MAXIMIZING YOUR MULTI-MONITOR SETUP

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WHY MULTIPLE MONITORS?

In a paperless office, your monitors are your principal workspace. And as tax and accounting firms get serious about paperless digital workflow, it quickly becomes clear that a bigger workspace is an easy, inexpensive way to dramatically improve productivity. Think back to the paper era—would you work on a desk that only enabled you to see one sheet of paper at a time?

The benefits of multiple monitors are by no means limited to firm principals and high-level managers. Deploying multiple monitors to preparers and administrative employees is a great way to improve productivity and increase morale. The initial investment is small, and it pays for itself in many different areas, including:

- Higher productivity: Studies have shown that a second monitor can increase the productivity of tax and accounting employees by 30% or more. And productivity continues to increase with additional monitors.
- More efficient workflow: For a truly paperless workflow, multiple monitors are absolutely essential.
- Reduced paper and printing costs: Deploying multiple monitors dramatically reduces the number of paper documents that employees print during the course of their work.
- A tech-savvy image: The presence of multiple monitors is a powerful way to present a premium image to clients.

Implementing multiple monitors isn't difficult. But as with most tech investments, it's wise to have a plan in place before you begin implementing. This whitepaper will help you develop that plan by addressing the most common concerns about multiple monitors. These include:

- Determining which staff members need multiple monitors
- Choosing a monitor type
- Choosing a screen layout
- Optimizing your software for multiple monitors

CASE STUDY

Gary Wolfe, Torosian & Walter, Fresno, California

CPA Gary Wolfe Torosian & Walter, LLP • Fresno, California

Gary found that using multiple monitors with his UltraTax CS® tax software did more than just increase efficiency. With access to a live view of the tax return calculations, his administrative personnel began to think more like seasoned tax professionals. They were able to contribute far more than menial data entry and add value to the tax prep process.

"I now have more staff that can step up and take on additional responsibilities, because they understand the process and the program better," he said.

Gary's entire testimonial is available at: CS.ThomsonReuters.com/Testimonials.

DETERMINING WHICH STAFF MEMBERS NEED MULTIPLE MONITORS

In a paperless office, employees must be able to reference tax prep software and supporting documents simultaneously. This was always possible in the paper environment, and it's just as critical in a paperless office. For this reason alone, every employee should have at least two monitors. For some members of your firm, anywhere from three to five monitors may be ideal.

Different types of employees will require different types of multi-monitor setups. So it's a good idea to begin by spending a few minutes with each employee to determine how they work and how multiple monitors can make them more productive. The questions below are a good starting point.

- How frequently do you reference printed materials during the tax preparation or review process? How long does it take to shuffle to the appropriate page?
- How frequently do you switch between different windows on your workstation to refer to a supporting workpaper or source document?
- How often during the preparation or review of a single tax return do you toggle between the views of inputted data and the resulting tax forms, then back again?
- How often do you switch to viewing the prior year tax return for reference or comparison?
- What bottlenecks and routing delays result from only having a single, physical copy of client documents which need to be routed to each member of the office who touches each tax return?

Once you have answers to these questions, you can begin to determine the best multi-monitor setup for your employees.

CHOOSING A SCREEN LAYOUT

Once you've decided to add additional monitors, it's important to arrange them in way that maximizes efficiency. This is especially important if you're deploying three or more monitors, as the human eye tends to neglect information that falls outside its peripheral vision. So you'll want to make sure that every monitor stays within the user's field of vision.

Screen placement for three monitors

If you're placing three monitors side by side, designate the middle monitor as your primary monitor. This will keep both secondary monitors in your peripheral vision.

An alternative is to mount your monitors on a wall or other surface. This will enable you to place one of the monitors above the other two, keeping the monitors adjacent to each other and within your field of vision.

Screen placement for four monitors

In most cases, the best layout for four monitors is a quadrant arrangement, where one pair of two monitors is mounted above the others. With a linear approach, one or more of the outermost monitors are almost always underutilized.

