

K2E Canada Inc. 2024 Course Catalogue



K2E Canada Inc.

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THANK YOU FOR CHOOSING K2E CANADA INC.

Hello, and thanks for taking a few moments to learn more about **K2E Canada Inc.** and **K2 Enterprises** and the training opportunities we offer. For over three decades, the team of professionals at K2 Enterprises has created and presented the finest in technology-focused education. Today, our focus remains unchanged – delivering outstanding value to our customers with every interaction, whether a seminar, conference, web-based class, or answering a simple email message.

This catalogue summarizes many of your choices to benefit from our courses and instruction team. Our curriculum of technology-focused learning options addresses many of the needs facing business professionals today. Since the October 2023 version of the catalogue was produced, we've added nineteen one-hour and two-hour titles. And, as always, if you don't see a particular topic in which you're interested, just let us know, and we'll do our best to accommodate your request.

Please take a few moments to consider our courses and the flexible scheduling options we make available to our clients. As you do, please note sessions that interest you and reach out to me (marilyn@k2e.ca). I will be happy to answer your questions and assist you with getting our courses scheduled for you and your team.

Thanks for your time, we look forward to hearing from you soon!

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K2'S SIXTEEN, EIGHT, AND FOUR-HOUR SEMINARS

The K2E Canada Inc. team is proud to offer one, sixteen, eight, and four hour sessions during 2024. You can learn more about each of these sessions in this section.

Please note that we can customize sessions to meet your specific needs. For example, in many cases, we can combine content from multiple sessions to create customized content, ensuring you maximize the ROI on the learning experience. Similarly, we can create custom content according to your specific needs and specifications.

K2's Excel Boot Camp

If you are ready for two days of intensive Excel training in a “laptop-optional, laptop-friendly” environment, then K2's Excel Boot Camp is for you! Using accounting-centric examples developed for accountants, Excel Boot Camp takes you through Excel from A to Z. Participate in this course, and you will elevate your use of Excel to the next level.

In addition to long-standing features in Excel, such as lookup functions, the Camera tool, and formatting options, K2's Excel Boot Camp will highlight the number of recent improvements to Excel. For example, you will learn about new functions, tables, a vastly improved charting engine, and an overhaul of PivotTable functionality. Additionally, you will learn various techniques to enhance your efficiency and effectiveness when working with Excel. Further, you will learn how to take advantage of a wide variety of “power features” to assist you in creating accurate spreadsheets in a fraction of the time previously required.

If you plan to take only one Excel course this year, make sure K2's Excel Boot Camp is the one you choose!

“Great course. I wish I would have taken this years ago!” L.S., CPA MN

“I learned some great tips, tools, and efficiencies.” R.M., CPA MN

Summary Description

If you want to jumpstart your Excel skills, K2's Excel Boot Camp is the session for you. In it, you will learn various skills to help you take advantage of Excel's best features, including formulas, PivotTables, charts, and macros.

Major Topics

- Creating error-free calculations
- Formatting your spreadsheets
- Constructing PivotTables
- Introducing Excel macros

Learning Objectives

Upon completing this course, you should be able to:

- Implement various tips, tricks, and techniques in Excel to address issues, such as formatting, AutoCorrect, handling dates and times, and selecting cells with special characteristics
- Utilize Excel's formula-building tools
- Identify how and when you should use Excel's table feature
- Create and audit complex formulas, including those containing arrays and lookup functions
- List and apply various techniques for securing Excel workbooks
- Create charts in Excel that captivate audiences and communicate messages effectively
- List the six components of PivotTables and create PivotTables, including PivotTables that perform user-defined calculations
- Implement Excel's Camera function to assist in generating custom reports
- Utilize Excel's Macro Recorder tool to create simple - yet beneficial - macros that you can put to work right away

Course Information

- **CPE credit:** Recommended for 16 hours of Computer Software and Applications
- **Instructional delivery method:** Group Live
- **Prerequisites:** Fundamental knowledge of Excel 2019 and newer
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Excel users and potential Excel users who want to increase their efficiency and effectiveness with Excel

K2's Advanced Excel

If you are an experienced Excel user seeking to elevate your skills, join the K2 team for K2's Advanced Excel. In this laptop-friendly program, you will learn critical advanced Excel skills in six key areas: 1) collaborating with other users and securing workbooks, 2) using tables to analyze and report data, 3) integrating and manipulating data from external sources, 4) creating and auditing complex formulas, 5) advanced data analysis tools, and 6) visualization techniques to analyze and communicate information.

The course draws from over twenty-five years of experience delivering Excel training to accountants and other business professionals. Throughout the program, relevant, real-world examples reinforce the topics presented. Take advantage of this opportunity to become more efficient and proficient in Microsoft Office Excel, the tool of choice for accounting and financial professionals. This course covers advanced Excel topics found in Excel 2019 and newer.

"Very effective presentation – great material & reference book." D.M., CPA PA

"The most enjoyable and productive course I have ever taken to improve my technology and productivity skills." M.G., CPA NH

Summary Description

If you're ready to move beyond Excel's fundamental features, participate in K2's Advanced Excel. This course will teach you about collaboration options, security techniques, tables, data models, PivotTables, and advanced formulas.

Major Topics

- Collaboration and security techniques
- Tables, data models, and PivotTables
- Advanced formulas
- Data queries
- Creating effective visualizations

Learning Objectives

Upon completing this course, you should be able to:

- Identify and implement the best techniques to secure sensitive information in Excel workbooks and collaborate with other users to improve accuracy and efficiency
- Create tables and take advantage of their advanced features, such as dynamic data ranges, structured reference formulas, and the ability to relate multiple tables together into a Data Model
- Import and link data into Excel from external sources – including text, Access, and SQL Server – and use advanced tools, such as Power Query and various cleanup tools, to manipulate the data to meet specific needs
- Use advanced functions, such as SUMPRODUCT, XLOOKUP, MATCH, INDEX, NETWORKDAYS, RAND, RANDBETWEEN, NPV, IRR, XNPV, and XIRR, to create and audit complex formulas
- Analyze worksheet data using techniques such as Data Tables, Subtotals, Slicers, Filters, and PivotTables
- Describe techniques used to create, manipulate, and customize charts for analyzing and communicating information

Course Information

- **CPE credit:** Recommended for 4 hours of Accounting and 4 hours of Computer Software and Applications
- **Instructional delivery methods:** Group Live and Group Internet Based
- **Prerequisites:** Experienced Excel user
- **Program level:** Advanced
- **Advance preparation:** None
- **Who should attend:** Business professionals who work with Excel 2019 or newer and want to extend their knowledge with advanced features and functions

K2's Budgeting And Forecasting Tools And Techniques

Do your budgeting and forecasting processes work as well as they should? Probably not, as many organizations report that budgeting and forecasting activities consume tremendous time and yield only marginal benefits. In this course, you will learn to achieve a greater return on your budgeting and forecasting activities using various tools and techniques available in today's market.

In addition to learning how to utilize Excel more effectively for budgeting and forecasting activities, you will also learn about other tools, such as Budget Maestro, PROPHIX, and Host Analytics, and how reducing your dependency on Excel can lead to better results. Additionally, you will learn how to account for risk and uncertainty in your budgeting and forecasting models and why doing so is a best practice for more meaningful budgets and forecasts. Join us in this course to learn how to reduce your time on budgeting and forecasting tasks while simultaneously increasing their value.

"Good mix between mixing non-Excel budgeting software with features in Excel." M.Z., CPA MN

"Excellent class!" J.F., CPA OR

Summary Description

Most budgeting and forecasting processes are in dire need of an overhaul. Join us in this session to learn better budgeting and forecasting methods, including using various technologies to get better results quickly.

Major Topics

- Budget-centric features in Excel
- Capital budgeting techniques
- Working with Solver and Scenario Manager in budgeting and forecasting environments
- Collaboration issues, version control, and audit history

Learning Objectives

Upon completing this course, you should be able to:

- Utilize processes for obtaining budget data and collaborating with others when using Excel, including Shared and Merged Workbooks, Excel's Audit Trail, controlling and validating data input, and collaborating with others
- Apply various Excel techniques for interacting with the accounting system, such as Office Data Connections, Open Database Connectivity, importing text files, and linking Internet-based data into budgeting and forecasting models
- Identify situations in which various Excel techniques are appropriately implemented, such as using Data Tables for sensitivity analysis, working with Excel's Goal Seek feature, using Solver to maximize scarce resources, working with Scenario Manager, forecasting with Regression Analysis, and analyzing risk with Monte Carlo simulations
- Implement various Excel functions – including NPV, IRR, XNPV, and XIRR – in capital budgeting situations and identify different methods by which Excel computes depreciation
- Compare and contrast Excel with other applications used for budgeting and forecasting activities and describe conditions in which you should use other solutions to reduce the dependency on Excel as a budgeting and forecasting solution

Course Information

CPE credit: Recommended for 4 hours of Accounting and 4 hours of Computer Software and Applications

Instructional delivery methods: Group Live and Group Internet Based

Prerequisites: Fundamental knowledge of Microsoft Office Excel 2019 or newer

Program level: Intermediate

Advance preparation: None

Who should attend: Business professionals involved in budgeting and forecasting activities

K2's Business Continuity – Best Practices For Managing The Risks

Are you and your team members prepared for a business disruption? Natural disasters, technology glitches, human failures, sabotage, and terrorism threaten businesses of all sizes today. In this course, you will learn how to develop and implement a business continuity plan (BCP) to help manage the risks associated with business interruptions. In addition, you will learn how to address critical issues related to staffing, how virtualization can speed recovery times, and how Cloud-based storage, synchronization, and mirrored databases can help ensure that you always have access to your critical data and applications. Most importantly, you will learn to identify your organization's significant risks and create an effective plan to address these contingencies.

Today's technology-dependent organizations must have a plan for operating when facilities, power, communications, or technology fail or become compromised. Unfortunately, many companies only learn about critical infrastructure weaknesses after experiencing an outage. Participate in this course and learn how to identify, understand, and develop strategies for mitigating risks of business interruption.

"Absolutely the best seminar I have been to in years!" C.L., CPA PA

Summary Description

The Pandemic brought Business Continuity issues to the forefront of many managers' thought processes. But is your business prepared for disruption, regardless of cause? This session will teach you key strategies and tactics to help your business survive.

Major Topics

- Identifying risks to Business Continuity
- Differentiating between Business Continuity and Disaster Recovery
- Implementing effective backup strategies
- Creating an effective Business Continuity/Disaster Recovery plan

Learning Objectives

Upon completing this course, you should be able to:

- Define the goals and activities involved in the creation of a Business Continuity Plan (BCP), and contrast a BCP with a data backup strategy
- Identify and assess critical risks to a company's operations
- Classify identified risks into four timeframes for creating disaster recovery plans
- Define three different types of data backups and explain the vital differences in how to create and store each so it can achieve its desired purpose

Course Information

- **CPE credit:** Recommended for 8 hours of Information Technology
- **Instructional delivery methods:** Group Live and Group Internet Based
- **Prerequisites:** Basic understanding of organizational business processes and technology terminology
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals who desire to reduce the risk associated with business disruptions

K2's Business Intelligence, Featuring Microsoft's Power BI Tools

Business Intelligence (BI) is perhaps the hottest topic in most professional circles in today's business climate. Increasingly, organizations of all sizes seek to take advantage of the data available to them to identify previously undiscovered insights and gain competitive advantages thought to be out of reach just a few short years ago. A growing array of tools – from Excel add-ins to dedicated solutions such as Power BI – now allow you to leverage your existing knowledge and skills to create powerful, interactive dashboards and analyses unthinkable until recently.

This program will teach you to implement “do-it-yourself business intelligence” using various techniques and tools. First, you will learn to use advanced Excel data query and summarization features to create Excel-based dashboards. You will then learn how to leverage that knowledge to build even more powerful BI objects using Microsoft's Power BI tools. If gaining better insights into your data to make better decisions interests you, then join us for a fast-paced look at how you can take advantage of these fantastic tools.

“This was a great course! Very useful information!” B.R., CPA MN

Summary Description

Business intelligence efforts continue to grow, and Microsoft's Power BI platform is central to many of these efforts. Participate in this session to learn more about business intelligence and how to create dashboards using Power BI.

Major Topics

- The importance of Business Intelligence in today's business climate
- Differentiating between Power BI licensing options
- A hands-on approach to creating effective Power BI reports and dashboards

Learning Objectives

Upon completing this course, you should be able to:

- Create Excel-based BI dashboards
- List the potential shortcomings of BI solutions based wholly on Excel
- Identify and implement various Excel add-ins that might be helpful in BI applications
- Differentiate between the BI opportunities in Excel and Power BI
- Create and distribute dashboards using Power BI

Course Information

- **CPE credit:** Recommended for 8 hours of Accounting
- **Instructional delivery methods:** Group Live and Group Internet Based
- **Prerequisites:** Basic understanding of computer operations and terminology, including Microsoft Office Excel 2019 and newer
- **Program level:** Advanced
- **Advance preparation:** None
- **Who should attend:** Business professionals seeking to develop and implement BI solutions

K2's Case Studies In Fraud And Technology Controls

Fraud continues to plague businesses at epidemic levels, and technology control failures are a significant reason fraud occurs. Using a case study approach, in this session, you will learn about the pervasiveness of fraud, the control failures contributing to fraud, and what you can do to mitigate fraud risk.

A specific focus of this course is applying information technology general controls and information technology application controls. In this course, you will examine numerous reported fraud cases and identify the general and application control failures that contributed to each fraud. By learning through these real-world case studies, you will be positioned better to reduce fraud risk.

Summary Description

The fraud epidemic continues, creating billions in losses every year. Participate in this session to learn how most frauds occur and what controls you can and should implement to reduce fraud risks.

Major Topics

- Key fraud risks impacting businesses today
- Examples of fraud and the monetary impact on victims
- How to create, implement, and assess technology-based internal controls to reduce the probability of becoming a fraud victim

Learning Objectives

Upon completing this course, you should be able to:

- Define information technology general controls and information technology application controls and distinguish between the two
- List examples of critical information technology controls
- Recognize control failures and weaknesses that can lead to fraud
- List recommendations for improving internal controls in an organization

Course Information

- **CPE credit:** Recommended for 8 hours of Auditing (We also offer this course as a 4-hour session.)
- **Instructional delivery methods:** Group Live and Group Internet Based
- **Prerequisites:** Fundamental understanding of internal controls
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** CPAs and other accounting, auditing, and business professionals who are seeking to reduce fraud risk

K2's Excel Best Practices

As spreadsheets evolve, so must your creating, editing, and auditing practices. In this program, you will gain an in-depth understanding of the best ways to work with Excel by learning best practices associated with Excel spreadsheets in each of the following areas: creating and editing Excel workbooks, securing Excel workbooks, collaborating with others in Excel, and reporting on data contained in Excel.

Today's best practices for Excel differ significantly from those used in the past, and you will learn the best ways to work with Excel spreadsheets in this "must-see" CPE program. Course materials include relevant examples to enhance your learning experience. Join us for this program to help you utilize Excel fully.

"I learned various tips/tricks that I expect to implement to my approach immediately." J.J., CPA DE

"Excellent course with lots of practical information that will be useful for work." V.S., CPA MS

Summary Description

There are right ways and wrong ways of working with Excel. In this session, you will learn a series of best practices to help you create Excel workbooks efficiently and effectively, including handling security issues, collaboration needs, and reporting options.

Major Topics

- Best practices associated with creating Excel workbooks, including managing workbooks
- How to secure Excel workbooks
- Collaboration options and best practices in Excel
- Effective reporting techniques in Excel

Learning Objectives

Upon completing this course, you should be able to:

- List critical spreadsheet design fundamentals
- Identify techniques used to minimize data input errors
- Utilize Excel's Table feature as a foundational component of spreadsheets
- Identify and implement three different methods for consolidating data
- Utilize various Excel features, such as Go To Special, to solve specific spreadsheet issues
- List and apply four techniques for sharing an Excel workbook and collaborating with others
- Implement different practices for auditing and error-checking Excel workbooks, including Trace Precedents, Trace Dependents, and Formula Auditing
- Identify the advantages of working with Defined Names in Excel
- List and apply six techniques for securing Excel data

Course Information

- **CPE credit:** Recommended for 8 hours of Computer Software and Applications
- **Instructional delivery methods:** Group Live and Group Internet Based
- **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2019 or newer
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Excel users who want to learn best practices for working with spreadsheets

K2's Excel Essentials For Staff Accountants

Staff accountants have specific needs when working with Excel. Unfortunately, their existing Excel knowledge often does not meet these needs. Chief among these are summarizing data quickly and accurately, generating accurate and aesthetically pleasing reports, and creating accounting-centric calculations for elements such as depreciation, amortization, and interest. By participating in this eight-hour session, staff accountants will gain the essential skills to maximize efficiency and accuracy when working with Excel.

This session begins with a quick overview of Excel best practices. It then progresses rapidly into discussions that address PivotTables, sophisticated formulas, Tables, formatting, and working with dates in Excel. Throughout the session, you will learn from accounting-centric examples to reinforce key learning points. In this session, you will learn in a “laptop-friendly” environment, and participants will have access to all the demonstration files. In sum, this seminar is a “must” for all staff accountants seeking to improve their efficiency and accuracy when working with Excel.

“I learned a lot that will assist me in my job.” T.D., CPA WA

“Excellent class and very valuable information!” S.B., CPA MN

Summary Description

Staff accountants often need guidance to learn which features can help them create effective Excel workbooks. This course will teach them about many of Excel's accountant-centric features to work more efficiently and generate accurate results.

