.adobe.com](http://tv.adobe.com)): short, five-minute videos on various Adobe products, etc.

- Acrobat user community ([acrobatusers.com](http://acrobatusers.com))

- Certified instructors

- Acrobat.com: free resource to collect data/use forms

**4/30/11**

9 a.m.-12 p.m.

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**Called to order 9:10 a.m.**

**Chapter reports:**

Jim Counts  
Investigating use of Connect throughout chapter

Peter Ianonne: CHC  
Chapter use of Connect

Michael Thompson: PSV  
Planning social media presentations—how to use for biz  
Could be through B&I Comm or Tech Comm

Lynne Walline: SAC  
Working as a resource for other chapter committees, rather than standalone meetings.

Bruce Gray: IE  
January meeting with David Cieslak. Well-received  
Also looking into using Connect to bring more of the membership involved since so spread out.

Jeff Lenning: OCLB  
Webcasting Fall Seminar Series to extend reach (starting in September)

John Misuraca: OCLB  
Starting regular meetings in May

Joanne Bender (asso member, firm admin): BAK  
Looking at doing more cloud computing  
Just launched website

Dale Bender: BAK  
CPA Site Solutions to get website going

\$70/month; lots of customization  
Encryption  
Upload and get notified when client downloads  
2-3 months go to the cloud and eliminate much of our hardware

Barry Hensick: LA  
Co-chair: Eastside Technology Group  
Piggybacking with an area discussion group and plan a monthly meeting—lunch/hour meeting  
Get 30-35 people each meeting

Charles Burak: EB  
Getting basic cloud computing meeting going  
Setting up Adobe meeting—thinking about angle to draw people  
Planning meeting for family law conf—there will be a tech portion: looking at portals where firms can share/access files with clients, etc. Make sure portal solution allows files to sync. Thinking SharePoint, but some security issues. Suggestions: LeapFile, DropBox, SharePoint

Ted Humphreville: LA  
Beverly Hills CPA Group  
LA Computer Show coming up (June). David Cieslak speaking

Jim Sanders: EB  
Had good experience with GoToMy Meeting webcast w/700+ attendees.  
Worth investigation as CalCPA moves forward with webcasting  
Esp when we have to call in w/phone and tie up phone line

Linda Heineman: LA  
Co-chair: Eastside Technology Group

Larry Russell: LA  
WTUG: group is piggybacking on Hollywood Discussion Group to be responsible for a meeting/month  
David Cieslak speaking in June  
WTUG trying to get arrangement where speaker will agree to speak to other chapters/committees/groups.

### **Arlynn Peavey Webinar Report**

**Speakers:** Al Silva (cloud computing or something else)

**Topics:** Acrobat (Patti Sokol from Adobe to speak); workflow; using free Adobe products; forensic e-discovery (Larry Russell can find speaker); social media (Freedman presentation?); Inspector Gadget (Cieslak); security; speeding up your computing; online conferencing

**Dates:** August (after post-Aug. 15)/September/October—Aldo check dates (check if two dates available w/in that 2.5 month period)

Jim Counts, Charles Burak, Woody, Pat, Arlynn—subcommittee

### **Tech Awards**

Jim S., Arlynn P., John Bedrick and Woody on committee to determine how move forward.

### Recap of Adobe meeting April 29

- Everyone was impressed with the presentation and the information gained.
- Look for ways to keep the relationship open with Adobe for chapter meetings or state committee meetings
- Larry R.: How to help auditors use Acrobat; digital signatures; use of forms
- Linda H.: Let Adobe know that Acrobat is a huge product for CPAs and we want/can partner with them.
- Use Adobe for webcasts
- Dale B.: Biggest takeaway was how Acrobat tools help workflow
- Michael Thompson: Tie in to document retention and render document useless, as well as related docs.

Jim Counts: Microsoft Action Pack update

### RAM Session

Jim C.: Discussed Thunderbolt (<http://www.intel.com/technology/io/thunderbolt/index.htm>; <http://goo.gl/S9Vh7>): data transfer between devices

Pat R.: Camtasia (<http://www.techsmith.com/camtasia/>): recording video/audio, then download, then copy to CD, etc.

Jim S.: Litecam (<http://www.innoheim.com/litecam.php>): Anything on your screen, you can pick up

### Upcoming Meeting

- **August 2011:** CalCPA HQ
- **Oct. 21:** S. CA
- **January:** Virtual
- **May 4-5, 2012**

Locations with most votes: Napa/Sonoma or Santa Barbara  
(other candidates: Tahoe; San Diego; Vegas; Stanford)

Committee also pursuing possibility of meeting at tech cos.: Google, Apple, Facebook and Microsoft among leading candidates.

(Candidates: Intel-0; HP-0; Google-12; Intuit; Apple-11; Facebook-9; LinkedIn; CCH (get them to come to our meeting, not go to them); Thompson (get them to come to our meeting, not go to them); Microsoft-9)

### Open session

The committee thanked Pat for his dedication and work during his two-year term as committee chair.