

CalCPA State Technology Committee Minutes

Date: May 18-19, 2012

Location: Santa Barbara, CA

Attendees

Live

Milla Austin

Cliff Beacham

Charles Burak

Jim Counts

Woody Fox

Bob Gaby

Bruce Gray

Charles Le

Aldo Maragoni

Arlynn Peavey

David Primes

Larry Russell

Terry Seiberlich

Virtual

Barry Hensiek

Dale Bender

George Chiu

Jim Sanders

Linda Heineman

Josh Cohen

Friday, May 18, 2012

9:30 a.m. Meeting called to order (Woody Fox) and minutes of January 2012 approved (unanimous)

Chapter Reports

Bruce Gray (Inland Empire): Had presentation regarding outsourcing IT; assembling local tech forums; launched monthly tech tip article in chapter bulletin.

Larry (LA): Had a presentation from David Cieslak

David Primes: More challenging these days finding tech topics for meetings that members interested in. Harder that just lining up Excel, QuickBooks, Lacerte.

Committee Vice Chair

Fox reminded committee members that a vice chair is needed and who would become chair in May 2013. Those interested can contact Fox.

CalCPA Connect

Staff liaison Aldo Maragoni gave the committee an early look at CalCPA Connect, CalCPA's online private network, which will launch in fall 2012. The online network will allow members quick access to their peers within CalCPA, easy sharing of materials and resources and the ability to form topic-specific groups, among other things.

Citrix Online

Johnny McGee of Citrix Online discussed the company's collaboration products: GoToMeeting, GoToMyPC, GoToWebinar, ShareFile; GoToTraining, Podio.

David Primes re-capped CES 2012.

Larry Rusell presented EnCase

4:12 p.m. Adjourn

Saturday, May 19, 2012

9:30 a.m. Meeting called to order with a discussion of future meeting dates

August 2012:

Following Aug. 15 tax deadline

Possible locations: Facebook (Charles Le will follow up with contact) or CalCPA Training Center

October 2012:

Following Oct. 15 tax deadline

Possible locations: Sage or SAP (Bob Gaby will follow up with contacts)

Jan. 22, 2013: Virtual

May 2013:

Possible dates: Thursday, May 2 (1-5 p.m.) and Friday, May 3 (9 a.m.–4 p.m.)

Location: Paso Robles (Aldo Maragoni to make arrangements)

Cloud Computing presentation: Bob Gaby

RAM Session:

Russell: Asked for opinions regarding the value of CITP. Jim Counts dropped him. Bob Gaby believes it adds credibility, given the tech work more CPAs are doing.

Burak: Looking for information on time and billing systems. Suggestions on what to go with, experience of others, etc.

Counts: Thinking about eliminating physical fax machine and move to internet fax. Terry Seiberlich recommended WinFax and SnappyFax.

Future meeting presentation possibilities:

iPad apps

Secure file transfers (SugarSync, etc)

Document management/paperless (Seiberlich presentation)

Time and billing programs

Cloud apps and back-up solutions (David Cieslak present?)

Outsourcing tech support

Setting up virtual PC

Public speaking pointers (Milla Austin?)

Noon: Meeting adjourned.

Projects working:

“What I Use” (Woody and Arlene): What products/software use at home/office.