Major Topics

- Best practices for creating and working with Excel workbooks
- Effectively using Excel functions when creating formulas
- The importance of PivotTables in modern reporting environments
- Best practices for formatting your workbooks

Learning Objectives

Upon completing this course, you should be able to:

- List five critical best practices associated with creating workbooks and constructing workbooks that comply with these principles
- Utilize PivotTables and PivotCharts to quickly summarize and present data without generating formulas
- Build sophisticated formulas to assist with reporting and analysis, including those that use functions such as VLOOKUP, XLOOKUP, SUMIFS, CHOOSE, XNPV, XIRR, PMT, IPMT, ACCRINT, and TRIM
- Create Tables from ranges of Excel data and identify the primary advantages of working with Tables
- Apply formats quickly and efficiently to Excel reports and understand the importance of features such as the Accounting format, Accounting Underlines, Precision as Displayed, Center Across Selection, and Flash Fill
- Work with date-oriented data in Excel and create calculations – such as those involving depreciation expense and interest accruals – involving the passage of time

Course Information

CPE credit: Recommended for 8 hours of Computer Software and Applications

Instructional delivery methods: Group Live and Group Internet Based

Prerequisites: Fundamental knowledge of Microsoft Office Excel 2019 or newer

Program level: Intermediate

Advance preparation: None

Who should attend: Accounting and financial professionals who want to use the power of Excel in common business situations to summarize and analyze data

K2's Excel PivotTables For Accountants

Many business professionals consider PivotTables the most powerful feature in Excel, yet most accounting and financial professionals do not use them in their day-to-day activities. If you are ready to learn how to take advantage of PivotTables or extend your existing knowledge of PivotTables, then plan to participate in this course. You will learn how to build PivotTables, group data inside PivotTables – including grouping options for fiscal periods – and create user-defined calculations in your PivotTables. You will also learn advanced PivotTable techniques, including building PivotTables that consolidate data from multiple data ranges and PivotTables that connect dynamically to external databases and financial accounting systems. Additionally, you will learn to take advantage of other Excel features associated with PivotTables, including Slicers, Power Query, and Power Pivot. You will be a master of Excel PivotTables at the end of the day!

This course is for you if you have been leery of working with PivotTables or have struggled to realize their many benefits. With some information, guidance, and coaching from your K2 instructor, you will be ready to use PivotTables to analyze and report on extensive data sets in a fraction of the time you spend completing such tasks.

“I learned a lot that will assist me in my job.” T.D., CPA WA

“Excellent class and very valuable information!” S.B., CPA MN

Summary Description

Isn't it time you learned about PivotTables – Excel's best feature? If so, participate in this session to learn PivotTables from A to Z to take full advantage of this terrific tool's many benefits.

Major Topics

- PivotTable fundamentals, including Recommended PivotTables and the six elements of PivotTables
- Formatting PivotTables
- Advanced PivotTable techniques and options, including consolidation PivotTables, user-defined calculations, and working with Power Pivot
- Analytical techniques available in PivotTables

Learning Objectives

Upon completing this course, you should be able to:

- Identify the six main elements of a PivotTable report and their use when creating PivotTables
- Create PivotTables and manipulate data in PivotTables using grouping techniques, modified Field Settings, user-defined calculations, and sorting and filtering options
- Import and link data from external data sources into PivotTables; additionally, use Tables and Data Models as data sources for PivotTables
- Create Consolidation PivotTables to consolidate data from multiple data sources in Excel
- Construct PivotTables in enterprise-class organizations using Power Pivot and Slicers
- Analyze data in PivotTables using tools and techniques, such as sorting, filtering, Excel's GETPIVOTDATA function, and PivotCharts
- Apply specific PivotTable methods to solve problems in areas of PivotTable formatting, creating multiple PivotTables from a single data source, grouping PivotTable data into fiscal reporting periods, and keeping PivotTable row order intact

Course Information

- **CPE credit:** Recommended for 4 hours of Accounting and 4 hours of Computer Software and Applications
- **Instructional delivery methods:** Group Live and Group Internet Based
- **Prerequisites:** Fundamental understanding of Microsoft Office Excel 2019 or newer
- **Program level:** Advanced
- **Advance preparation:** None
- **Who should attend:** Accounting and financial professionals who want to use the power of Excel PivotTables to analyze and summarize data

K2's Excel Tips, Tricks, And Techniques For Accountants

Excel is the accountant's tool of choice for analyzing and reporting financial data, yet many use time-consuming and error-prone processes to complete everyday tasks. Regardless of your experience level, if you use Excel, you need this course to learn more efficient and effective ways to work with Excel. In this course, you will discover countless tips, tricks, and techniques to improve your general level of productivity, reduce the amount of time you spend on mundane tasks, such as formatting, and customize Excel for greater accuracy and efficiency. You will also learn valuable formula-building skills, best practices for linking Excel data from other worksheets and workbooks, and streamlining report generation and printing processes.

Your K2 instructor will reinforce key learning points throughout the program with practical, real-world examples to improve your understanding and comprehension of the topics presented. This highly acclaimed course draws on over twenty-five years of experience delivering spreadsheet training to accounting and financial professionals, assuring you of the relevance and usefulness of the information and guidance provided during the program.

"I have taken other Excel classes, but they were not geared toward Accountants. This seminar provided practical & relevant information for use in my daily work." A.S., CPA MI

*"This is the most effective CPE course I have ever attended. It will truly help me be more efficient & effective at work."
E.K., CPA PA*

Summary Description

Almost every accountant uses Excel, but most don't use it as efficiently and effectively as they could or should. Participate in this session to learn various accountant-centric Excel tips, tricks, and techniques to leverage Excel for your benefit.

Major Topics

- Fundamental Excel techniques all accounting and financial professionals should know and use
- Creating date-based calculations in Excel
- How to create Excel templates
- Key options you should enable in Excel
- Linking data in Excel

Learning Objectives

Upon completing this course, you should be able to:

- Implement tools and techniques for formatting data in Excel, including multiline column headings, the Accounting Format, custom date and number formats, and Conditional Formatting
- Customize Excel's user environment, including the Ribbon and the Quick Access Toolbar, adjust Excel's Options to improve efficiency, and create and use Templates to increase efficiency and productivity
- Utilize various formula-building tools to create formulas more efficiently and create multiple types of formulas, including formulas to manipulate text and dates, formulas containing XLOOKUP functions, formulas that contain conditional calculations, and formulas that contain circular references
- Link data across multiple Excel worksheets and workbooks, update and manage links, and create sum-through formulas and rolling reports

Course Information

- **CPE credit:** Recommended for 4 hours of Accounting and 4 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live and Group Internet Based
- **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2019 or newer
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Accounting and financial professionals who want to learn how to use Excel more efficiently and effectively

K2's Microsoft 365/Office 365 - All The Things You Need To Know

Microsoft 365/Office 365 continues to grow and evolve, yet most utilize only a fraction of the tools available in their subscription. For example, powerful resources such as SharePoint Online and audio and video conferencing can change how your organization communicates and collaborates. In contrast, more personal apps such as Teams, Planner, Flow, and Sway allow individuals to work more efficiently and effectively in virtually all facets of their jobs. Further, security enhancements to Office 365 mean that your organization can take advantage of all these features in a highly secure environment.

Isn't it time you learned how to move beyond the traditional Microsoft 365/Office 365 applications such as Excel, Word, and Outlook and unleash all your subscription offers? Join us in this fast-paced and highly interactive seminar where you will learn what you need to know to succeed with Microsoft 365/Office 365.

Summary Description

Most Microsoft 365/Office 365 subscribers barely scratch the surface of the power of the tools available in their subscriptions. If you use a 365 subscription, join us in this session to learn about your improved productivity, efficiency, and security options.

Major Topics

- Understanding the Microsoft 365/Office 365 subscription model
- Working with vital 365-based apps and services
- Using Teams as your primary collaboration tool
- Taking advantage of lesser-known features and services in a Microsoft 365/Office 365 subscription

Learning Objectives

Upon completing this course, you should be able to:

- Implement tools and techniques for securing your Microsoft 365/Office 365 implementations
- List key Microsoft 365/Office 365 apps that can improve collaboration and productivity
- Identify opportunities to utilize SharePoint Online to improve team efficiency
- Utilize Microsoft 365/Office 365 apps to communicate more effectively with others

Course Information

- **CPE credit:** Recommended for 8 hours of Computer Software and Applications
- **Instructional delivery methods:** Group Live and Group Internet Based
- **Prerequisites:** Fundamental understanding of computer operations
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals seeking to maximize their return on investment in Microsoft 365/Office 365

K2's Microsoft Access – Tables, Queries, And Beyond

Microsoft Access is an enigma to business professionals, primarily because many try to use Microsoft Office Access as they use Excel. Unfortunately, they fail to understand that the two applications are decidedly different tools, and they become frustrated when they do not realize their intended results. In this course, you will learn about tables and queries – two cornerstone pieces of databases.

You will also learn how to link data between multiple tables and why your choice matters. Moreover, you will learn how to design and create a complete database, including one with Forms and Reports. If you're serious about using Microsoft Office Access to manage larger volumes of data, this course is for you.

Summary Description

For most professionals, Microsoft Access remains an enigma. Many know that Access provides excellent data storage and reporting options but have never learned the fundamentals of the application. If you're ready to learn Access, this course is for you!

Major Topics

- Understanding database principles, including differentiating between databases and spreadsheets
- How to create tables and relate tables in the same database
- Creating and using queries
- Building forms and reports in Access

Learning Objectives

Upon completing this course, you should be able to:

- Define tables, queries, forms, and reports and list the fundamental steps for creating each object
- Differentiate between different types of joins in a database, including inner joins and outer joins
- Describe referential integrity and identify its importance in databases
- Discern critical differences between managing data in an Access database compared to an Excel spreadsheet

Course Information

- **CPE credit:** Recommended for 8 hours Information Technology
- **Instructional delivery methods:** Group Live and Group Internet Based
- **Prerequisites:** Fundamental knowledge of computer operations
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals who are interested in using Microsoft Office Access to manage data

K2's Next Generation Excel Reporting

New features in Excel provide tremendous opportunities to improve Excel-based operational and financial reports. For example, Data Models, Power Query, Data Analysis Expressions, Power Pivot, and many others can help you create more powerful summaries and schedules in less time than ever. Bundle these tools with some of Excel's "legacy" features, and you have significant new opportunities to improve your Excel-based reporting environments.

In this fast-paced seminar, you will learn about the importance of using Power Query to link data into Excel data models and how you can manage these data models to facilitate better and more efficient reporting. Additionally, you will learn how to incorporate Key Performance Indicators, Slicers, and Timelines into your reports to enhance the analytics and understandability of the data. Further, you will learn best practices to format your spreadsheets quickly and efficiently to give them a polished and professional appearance. This course should be at the top of your professional development list if you use Excel for any reporting process.

Summary Description

Are you using features such as Data Models, Power Query, and Power Pivot? If not, it's time to learn about newer options in Excel to take your reporting practices to the next level, and you will do precisely that in K2's Next Generation Excel Reporting.

Major Topics

- Identifying weaknesses in traditional reporting processes
- Using leading-edge features in Excel to improve reporting practices
- How to work with Power Query to solve common reporting challenges
- Adding Slicers and Timelines to your Excel-based reports

Learning Objectives

Upon completing this course, you should be able to:

- Name at least three deficiencies associated with traditional Excel-based reporting practices
- Distinguish between the roles of tools such as Power Query, Power Pivot, and Data Analysis Expressions in next-generation Excel-based reports
- Cite the steps for creating data queries and transformations using Power Query
- Identify the opportunities for managing Data Models in Power Pivot
- List the steps necessary for summarizing data from a Data Model using a PivotTable
- Specify examples of formatting options and tools that you can use to enhance the appearance of an Excel-based report

Course Information

- **CPE credit:** Recommended for 8 hours of Accounting
- **Instructional delivery methods:** Group Live and Group Internet Based
- **Prerequisites:** Fundamental knowledge of Excel 2019 or newer
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Excel users who want to improve Excel-based reporting processes to create accurate reports quickly and easily

K2's Paperless Office

Would you like to find important documents in 10 seconds or less? Would you like to ensure your digital information is safe and secure? Would you like to improve workflow efficiency? Of course, you would, and with some planning and guidance, you will realize these and other benefits of a paperless office. Naturally, no one expects a fully “paperless” office, but reducing the amount of paper we shuffle can offer tremendous rewards. This course will teach you the best practices and proven processes for effective document management.

Participating in this program will teach you how to implement simple, inexpensive document management systems at an individual, workgroup, or small business level. You will also learn about sophisticated and comprehensive document management systems appropriate for larger offices and organizations, including systems with automated workflow processing. Your instructor will guide you through issues such as digitizing paper files, exporting and importing data from specialized applications into a document management system, essential hardware and software considerations, and the policies necessary to facilitate a successful office. Upon completing this course, you will have a comprehensive understanding of your options and a clear direction for implementing your version of the Paperless Office.

Summary Description

The Paperless Office is not a myth! With today's technology, you have many fantastic options for “going paperless.” In this session, you will learn how to leverage these technologies for better document management and storage practices.

Major Topics

- The importance of “going paperless”
- Key technologies that facilitate a paperless office
- Advantages of going paperless
- Examples of leading document management systems and processes

Learning Objectives

Upon completing this course, you should be able to:

- Define key paperless terms such as Document Management, Records Management, and Business Process Management
- Estimate the Return on Investment of moving to a paperless environment
- Create a Records Retention Policy appropriate for your organization
- Identify the three components of a successful document management initiative
- List key characteristics of Electronic File Cabinet solutions and Document Management solutions and typical costs associated with these systems
- Identify essential hardware and software requirements for successful document management, including scanners, storage, memory, operating systems, and network considerations
- Describe critical data backup, disaster recovery, and business continuity issues and identify key vendors in this area and the solutions they offer

Course Information

- **CPE credit:** Recommended for 8 hours of Information Technology
- **Instructional delivery methods:** Group Live and Group Internet Based
- **Prerequisites:** Fundamental knowledge of computer operations
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Accountants and other business professionals who are seeking to improve document management processes in their organizations

K2's Small Business Internal Controls, Security, And Fraud Prevention And Detection

Internal controls are more important than ever, and their importance increases daily. However, internal controls present a challenge for many smaller organizations. This program will teach you how to evaluate, develop, and implement an effective internal control structure in a small business environment. You will identify how to assess risk in smaller organizations and implement preventive, detective, deterrent, and compensating controls to mitigate these risks, even without proper segregation of duties. Additionally, participating in this program will teach you technology-focused techniques for preventing and detecting fraud and securing information systems and sensitive data.

For small organizations, maintaining an effective system of internal controls presents a significant challenge. Realistically, implementing many theoretical concepts surrounding internal controls may sometimes be impossible. Consequently, many internal control structures foster an environment where too much risk exists. This factor and uncontrolled information systems can often lead to disastrous results. Participate in this program to learn the necessary insights and tools to design, implement, and monitor small organizations' internal controls, security, and anti-fraud measures.

“Great real-life examples! Great easy & simple techniques that can easily be applied in business practice that will certainly add value to any organization.” K.E., CPA MN

Summary Description

Fraud plagues small businesses – the group that can least afford it! Fortunately, there are proven options you can implement to stem the tide of fraud found in smaller companies and not-for-profits, and in this session, you will learn how to do precisely that!

Major Topics

- Common challenges associated with implementing appropriate internal controls in small business environments
- Fraud in small business environments
- Internal control options in small business accounting software
- Understanding the need for application controls and general controls

Learning Objectives

Upon completing this course, you should be able to:

- Cite internal control fundamentals, including definitions and concepts, types of internal control activities, and the need for internal controls
- Identify common small business control deficiencies and issues, including concentration of ownership and inadequate segregation of duties, and list five key risk areas for small businesses
- Recognize the common types of fraud schemes occurring in small businesses and implement internal control measures to reduce the threat of becoming a victim
- List the objectives and common deficiencies of small business accounting systems
- Define the purpose of general controls and list examples of typical control techniques in small businesses
- Implement technology tools to prevent and detect occupational fraud
- List opportunities to enhance security over information systems and sensitive data

Course Information

- **CPE credit:** Recommended 8 hours of Auditing
- **Instructional delivery methods:** Group Live and Group Internet Based
- **Prerequisites:** Basic understanding of internal controls and accounting and administrative processes in smaller organizations
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals responsible for internal control and fraud prevention and detection

K2's Technology For CPAs - Don't Get Left Behind

How good are you with the technology you use daily? Are new technology tools available to save time and make you more effective? Technology continues to accelerate rapidly, and keeping pace is essential. This course is for you if you are not an information technology (IT) expert but need a technology update to maintain and improve your skills to serve your companies or clients more efficiently and effectively!

In this fast-paced, update-style course, you will survey today's IT environment, learning about computer hardware, software (including Microsoft Office), operating systems (including Windows 11), peripheral devices, and what they mean for you. You will also learn about significant trends in information technology and how to take advantage of the opportunities presented by these trends. Examples include the latest Excel features, best practices for working with PDF files, and security and privacy issues. Additionally, you will learn how to improve the overall performance of your IT investment, thereby increasing your return on investment.

Throughout this program, you will learn from real-time demonstrations of practical applications of the latest tools, which can provide you with the knowledge you need to harness the power of technology, both now and in the future. So register now for this "don't miss" opportunity to get the skills required to enhance the value of your IT investment.

