

CalCPA Tech Committee

Jan. 22, 2013

Sacramento

1-4 p.m.

Attendees (live)

Bruce Gray

Jim Sanders

Jim Counts

Woody Fox

John Misuraca

Larry Russell

Milla Austin

Pat Rogan

Attendees (phone)

Mike Thompson

Jeremy Calabro

Arlynn Peavey

Jeff Lenning

10 a.m. Introductions/Chapter Reports

IE (Bruce): Started running tech tips articles Bulletin. Written by Bruce.

OCLEB (John M.): Haven't met for a while

LA (Larry): Been dark for a while. Presenter backed down b/c didn't like crowd, which wasn't tech oriented.

EB (Jeremy): Breakfast CPE in November on Windows 8.

Woody: Attended Microsoft Windows 8—phone, desktop, tablet—demostration/meeting. Could see how it all came together. Lining up for future meeting. Maybe 1 hour CPE. Put on by Accent Computer Solutions.

Jeremy: Saw preso at East Bay Partners Forum from Cieslak. Good presentation.

Larry: LA has difficulty finding a venue, making it harder to hold meetings.

Bruce: Reported from his attendance at AICPA's Digital CPA conference. Might have contact/speaker that can come to April meeting in Paso Robles.

1:30 p.m. November minutes approved.

1:30 p.m. TBRG brainstorm

Deadline: Mid-February

1. **Excel 2013 update** (Jeff)

2. **What I use and why** (Woody)

3. **Point/counterpoint:** (TBA)

4. **Mobile apps** (Milla)

5. **Pushing services out based on SAS-based software** (Bruce)

6. **Virtual machines—why and how** (Terry)

7. **Password encryption** (Larry)

8. **Using LinkedIn to build biz** (John M./Milla)

2:15 p.m. Role/Purpose (Misuraca)

This is a long-term discussion/initiative

Woody: How keep enthusiasm between meetings? Include more action items and build in accountability.

Communicate with chapters about their experiences with the state tech committee and their needs.

John surveyed chapter leadership

- Tech groups in chapters — EB, LA — really strong, OCLB and LA are doing OK. Other chapters struggling. Not enough interest in in-person meetings.
- Creating speaker list is popular idea
- Privacy and security are top issues members concerned with

Focus on chapters and we can be more effective if do on state level. If we promote our material more, that can help.

Idea of breaking committee into sub-committees: communication, webinars, etc

There were chapters that didn't seem interested or couldn't find the interest or leader to have regular tech meetings, but they were open to having a one-time speaker now and again on relevant topic.

Good idea to develop a speaker list that chapters would especially find useful.

Have an event, and invite neighboring chapters to attend, too. Tactic used by YEP groups and it's working.

Woody: Do we develop framework and guidelines and expectations for chapter tech committee chairs?

Possible solutions: Camtasia to record these things and do podcasts, too. Free 30-day trial

FSS Tech Tips, Tricks, Etc (Misuraca)

Have committee members review and if they are able to help, let John know.

3:30 p.m. RAM Session

Jim: Any tips on what to look for when buying a smartphone? Need smartphone to use Square credit card reader; get email

- Woody: You can usually get 14-day trial, so try them all. I tried Windows, then Android

Jim: Anyone look at Office 2013?

- Larry: Through-put is good. Made changes to Outlook and how things look. It's faster. It's not as pretty as Office 2010, but works faster.
- Woody: All the youngsters are OK with it in my office; older folks don't like it.

Other:

Modernizing office: New computers, etc. What learn? What came up that didn't expect? How resolve? Cost? (Woody)

Use QR codes rather than URLs in magazine

Discussion about how Tech Committee can produce meetings (for CPE and not) and then promote to greater membership.

- Record presentations from Tech Committee meetings
- Podcasts?
- Videos

Next meeting: April 25-26 (Paso Robles)

4 p.m. Adjourn