What layout might most benefit staff preparers and/or reviewers?

When each user's screens are in place, users can begin to customize their workspaces according to the way they work. At this stage, it's important to consider the functions and windows used by different types of workers in your firm, then configure each workspace to simultaneously display as many as possible.

CASE STUDY

Roman Kepczyk, CPA.CITP
Director of Consulting, Xcentric

A consultant to tax and accounting firms around the country, Kepczyk sees an increasing number of multi-monitor setups in his work. He finds that two to five monitor configurations are common, with a three-monitor setup becoming the norm for most users.

For a sleeker (and often less expensive) alternative, Kepczyk often encourages firms to consider using two oversized monitors instead of three standard monitors. This provides users with a workspace that rivals a three-monitor setup in size, with a more elegant appearance and a lower cost.

Tax preparers and reviewers

For staff preparers, the most commonly referenced items generally include:

- Tax prep software input screens
- Tax prep software tax forms
- Tax prep software diagnostics and analysis
- Client source documents
- Client workpapers
- Prior-year tax returns

Preparers and reviewers have slightly different needs. For example, some reviewers may never even enter the tax solution and start from the assumption that there are no diagnostics or other analysis to review within—but both roles benefit from having as much on-screen information as possible.

Data entry operators

Data entry operators often don't require as much on-screen information as reviewers. Their key areas generally include:

- Tax prep software input screens
- Diagnostics list of items present in the prior year but not the current year
- Diagnostics indicating possible data entry errors
- Prior year tax return input values

Balancing customization with consistency

Many firms give each staff member the ability to customize their workspaces as they see fit. But this can make it more difficult for employees to collaborate and share work. For this reason, you should carefully consider the amount of flexibility that you grant your staff in how they configure their program and desktop layouts. In some cases, too much customization can actually hinder efficiency.

CHOOSING THE RIGHT MONITORS

You might be surprised to discover that your monitor choices are no longer limited to traditional desktop units. You can now choose from a variety of mobile monitors and even tablet computers that double as monitors. The best type of monitor for each staff member generally depends on their role, their amount of travel, and their level of client interaction.

Desktop monitors

For employees that stay in one location and don't have a great deal of client interaction, traditional desktop flat screen monitors are often the best choice. They're usually the least expensive option, and their adjustable stands minimize their desktop footprint and make for comfortable viewing.

MULTI-MONITOR APPS

Your tablet may be capable of doing double duty as a second monitor—all it takes is an inexpensive app to make it happen. Some of the most popular providers include:

iOS/Android:
Avatron.com
Getidisplay.com

iOS only:
Maxivista.com
Splashtop.com

Mobile monitors

For staff members who travel often or hold frequent off-site meetings, a mobile monitor may be a good option. Mobile monitors look a lot like the tablet computers you're probably familiar with. With no bulky stands, they slip easily into a briefcase or laptop bag. They quickly connect to your computer using compact USB cables and they usually don't require their own 110-volt power supply.

Mobile monitors are usually more expensive than desktop monitors, but they enable your employees to be more productive on the road. They're also a great tool for client meetings.

If you really want to get the most out of working on the go, purchasing a mobile monitor may be your best option – particularly if you do a lot of tax or audit work while on location with clients, or if you simply prefer the flexibility of a multi-monitor environment that works well on a kitchen table or in an airport terminal.

Using a tablet computer as a monitor

If you have a tablet computer, it's easy to set it up as an additional monitor. There are a variety of inexpensive Android and iOS apps that do this by running a companion program on your PC. They use a local network to connect the tablet and PC and allow the user to configure the tablet display as if it were a monitor attached to the workstation.

Obviously, this is a very inexpensive way to add a monitor if you already own a tablet. But in some situations, it may make sense to buy a tablet specifically for use as a monitor. For example, you can increase the "wow" factor at client meetings by presenting them with a finished tax return on a tablet, or by presenting clients with electronic copies of presentations and engagement letters. You can even use a tablet to display an electronic version of your client intake form and allow the customer to enter and verify all information during the interview.