"One of the best IT courses offered." R.O., CPA MS

"Extraordinary amount of information and resources provided – very good seminar." A.M., CPA NJ

Summary Description

Technology changes daily, so you must stay abreast of critical developments to leverage today's technologies. Join us in this session to survey key technology developments affecting accounting and financial professionals.

Major Topics

- Emerging technologies all business professionals should know
- Considerations associated with upgrading to Windows 11
- Practical options for protecting your data
- New features in commonly-used applications such as Excel and Adobe Acrobat DC

Learning Objectives

Upon completing this course, you should be able to:

- Identify essential hardware and software enhancements and updates that are relevant to accountants, including operating systems, desktop productivity suites, accounting software, and document management systems
- Implement critical features in Microsoft Office applications, including accountant-centric features in Excel, Word, and Outlook
- List and apply features found in Adobe Acrobat for working with PDFs, including commenting, reorganizing PDFs, securing PDFs, and creating and working with PDF forms
- Identify security and privacy issues facing accountants, including practical tools and techniques for mitigating risks, such as data encryption, password management, biometrics, and portals

Course Information

- **CPE credit:** Recommended for 8 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live and Group Internet Based
- **Prerequisites:** None
- **Program level:** Basic
- **Advance preparation:** None
- **Who should attend:** Accounting and financial professionals seeking to improve their knowledge of technology and the return on their investment in technology

K2's Advanced QuickBooks Tips And Techniques

The QuickBooks platform – including the desktop and online environments – is one of the leading accounting solutions for small and growing businesses. Further, Intuit has incorporated numerous advanced features and changes into the tools over the past few releases. This seminar will teach you how to use many new and advanced features in the desktop and online environments to help you solve critical issues. For example, you will learn advanced inventory management techniques, including changing the default costing methodology and implementing lot and serial number tracking. You will also learn how to build complete sets of financial statements in Excel that link in real-time to underlying QuickBooks data files and how to create multi-company financial statements. Additionally, you will learn how to use the Client Data Review feature to streamline how to identify and correct errors and close accounting periods in QuickBooks.

Knowing how to take advantage of the advanced tools and features available can determine your level of success when working with QuickBooks. So, take advantage of this opportunity to learn about QuickBooks' "deep" features to maximize your effectiveness with QuickBooks.

"I learned a lot that I can't wait to get back to the office to try!" S.C., CPA NE

Summary Description

QuickBooks Desktop and QuickBooks Online offer numerous features beyond simply recording and summarizing transactions. Join us for this session to learn advanced options for managing inventory, better reporting, and cleaning up data files, among other items.

Major Topics

- Tips for improving efficiency with QuickBooks and QuickBooks Online
- Better reporting when working in QuickBooks environments
- Tips for cleaning up QuickBooks and QuickBooks Online instances
- Managing inventory more effectively when working with QuickBooks and QuickBooks Online

Learning Objectives

Upon completing this course, you should be able to:

- Identify techniques for handling advanced reporting issues, including the QuickBooks Statement Writer, QuickBooks Online Management Reports, linking QuickBooks data into other applications via Open Database Connectivity, and multi-company reporting
- Manage inventory more effectively in QuickBooks, including using Items, changing inventory costing methodologies, creating Assembly items, adjusting inventory quantities and valuations, and listing the advantages associated with QuickBooks' Advanced Inventory feature
- Differentiate between various techniques for exchanging QuickBooks data with others, including QuickBooks Accountants' Copy feature, Portable Company Files, and backup files
- Utilize QuickBooks' Client Data Review feature to streamline the process of cleaning up QuickBooks data files and closing accounting periods

Course Information

- **CPE Credit:** Recommended for 4 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental knowledge of QuickBooks and QuickBooks Online
- **Program level:** Advanced
- **Advanced preparation:** None
- **Who should attend:** Accounting and financial professionals who want to learn about advanced features and techniques associated with QuickBooks and QuickBooks Online

K2's An Accountant's Guide To Blockchain And Cryptocurrency

Blockchain technology offers the promise of digital truth. When appropriately implemented, it provides a transparent, permanent, immutable, and high-speed record-keeping system. The possibilities are endless, from managing the logistics of supply chain networks to facilitating international commerce. The adoption of this technology is growing, with millions of new users every year. Organizations adopt this technology daily to help improve their existing operations through its ledger capabilities or by executing smart contracts. Cryptocurrency is one example of blockchain technology, and its growth and value have exploded to over \$2 trillion in the last few years. This growth has helped fuel the adoption of Wall Street traders and traditional investors.

While more popular than ever, few business professionals understand these technologies and their capabilities, risks, and potential impacts on business operations and processes, such as contract execution, recording and maintaining real estate ownership records, and supply chains. Unfortunately, this incredible technology is a mystery for most accounting professionals. This course will provide an in-depth look at this technology, including a detailed overview of the underlying technology, the benefits, the risks, the major players, and many practical applications. By participating in this session, you will gain a deeper understanding of the inner workings of this technology and recommendations for getting started.

Summary Description

For many accounting and financial professionals, blockchain and cryptocurrency remain mysteries. Yet, these technologies offer great promise and continue to move toward mainstream adoption. Participate in this session to gain a better understanding of these tools.

Major Topics

- Understanding the fundamental tenets of blockchain technology
- Examples of applied applications of blockchain technology
- Identifying leading cryptocurrencies available today
- Understanding risks associated with cryptocurrencies

Learning Objectives

Upon completing this course, you should be able to:

- Define blockchain and identify an example of blockchain technology currently in use
- List examples of how blockchain uses encryption to make the resulting ledger tamper-resistant
- Identify at least four possible uses for blockchain-based ledgers
- Define cryptocurrency and list the four major cryptocurrencies used today
- List examples of benefits and risks associated with using cryptocurrencies

Course Information

- **CPE credit:** Recommended for 4 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** None
- **Program level:** Basic
- **Advance preparation:** None
- **Who should attend:** Accountants and business professionals who are interested in helping clients improve their understanding of blockchain

K2's Artificial Intelligence For Accounting And Financial Professionals

Discover the real-world power of Artificial Intelligence (AI) and equip yourself with the skills to conquer modern challenges in accounting and finance. In this engaging course, we demystify AI and unveil its practical applications, transforming it from theory into a hands-on tool. Learn the essential AI fundamentals and unlock its remarkable potential to boost your productivity and effectiveness alongside your team.

Explore the specific problem-solving capabilities of AI, tailored to address the unique challenges faced by accounting and financial professionals. Gain expertise in leveraging AI features integrated into everyday applications, including the ubiquitous Excel. Uncover how these features enable you to effortlessly detect fraud, identify potential transaction errors, and elevate your financial operations to new heights. Witness firsthand how AI is reshaping the present and future of your profession, positioning you at the forefront of this revolutionary wave.

Summary Description

From simple applications such as spam filtering to more advanced issues such as fraud detection, AI continues to move into the mainstream. In this session, you will learn about different forms of AI and practical business applications of this emerging tool.

Major Topics

- Exploring AI applications in accounting and finance
- Understanding AI features in everyday tools
- Embracing the future: AI's impact on finance and accounting

Learning Objectives

Upon completing this course, you should be able to:

- Recognize essential components of Artificial Intelligence.
- Distinguish AI, Machine Learning, and Robotic Process Automation.
- Explore practical AI applications in accounting and finance.
- Identify AI features in applications like Excel.
- Evaluate AI's impact on accounting and financial fields.

Course Information

- **CPE credit:** Recommended for 4 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** None
- **Program level:** Basic
- **Advance preparation:** None
- **Who should attend:** Accounting and financial professionals seeking to learn how to use Artificial Intelligence to work more efficiently and improve business processes

K2's Best Word, Outlook, And PowerPoint Features

Most professionals routinely use Word, Outlook, and PowerPoint, but many are self-taught and, as a result, have not used many of the best features of these three applications. Consequently, they often use “brute force,” inefficient means when working with these three components of Microsoft Office. If that describes you, carve time out of your schedule to participate in this four-hour session. In it, you will learn how to work much more efficiently when using these tools to get better results in less time.

Summary Description

Almost all business professionals use Microsoft's Word, Outlook, and PowerPoint applications, but most never receive training on the “right way” to work with these tools. Participate in this session to learn how to leverage these apps more efficiently and effectively.

Major Topics

- Creating Word and PowerPoint documents with greater ease and efficiency
- Enabling critical Outlook options for improved productivity
- Best practices for working with Word, Outlook, and PowerPoint

Learning Objectives

Upon completing this course, you should be able to:

- Recognize the benefits associated with using Styles in a Word document
- Identify the key characteristics of effective PowerPoint presentations and the steps required to create them
- List features in Outlook that can improve personal and team productivity
- Identify key Options and Settings in Word, Outlook, and PowerPoint and the steps necessary to manage them

Course Information

- **CPE credit:** Recommended for 4 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental understanding of Microsoft Office applications
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** CPAs and other accounting, financial, and business professionals who want to work more efficiently when using Word, Outlook, and PowerPoint

K2's Better Productivity Through Artificial Intelligence And Automation Tools

Artificial Intelligence (AI) and automation tools offer incredible opportunities for all business professionals to improve productivity and accuracy. For example, generative AI tools such as ChatGPT and Bard can be beneficial when conducting research or drafting reports and correspondence. Likewise, Microsoft's Power Automate platform and similar tools such as Zapier can help you elevate efficiency to levels you may have thought unattainable. If this sounds appealing, plan to participate in this session to modernize your workflows and take advantage of these tools.

This session will teach you practical applications of today's AI and automation tools. Moving beyond fundamental discussions, you will learn how to use AI and automation to streamline workflows, improve internal control, maximize productivity, and even improve team member morale. In addition, you will learn about some potential pitfalls associated with these technologies and how to avoid making mistakes when using these tools. In sum, this session is "must-see CPE," and you should plan to participate in this class today.

New Course For 2024!

Summary Description

Artificial intelligence and automation are among today's "leading edge" technologies. In this session, you will learn how to leverage these tools to improve your business workflows, yielding greater efficiency, productivity, and reduced errors.

Major Topics

- Practical opportunities to leverage artificial intelligence and automation in business settings
- Potential risks associated with using AI and automation, including inherent ethical issues
- Pros and cons associated with tools such as ChatGPT, Bard, Power Automate, and Zapier

Learning Objectives

Upon completing this course, you should be able to:

- List potential benefits and risks associated with artificial intelligence and automation
- Identify examples of tasks that you can improve using AI
- List examples of how you can use Power Automate and similar tools to automate tasks
- Specify characteristics of tasks that lend themselves to automated workflows

Course Information

- **CPE credit:** Recommended for 4 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental understanding of business technologies and workflows
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** CPAs and other accounting, financial, and business professionals who want to work more efficiently using AI and automation

K2's Case Studies In Fraud And Technology Controls

Fraud plagues businesses at epidemic levels, and technology control failures are a major contributing factor. Using a case study approach, in this session, you will learn about the pervasiveness of fraud, the control failures that contribute to fraud, and what you can do to mitigate fraud risk.

A specific focus of this course is the application of information technology general controls and information technology application controls. In this course, you will examine numerous reported fraud cases and identify the general control and application control failures that contributed to each fraud. By learning through these real-world case studies, you will be better positioned to reduce fraud risk.

Summary Description

The fraud epidemic continues, creating billions in losses every year. Participate in this session to learn how most frauds occur and what controls you can and should implement to reduce fraud risks.

Major Topics

- Key fraud risks impacting businesses today
- Examples of fraud and the monetary impact on victims
- How to create, implement, and assess technology-based internal controls to reduce the probability of becoming a fraud victim

Learning Objectives

Upon completing this course, you should be able to:

- Define information technology general controls and information technology application controls and distinguish between the two
- List examples of critical information technology controls
- Recognize control failures and weaknesses that can lead to fraud
- List recommendations for improving internal controls in an organization

Course Information

- **CPE credit:** Recommended for 4 hours Auditing (We also offer this course as an 8-hour session.)
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental understanding of internal controls
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** CPAs and other accounting, auditing, and business professionals who are seeking to reduce fraud risk

K2's Data Analytics For Accountants And Auditors

In the world of “Big Data,” virtually all business professionals have become data analysts, at least to some extent. However, that is particularly true in auditing, where internal and external auditors increasingly turn to data analytics to identify situations requiring follow-up and investigation. Those who understand how to use various tools to assist in these efforts benefit by conducting more thorough analyses and achieving superior results in less time.

In this session, you will learn about various tools and techniques you can use for more thorough data analyses. The discussion includes Excel as a data analysis tool, multiple Excel add-ins, and Microsoft's Power BI application. If you're seeking to improve your skills in the field of data analytics, this session is the one for you!

Summary Description

Data analytics is among the most talked about subjects in business circles today. In this session, you will learn about the four types of data analytics, tools for generating data analytics measures, and how to interpret and use data analytics results.

Major Topics

- Understanding the importance of data analytics in modern business environments
- Generating and interpreting data analytics using everyday applications such as Microsoft Office Excel and Microsoft's Power BI platform
- Using regression analysis to create and validate forecasts and projections

Learning Objectives

Upon completing this course, you should be able to:

- List the four types of data analytics and identify situations in which each can be useful in auditing environments
- Identify opportunities to use features in Excel to analyze data in the context of auditing
- Distinguish between Business Intelligence and Data Analytics
- Differentiate between correlation and causation
- Cite examples of how Power Query, Power BI, and other tools can streamline and enhance Data Analytics

Course Information

- **CPE Credit:** Recommended for 4 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Basic knowledge of technology strategy and standards
- **Program level:** Intermediate
- **Advanced preparation:** None
- **Who should attend:** Practitioners and business executives who need to know more about data analytics and their importance

K2's Emerging Technologies For Accountants, Including Blockchain And Cryptocurrencies

Unlike technologies we use every day, many currently emerging technologies can change how we work in the future. This session covers various technologies nearing mainstream adoption and helps you understand what they do, how they work, and some of the potential risks and rewards they offer.

Attend this course and learn the basics of blockchain, cryptocurrencies, big data, artificial intelligence, and machine learning, as well as some of the uses, benefits, risks, and threats these innovative yet disruptive platforms pose to legacy businesses.

Summary Description

The effects of many emerging technologies, including blockchain and cryptocurrency, are being felt far and wide. So, if you're ready to learn about blockchain, cryptocurrency, big data, artificial intelligence, and machine learning, this session is for you!

Major Topics

- Understanding many of today's emerging technologies and their role in business environments
- Applied examples of artificial intelligence and machine learning
- Risks associated with emerging technologies

Learning Objectives

Upon completing this course, you should be able to:

- Define blockchain, artificial intelligence, cryptocurrency, Big Data, and machine learning
- Identify significant similarities and differences between Big Data, artificial intelligence, and machine learning
- List examples of potential use cases for each of the technologies discussed in this session and how their use differs from current practices

Course Information

- **CPE Credit:** Recommended for 4 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Basic knowledge of technology strategy and standards
- **Program level:** Intermediate
- **Advanced preparation:** None
- **Who should attend:** Practitioners and business executives who need to know more about emerging technologies, including blockchain and cryptocurrencies

K2's Ethics And Technology

With the explosion of technology over the past thirty years, one fair question is, “what are the ethical considerations and impacts related to this technology?” Of course, practical technology issues such as data privacy and security undoubtedly carry ethical considerations. However, technology also affects the ethics associated with work-life balance, the digital divide, training needs, copyrights, and fraud, to name a few.

This course will teach you about “technoethics” and its implications for individuals and organizations. To that end, you will explore many current and emerging issues associated with ethics and technology, such as copyrights, cybercrimes, privacy versus security, and geo-tracking technologies. Given the profound implications of ethics and technology, this could be the most impactful session you will ever attend.

Summary Description

Ethics issues in the field of technology continue to increase. Examples include software licensing, copyright issues, fraud, work-life balance, and a growing digital divide. Participate in this session to learn more about ethical challenges related to technology.

Major Topics

- Understanding the differences between ethics, morals, and laws
- Key technology issues that can impact ethical behavior in businesses
- Examples of potential ethical conflicts precipitated by modern technologies

Learning Objectives

Upon completing this course, you should be able to:

- Distinguish between morals and ethics
- Define “technoethics” and identify examples of business ethics issues and how they are affected by technology
- Recognize the influence of ethics requirements in Codes of Conduct
- List at least five examples of potential ethical issues associated with leading technologies today

Course Information

- **CPE Credit:** Recommended for 4 hours Behavioral Ethics
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** None
- **Program level:** Basic
- **Advanced preparation:** None
- **Who should attend:** CPAs who desire a deeper understanding of critical ethical issues facing accountants today

K2's Excel Charting And Visualizations

Charts and graphs are nothing new. However, many professionals struggle with building compelling visualizations. If that statement describes you, participate in this session to improve your skills in creating Excel charts and other visualizations. As a result, you will create visualizations to enhance your communication skills.

This session is much more than just a seminar on fundamental charts. Instead, in this session, you will learn how to create advanced charts that are interactive, dynamic, and aesthetically pleasing – three qualities that will help to ensure that your readers and audience will understand the data you are presenting. This seminar is a must if you want to improve your communication skills.

Summary Description

Excel charts and other visualizations can be great tools for helping to communicate your intended messages. Join the K2 team in this session to learn more about how you can create compelling visualizations to help you convey key business messages.

