5-2 Project One: Technology, Hardware, and Software

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When considering the needs of the fictitious organization for week five’s project, I leveraged Human Company Interaction tactics by contemplating the software, hardware, security measures, and networking equipment that would coincide with the needs of the employees of the fictitious tax preparation company. From my understanding, all employees of tax preparation organizations have access to PII information to some degree. Additionally, the employees generally work in a collaborative environment. When considering hardware components, I leveraged my Human-Computer Interaction skills and analyzed the data that a tax preparation business has access to and compared it to the various categories of employees that a tax preparation business has. I felt that all employees CPA, Tax Specialists, and Data Entry specialists should have a standard PC connected to the internet through an ethernet connection. Ethernet connections are optimal, reliable, and more secure than wireless connections. To elaborate, with ethernet connections, data can only be accessed by other devices physically attached to the Network. Also, all employees will need two 20” inch monitors; the monitors will allow all employees to easily use and view multiple computer applications at once. Because the employees will be using a PC versus a laptop, they will need a standard mouse and a standard Keyboard. Additionally, the employees will need a fully functional printer. A laser jet printer, preferably a Xerox B225 A4 mono laser printer, would be advantageous because of its multi-use capabilities. For instance, the laser jet printer would allow employees to print, copy and scan tax-related information. The employees will also need a document shredder and telephones. The shedder will enable all employees a secure way to destroy and dispose of tax-related or sensitive internal documentation. The telephones would provide a way for all employees to communicate with clients. The PCs should also include standard hardware components such as a high-performing central processing unit, motherboard, and processor. The CPA and tax specialist PCs will require adequate storage in the form of RAM (16GB), hard drives (64GB), and memory devices. The PC for the data entry specialist will require basic storage in the form of RAM (8GB) and a hard drive (16GB) the data entry specialist’s PC will only require basic storage because the data entry specialist losses access to tax return documentation after the records have been submitted to a tax specialist for further review. Additionally, the PC for the tax specialist and CPA should include a video card, a sound card, and a USB flash drive. All PCs should include a power supply.

For the tax preparation company, all employees should have the Microsoft Windows 11 operating system installed. The Microsoft Windows 11 OS is an ideal software choice because the operating system automatically includes a plethora of resources. For instance, the Windows 11 OS includes Microsoft Office applications such as Outlook, Microsoft Excel, Microsoft OneNote, Microsoft Defender (antivirus/antispyware software), and Microsoft Teams. The Microsoft Teams application would be ideal for the CPA and Tax Specialist positions. To elaborate more, the data entry specialist will not need access to teams because the data entry specialist will only provide essential tax preparation services to walk-in clients. However, a CPA and/or a Tax Specialist may be required while working on a tax return to communicate with clients electronically, over the phone, or via a meeting to gather information needed to reconcile tax records. The Microsoft Teams application could be leveraged to schedule virtual appointments with all categories (Corporate or Individual) of clients to gather missing information that could be needed by a CPA and/or tax specialist to move forward with filing a corporate or personal tax return on a client’s behalf. Additionally, the Microsoft Windows 11 OS includes a window security platform that could be configured to automatically install system updates and security protocols to ensure that the employees’ computers are steadily optimal and healthy. For internet access, all employees should have Google Chrome installed on their PC because Google Chrome is compatible with the Windows 11 OS. The CPAs and Tax Specialists should have Adobe installed on their PC to allow them to use the DocuSign feature when necessary. Additionally, all employees should have standard accounting software like QuickBooks installed on their computers. QuickBooks is a multifunctional database that allows representatives to enter basic tax-related information and/or craft intricate tax returns for corporations and/or individuals.

Data security would be pivotal for a tax preparation company regardless of an employee’s function. As an employer, the company should establish the appropriate data access controls for each type of employee. The access controls should determine what the employee can see and do within the QuickBooks application, throughout the internal intranet, and throughout internal storage databases that include but are not limited to data clouds, SharePoint, C-Drive, and their PC's hard drive. Also, the PC used by Data Entry Specialists, Tax Specialists, and CPAs should be set up with Firewall protection. A firewall could be used as a security measure to protect internal information by shielding the organization’s internal data from dubious access attempts. All employees should be set up with multi-factor authentication. Utilizing multi-factor authentication will reduce the risk of account seizures by unauthorized users. Also, all employees should be required to attend monthly security awareness training that will provide the employees with techniques that they can use to identify phishing attacks and create secured multi-factor credentials. In addition to the security measures established for all employees, the Tax Specialist and CPA should be able to share encrypted communications with individuals/corporations they are preparing tax returns for. This would be helpful if the Tax specialist or CPA needs to send or receive information that includes PII data. Lastly, in addition to all security measures mentioned, the CPA should have access to a secured data cloud that could be used to save or review corporate tax returns filed on a company’s behalf.

The computer network equipment needed for all employees of the tax preparation company would include a Local Area Network LAN connected to a firewall, internet, a department server, and ethernets. The Local Area Network LAN would be ideal for employees of a small tax preparation company housed within the same geographical area because LANs allow employees to share equipment like printers easily and quickly share data files. LANs are easy to install and manage. Also, the department server could be connected to the LAN, and access to organizational data could be monitored and controlled wholly by the company’s IT department.

In conclusion, ensuring that the most appropriate hardware, software, and security measures are applied to the PCs for all levels of employees could guarantee that an organization is protecting its clients’ information. Additionally, when considering a tax preparation company, aligning software, hardware, and security with the people who use it will ensure accurate tax returns are filed and that employee/client engagements are seamless. By leveraging Human Company Interaction techniques, organizations can invest in optimal hardware and software solutions that will correlate to the day-to-day functions of specific levels of employees. Additionally, when applying Human Company Interaction techniques to security equipment selection, companies can craft the right type of security measures to ensure they implement stringent security protocols.

For a tax preparation company, this would ensure that the highest degree of customer and employee satisfaction will be achieved.

Citations

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