OPTIMIZING YOUR SOFTWARE FOR MULTIPLE MONITORS

Many software makers have begun to tailor their applications to multi-monitor work environments. The CS Professional Suite® includes an array of features that make it easy to maximize productivity with multiple monitors. Other software providers have added features to accommodate multiple monitors as well, including Microsoft and Adobe.

Using multiple monitors with UltraTax CS

UltraTax CS offers a variety of multi-monitor features, including:

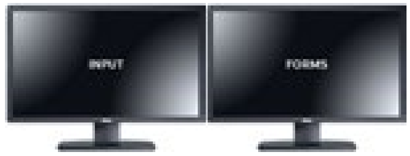
1. A library of customizable, fully automatic layouts that snap into place when selected from a drop-down menu. This eliminates the need to manually drag and expand windows when you open the software, change functions, or switch between clients.

2. "Smart" views that automatically switch to the best layout as you navigate through the software. For example, when a user navigates to the Itemized deductions data entry in the Input view screen, the Form view automatically displays Schedule A.

UltraTax CS includes a video to guide you through the process of establishing and customizing screen layouts. To view it, open the UltraTax CS home page, click the Home Page button at the top-right of the program, and then click the Multimedia Presentations link.

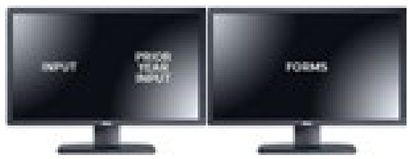
Input & Forms

Placing the input screens on one monitor and the forms on another is often a good choice for a dual-monitor setup. Even on a single monitor, the Tile View display preference option can display both screens side by side.



Input & Prior-Year Input

The Prior-Year View (F8) feature in UltraTax CS provides a quick way to toggle between the current and prior-year input screens. Multiple monitors enable you to take this to the next level by toggling between the forms screen and the prior-year input screen on your secondary monitor while the primary monitor displays the current-year input screen. A third monitor makes it possible to view all three screens simultaneously.

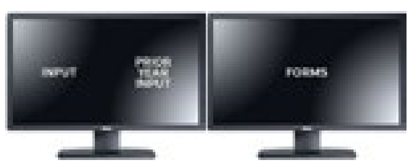


Forms Screen

Some firms have found that it's helpful for their data entry operators to view the forms screen and the input screen simultaneously. This provides a live view of how the data they enter flows to the finished return, which trains data entry operators on the workings of a tax return as they enter data.

Input/Prior-Year Input & Forms

Another commonly used setup places the current and prior-year input screens side by side, with the firms screen on a separate monitor. This is possible even with only two monitors, since UltraTax CS allows users to tile multiple views on the same monitor, even in a multi-monitor setup.



Input/Prior-Year Input & Forms/Diagnostics

Another popular way to combine a tiled layout with multiple monitors is to display the current year and prior year input screens side by side on one monitor while displaying forms and diagnostics on the other. Because the UltraTax CS diagnostics are hyperlinked, this setup can be a very effective way to speed the review process.

Client Meetings

During client meetings, it's often helpful to designate one monitor as the client view. This enables the client to follow presentations and view documents without paper handouts. A tablet computer used as a monitor works particularly well in this situation

Using three or more monitors

Using three or more monitors opens up a variety of new possibilities, enabling you to display a great deal of information in a wide variety of configurations.

Leveraging your multiple monitor setup to assist with data conversion

A multi-monitor setup can make the conversion from another tax prep system to UltraTax CS much easier, particularly when it comes to reviewing converted data and entering the handful of amounts that do not convert automatically. Here's how it works:

1. Open 2013 UltraTax CS, then open the client whose conversion you intend to review. Display this on monitor A.
2. On monitor B, display the completed 2012 return, either in your prior tax program or in your document management solution.
3. Review the carryover reports that your prior tax program generated with the completed return on monitor B, then reconcile them to the UltraTax CS figures on monitor A.
4. Once this process is complete, UltraTax CS generates a number of different reports and worksheets that summarize carryovers from the prior year. These can be used for one last confirmation that all relevant carryovers have been entered and that the return is ready for 2013 processing.