Major Topics

- Understanding the best types of visualizations to use in specific situations
- Creating compelling visualizations using Excel
- Adding interactivity to your Excel-based visualizations

Learning Objectives

Upon completing this course, you should be able to:

- Identify the types of visualizations that you should use to communicate specific messages
- List the steps to creating compelling visualizations in Excel and other Microsoft Office applications
- Identify options for creating interactive visualizations
- Utilize Sparklines and Conditional Formatting to enhance visualizations in Excel
- Identify options for linking Excel-based data and visualizations into Word and PowerPoint

Course Information

- **CPE credit:** Recommended for 4 hours Computer Software and Application
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental understanding of creating charts in Microsoft Office applications
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** CPAs and other accounting, financial, and business professionals who want to learn how to create more effective charts and visualizations in Excel

K2's Improving Productivity With Microsoft 365/Office 365 Cloud Applications

Many Microsoft 365/Office 365 subscriptions include robust Cloud services for improving productivity. Foundational services, such as **SharePoint Online**, **OneDrive for Business**, and **Exchange Online**, join with other powerful tools such as **Teams**, **Planner**, **Power Automate**, **Forms**, and **Power Apps** to provide a productivity platform second to none. Unfortunately, most users will never benefit from working with these tools simply because they remain unaware of these features.

Plan to attend this session to learn about the “rest of 365” and how these Cloud-based applications can enhance personal and team productivity while simultaneously facilitating remote working arrangements. Don't miss this opportunity to get all the knowledge and guidance necessary to leverage your investment in Microsoft 365/Office 365 fully.

Summary Description

Isn't it time you learned how to take advantage of critical features available in your Microsoft 365/Office 365 subscription? In this session, you will learn to use tools such as Teams, Planner, Power Automate, and others to enhance productivity and efficiency.

Major Topics

- Understanding the Cloud-based options available in a Microsoft 365/Office 365 environment
- How to use tools such as Teams, Planner, and Power Automate
- Storing data in SharePoint Online and OneDrive for Business

Learning Objectives

Upon completing this course, you should be able to:

- Identify relevant, Cloud-based components of the Microsoft 365/Office 365 subscription model
- Differentiate between OneDrive, OneDrive for Business, and SharePoint Online
- Cite examples of how Teams can improve productivity and enhance collaboration and communication
- List examples of other Cloud-based services available through a Microsoft 365/Office 365 subscription
- Specify situations in which tools such as Planner, Power Automate, Bookings, Stream, and Sway might enhance individual and organizational productivity, efficiency, and profitability

Course Information

- **CPE credit:** Recommended for 4 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental knowledge of computer applications and the Microsoft 365/Office 365 subscription models
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** CPAs and other business professionals who are seeking to leverage their Microsoft 365/Office 365 subscriptions by taking advantage of some of the Cloud-based features available in these environments

K2's Introduction To Excel Macros

You have used Excel for years and perhaps Lotus 123 before that. And through all that time, you have repeatedly said, "One day, I'll learn how to write macros." Finally, that time has arrived because this four-hour program will introduce you to the wide world of Excel macros and Visual Basic for Applications (VBA).

This course teaches the fundamentals of creating and working with macros in Excel and is designed specifically for those with little experience working with macros. More specifically, taking this course will teach you how to use Excel's Macro Recorder to write simple yet effective macros. You will also learn how to secure and share macros with other Excel users and create user-defined functions to solve specific accountant-centric problems in Excel. Further, you will learn how to create macros that run when a user opens a workbook and VBA basics. Don't miss this unique opportunity to learn how to begin working with macros – one of Excel's most powerful tools.

"Very helpful Excel Macro class for beginners." L.C., CPA PA

"I learned a tremendous amount during this course." A. P., MA

Summary Description

There's no need to be intimidated by Excel macros! Instead, participate in this session to learn how to create helpful macros to automate many business processes without writing VBA code. You'll be amazed at how easy Excel macros can be!

Major Topics

- Getting started with Excel macros by using the Macro Recorder
- Fundamentals of writing VBA code
- Saving and sharing macros
- Getting started with User-Defined Functions

Learning Objectives

Upon completing this course, you should be able to:

- Create a macro in Excel using the Macro Recorder tool
- Manage the fundamental elements of macros in Excel, including accessing macro functionality, naming macros, shortcut keys, storing and deleting macros, absolute vs. relative cell references in macros, and macro security
- Identify the usefulness of the Macro Recorder and list four critical limitations of the Macro Recorder; additionally, modify Excel's Quick Access Toolbar and the Ribbon to provide shortcuts to macros
- List the nine essential elements of macros written using Visual Basic for Applications and utilize the Visual Basic Editor; manage macros through copy/paste and delete processes
- Create variables in macros and identify the purpose of branching and conditional logic routines such as IF/THEN/ELSE, DO/WHILE, and CASE

Course Information

- **CPE Credit:** Recommended for 4 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** None
- **Program level:** Basic
- **Advanced preparation:** None
- **Who should attend:** Business professionals seeking to extend Excel's functionality with simple yet highly effective macros

K2's Mastering Advanced Excel Functions

With approximately 500 functions now available in Excel, some newer and more powerful tools are easy to overlook. But, if you do that, your productivity will suffer. In this session, you will learn how to take advantage of many of Excel's more advanced features – some new and some legacy – to elevate your productivity to higher levels.

In this session, you will learn about many of Excel's newer tools, including **XLOOKUP**, **SUMIFS**, **SWITCH**, and **STOCKHISTORY**. Also included in this session are discussions of advanced financial functions, such as **IPMT** and **PPMT**, and how to retrieve summarized data easily using **GETPIVOTDATA** and **CUBEVALUE**. Additionally, you will learn how to make sophisticated calculations easier with Dynamic Array formulas, harness the **AGGREGATE** function's power, and create more accurate forecasts with Excel's **FORECAST.ETS** function. No matter your experience working with Excel, participating in this course will help you work more efficiently and effectively in Excel.

Summary Description

Are you ready to move past Excel's simple functions, such as SUM? If so, participate in this session to learn about many of Excel's advanced functions, including XLOOKUP, SUMIFS, and SWITCH. You'll also learn about the revolutionary Dynamic Arrays feature.

Major Topics

- Powerful new functions and features in Excel, such as XLOOKUP and Dynamic Arrays
- How to use "legacy" features and functions such as AGGREGATE
- Creating effective forecasts in Excel

Learning Objectives

Upon completing this course, you should be able to:

- List examples of best practices for constructing formulas in Excel spreadsheets
- Identify situations in which each of the following functions might be useful: SUMIFS, SWITCH, and STOCKHISTORY
- Distinguish between the XLOOKUP function and legacy Excel functions such as VLOOKUP, HLOOKUP, INDEX, and MATCH
- Cite examples of when using Dynamic Arrays would be useful
- Differentiate between Excel's AGGREGATE and SUBTOTAL functions
- Identify conditions in which the FORECAST.ETS function is preferable to the FORECAST function

Course Information

- **CPE credit:** Recommended for 4 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental knowledge of Excel 2019 or newer
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals who work with Excel and want to extend their knowledge of advanced features and functions to become more accurate, effective, and efficient with spreadsheets

K2's Microsoft Teams

Microsoft Teams is one of the most exciting personal and organizational productivity tools ever appearing on the business landscape. With Teams, you can communicate and collaborate easily and securely with others, including colleagues outside your organization. Further, you can extend the already-robust functionality in Teams by incorporating add-in solutions with just a few mouse clicks. Unfortunately, despite Teams' power and relatively simple interface, many organizations struggle to deploy and use Teams.

In this session, you will learn how to get up and running quickly in Teams to take full advantage of this powerful tool. More specifically, you will learn how to get started in Teams and critical decisions affecting your deployment. Also, you will learn how to work in Teams, take advantage of the chat, voice, and video call services, and share documents securely with others. Moreover, you will learn how to extend your Teams platform to external organizations for improved communication and collaboration. Additionally, you will identify how to add other applications to Teams and optimize Team's configuration for the best overall efficiency and security. If you are working with Teams or plan to do so, this is one CPE session you can't afford to miss!

Summary Description

Microsoft Teams usage has grown incredibly over the past five years. However, most business professionals take advantage of only a tiny fraction of the platform's utility. Participate in this session to learn more about what Teams can do for you and your organization.

Major Topics

- Understanding the Teams platform
- Communicating and collaborating in Teams
- Adding applications and services to Teams
- Extending Teams to individuals outside your organization

Learning Objectives

Upon completing this course, you should be able to:

- Identify critical potential benefits associated with using Microsoft Teams
- List various elements of functionality offered by Teams
- Differentiate between "guest" and "external" users in Teams
- Cite examples of additional applications that you can incorporate into Teams
- Name examples of communication options available in Teams
- Specify examples of security measures available in Teams

Course Information

- **CPE credit:** Recommended for 4 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental knowledge of computer applications
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** CPAs and other business professionals who are seeking to leverage their Office 365/Microsoft 365 subscriptions by taking advantage of Teams for improved communication and collaboration

K2's Securing Your Data: Practical Tools For Protecting Information

Security is not optional, and yesterday's security techniques do not minimize today's threats. Therefore, now is the time to tune up what you know about protecting sensitive data. This program will teach you the latest tools and techniques for securing your data, including encryption, virus protection, safe communications, electronic signatures, secure authentication, and more. You will also learn how to implement a practical, five-step approach to securing your PC and the questions you should ask your staff to ensure server-based information remains protected.

Security failures, such as client or customer data breaches, are costly – they can even drive your company out of business. So, what security tools do you need, and how should you use them to secure your sensitive data and systems? Can you risk attempting to manage today's threats using yesterday's techniques? Participate in this program to learn how to identify viable and practical solutions to mitigating today's security threats.

"Great info. I took several ideas from this class." W.H., CPA MS

Summary Description

Data security is a top-of-mind concern for almost all business professionals, yet most struggle to achieve this objective. Make plans to participate in this session to learn about many practical tools you can use to protect your data and enhance cybersecurity.

Major Topics

- Understanding today's cybersecurity risks
- Identifying major cybersecurity risks
- Implementing specific steps to reduce risk

Learning Objectives

Upon completing this course, you should be able to:

- Assess the relevant security risks in your organization
- Identify specific tools and techniques to protect sensitive data
- List five specific steps to improve PC security
- Differentiate between security procedures to improve organizational security

Course Information

- **CPE credit:** Recommended for 4 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Basic understanding of computer operations
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals seeking to secure sensitive data

K2's Small Business Accounting Shootout

The market for accounting solutions designed for small businesses has never been better! From traditional desktop applications to newer Cloud-based solutions, small businesses have affordable options available today that were unthinkable for many just a few years ago. In this seminar, you will learn about these options and receive the benefit of an unbiased comparison of many of today's leading solutions, helping you make an informed decision about the future direction of your accounting platform.

You will learn about solutions from Intuit, Sage, Xero, Wave, and Zoho to help you decide whether to remain with your current platform or switch to a different one. Additionally, you will learn about various third-party add-ins to help you make informed decisions about issues such as automated data entry, sales tax processing, reporting, and business intelligence. In sum, if you are the least bit curious about the accounting options available for smaller businesses, this is the most critical session you will participate in this year.

Summary Description

Small business accounting solutions have never been better, with many fantastic options. In this session, you will learn about the relative strengths of these platforms so you can make the right choice when selecting and implementing a solution.

Major Topics

- Understanding the small business accounting landscape
- Learn how solutions from leading providers can potentially solve your small business accounting and reporting issues
- Create investment estimates for acquiring and implementing a new small business accounting solution

Learning Objectives

Upon completing this course, you should be able to:

- Create a list of needed features and functions for a small business accounting application
- Identify solutions that represent a potential “good fit” for an organization
- Estimate the investment required to implement a specific solution
- List examples of third-party add-ins to provide necessary additional functionality

Course Information

- **CPE credit:** Recommended for 4 hours Accounting
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** General understanding of accounting practices in use in small businesses
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals and advisors seeking to identify an accounting solution that is the “right fit” for a small business organization

K2's Technology Update

Which technology trends will impact you and your business? What emerging technologies will potentially help you to address security and efficiency? How will the emergence of Windows 11 affect you? Should you consider subscription-based software? What does the future of communication technology have in store for you? Get answers to these and other questions by participating in K2's Technology Update, a four-hour review of technology trends and developments affecting virtually all business professionals.

In this session, you will learn about significant issues such as:

- Hardware trends,
- Software innovations,
- Communication and collaboration tools,
- Security issues and solutions,
- Key products to consider for implementation, and
- Unusual and emerging technologies you may have missed.

If you're taking just one technology-focused training session this year, this should be it!

Summary Description

Technology changes daily, so how can you stay abreast of all the relevant issues and options? What trends do you need to monitor? Are there developments that will impact you? You can get answers to these and other questions by joining us for this update session.

Major Topics

- Developments in hardware and software
- Options for communicating and collaborating more effectively
- Addressing cybersecurity issues

Learning Objectives

Upon completing this course, you should be able to:

- Identify major hardware trends and software developments
- List examples of technologies that can improve communications and data transfers
- Differentiate between various communication tools and platforms
- List key security issues and identify appropriate responses

Course Information

- **CPE credit:** Recommended for 4 hours Information Technology
- **Instructional delivery methods:** Group Live and Group Internet Based
- **Prerequisites:** General understanding of technology in business settings
- **Program level:** Basic
- **Advance preparation:** None
- **Who should attend:** Business professionals and advisors seeking to learn more about technologies impacting accounting and financial professionals

K2's Testing And Auditing Excel Workbooks

Excel errors continue to plague organizations of all sizes. As spreadsheets become more common, these errors will continue to impact virtually every Excel user and those who rely on Excel-based data and analyses. Fortunately, that need not be the case because many options exist to prevent, identify, and correct spreadsheet errors before adversely affecting reports and decision-making processes.

In this session, you will learn how to apply best practices to reduce the error rate in workbooks you and others on your team create and edit. Equally important, you will learn how to use add-ins for Excel to programmatically scan and audit your spreadsheets to identify potentially costly errors while there is still time to correct them. Finally, you do not want to miss this opportunity to learn how PerfectXL, ClusterSeven, and ActiveData tools can help you and your team identify and correct potentially disastrous spreadsheet errors.

Summary Description

Are we sure that our Excel workbooks yield accurate results? Unfortunately, some estimates indicate over 90% of workbooks contain errors! Participate in this session to learn how to test and audit your workbooks to ensure you can rely on their results.

Major Topics

- Examples of common errors found in Excel workbooks
- How to reduce Excel errors
- Add-in solutions that can minimize spreadsheet error risk

Learning Objectives

Upon completing this course, you should be able to:

- List common causes of spreadsheet errors and the potential impact of these errors
- Identify best practices to reduce the number of errors in Excel workbooks
- Cite examples of Excel Add-ins to identify spreadsheet errors programmatically

Course Information

- **CPE Credit:** Recommended for 4 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental understanding of Microsoft Office Excel 2019 and newer
- **Program level:** Intermediate
- **Advanced preparation:** None
- **Who should attend:** Business professionals seeking to reduce errors and improve accuracy and efficiency when working with Microsoft Office Excel. Although many of the concepts in this program apply to Microsoft Office Excel for the Mac, this course focuses on techniques found in Microsoft Office Excel for Windows

K2's Top PDF Features You Should Know

Stop struggling with PDFs! Adobe Acrobat and other PDF tools provide access to features that make working with PDF files a breeze. This course will teach you to use tools and features such as PDF forms, redaction, converting PDFs to Word and Excel files, and electronic signatures. You will also learn how to create and apply tick marks and build indices, catalogues, and portfolios. You will also learn how to secure PDF documents to their fullest.

The popularity and usefulness of PDFs increase daily, but most PDF users have not learned how to manipulate PDF documents effectively. Accordingly, they struggle and strain with these standard files. You do not need to let this be the case. Join us in this very timely session, where you will learn the top features necessary to optimize your work with PDF documents.

“Very helpful, more tools than expected.” C.L., CPA, NE

Summary Description

PDFs are a business mainstay, yet most professionals don't work efficiently with them and often struggle with creating, editing, and securing their PDFs. Participate in this session to learn how to work effectively with PDFs and gain efficiency along the way.

Major Topics

- Best practices for creating, editing, and managing PDFs
- The process for creating and distributing PDF forms
- Integrating PDFs with other applications
- Securing your PDFs

Learning Objectives

Upon completing this course, you should be able to:

- Identify procedures to reorganize and manipulate PDF documents – including applying bookmarks – to meet specific needs
- Cite examples of how to create and distribute PDF forms and automate the process of collecting and summarizing form response data
- List examples of ways to markup and edit PDF documents, including applying tick marks
- Differentiate between options for securing PDF documents and facilitating electronic approvals and signatures
- Identify options for converting PDF documents to Word and Excel files

Course Information

- **CPE credit:** Recommended for 4 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental knowledge of basic PDF operations
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals who are seeking to become more efficient and effective when working with PDF documents

K2's Working Remotely – The New Normal

Many team members now work remotely, whether by choice or necessity. As a result, questions abound about remote access to desktops and data, security, communications, collaboration, and other considerations in this new normal. When implemented correctly, remote work strategies can be a “win-win” for all involved; however, failed implementations may lead to inefficiencies, security issues, and dissatisfied team members.

This session will teach you today's best practices for working remotely. Specifically, you will learn about various remote access tools, communication and collaboration options, and security best practices. You will also learn about managing and monitoring workflows in remote work environments and tools you can use. After completing this session, you can implement a remote work strategy that yields efficiency, security, and satisfaction to all involved.

Summary Description

Remote work is a business mainstay. However, technology issues, collaboration needs, and information security are all challenges to effective remote work environments. Participate in this session to learn best practices for working remotely.

