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[Tech2Go Episode 5 - Sage Insights, Technology Innovation Awards, and Workflow Products](#)

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Tech2Go is a fast-paced roundtable discussion with Executive Editor Gregory L. LaFollette, CPA.CITP, and regular columnists Brent Goodfellow, Dave McClure and Randy Johnston. These thought leaders tackle current technology issues impacting the tax and accounting profession. This month, the panel discusses the Sage Insights Conference, The Technology Innovation Awards, Workflow products, and then addresses a few listener questions. [Running time is 1:03:49]



Gregory L. LaFollette
CPA.CITP



Brent Goodfellow
CPA.CITP, MCSE, MST,
MCT



Dave McClure



Randy Johnston

Tech2Go Show Notes

Episode 5 - June 2007

Recorded May 21, 2007

Duration: 1:03:49

- [Sage Insights Conference](#) and “Eco-System” Group
 - Restructuring of Sage business divisions

- Getting serious about the small and medium-sized business market
- Tradeshow highlights
- **Technology Innovation Awards**
 - Presented at [California Accounting & Business Show](#) in LA on June 4
 - Presented to the profession on Tuesday, June 12, at the [AICPA TECH+ Conference](#)
 - Voting ballot included 41 different product entries
 - Innovative Product Impressions
 - Document Management category rapidly evolving and growing
 - Mobile cell phone and email device entered for the first time
 - Forms recognition and OCR technology, data auto-entry – [SurePrep 1040 Scan](#), [Lacerte Source Doc Auto Entry](#)
 - Check scanning and bookkeeping auto-entry through QuickBooks – [BankServ DepositNow! A/R](#)
 - Practice Management – time and billing – [BillQuick](#), [Practice CS](#)
 - Web-based CPE tracker for individuals – [CPE Tracker](#)
 - Paperless Software products and integrations – [Acct1st DMS](#)
 - Forecasting, Budgeting and Modeling
 - [CCH Tax Zone Locator](#) for looking up zip code locations and applicable software products to deal with specialized tax implications
- **Workflow Products**
 - [XCM](#), [SurePrep](#), [Acct1st DMS](#), and more
 - Some disparity between systems for all the different workflows and software packages
 - [Microsoft SharePoint 2007](#) customizable workflow for document sharing
 - Workflow good, but still not as integrated across the different products as it could be
 - Firms are saying that investment in workflow is worth the effort and money
 - Data management and Knowledge management become part of workflow
 - [Adobe LiveCycle](#) product for business workflow and PDF documents
- **Listener Questions**
 - 16:9 aspect ratio monitors vs. older 4:3 aspect ratio
 - More screen real estate at an inexpensive price
 - New software interfaces arranged to take advantage of wider monitors
 - Rotating benefit from portrait to landscape mode for documents
 - Microsoft Annual Program (MPAN and ActionPack)
 - [Microsoft Professional Accountants Network](#)
 - Access to the [ActionPack](#) with generous software license allowances