Using multiple monitors with Practice CS®, Accounting CS™, and FileCabinet CS®

An easy way to optimize a multi-monitor setup in Practice CS and Accounting CS is to open multiple instances of the same program. For example, three instances of Practice CS could show the Client Dashboard, the Staff Dashboard, and the Practice CS Scheduling Calendar on separate monitors.

In Accounting CS, it's possible to view the Client Dashboard on one monitor while entering monthly transactions for that same client on another.

In FileCabinet CS, it's possible to view a client's completed tax return for the current tax year on one monitor while viewing the prior year tax return for the same client on another.

Using multiple monitors with Workpapers CS™

Workpapers CS splits the Workpapers Dashboard into its own standalone window, which allows reference to annotatable documents on one screen while making adjusting journal entries and viewing a live trial balance on another.

Using multiple monitors with AdvanceFlow™

AdvanceFlow takes full advantage of multiple monitor environments, allowing users to save tabs of different filtered data views and separate them into independent windows for easier viewing on multiple monitors.

Using multiple monitors with Microsoft Excel®

One frustrating limitation of Microsoft Excel is the way it handles multiple windows. It only allows you to view one worksheet at a time, unless you manually stretch the main program window across your entire desktop.

Microsoft has effectively fixed this problem for Office 2013 by transitioning Excel from a Multiple Document Interface (MDI) program to a Single Document Interface (SDI) program. With the new configuration, every Excel worksheet will always open into its own window.

If you're using an earlier version of Microsoft Office, you can get around this limitation by opening each spreadsheet in its own instance of Microsoft Excel. Here's how:

1. Open the first spreadsheet as you normally would.
2. To open additional spreadsheets, re-launch Excel from the Start Menu or shortcut, then open the spreadsheet using File > Open.

Note, however, that certain operations may not work fully or at all when performed across the two Excel instances, including Paste Special operations and the copy/paste of large data sets.

Using multiple monitors with Microsoft Windows® 7 and 8

Microsoft Windows 7 and 8 include several features to help multi-monitor users increase their productivity, including a Snap feature that makes it easy to maximize windows on multiple monitors.

- To maximize a window on one monitor: Click and drag the title bar of the window to the very top of the monitor before releasing it. Windows will paint an outline that spans the whole window to let you know that it will maximize upon releasing your click.
- To tile a window on one monitor: Click and drag the title bar of one of the windows, then drag it all the way to the side of one monitor before releasing it. Windows will draw a box around that half of the screen before you release the mouse button to show you that it will automatically format the window to take up half of your screen.

  To use the tile feature, you need to drag the window to an outside boundary of your desktop. The feature will not work if you drag a window to a side that flows onto another monitor. To get around this limitation, you can also Win Key + Arrow Direction (i.e. Win+Left) to snap to the corresponding side of the screen.

Using multiple monitors with Adobe Acrobat

It's often helpful to compare two versions of the return in PDF format side by side to identify and confirm any differences. There are a variety of tools that can make this process much simpler and more efficient.

Adobe Acrobat XI Pro Compare Documents feature—If you license Adobe XI Pro, this feature is already available to you.

Bluebeam Revu Split View mode—the Revu product synchronizes navigation between two PDF document viewer windows. For example, if you navigate to page 50 in the document version on your left monitor, it will automatically navigate the document version on your right monitor to page 50 as well. It also synchronizes panning and zooming actions. The two documents can be tiled on the same monitor or split across multiple monitors.

WHEN YOU'RE READY TO IMPLEMENT

Multiple monitors are a basic necessity of the paperless office. When you're ready to implement, there are a variety of applications that can help you get the most out of your multi-monitor setup.

Virtual monitor software:
These programs enable you to divide a single monitor into multiple workspaces.

iShadow VDM

DisplayFusion

Window management software:
These programs make it easier to tile and resize individual windows.

SplitView

GridMove