Major Topics

- Key technologies that facilitate remote work options
- Cybersecurity issues impacting remote work environments
- How to communicate and collaborate when working remotely

Learning Objectives

Upon completing this course, you should be able to:

- Differentiate between options for remotely accessing your computer, applications, and data
- Identify recommended security practices for remote access and related tools and services
- List examples of Cloud-based services and suites that can contribute to working remotely
- Distinguish between communication and collaboration tools for remote workers

Course Information

- **CPE credit:** Recommended for 4 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental knowledge of computer applications
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** CPAs and other business professionals who are seeking the best ways to implement remote work and work-from-home strategies

K2'S 2024 TECHNOLOGY CONFERENCE SESSIONS

The K2 Enterprises team has delivered the market-leading technology conference to accounting and financial professionals throughout the United States and Canada for over thirty years. For 2024, we look forward to providing another stellar event. We believe that our success with the Technology Conference is partly driven by how we choose the sessions for the Conference. We select these sessions based on the results of a survey we conduct during the Fall of each year.

Based on the results of our survey, following is the standard agenda we anticipate using for our 2024 Technology Conferences. Note that we can also present the Conference as a two-track event. Further, we can deliver the Conference as a one-day option if your situation warrants. Let us know what works best for you, and we'll do our best to accommodate your request.

K2 Enterprises 2024 Standard Two-Day Conference Layout		
Day One		
K2's Tech Update <i>(100 minutes)</i>		
K2's Office Scripts – The New Macros <i>(100 minutes)</i>	K2's Getting Started With Artificial Intelligence <i>(100 minutes)</i>	K2's The ABCs Of Automation With Microsoft's Power Platform <i>(100 minutes)</i>
<i>Lunch</i>		
K2's What's Now, What's Next: Emerging Technologies <i>(100 minutes)</i>	K2's Accessing Your Company's Data With Power Query And Power BI <i>(100 minutes)</i>	K2's CPA Firm Technology And Management Update <i>(100 minutes)</i>
K2's Excel Best Practices And Features <i>(100 minutes)</i>		
Day Two		
K2's Time To Advance Automation <i>(100 minutes)</i>		
K2's Optimizing Your Tech Stack <i>(100 minutes)</i>	K2's Advanced Collaboration Solutions <i>(100 minutes)</i>	K2's Small Business Accounting Solutions <i>(100 minutes)</i>
<i>Lunch</i>		
K2's Consumer Electronics Show 2024 Review <i>(50 minutes)</i>	K2's AI Confidential? Privacy And AI <i>(50 minutes)</i>	K2's Better Reporting With QuickBooks Online <i>(50 minutes)</i>
K2's Harnessing ChatGPT <i>(50 minutes)</i>	K2's Effective Automation And Outsourcing <i>(50 minutes)</i>	K2's Saving Time With Electronic Forms <i>(50 minutes)</i>
	K2's Ripped From The Headlines: Lessons Learned From Interesting Crimes <i>(100 minutes)</i>	

Detailed descriptions of each of the above sessions follow on the ensuing pages.

K2's Tech Update

Keeping pace with technology has never been more crucial, and K2's Tech Update is your key to staying informed and ahead. This comprehensive session is tailored for accounting professionals seeking to understand the landscape of technological advancements. You will gain insights into the latest developments and how they impact the accounting sector. Our expert-led program will delve into the newest Software and Hardware innovations, the evolving role of AI and machine learning in accounting, and the burgeoning impact of technologies like quantum computing and blockchain. This course guides you through the advantages and challenges of these technologies and helps you craft a technology strategy that aligns with your business goals.

Summary Description

Technology continues to revolutionize our professional and personal lives. Stay up to date on key technologies that may affect you in the very near future so that you may position you and your organization for success.

Major Topics

- AI and machine learning trends
- Quantum computing in finance
- Understanding the growing impact of blockchain and digital currencies in accounting
- Software and hardware innovations

Learning Objectives

- Identify and assess the impact of AI and machine learning on accounting practices.
- List potential applications and implications of quantum computing in finance.
- Identify the evolving role of blockchain technology and cryptocurrencies in financial systems.
- Specify examples of the practicality and benefits of using the latest software and hardware tools

Course Information

- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** None
- **Program level:** Update
- **Advance preparation:** None
- **Who Should Attend:** This course is essential for accounting professionals eager to stay current with technological evolution and apply these advancements in their practices.

K2's Office Scripts – The New Macros

Office Scripts is a new feature that allows you to automate tasks in Excel and other Office applications. Unlike VBA, a legacy language that runs only on Windows, Office Scripts can run on any platform and device that supports Office on the web. Further, Office Scripts has a modern and intuitive interface that lets you easily create, edit, and share your scripts. Office Scripts are stored in the Cloud, and they work with Office Online apps and integrate with Power Automate for process automation. Save time and improve productivity using Office Scripts in Excel and other Office applications.

Summary Description

Office Scripts are an exciting new development for Excel and other applications. Although they are like macros in some respects, most users will likely find them easier to work with. Learn how to put this powerful automation tool to use!

Major Topics

- Introduction to Office Scripts
- Recording your first script
- Integration with Power Automate

Learning Objectives

- List three benefits of using Office Scripts over legacy VBA macros
- Distinguish the storage locations for Office scripts vs. VBA macros
- Identify four reasons why Office Scripts may not be available for use
- List two ways of sharing an Office Script with other users

Course Information

- **CPE credit:** Recommended for 2 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental knowledge of basic computer operations
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who Should Attend:** This course is essential for business professionals seeking guidance on how to work with Office Scripts

K2's Getting Started With Artificial Intelligence

Much has been written and said about Artificial Intelligence (AI). But for many professionals, AI remains an enigma because they do not know how to get started using tools such as Bard, ChatGPT, and Copilot. If that describes your situation, relax because help is here!

Participate in K2's Getting Started With Artificial Intelligence to learn to use today's AI tools. This session will teach you how to access and use multiple popular AI tools to improve efficiency and productivity. If you are starting with AI, this is one session you cannot miss!

Summary Description

Generative AI tools such as ChatGPT, Bard, and Copilot are available to everyone and offer great promise for improved productivity. Learn how you can begin to take advantage of these tools by participating in this session.

Major Topics

- Understanding AI tools available today
- Creating accounts in AI platforms
- Querying data from AI platforms
- Customizing your AI subscriptions

Learning Objectives

- List the steps for querying data from tools such as Bard and ChatGPT
- Identify the capabilities of Microsoft's Copilot
- Differentiate between the capabilities of free and paid AI tools
- Name examples of risks associated with AI

Course Information

- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** None
- **Program level:** Basic
- **Advance preparation:** Fundamental understanding of business-related technology
- **Who Should Attend:** Business professionals seeking to learn how to work with AI tools

K2's The ABCs Of Automation With Microsoft's Power Platform

Automation and standardization are two of the keys to productivity, but most people who are not programmers are unsure where to start. Microsoft's Power Platform is a comprehensive platform for creating automated workflows, integrations, and data-driven reports. Components include Power BI, Power Apps, Power Automate, Power Pages, and Power Virtual Agents. Attend this session to learn about this platform and how everyone can use its low-code, no-code environment to solve process challenges.

Summary Description

Microsoft's Power Platform – incorporated into many Microsoft 365 subscriptions – offers tools to automate common business processes. Learn how to take advantage of the Power Platform in this session.

Major Topics

- Overview of the Power Platform and its components
- Review examples of business processes that may benefit the most from using automation
- Discussion and demonstration of its low-code/no-code app development environment

Learning Objectives

- Identify the major steps in automating business processes
- Identify two rudimentary process automation applications in Microsoft 365 and explain how the use cases for these applications differ from those for Power Platform.
- List the applications which make up the Power Platform
- From a list, identify significant differences in expected use cases and user bases for Microsoft Forms in Microsoft 365 and Microsoft Power Automate/Power Apps in the Power Platform
- Identify the Power Platform components used to solve common problems when creating process automation solutions

Course Information

- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental knowledge of business-related technology
- **Program level:** Basic
- **Advance preparation:** None
- **Who Should Attend:** Accounting and financial professionals seeking to automate workflows in their organizations

K2's What Now, What's Next: Emerging Technologies

The Internet, Cloud-based applications, blockchain, cryptocurrencies, generative artificial intelligence, and software as a service were all revolutionary in their time. Still, many more technologies are in the pipeline and will change how we work, play, and experience life. This session will begin with an update on some of the technologies highlighted in our first session on this topic in 2018 and will continue with a discussion of the innovations to come in 2024 and beyond. Attend this session and learn about innovative technologies shaping our world today and those that will change it in the future.

Summary Description

Participate in this session to learn about key emerging technologies, including quantum computing, artificial intelligence, and self-supervised learning.

Major Topics

- Quantum Computing
- The integration of physical and digital experiences
- Self-supervised learning
- Synthetic data and its implications for AI training

Learning Objectives

- Identify key emerging technologies discussed in this session
- Select from a list of choices the best definition for key terms associated with this session
- Identify at least one of the key emerging technologies from the summary of our 2018 course on this topic, which is in wide use today

Course Information

- **CPE credit:** Recommended for 2 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental knowledge of basic business-related technologies
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Accounting professionals who have decision-making or influence on the use of accounting technology in their organization

K2's Accessing Your Company's Data With Power Query And Power BI

Power Query and Power BI are genuinely incredible tools to revolutionize your workflow. They offer the promise of "write once, refresh many" reporting, where your reports can instantly update by clicking a button. While incredible tools, these features require additional training and experience to master. This course series will review the different methods of connecting to your data and have multiple hands-on activities to help you master these incredible tools. After completing this session, you will know how to turn your organization's data into repeatable, refreshable PivotTables, Power BI dashboards, and more!

Summary Description

Power Query and Power BI offer great opportunities for accessing your data and making it more useful in reporting scenarios. Learn how to benefit from these tools in this session.

Major Topics

- Utilizing Power Query to access data from the web, spreadsheets, folders, and databases
- Using Power Query to perform various transformations to clean up data before importing it to Power BI or Excel
- Producing various reporting documents from data delivered from Power Query

Learning Objectives

Upon completing this course, you should be able to:

- Outline Power Query's noteworthy features and functions and how you can use them for reporting projects
- Demonstrate how to connect Power Query to web resources, spreadsheets, and databases to extract, transform, and load data into your reports
- List the various methods to transform your data using Power Query before importing it into a report.
- Demonstrate connecting Power Query and Power BI to a sample data server

Session Information

- **CPE credit:** Recommended for 2 hours Computer Software & Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental knowledge of Excel
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Financial professionals who want to save time, improve accuracy, and promote efficiency with their reporting projects

K2's CPA Firm Technology And Management Update

In the ever-evolving landscape of public practice accounting, K2's CPA Firm Technology and Management Update stands as a beacon of knowledge and innovation. This year's session delves into the latest advancements in technology and management strategies. We will also explore cutting-edge developments in data analytics, cybersecurity, practice management, and client service excellence in a highly competitive market. We will examine technologies like AI-enhanced auditing, blockchain in finance, and the latest in Cloud computing and automation. This session provides a comprehensive overview of significant trends, helping you make informed decisions for your firm's current and future technological and managerial needs.

Summary Description

With many technologies now ready for “prime time,” it’s exciting to see some of the options for improved productivity in CPA firms. Learn more about these new tools in this session.

Major Topics

- Evolving trends in the accounting profession, including shifts in supplier dynamics
- Advanced software solutions tailored for various service lines and niche markets
- Innovative automation tools, with an emphasis on AI and machine learning in accounting
- Optimized technology stacks to boost productivity and profitability

Learning Objectives

Upon completing this course, you should be able to:

- Catalogue recent changes by leading suppliers in the accounting sector
- Evaluate software solutions for specific service lines and niche applications
- Recognize opportunities for automation and innovation within accounting practices
- Select the most suitable technology stack for enhancing your firm's performance

Session Information

- **CPE credit:** Recommended for 2 hours Business Management and Organization
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** None
- **Program level:** Update
- **Advance preparation:** None
- **Who should attend:** This course is indispensable for partners, managers, and IT professionals in CPA firms responsible for adopting and managing innovative applications and strategies.

K2's Excel Best Practices And Features

Microsoft Office Excel is one of the most widely used applications by accounting and financial professionals. Yet, many remain unaware of new and improved features in Excel and, therefore, fail to reach the level of productivity and accuracy they desire. Further, with new features appearing in Excel provided through Microsoft 365 subscriptions and the forthcoming release of Excel 2024, it is more important now than ever to get up-to-speed on the world's most popular spreadsheet!

Make plans now to elevate your Excel skills by participating in this session. You will learn about the newer features available to improve efficiency and accuracy in it. You will also learn about the importance of numerous legacy features in Excel and how you can – and should – continue to use these tools to improve productivity.

Summary Description

Excel remains a staple tool for virtually all accounting and financial professionals. In this session learn about many of the newer features in Excel, along with some you may have overlooked in the past...truly “must-see CPE!”

Major Topics

- What to look for in Excel 2024
- How to take advantage of new functions and features in Excel
- Integrating Excel data with other applications
- Improving Excel security

Learning Objectives

Upon completing this course, you should be able to:

- List examples of new functions and features in Excel
- Differentiate between Excel 2024 and subscription-based versions of Excel
- Identify steps necessary to automate tasks in Excel
- Specify the actions required to integrate data from other sources into Excel

Session Information

- **CPE credit:** Recommended for 2 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites** Fundamental understanding of Excel
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals seeking to use Microsoft Office Excel more effectively

K2's Time To Advance Automation

In today's business environment, automation is no longer just a buzzword but a critical component for enhancing efficiency and accuracy. This session provides practical insights on automating your organization using advanced tools from Zoho, Zapier, Microsoft, and others. We will focus on real-world applications, demonstrating how to automate key accounts payable, banking, and approval workflows. You will also learn to recognize and avoid common pitfalls in automation projects. This course is essential for accounting and financial professionals seeking to leverage automation to achieve greater efficiency, reduce errors, and foster a more productive work environment.

Summary Description

Increasingly, automating business processes is a necessity. In this session, you will learn about real-world examples of automating business processes. Remember, the survival of your business might depend upon successful automation!

Major Topics

- **Advanced Automation Strategies:** Best practices for starting or enhancing your automation journey
- **Key Tools for Automation:** Exploring the latest features in Zoho, Zapier, Microsoft, and other tools
- **Practical Automation in Finance:** Automating tasks in accounts payable, banking, and approval workflows
- **Navigating Common Pitfalls:** Identifying and avoiding typical obstacles in automation projects

Learning Objectives

Upon completing this course, you should be able to:

- Outline the primary benefits of advanced automation in business processes
- Select appropriate automation tools for data extraction and transformation
- Identify Microsoft 365 plans and other tools that offer powerful automation capabilities like Power Automate
- Compare and contrast the functionalities and applications of Power Automate and Zapier
- Recognize business tasks that are prime candidates for automation

Session Information

- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites** Fundamental understanding of basic business technologies
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals desiring to improve efficiency and accuracy through automation

K2's Optimizing Your Tech Stack

In the ever-evolving landscape of business technology, it is about having the right tools and optimizing for efficiency and cost-effectiveness. K2's Optimizing Your Tech Stack for Efficiency and Cost-Effectiveness is designed for professionals seeking to balance functionality with financial prudence. This session delves into strategies for streamlining your technology stack without sacrificing performance. We will guide you through assessing your current tech tools, identifying redundancies, and exploring less expensive yet effective alternatives. You will learn techniques to evaluate the total cost of ownership of tech tools and make informed decisions to avoid overspending. This course is necessary for professionals seeking the most value from their technology investments.

Summary Description

Is your tech stack aligned with your organizational goals? Is there duplication among software titles? Is your hardware where it needs to be? Get answers to these and other questions in this session!

Major Topics

- Conducting a tech stack assessment, including an inventory of current tools and applications
- Identifying essential and redundant tools
- Exploring cost-effective alternatives
- Calculating your total cost of ownership

Learning Objectives

Upon completing this course, you should be able to:

- Accurately assess the technology tools used in your business environment
- Identify common feature overlaps in tech stacks that lead to unnecessary costs
- Discover affordable and efficient alternatives to conventional tech tools
- Analyze and calculate the total cost of ownership for various technology solutions

Session Information

- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites** Fundamental understanding of basic business technologies
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Accounting, financial, and business professionals who want to refine their tech stack to achieve maximum efficiency at a minimal cost

K2's Advanced Collaboration Solutions

In an era where seamless collaboration and efficiency are paramount, K2's Advanced Collaboration Solutions provides an in-depth look into integrating cutting-edge technologies to enhance client interactions and workflow. This course explores the latest advancements in client portals, incorporating PBC (Provided by Client) and 1040 workpaper products, integrating payment options, and eSignature capabilities. Understand how these tools meet compliance standards and significantly improve the user experience and operational efficiency. We will guide you through selecting the right mix of technologies to address your business challenges, ensuring your firm has the best tools for success in today's digital landscape.

Summary Description

Collaboration is more important now than ever. In this session, you will learn how to take advantage of today's collaboration tools to improve accuracy, customer/client service, and organizational efficiency.

Major Topics

- Enhanced Portals for Collaboration: Including PBC and 1040 workpaper integration
- Modern Payment Solutions: Understanding and integrating various payment options into your portal
- Effective Use of eSignatures: Streamlining processes and ensuring compliance
- Feature Checklist for Collaboration Tools: What to look for in the latest technology

Learning Objectives

Upon completing this course, you should be able to:

- Evaluate and select portal products that include PBC and 1040 workpaper functionalities.
- Compare different vendor options for integrating payment processes.
- Assess eSignature needs and the features that best address them.
- Develop a comprehensive understanding of the features necessary for effective collaboration.

