

accounting**TECHNOLOGY**

From Desktop to Cloud: Choosing the Right Platform

AUGUST 10, 2016

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Like most businesses and professions, accounting firms constantly evaluate the pros and cons of the many IT solutions available to them. Those solutions may solve challenges, and in some instances be required to remain competitive and efficient when dealing with the document preparation, filing and retention demands that their services require.

With the interest in cloud computing increasing, the benefits that hosted solutions offer, and the wide range of software and data sharing options that seem to emerge daily, cloud-based options have to be seriously considered. But any thorough evaluation must take a hard look at the validity of the concerns often raised about cloud-based solutions. Is a cloud-based system or solution more or less secure than internally managed IT systems?

Most would argue that companies that have an IT solution as their primary product or service will be significantly more invested in ensuring that their system is both secure and stable. Do the contracts with cloud providers deliver the data protection to which accountants are bound? The answer to that question lies within the agreements of the prospective vendor partner you are considering.



What's right for accountants?

Accountants need immediate, mobile access to their data and software. Whether at a client's office, home office, on the road or burning the candle at both ends to meet filing deadlines, having access to all of their sensitive information is essential to meeting the timelines of the IRS and state governments, as well as client-driven projects. There are plenty of file-access and sharing solutions available, as well as different software-as-a-service solutions.

The determining factors in finding the best solution to suit the needs of an accounting firm for access, availability, sharing protocols, security and redundancy

of their data and software lie within the service level agreements, solution and customer support qualifications associated with each solution or service provider. Another consideration is whether the solution will be temporary for when you are out of the office's IT network, or incorporated into your permanent workflow process.

Much time and money is invested in the multitude of services that accountants deliver their clients, which require significant quantities of data and files on their IT platforms. That information also needs to be retained for future retrieval and use. As a result, the backup, archival and disaster recovery measures need to be considered as part of the selection process for the most appropriate solution to ensure the long-term retention of these valuable documents. Whether choosing one of the myriad cloud-based data backup solutions on the market or using internal IT infrastructure, successful data retention and recovery is a must. Redundancy of that data — having the data backed up in multiple locations — is mandatory.

Data security

Accountants collect and use sensitive data as a result of the types of services they provide. Because of that, the protection of data is paramount. The security measures in place to protect the data during all phases of the data lifecycle — while actively being used, backed up or archived — are requirements when searching for the best solution.

Questions to ask:

- What security protocols are in place?
- How often are firewall, anti-intrusion, anti-virus and patch management updates implemented?

- Are typical update schedules used or is the data protected with zero-day protection, meaning updates are pushed and implemented as soon as a potential threat is discovered?

DaaS in accounting

Do Desktop-as-a-Service (DaaS)/hosted desktops have a place in the accounting field? Whether internally deployed or delivered by a qualified IT managed services provider, hosted desktop environments are capable of delivering all of these data, software, and hardware driven demands and needs when managed by a highly qualified party utilizing the appropriate IT systems architecture.

DaaS environments are still highly customizable and even afford accounting firms the option of employing a bring your own device (BYOD) policy. There are certainly additional considerations and policies to be considered with BYOD, but it can be successfully accomplished and deployed while maintaining a highly secure environment.

In today's computing environment the capabilities and options are staggering. New solutions, applications, and hardware hit the market every day. The exposure to new cybersecurity threats arise daily as well. The key is to be thoughtful about the primary objectives that you and your firm desire to accomplish as it relates to the creation, use, sharing and protection of your data. Once those objectives are in place, thorough research will unveil what path and end solution are best for your organization.

*Brett Helgeson is the president of **Adopt Technologies**, which provides turnkey cloud-based IT solutions for organizations inclusive of consultation and migration services, to transition companies from on-premise IT infrastructure to cloud platforms.*

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