Session Information

- **CPE credit:** Recommended for 2 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites** Fundamental understanding of basic business technologies
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Accounting and financial professionals who want to leverage the latest collaboration technologies, including advanced portals, payments, eSignatures, and more, to enhance their practice's efficiency and client satisfaction

K2's Small Business Accounting Solutions

The landscape of small business accounting constantly changes, and K2's Small Business Accounting is your essential guide to navigating these changes. This course focuses on the most effective accounting solutions and supplementary tools for today's small businesses. We explore robust, user-friendly software options, from industry staples like QuickBooks Online and Xero to emerging Cloud-based platforms and add-ons. The course helps you understand how these tools can streamline financial management for businesses with annual revenues up to \$15 million. You will gain insights into the latest advancements, integration capabilities, and how to maximize efficiency and accuracy in small businesses.

Summary Description

Small businesses have better options now than ever before in the market of accounting solutions. Participate in this session to learn more about these options and which might be best for you or your clients.

Major Topics

- Current landscape of small business accounting software
- Strengths and limitations of critical solutions
- Effective add-ons and integrations
- Implementation strategies

Learning Objectives

Upon completing this course, you should be able to:

- Catalogue the leading accounting solutions tailored for small businesses
- Critically evaluate the strengths and limitations of various accounting tools in the small business context
- Understand the role of add-ons in enhancing accounting software functionalities
- Develop strategies for selecting and implementing the most appropriate accounting solutions for small business clients

Session Information

- **CPE credit:** Recommended for 2 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Basic understanding of small business accounting needs and current practices
- **Program level:** Update
- **Advance preparation:** None
- **Who should attend:** This course is ideal for accountants, financial advisors, and consultants who specialize in or are interested in small business finance, seeking comprehensive knowledge of the latest accounting tools and their applications.

K2's Consumer Electronics Show 2024 Review

The Consumer Electronics Show 2024 (CES) is the premier event for witnessing the convergence of technology and consumer needs. This year's show provides unparalleled exploration of the latest innovations in the tech world. Attendees will experience the newest trends in smart home technology, wearable devices, augmented and virtual reality, and sustainable tech solutions. Our expert-led session provides accounting-centric insights into how these technologies reshape consumer behavior and the global marketplace. Whether you are a tech enthusiast, an industry professional, or just keen on staying ahead of the technological curve, CES 2024 offers valuable insights you should not miss.

Summary Description

Small businesses have better options now than ever before in the market of accounting solutions. Participate in this session to learn more about these options and which might be best for you or your clients.

Major Topics

- Smart Home Innovations: Discover the latest advancements in home automation and IoT devices
- Wearable Technology Trends: Explore the future of health, fitness, and personal tech wearables
- Augmented and Virtual Reality: Delve into immersive experiences and their impact on entertainment, education, and business
- Sustainable Technology Solutions: Uncover new developments in eco-friendly and energy-efficient technologies

Learning Objectives

Upon completing this course, you should be able to:

- Identify emerging trends and products in the consumer electronics industry
- Understand the application of AR and VR in various sectors
- Evaluate the role of sustainable technologies in shaping future consumer choices
- Gain insight into the future of wearable technology and smart home devices

Session Information

- **CPE credit:** Recommended for 1 hour Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Basic understanding of business-related technology
- **Program level:** Update
- **Advance preparation:** None
- **Who should attend:** Accounting professionals, tech industry professionals, entrepreneurs, investors, gadget enthusiasts, and anyone interested in the latest trends in consumer electronics

K2's AI Confidential? Privacy And AI

Generative Artificial Intelligence captured everyone's imagination when it launched in 2022, but it also creates opportunities for data leakage and inappropriate use of confidential data based on the terms of service. Unfortunately, everyone has clicked "I agree" on a Terms of Service (TOS) or End User License Agreement (EULA) document which they neither read nor understood. This session will review the standard terms embedded in these documents with thousands of words and incomprehensible terminology. Attend this breakout and learn what you wish you knew about analyzing and evaluating license agreements and privacy policies.

Summary Description

AI is an extremely popular topic these days, and for good reason! However, does AI present yet another threat to your privacy? Get answers to this question and more in this session.

Major Topics

- Tools for evaluating and summarizing licenses and privacy policies
- Definitions of significant terms and concepts often used in software licenses
- Review critical terms associated with services like Microsoft 365 or QuickBooks Online

Learning Objectives

Upon completing this course, you should be able to:

- Identify at least one tool which helps users to organize and identify critical sections of license agreements
- Select the correct definition for key terms used in license agreements and privacy policies
- Explain how to identify significant sections in license agreements, including how to "opt out" of features that may compromise your privacy

Session Information

- **CPE credit:** Recommended for 1 hour Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Basic understanding of business-related technology and privacy issues
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Individuals who want to protect their organizations from unreasonable privacy policies and contract terms in boilerplate agreements

K2's Better Reporting With QuickBooks Online

Presently, over seven million businesses use QuickBooks Online. However, these businesses often struggle to get the reports they need. In some cases, they are limited because of their chosen subscription. However, necessary reports are available in other cases, yet users do not know how to access them. Join us in this session to learn about better reporting options in QuickBooks Online.

In this session, you will learn how to create and customize your reports in QuickBooks Online. You will learn about Standard, Custom, and Management reports. You will also learn about the new Spreadsheet Sync tool that allows you to create customized reports, including multi-company reports in Excel. If you use QuickBooks Online and want to improve reporting, this session is for you!

Summary Description

If you're using or plan to transition to QuickBooks Online, will you be able to get the reports you need from the platform. In this session, you'll learn how to maximize your reporting options when working with QuickBooks Online.

Major Topics

- The types of reports available in QuickBooks Online, by subscription level
- Customizing reports to meet your needs
- Spreadsheet Sync in QuickBooks Online Advanced

Learning Objectives

Upon completing this course, you should be able to:

- Differentiate between report types in QuickBooks Online
- List the steps necessary to create custom reports
- Identify how Management Reports differ from traditional reports
- Specify how to use the new Spreadsheet Sync feature in QBO

Session Information

- **CPE credit:** Recommended for 1 hour Accounting
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Basic understanding of small business reporting needs and tools, including QuickBooks Online
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** QuickBooks Online users seeking to improve reporting processes

K2's Harnessing ChatGPT

Enhance your productivity and streamline your accounting practices with ideas learned in this course. This dynamic program, designed specifically for accountants seeking a competitive edge, delves into the practical applications of ChatGPT in your daily workflow. From conducting comprehensive research and crafting compelling correspondence to swiftly addressing technical inquiries and optimizing Excel formulas, you will gain invaluable skills to expedite your tasks and improve overall efficiency. Furthermore, we will delve into the power of ChatGPT plugins, equipping you with the knowledge to process PDF documents seamlessly and efficiently navigate the vast expanse of the web. Join us on this transformative journey and unlock your potential as a proficient and empowered accountant.

Summary Description

Are you ready to maximize the utility of ChatGPT? If so, participate in this session so you can learn the best ways to leverage this tool.

Major Topics

- Leveraging prompt engineering in ChatGPT for various accounting tasks
- Exploring the applications and limitations of ChatGPT in accounting
- Empowering efficiency for everyday accounting tasks

Learning Objectives

Upon completing this course, you should be able to:

- Identify options to leverage ChatGPT for research, correspondence, technical inquiries, and Excel formula optimization
- List examples of practical applications of ChatGPT in the realm of accounting
- Identify powerful plugins for GPT4 for efficient PDF document processing and web searching
- List examples of how accountants can unlock professional efficiency by utilizing ChatGPT

Session Information

- **CPE credit:** Recommended for 1 hour Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Basic understanding of business-related technology
- **Program level:** Basic
- **Advance preparation:** None
- **Who should attend:** Ideal for financial professionals, accountants, bookkeepers, and industry practitioners who are interested in maximizing their utilization of ChatGPT

K2's Effective Automation And Outsourcing

While outsourcing and automation have been used in multinational corporations, the decline in accounting program enrollment at many universities has made finding qualified entry-level staff more challenging and forced a new conversation about these tools in small and mid-sized businesses. This session will discuss the business environment for outsourcing and review the ethical, regulatory, and practical considerations associated with revealing data and relying on the work of others in your organization.

Summary Description

Automation and outsourcing offer viable options for addressing today's labor issues. In this session, you will learn about the potential benefits and risks associated with automation and outsourcing.

Major Topics

- Overview of how firms and businesses currently use automation and outsourcing
- Discussion of the management and regulatory compliance issues with offshore and onshore outsourcing use in small and mid-size organizations
- Review of which tasks are best suited for offshoring, which solutions are best for onshore outsourcing, and which solutions can be solved with technology
- Discussion of specific solution providers which provide solutions for tax and accounting firms as well as internal accounting departments

Learning Objectives

Upon completing this course, you should be able to:

- Identify at least three business processes that can be made significantly more cost-effective using automation and outsourcing
- Identify at least three tasks that are not appropriate for offshore outsourcing and automation
- Identify at least one service provider or technology solution discussed in the course which provides a solution to a common accounting-oriented task
- List examples of why outsourcing and automation have been used in enterprises and multinationals but have weak adoption in small and mid-sized businesses

Session Information

- **CPE credit:** Recommended for 1 hour Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental understanding of business-related technology
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Accounting professionals who are considering the use of automation and outsourcing in their work

K2's Saving Time With Electronic Forms

Web portals, "low-code/no-code" data collection, and survey tools have changed how we collect data. Modern solutions like Microsoft 365 Forms, Zoho Survey, SurveyMonkey, Microsoft PowerApps, and legacy tools like Adobe Acrobat Forms allow users to create web forms and integrate the resulting data into business process workflows. This session introduces the range of available tools, demonstrates standard features, and shows how tools permit users to expose or conceal questions based on answers given earlier in the survey. Attend this session to learn how to use tools you already own to collect data from your team, customers, and vendors efficiently.

Summary Description

Business professionals can automate data collection processes by using today's electronic forms. Learn about these tools and how to deploy them in this session.

Major Topics

- Comparing the capabilities and costs associated with forms/data collection tools and the different approaches taken by each tool
- The benefits and risks associated with using each approach
- Examples of how tools can be used effectively, with examples

Learning Objectives

Upon completing this course, you should be able to:

- Identify the licenses or subscriptions required to use forms/data collection tools, including Microsoft Power Apps, Zoho Forms, Microsoft Forms, and Adobe PDF forms
- Identify examples of benefits and risks of using each approach to creating forms
- Identify which tool or approach would be the best fit for a particular data collection task

Session Information

- **CPE credit:** Recommended for 1 hour Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental understanding of business-related technology
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Accounting professionals who want to collect, aggregate, and report on data from employees, vendors, and customers more effectively

K2's Ripped From The Headlines: Lessons From Interesting Tech Crimes

Remote and hybrid work during the Pandemic created new opportunities for cybercriminals and other fraudsters to exploit, and accounting professionals are among the most targeted individuals. This session is a series of case studies that examine actual criminal filings and news accounts and use them to highlight the actions you can take to limit your exposure to similar schemes. Attend this session and learn more about how high-profile control failures occurred so you can be more effective at preventing crimes such as theft, malware, ransomware, phishing, and hacking.

Summary Description

Hacks, attacks, ransomware, malware – where does it end? Unfortunately, tech crimes continue to plague businesses of all sizes. Participate in this session to learn how you can reduce the risk of becoming yet another victim.

Major Topics

- Common security weaknesses that occur with hardware and software at home and in the office
- Malware, ransomware, data breach, and incident response tips
- Internal control failures which result in the theft of assets or unauthorized manipulation of data

Learning Objectives

Upon completing this course, you should be able to:

- List at least three major security incidents reported in the headlines in the last year, and explain at least one internal control design or operation flaw that allowed the hack to occur
- Select the correct definitions for security terms such as attack surface, vulnerability, exploit, social engineering, phishing, malware, heuristics, biometrics, and multi-factor authentication (MFA)
- List at least three best practices learned by reviewing the control failures cited in the case studies

Session Information

- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental understanding of business-related technology
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Managers, owners, and accounting professionals who want to learn from computer crime incidents best practices that can be used to enhance their organization's security posture

ONE AND TWO-HOUR SESSIONS

In addition to the sixteen-hour, eight-hour, four-hour, and current year conference sessions detailed previously, the K2E Canada Inc. team is proud to offer a variety of one-hour and two-hour sessions to accommodate more specialized and focused needs. These sessions provide timely and relevant content along with scheduling flexibility.

As mentioned earlier, this version of the catalogue includes nineteen, all-new one and two-hour sessions. These sessions constitute the backbone of our Technology Conferences, but we can deliver them in other programs also.

TIP: You may want to consider scheduling three or four sessions on the same day to create a focused, customized learning experience to meet your group's specific needs.

K2's Accounting Automation

Why is it so hard to automate accounting? Because many accountants don't know their options and, therefore, fail to reap the rewards of accounting automation.

This session will teach you how easy and profitable accounting automation can be. In it, you will learn how to automate many traditional accounting processes, often with technology you already own. In addition to bank feeds, you will learn about automation options for processing accounts payable and receivable, approving transactions, and linking data from one platform to another. If you are serious about improving efficiency and accuracy, you should make plans to attend this session.

Summary Description

Labor shortages and the need to improve efficiency and accuracy have led us to a new era of accounting automation. Join us in this session to learn more about today's tools and options to automate many accounting-oriented tasks and workflows.

Major Topics

- Key automation opportunities
- Benefits and risks associated with automation
- Primary tools available for automation efforts

Learning Objectives

- List at least three examples of automation opportunities in businesses today
- Identify examples of core technologies used in automation efforts
- Differentiate between tasks ideal for automation and those that humans should perform
- Identify the importance of Robotic Process Automation to your accounting automation efforts

Course Information

- **CPE credit:** Recommended for 1 hour Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** None
- **Program level:** Overview
- **Advance preparation:** None
- **Who should attend:** Business professionals desiring to improve efficiency and accuracy within the accounting discipline

K2's Advanced Topics In Power BI

So, you've been using Power BI to create fundamental reports and dashboards, and now you're ready for even more advanced reporting...if so, this session is for you. In this session, you will learn how to extend your Power BI environment by incorporating tools such as Data Analysis Expressions, Key Performance Indicators, Hierarchies, and Apps and Content Packs, among others. By taking advantage of the tools and techniques covered in this session, you will be able to move beyond simple reports and dashboards in Power BI and truly leverage the power of this awesome reporting tool.

Summary Description

If you're ready to move past Power BI's fundamentals, participate in this session to learn how to create user-defined calculations, manage security options, publish reports and dashboards to apps, and add Key Performance Indicators, among other items.

Major Topics

- Creating formulas in Power BI with Data Analysis Expressions
- Adding Key Performance Indicators to your Power BI reports and dashboards
- Managing security in Power BI
- Publishing your reports and dashboards to Apps and Content Packs for easy sharing with other team members

Learning Objectives

Upon completing this course, you should be able to:

- List the steps necessary to create formulas using Data Analysis Expressions
- Identify the importance of Key Performance Indicators
- Apply appropriate security techniques to your Power BI reports and dashboards
- Identify the purpose of Apps and Content Packs in the context of Power BI

Session Information

- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental understanding of Power BI
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Financial professionals who are looking to expand their knowledge of business intelligence and dashboard reporting

K2's Automation For Increasing Personal Efficiency And Effectiveness

Automation is a great way to save time and improve accuracy and effectiveness. It also allows you to get more value from your workday. This session will teach you how to automate the tasks that are mundane or take up too much energy so you complete them automatically instead. One of the best things a person can do is invest time into automating their workday to help them achieve more work, reduce daily stress, and provide better mental clarity.

This session focuses on various tools and services you can use to help promote personal automation. In it, you will learn about technologies such as integration platform tools, Amazon Alexa and Google Home, and the Elgato Stream Deck.

Summary Description

Automation options abound, and in this session, you will learn how to take advantage of many personal automation tools and services. You will learn about various automation platforms, creating automation workflows, and automation tools to become more efficient.

Major Topics

- Automation opportunities
- Understanding integration platforms
- Productivity tips, tricks, and applications
- Tips and tricks for saving valuable time

Learning Objectives

- Define automation and demonstrate different use cases
- Identify processes in your personal and professional life where you can use automation to save time
- Distinguish between various automation platforms
- Identify the steps necessary to establish an account with an integration-as-a-platform-service (iPaaS) provider and create automation workflows for daily tasks such as email, calendaring, and document management
- Leverage the power of the Elgato Stream Deck for the simple use of application hotkeys and launching automation process with the touch of a button

Course Information

- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental understanding of technology in business settings
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals desiring to improve personal and team efficiency and effectiveness

K2's Backups Done Right

Where is your data? Do you have it controlled and backed up? If all your data is in the Cloud, how do you verify that the backup recovery is rapid? If your data is in various silos from your application providers, how do you ensure you have the protection and disposal approaches needed?

This session will help you understand and guide your IT team and providers to take the right actions to protect your business. Backup considerations, including Cloud, backup appliance, disaster recovery, and business continuity approaches, are included. If you are from the “trust but verify” school of thought, this session will help you ask the right questions.

Summary Description

If you experience a data catastrophe, could you recover all your data? Are you sure? Join us in this session to learn the best practices for ensuring that you can recover all your data should the need arise. Remember, your data is your most important asset – protect it!

Major Topics

- List the significant backup approaches
- Identify areas of critical weakness or threats in your backup and recovery systems
- List all critical and non-critical applications and establish their order of recovery
- Differentiate between backup solutions based on their features and benefits

Learning Objectives

Upon completing this course, you should be able to:

- Distinguish the differences in the top five methods for backup
- Detect common backup deficiencies
- Categorize backup priorities, including RPO and RTO
- Create an implementation plan for your business

Session Information

- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites** Fundamental knowledge of computer operations
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals who want to ensure that appropriate backups are in place in their organization

K2's Collaboration – Portals, Payments, And Signatures

Demands for an excellent user experience are at an all-time high. But how do you solve for easy collaboration, compliance, and workflow? What features do you need to be effective? How do you integrate payments, eSignatures, and other technologies to make interaction convenient? This session will explain the necessary features, provide an overview of the best technologies for collaboration, and help you think through how to solve your business problems. You'll learn about the options available from client portals, workflow management, payments, eSignatures, and more. Attend this session and arm yourself with the tools you need to succeed!

Summary Description

Business collaboration options have never been better. Portals, eSignatures, and payment platforms make it easy to transact business in ways previously unimaginable. Participate in this session to learn about your best collaboration options.

Major Topics

- Portals as collaboration enablement
- Learn about payment options you can integrate into your portal
- Leave with a checklist of features to consider for collaboration

Learning Objectives

Upon completing this course, you should be able to:

- Identify portal products that fit your needs
- Differentiate between vendor options for payment processes
- List examples of eSignature needs and features

Session Information

- **CPE credit:** Recommended for 2 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** None
- **Program level:** Basic
- **Advance preparation:** None
- **Who should attend:** Accounting professionals interested in collaboration technology, including portals, payments, and eSignatures

K2's CPA Firm Update

It's an exciting time to manage a public practice accounting firm! In addition to technical knowledge in tax, auditing, and accounting, we need to understand data analytics and security options in an advisory context. Beyond that, we must manage the practice and people while profitably delivering excellent client service in a competitive environment for the owners. Further, portals, CAS stacks, PBC lists, electronic signatures, Cloud, and robotic process automation are technologies we need to understand beyond our tax, audit, practice management, document management, and workflow systems. This CPA Firm Update session independently covers significant trends and technologies for CPA firms, which will help you understand your current and future choices. With such rapid change, what will your firm do?

Summary Description

Professionals in public accounting practices face unique technology challenges compared to their clients. They must provide their clients with a wide range of services efficiently, effectively, and securely. You should participate in this session to learn about the technologies that can help CPA firms realize their objectives.

Major Topics

- Trends in the profession, including supplier changes
- Software products by service lines
- Innovation and automation tools
- Specific technology stacks to improve productivity and profitability

Learning Objectives

Upon completing this course, you should be able to:

- List changes made by major suppliers to the profession
- Identify software for service line and niche solutions
- Define automation opportunities in accounting firms
- Differentiate tools from a technology stack that fits your firm best

Session Information

- **CPE credit:** Recommended for 2 hours Business Management & Organization
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites** None
- **Program level:** Update
- **Advance preparation:** None
- **Who should attend:** Partners, Managers, and IT staff responsible for choosing and deploying CPA firm applications

K2's Eight Awesome PivotTable Features

Are you looking to take your PivotTables to the next level? Many experts consider PivotTables to be Excel's most powerful feature. Yet, most who create and work with them barely scratch the surface of all PivotTables can do. In this session, you'll learn eight powerful features you may have missed. From user-defined calculations to consolidating reports and adding KPIs, we'll show you how to get the most out of your PivotTables. These are just some examples of the great things you can do with PivotTables, and in this session, you will learn these and other techniques to make your PivotTables even more powerful.

Summary Description

PivotTables are Excel's most powerful feature! Plan to participate in this session to learn about eight key PivotTable features to enhance your Excel-based reporting processes. Upon completing this session, you'll be stunned at what PivotTables can do!

Major Topics

- Adding user-defined calculations to PivotTables
- Enhancing PivotTables with Key Performance Indicators
- Using PivotTables to consolidate "standard" Excel reports
- Creative ways to filter PivotTables
- Linking accounting software data into PivotTables

Learning Objectives

- Identify three types of user-defined calculations in PivotTables
- List the steps necessary to add Key Performance Indicators to PivotTables
- Name at least two benefits of using PivotTables for data consolidation needs
- Differentiate between Slicer and Timeline filters
- Cite examples of potential benefits associated with linking data into PivotTable reports

Course Information

- **CPE credit:** Recommended for 2 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Working knowledge of PivotTables created using Microsoft Office Excel
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals seeking to improve their knowledge of Excel PivotTables

K2's Excel's Best New Features

With recent Excel updates provided through Microsoft 365/Office 365 subscriptions and Office 2021, Microsoft continues to pack new features into the popular spreadsheet tool. More recent Excel versions offer enhanced data analysis tools, new functions, and improved collaboration opportunities. For those who know about these new features and apply them, exciting opportunities for improved productivity await. So take advantage of this opportunity to learn how to use Excel's best new features!

Summary Description

Microsoft continues to add new features to Excel at a breakneck pace. Dynamic Arrays, XLOOKUP, Power Query, and collaboration and commenting tools can improve productivity and efficiency. Learn about these features – and others – in this session.

Major Topics

- Learn how to work with Dynamic Arrays
- Using Excel's new XLOOKUP and XMATCH feature
- Improvements to Power Query and why they matter to you
- New collaboration and commenting options in Excel

Learning Objectives

Upon completing this course, you should be able to:

- Apply primary new functions available in Excel, including STOCKHISTORY, SORT, and FILTER
- Employ Excel's co-authoring feature to collaborate in real time with other users
- List at least three new functions that capitalize on Excel's Dynamic Arrays feature
- Utilize Excel's XLOOKUP and XMATCH functions to locate data in spreadsheets

Session Information

- **CPE credit:** Recommended for 2 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites** Fundamental knowledge of Microsoft Office Excel
- **Program level:** Update
- **Advance preparation:** None
- **Who should attend:** Accounting and financial professionals seeking to use Excel's newest features

K2's Formatting Excel Spreadsheets The Right Way

Some estimates indicate that business professionals spend almost half their time in Excel applying formats. If you want better formatting results in less time, participate in this session to learn the best practices for formatting your Excel spreadsheets.

In this session, you will learn best practices for applying formats in your workbooks. More specifically, you will learn about features such as Custom Format Codes, Templates, Styles, the Accounting Format, Precision as Displayed, date formats, and many others, all of which can save you substantial time when working in Excel.

Summary Description

Stop wasting time formatting your Excel spreadsheets! Custom Formats, Templates, Styles, the Accounting Format, and Precision As Displayed are all options to improve Excel formatting. Join us in this session to learn best practices for formatting your spreadsheets.

Major Topics

- Creating and using Styles in Excel
- The Accounting Format and why you should use it
- How to Create Custom Formats
- Formatting dates for maximum impact
- The advantages of storing formats in templates

Learning Objectives

- Identify the benefits of using Styles for formatting
- Specify which Custom Format codes are necessary for specific situations
- List advantages of using Excel template files
- Cite examples of when using the Accounting format is useful

Session Information

- **CPE credit:** Recommended for 2 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites** Fundamental knowledge of Excel
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Accounting and financial professionals desiring to learn the most effective and efficient ways to format Excel spreadsheets

K2's Implementing Data Loss Prevention For Better Security And Privacy

Data Loss Prevention (DLP) is a tool for creating and enforcing security policies in an organization. For example, you can create DLP rules that programmatically block all outbound email messages containing Social Security or credit card numbers. Unfortunately, most business professionals have not discovered DLP and how it improves security.

In this session, you will learn the fundamentals of DLP and, through demonstrations, see how you can use DLP to enhance organizational security. You do not want to miss this chance to learn about one of the most innovative security options available!

Summary Description

If you're eager to ensure better security and privacy of sensitive data, Data Loss Prevention (DLP) tools should be a priority. In this session, you will learn about DLP solutions, how they enhance security and privacy, and the steps for successful implementations.

Major Topics

- Understanding the concept of Data Loss Prevention
- Examples of how DLP rules are beneficial
- Creating and enforcing DLP rules

Learning Objectives

- Define Data Loss Prevention and list examples of how it can enhance organizational security
- List examples of tools and services available that support DLP
- Identify the process for creating DLP rules in platforms such as Microsoft 365

Course Information

- **CPE credit:** Recommended for 1 hour Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental understanding of data security issues
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals seeking to improve security and privacy by using DLP tools

K2's Kicking It Up A Notch With KPIs

The adage, “what gets measured, gets managed,” has never been more true than it is today. Organizations of all kinds and sizes are creating systems and processes to categorize, track, and report on many of their operations by creating reports featuring key performance indicators (KPIs). This session will teach you about many different kinds of KPIs. Further, you will learn how to find data and use tools like Microsoft Excel and Power BI to measure performance. You will also identify the benefits and drawbacks of using KPIs in management philosophies like holacracy to make it easier for employees to know where they stand in real-time.

Summary Description

Using Key Performance Indicators (KPIs) is becoming a standard measure of business performance. Participate in this session to learn about KPIs to measure and improve organizational performance.

Major Topics

- Types of KPIs
- How to look for data in your existing systems
- The basics of data prep tools
- Tools for tracking and reporting on KPIs

Learning Objectives

Upon completing this course, you should be able to:

- Identify the correct definition for terms associated with key performance indicators from a list of options
- Differentiate the benefits and limitations of using tools such as Excel, Power BI, and Tableau for reporting KPIs
- When presented with the name of an Excel or Power Query feature discussed in the session, select the definition that best describes the feature
- List examples of KPIs that might be useful in many business environments

Session Information

- **CPE credit:** Recommended for 1 hour Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Basic knowledge of Microsoft Excel
- **Program level:** Basic
- **Advance preparation:** None
- **Who should attend:** Accounting and financial professionals who want to learn and utilize best practices for measuring business performance

K2's Now Is The Time To Automate

“Automate” has been an industry buzzword for at least a decade. Yet, few organizations have embarked on successful automation journeys, leading to greater efficiencies, reduced errors, and happier team members. In this session, you will learn how to crank up your automation projects and see first-hand how easy and effective automation can be. More specifically, this session shows you exactly how you can work with tools from Zoho, Zapier, and Microsoft to enable powerful routines that will allow you and your team to get more done in less time.

Summary Description

Labor shortages, the desire to improve internal controls, and the need to enhance organizational efficiency are all driving forces behind today's automation efforts. Participate in this session to learn how to automate specific tasks and reap the related rewards.

Major Topics

- Where to begin your automation journey
- Which automation tools should you initially focus on
- How to automate everyday tasks in accounts payable, banking, and approval workflows
- Common automation pitfalls

Learning Objectives

Upon completing this course, you should be able to:

- Identify at least three benefits of successful automation efforts
- List two automation tools you can use to extract and transform data
- Specify examples of Microsoft 365 plans that include access to Power Automate
- Differentiate between Power Automate and Zapier
- Identify at least three tasks that most businesses should automate

Session Information

- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites** Fundamental understanding of computer operations
- **Program level:** Intermediate
- **Advance preparation:** None is required; however, we recommend having OneNote accessible during class
- **Who should attend:** Accounting and financial professionals desiring to improve efficiency, accuracy, and internal control

K2's OneDrive's Best Practices

Although Windows incorporates the OneDrive app, you may not have configured it correctly for your needs. Using the OneDrive app and the related Cloud storage service to their fullest potential means you can access your files when and where you need them. Further, sharing your files and collaborating with others is easy when using OneDrive correctly. This session will teach you best practices for taking full advantage of OneDrive.

Summary Description

OneDrive is available to most computer users today, yet few take full advantage of this terrific data storage and collaboration tool. Participate in this session so you can begin reaping the benefits of OneDrive immediately.

Major Topics

- Navigating to OneDrive on the web
- Synchronizing your files to your desktop pc
- Working with shared files
- Managing different versions of files
- Understanding how OneDrive works with OneNote, Teams, and SharePoint

Learning Objectives

Upon completing this course, you should be able to:

- Identify options for accessing and managing your files in OneDrive
- List the steps necessary to synchronize your files from the Cloud to your computer
- Identify opportunities for sharing files and accessing previous versions of a file
- Name the steps for creating a OneNote notebook in OneDrive
- List options for viewing OneDrive thru Teams or SharePoint

Session Information

- **CPE credit:** Recommended for 1 hour Computer Software & Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Microsoft apps knowledge and general knowledge of computer operations
- **Program level:** Intermediate
- **Advance preparation:** We recommend you log in to your OneDrive account before starting this session.
- **Who should attend:** Business professionals who seek to enhance their understanding of Microsoft OneDrive

K2's Options To Automate Your Tax Preparation Workflow

Tax Season can be a daunting time for tax preparers, but it doesn't have to be with the help of tax automation software tools and other innovative technology. This session will provide an overview of the latest technologies and tools to help automate your workflow and make the entire tax return preparation process smoother and more efficient. From client portals, workflow management, and e-signatures to robotic process automation, you'll learn about all the options available to help streamline your tax preparation process. So don't dread Tax Season - attend this session and arm yourself with the tools you need to succeed!

Summary Description

Automation is one of today's hottest topics. Client portals, workflow management, and scan-and-populate tools are among the many great options for automating your tax practice. Participate in this session to learn how to automate your tax practice.

Major Topics

- Tax automation software options
- Learn about the best client collaboration options
- Leave with a checklist of tools to consider your tax practice

Learning Objectives

- Identify key tax return preparation processes that have technology automation solutions
- Differentiate between vendor options for key tax return preparation processes
- List examples of how preparers can use RPA to automate tax processing

Course Information

- **CPE credit:** Recommended for 2 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental understanding of tax return preparation software
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Accounting and tax professionals interested in the latest developments in automation technologies for tax practices

K2's Ripped From The Headlines – Outrageous Tales Of Cybercrimes

Remote work environments have created many new opportunities for cybercriminals and other fraudsters to exploit, and accounting professionals are some of the most commonly targeted individuals. This session is a series of case studies that examine actual criminal filings and news accounts and use them to highlight some of the actions you can take to limit your exposure to similar schemes. Attend this session and learn more about how high-profile control failures occurred so you can be more effective at preventing crimes in your organization.

Summary Description

Cybersecurity threats remain a top-of-mind concern for all business professionals. Participate in this session to learn more about today's risks and, more importantly, what you can do to minimize your exposure.

Major Topics

- Common security weaknesses which occur with hardware and software at home and in the office
- Malware, ransomware, data breach, and incident response tips
- Internal control failures that resulted in the theft of assets or unauthorized manipulation of data
- User authentication and security awareness training

Learning Objectives

Upon completing this course, you should be able to:

- List at least three major security incidents reported in the headlines in the last year, and explain at least one primary internal control design or operation flaw that allowed the hack to occur
- Select the correct definitions for security terms such as attack surface, vulnerability, exploit, social engineering, phishing, malware, heuristics, biometrics, and multi-factor authentication (MFA)
- List at least three best practices learned by reviewing the control failures cited in the case studies

Session Information

- **CPE credit:** Recommended for 2 hours Auditing
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** None
- **Program level:** Basic
- **Advance preparation:** None
- **Who should attend:** Managers, owners, and accounting professionals who desire to learn from computer crime incidents best practices they can use to enhance their organization's security posture

K2's Safeguarding Taxpayer Data – A Guide For Your Required Security Plan

Combatting today's cybercriminals takes everyone working together. The Internal Revenue Service works with state tax agencies and the tax industry to fight these 21st-century identity thieves. Unfortunately, data thefts at tax professionals' offices are on the rise. Online providers also must follow the six security and privacy standards in Publication 1345, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns. In addition, you fall under the PTIN and 4557 mandates if you prepare tax returns. Learn how to fulfill your obligations by participating in this session.

Summary Description

Regardless of size, most public accounting firms are mandated to have a written security plan in place. Failing to have such a plan in place can lead to substantial fines. Join us in this session to learn what your security plan should include and how to implement it.

Major Topics

- Understand the need to protect client data
- Learn about the required security and privacy standards
- Leave with a sample plan to consider your tax practice

Learning Objectives

- List examples of basic security steps and how to take them
- Identify the signs of data theft and how to report data theft
- List examples of how to respond and recover from a data loss
- Identify examples of specific compliance issues found in the FTC Safeguards Rule

Course Information

- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental knowledge of tax return preparation processes and cybersecurity issues and risks
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Public practitioners who desire to learn more about specific security requirements imposed on firms and how to comply with them

K2's Shredding Your Servers And Going Virtual

Most small and mid-sized businesses are at least considering cloud-based suites for business management, performance management, and productivity. Unfortunately, many owners and accounting professionals need to learn the difference between using cloud-native tools, employing a managed service provider, and utilizing a desktop hosting provider. This session helps participants understand the differences in the levels of service provided by these offerings and highlights some of the regulatory barriers that could create problems for your organization. Attend this session and learn what you need to know before saying “see ya” to your servers.

Summary Description

Business collaboration options have never been better. Portals, eSignatures, and payment platforms make it easy to transact business in ways previously unimaginable. Participate in this session to learn about your best collaboration options.

Major Topics

- The similarities and differences in desktops managed by a managed service provider, a desktop/application hosting company, and a browser-based cloud
- Regulatory requirements like HIPPA, GLB, PCI, and more
- Practical tips for dealing with service providers

Learning Objectives

Upon completing this course, you should be able to:

- Identify critical differences between a managed service provider, a desktop/application hosting company, and a browser-based cloud solution
- From a list of regulations, identify a practical restriction on users imposed by the regulation
- Identify services included in productivity suites from Microsoft, Google, and Zoho and match them to the tools that best address identified business needs

Session Information

- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** None
- **Program level:** Overview
- **Advance preparation:** None
- **Who should attend:** Accounting professionals who are responsible for selecting, implementing, or working in an environment which is reducing or eliminating on-premises servers

K2's Six Essential Teams Features

The mad scramble to remote work and utilize apps like Teams has been trying for most organizations. With a rush to install and no time to plan, most team members did their best, prioritizing remote meetings as the primary concern. Therefore, as a result, Teams is vastly misunderstood and underutilized in most organizations. Join us in this session to go beyond Teams's remote meetings aspect and learn how to optimize efficiency, communication, and workflow with Teams.

Summary Description

Microsoft Teams is now one of the most widely used tools in businesses today. Yet, most business professionals take advantage of only a fraction of its features. Participate in this session to learn six essential Teams features you should use and how they will improve your productivity

Major Topics

- Learn how to set up Teams for successful collaboration
- Create a filing system that does not include endless sub-folders
- Manage staff delegation and follow-ups with ease
- Define what Lists need to be available to your Team
- Discover how to create automatic Flows that can notify others of update
- Utilize survey Forms or questionnaires from within Teams

Learning Objectives

Upon completing this course, you should be able to:

- List steps for creating effective Teams and Channel structures
- Identify how to establish file management columns for more information within Teams
- Specify examples of how to work with Microsoft Planner within Teams
- Identify how Lists work and why they can be better than spreadsheets
- Identify options for incorporating Power Automate into Teams
- Cite examples of how to use Microsoft Forms within Teams

Session Information

- **CPE credit:** Recommended for 1 hour Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Basic knowledge of Microsoft Teams
- **Program level:** Overview
- **Advance preparation:** None
- **Who should attend:** Business professionals seeking to enhance their understanding of Microsoft Teams

K2's Taking Another Look At PDFs

We're all familiar with PDF documents. However, it's safe to say that most professionals use only a tiny fraction of their features. This circumstance is unfortunate, considering all you can do with PDF documents. Therefore, isn't it time to take another look at PDF documents and all you can do with them?

Participate in this session to learn more about PDFs and how and why they should be a cornerstone technology in most organizations. Collaboration options, long-term storage and archival, and fillable forms are just a few features you will learn about in this session. If you're ready to elevate your PDF productivity, this session is for you!

Summary Description

The Portable Document Format (PDF) is a cornerstone technology, yet most business professionals fail to take advantage of this fantastic technology's many benefits. In this session, you will learn how to work more efficiently and effectively with PDF documents.

Major Topics

- Understanding the Portable Document Format
- Identifying tools you can use to work with PDFs
- Collaborating using PDFs
- Creating, distributing, and collecting fillable PDF forms
- Using PDFs to enhance security

Learning Objectives

Upon completing this course, you should be able to:

- List examples of PDF software vendors
- Differentiate between PDF options available from Adobe
- List at least two ways you can use PDFs in collaborative environments
- Identify critical steps in the process used to create fillable PDF forms

Session Information

- **CPE credit:** Recommended for 2 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Fundamental understanding of PDFs
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals seeking to enhance their understanding of PDFs

K2's Tech Update

What are my best technology choices, and how do I keep up? Even informed accounting professionals will find multiple ideas they can apply daily. This visionary session provides insights, options, and recommendations to help you decide which technologies will affect your business and which will give you a competitive edge. Included in Tech Update are emerging and evolving technologies important to accounting professionals. We will cover the benefits and risks of adopting recent technologies, ranging from software applications to hardware devices. You will also learn to develop a balanced technology strategy that includes your firm or business's current, emerging, and future technology choices.

Summary Description

If you're looking for a single session to update you on "all things tech," this is it! In K2's Tech Update, you will learn about technologies that will affect your business and give you a competitive edge. This session is a must for all accounting and financial professionals.

Major Topics

- Hardware and software trends
- Communication and collaboration tools
- Essential products to consider for implementation
- Emerging technology in accounting automation, metaverse, and blockchain

Learning Objectives

Upon completing this course, you should be able to:

- Create strategic and tactical benefit lists of hardware and software options
- Evaluate current communications choices to improve your efficiency
- Identify key technologies to implement in your business and personal life
- List examples of emerging technologies that will affect the accounting profession

Session Information

- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites** None
- **Program level:** Update
- **Advance preparation:** None
- **Who should attend:** Accounting professionals interested in choosing and managing technology

K2's Ten “Must-Know” Features In Excel

Most business professionals have used Excel for years, often without the benefit of any formal training. Thus, they don't know about key features in the application and, therefore, don't use them. Of course, this leads to inefficiencies and errors. Isn't it time to stop this madness? If you're ready to become more efficient and effective with Excel, this session is for you! You will learn ten critical features that can help you complete more work in less time and improve your accuracy. We encourage you to make plans to join us for this session to learn the best ways of working with Excel!

Summary Description

Microsoft Excel is perhaps the most commonly used business application today. Yet, many Excel users remain bogged down in yesterday's spreadsheet practices. Participate in this session to learn ten terrific features you should use to enhance your productivity with Excel.

Major Topics

- Best practices for working with large volumes of data
- How to securely and efficiently collaborate with others
- Using Excel for optimization scenarios
- Creating “audit trails” in Excel
- Define “dynamic arrays” and list examples of their benefits

Learning Objectives

Upon completing this course, you should be able to:

- List at least three primary features associated with Power Query
- Identify the steps necessary to utilize modern collaboration options in Excel
- Cite examples of the benefits related to using dynamic arrays
- Differentiate between Solver and Scenario Manager as optimization tools
- Identify at least three benefits of protecting your data with Sensitivity Labels

Session Information

- **CPE credit:** Recommended for 2 hours Computer Software & Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Basic knowledge of Microsoft Office Excel
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Accounting and financial professionals seeking to improve their efficiency and effectiveness when working with Excel

K2's The Best Kept Secrets Of Microsoft 365

Many organizations have implemented Microsoft 365/Office 365 at a basic level, but few have truly explored the breadth and depth of tools included with their subscriptions. Some less commonly known apps help you manage shared email boxes, create and use web forms, schedule appointments, trade shifts, create real-time closed captions, and translate presentations. Attend this session and learn more about the hidden features in Microsoft 365 that you can use to level up your productivity.

Summary Description

Microsoft 365 offers more than just Excel, Outlook, Word, and PowerPoint! Participate in this session to learn about the best-kept secrets in your Microsoft 365 subscription and how they can improve personal and team productivity and security.

Major Topics

- New features and tips and tricks in Microsoft 365
- Learn how to take advantage of optional services like Bookings, Shifts, Information Rights Management, and Approvals
- See some of the tools you can activate to help your team create and share video content intended only for internal use

Learning Objectives

Upon completing this course, you should be able to:

- Select at least three optional services included with Office 365
- List at least two tools that extend Microsoft Teams to perform new tasks
- Identify at least one optional Office 365 service that protects confidential information

Session Information

- **CPE credit:** Recommended for 2 hours Computer Software and Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** None
- **Program level:** Basic
- **Advance preparation:** None
- **Who should attend:** Anyone who wants to make the most of their Microsoft 365/Office 365 subscription at work

K2's The How's And Why's Of Data Analytics

Increasingly, accountants and auditors are called upon to use data analytics to understand and improve results. Yet, many professionals struggle with data analytics and remain unaware of how to obtain the needed results using tools they already own.

In this session, you will learn about the four primary types of data analytics and when to use each. Further, you will learn how to generate meaningful analytical measurements using Excel, Power BI, and other tools and, more importantly, how to interpret the results. This session is for you if you seek to use data analytics – and who isn't.

Summary Description

Data analytics is among today's hottest topics in most professional circles, including accounting. In this session, you will learn about the four types of data analytics and how to use them to make better decisions in virtually all aspects of your business.

Major Topics

- Understanding the four types of data analytics
- Differentiating between correlation and causation
- How to generate data analytics in Excel and other applications already in use
- The role of Artificial Intelligence in data analytics

Learning Objectives

- List the four types of data analytics
- Identify examples of analytics available in Excel's Analysis ToolPak
- Differentiate between correlation and causation
- Identify at least two analytical techniques available in Microsoft's Power BI platform

Course Information

- **CPE credit:** Recommended for 2 hours Auditing
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Working knowledge of Microsoft Office Excel
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Accounting and business professionals seeking to learn more about the emerging field of data analytics

K2's Top Tech Productivity Tips And Tricks

The world of work changed radically and became much more virtual after the pandemic's onset in 2020. Over two years into the "new normal," our team has compiled a list of the top technology productivity tips, tricks, and traps.

In this session, you will learn about shortcuts and hacks to help you accomplish more in Excel, Teams, Outlook, virtual meetings, and many other applications you use every day. Attend this session and learn the best tips to help you and your team accomplish more in less time.

Summary Description

Are you ready to learn tools you can use to become more efficient? Do you want to optimize your virtual meetings or take full advantage of Microsoft 365? If you answered "yes" to any of these questions, get the answers you seek in this session.

Major Topics

- Microsoft 365 tricks and tips
- Best practices for virtual meetings
- Productivity-enhancing apps and tools that you should consider using

Learning Objectives

- Identify steps necessary to construct a Microsoft Teams site
- List examples of essential productivity tips for typical Microsoft 365 applications
- Identify examples of when you can use templates and forms to automate data collection

Session Information

- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites** Fundamental understanding of technology in business settings
- **Program level:** Update
- **Advance preparation:** None
- **Who should attend:** Accounting and financial professionals seeking to enhance their personal and team productivity

K2's Top Ten Outlook Tips

Using Outlook for email management is routine for most business professionals these days. Unfortunately, using this tool for so long may cause some to perpetuate bad practices and habits when working in Outlook and exploring new options Outlook offers. In this session, you will discover ten valuable tips to take you to the next level of your email and work management.

Summary Description

Oddly, Outlook is one of today's most-used applications, yet most business professionals have never received formal training on how to use Outlook effectively. Participate in this session to learn tips to help you work more efficiently and effectively with Outlook.

Major Topics

- Action your email with more than just a flag
- Working more efficiently by structuring your screen better, creating shortcut buttons, using Categories, creating Search folders, and using boards
- Store emails in better places so you can reference them faster
- Stop typing and use templates instead

Learning Objectives

Upon completing this course, you should be able to:

- Cite examples of how to action and sort your emails faster
- List examples of valuable shortcuts you can add to Outlook
- Identify options for storing your email, so that referencing is easy
- List examples of using boards to access information more quickly
- Cite examples of how categories and search folders can improve efficiency
- Identify processes for cleaning up email quickly
- List the steps for creating templates to save time

Session Information

- **CPE credit:** Recommended for 2 hours Computer Software & Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Basic understanding of Microsoft Outlook
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Business professionals who desire to enhance their understanding of Microsoft Outlook

K2's Privacy Issues And Solutions – What You Need To Know!

Privacy should be everywhere, yet every day seemingly brings a new story about a privacy violation. While it can be frustrating and sometimes scary to think about mishandling our personal information, it's important to remember that we can take steps to protect our privacy.

This session will teach you where your critical threats are and what information you may already have at risk. More importantly, you will learn how to manage and mitigate privacy risks. With increasing connectivity – and, by extension, risk – this session should be on your list to take as soon as possible.

Summary Description

Keeping personal data private is more challenging than ever. Browsers and search engines are two of the leading culprits leading to privacy compromises. If data privacy concerns you, join us for this session to learn about tools you can use to regain control.

Major Topics

- The most significant privacy threats today
- Your browser and search engine and why they matter
- Privacy policies – the fine print

Learning Objectives

- Identify examples of critical privacy threats
- Cite examples of how your data becomes compromised through web browsers and search engines
- List maneuvers you can make to reduce your privacy risk

Session Information

- **CPE credit:** Recommended for 1 hour Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites** Fundamental understanding of privacy and cybersecurity risks
- **Program level:** Update
- **Advance preparation:** None
- **Who should attend:** Accounting and financial professionals seeking to enhance their understanding of today's privacy issues

K2's Supercharging Your Spreadsheet Collaboration

Collaboration is a key to productivity and success. However, remote work can make collaboration more challenging, including collaborating on spreadsheets. Fortunately, tools like portals with check-in/check-out capabilities, version control, comment tracking, and co-authoring can enable online spreadsheet collaboration. Further, Excel's Inquire tool can facilitate spreadsheet collaboration in offline environments.

Don't let remote work hamper your spreadsheet collaboration needs! Participate in this session to learn how to collaborate on spreadsheets effectively from anywhere using tools you own or license.

Summary Description

Collaboration – particularly in remote work environments – is one of today's keys to productivity and success. If you want to improve how you work with others on spreadsheets, join us for this session to learn best practices in today's environment.

Major Topics

- Collaboration methods using Microsoft Office and Microsoft 365
- Ways to track changes to sheets and compare different versions of a file
- Tools for sharing and responding to comments among a team from within a file

Learning Objectives

- Select various Excel features associated with collaboration
- List the steps necessary to use Excel's Inquire tool to identify differences between two spreadsheets
- Differentiate between the capabilities of Excel's Notes feature and its' Comments feature
- Choose the correct definitions for key terms associated with file storage, such as check-in/check-out and version control from a list of options

Course Information

- **CPE credit:** Recommended for 1 hour Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites** Working knowledge of Microsoft Office Excel
- **Program level:** Intermediate
- **Advance preparation:** None
- **Who should attend:** Accounting and financial professionals seeking to enhance their spreadsheet collaboration efforts

K2's Understanding Your Ransomware Risk

Protecting yourself from ransomware requires more than just anti-virus software. Additional technology protections are necessary. Further, business continuity, legal and regulatory, and cybersecurity insurance considerations should all be a part of your risk abatement strategy. Attend this session to determine if your current level of ransomware protection reduces your risk to an acceptable and identify ways to ensure that you are protected.

Summary Description

Ransomware remains a persistent threat, potentially compromising corporate and personal data. For this reason, ransomware should stay a top-of-mind concern for all technology users. Learn about ransomware and how to mitigate its threat by participating in this session.

Major Topics

- Understanding how ransomware can cripple a business
- Trends in ransomware attacks
- Best practices for minimizing ransomware risk

Learning Objectives

Upon completing this course, you should be able to:

- Distinguish between various options to mitigate risk
- Identify practical actions for reducing ransomware risk
- List examples of high-profile ransomware attacks and how they occurred

Session Information

- **CPE credit:** Recommended for 1 hour Information Technology
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Basic knowledge of computer operations
- **Program level:** Update
- **Advance preparation:** None
- **Who should attend:** Accounting and financial professionals seeking to improve data security by minimizing ransomware threats

K2's Using OneNote More And Email Less

OneNote is a fantastic application included in your Microsoft 365 subscription. Yet, it is underutilized and misunderstood most of the time. If you genuinely want to change how you work, embrace OneNote. Stop using Outlook as a filing cabinet for essential emails and move them to OneNote instead. If you share a OneNote notebook with others, you can stop emailing altogether within your group and use OneNote as your collaboration and reference platform.

Summary Description

Although OneNote has been available for years, most professionals have not yet embraced the tool, nor have they discovered how it could be an attractive alternative to email. Participate in this session to reduce your reliance on email and improve collaboration.

Major Topics

- Using OneNote as a powerful reference resource
- Learn how to move your emails into OneNote
- Share OneNote with a group of people and communicate within a notebook rather than email

Learning Objectives

Upon completing this course, you should be able to:

- List tasks for which you might choose to use OneNote
- Identify ways to reduce email and use OneNote for yourself and your group or team
- Cite examples of how you can use OneNote for storing and retrieving important reference information
- Identify the process for acquiring OneNote

Session Information

- **CPE credit:** Recommended for 2 hours Computer Software & Applications
- **Instructional delivery methods:** Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites** Basic understanding of Microsoft apps
- **Program level:** Overview
- **Advance preparation:** None is required; however, we recommend having OneNote accessible during class
- **Who should attend:** Business professionals seeking to enhance their understanding of Microsoft OneNote and looking for a new way to organize their email communications

ABOUT K2E CANADA INC. AND K2 ENTERPRISES

K2 Enterprises, named after the world's second-highest mountain, is a partnership of instructors formed in 1988 to teach CPE sessions focused on information technology. We aim to produce and deliver the highest quality technology seminars and conferences available to accounting, financial, and other business professionals. In addition, the K2 team seeks to maintain the highest level of integrity, family values, and friendship among all involved.

K2 Enterprises is one of North America's largest providers of technology-focused education to accounting and financial professionals. Additionally, our team has delivered educational content to locations as far away as Great Britain, Israel, Australia, and South Africa. Our curriculum includes sessions on Excel and other Microsoft Office applications, budgeting, QuickBooks, internal controls, artificial intelligence, and other technology-related topics.

To stay abreast of technology developments, we work cooperatively with professional organizations and vendors of technology products to learn about the latest technologies of interest to accounting, financial, and other business professionals. These relationships help us develop and deliver the most accurate and timely educational content possible. Additionally, we frequently review technology products and services for numerous publications and offer consulting services and advice on technology. Further, we publish a monthly newsletter to help our audience stay abreast of technology developments and assist our partners in promoting our courses to their members.

K2's content is among the best in the business. K2 team members invest thousands of hours each year to research, write, and rehearse the various seminar and conference sessions we present. As a result, our content is highly regarded and is among the best technology-focused CPD available.

Thanks for your time, we look forward to working with you.