



# Course Catalogue

2019 Spring

*Hello,*

We are very excited about 2019 and believe our course offerings to be a strong technology CPD lineup. Our courses are undergoing continuous updating for changes in applications and technology.

#### *About K2E Canada Inc.*

K2E Canada Inc., named after the second highest mountain in the world, is a partnership of instructors formed in 1988 to teach information technology seminars.

#### *Mission Statement*

Our goal is to produce and deliver the highest quality technology seminars and conferences available to business professionals. We work cooperatively with professional organizations and vendors of technology products to provide the timeliest information possible. We also provide consulting services and advice on technology. We make every effort to maintain a high level of integrity, family values, and friendship among all involved.

Currently, K2E Canada Inc. teaches courses nationally and internationally. We teach courses on Excel, cloud computing, Adobe Acrobat, budgeting, business analytics, internal controls, paperless office technologies, and other technology related topics. We are frequently asked to review computer products for nationally known computer magazines and have a large national audience.

#### *Top five attended courses in 2018*

- ◆ Advanced Data Magic with Excel
- ◆ Excel Tips, Tricks and Techniques for Accountants
- ◆ Excel Budgeting and Forecasting Techniques
- ◆ Paperless Office
- ◆ Technology Update

#### *Conferences*

We have attached our conference agenda and session descriptions to this year's catalogue. Our two-day IT conference is a complete package providing three tracks with three instructors. If you would like to discuss the conference in more detail, please contact me. The conference sessions are also available individually for presentation at any of your conferences or forums during the year.

#### *Instructor Pool*

We are pleased to provide a group of instructors that are seasoned veterans with excellent ratings. While we are always on the lookout for new talent, we are confident we have the very best to date.

We look forward to working with you.

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# GENERAL INFORMATION ON ALL SEMINARS OFFERED

## Features

- ◆ Courses designed and taught by veteran instructors
- ◆ High quality projector - supplied by K2
- ◆ Real life examples and practical knowledge
- ◆ Professionally prepared participant materials

## Facilities

All you need to hold one of our seminars is the following:

- ◆ Nice room with high ceiling (12' min.) which allows for a large screen
- ◆ Large quality screen at least 10'x 10'
- ◆ High-Speed Internet access
- ◆ Projection cart
- ◆ Instructor table
- ◆ Cordless lavalier microphone (when attendance is over 35)
- ◆ Comfortable classroom seating

## Course Scheduling and Administration

Please contact Ward Blatch directly at [ward@k2e.ca](mailto:ward@k2e.ca) or 902-880-9273 for any questions regarding our offerings and for your course scheduling and administration needs.

## Advantages of Our Seminars

- ◆ We have been in business as a team for over 30 years with the same core personnel, and we plan to be in business for a long time to come.
- ◆ Our instructors are some of the nation's finest and have been the recipients of Outstanding Discussion Leader awards, as well as other honors.
- ◆ We experience everything we recommend. Our depth of teaching comes from our experience with technology products.
- ◆ We can quickly identify with the needs of seminar participants. Even if the planned material does not cover the need, we find a way to answer their questions during the seminar or use follow-up calls, files, and emails.
- ◆ We have a well-respected name in the seminar business.
- ◆ We own and understand how to use high quality video projection equipment, which is used in all our presentations.
- ◆ All our instructors are experienced travelers and know how to avoid potential "travel trauma."
- ◆ We use technology to provide course attendees with the best instructional examples and solutions to problems.

# EXCEL BOOT CAMP

## *TWO DAYS OF INTENSIVE EXCEL TRAINING*

If you are ready for two days of intensive Excel training in a “laptop optional, laptop friendly” environment, then this course is for you. By using accounting-centric examples, developed for accountants, by accountants, **Excel Boot Camp** takes you through Excel from A to Z and shows you how to 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, this program will highlight the number of recent improvements to Excel including additions to the function library, tables, a vastly improved charting engine, and an overhaul of PivotTable functionality. You will also learn various techniques for enhancing, not only your efficiency, but also your effectiveness, when working with Excel by taking advantage of a wide variety of “power features” to assist you in creating accurate spreadsheets in a fraction of the time previously required.

### *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 Excel’s table feature should be used
- ◆ Create and audit complex formulas, including those containing arrays and SUMIFS, VLOOKUP, HLOOKUP, INDEX, and MATCH 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 creating custom reports
- ◆ Utilize Excel’s Macro Recorder tool to create simple, yet very useful, macros that you can put to work right away

### *Course Information*

- ◆ **CPE credit:** Recommended for 14 hours
- ◆ **Instructional delivery method:** This course will be taught in Excel for Office 365 with reference to the differences to Excel 2010 and subsequent. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2010 or newer to follow along with the instructor.
- ◆ **Prerequisites:** Fundamental knowledge of Excel 2010 or newer
- ◆ Program level: Intermediate
- ◆ Advance preparation: None
- ◆ **Who should participate:** Excel users and potential Excel users who want to increase their efficiency and effectiveness with Excel. The focus of this session is on Excel for Windows; however, many of the Excel features discussed are also available in Excel for Mac.

# ADVANCED DATA MAGIC WITH EXCEL

Ready to take your Excel skills to the next level? This seminar starts by clarifying some key Excel misunderstandings that affect typical Excel workbooks and shows you how advanced Excel functions will improve your calculating skills. Need to bring in data into Excel from an outside source? The seminar will cover this in depth. You will learn how to use Excel's data analysis tools, including advanced lookups. Then the course dives into array formulas, a powerful tool that very few Excel users understand. Finally, you will be exposed to PowerPivot, a tool first introduced in Excel 2010 that enables you to work with large amounts of data from multiple data sources.

## *Learning Objectives*

Upon completing this course, you should be able to:

- ◆ Understand how Excel calculates; creating custom formats; and date arithmetic.
- ◆ Use Excel functions such as AND, OR; CHOOSE, INDEX, MATCH and INDIRECT.
- ◆ Understand how to access external data including importing from ACCESS and other file types, using Microsoft Query
- ◆ Use data analysis tools such as Goal Seek, Data Tables, Scenario Manager and Solver.
- ◆ Understand the power of lookups, VLOOKUPS with IFERROR, VLOOKUPS with wild cards, combining VLOOKUPS and doing a VLOOKUP across multiple sheets.
- ◆ Use array formulas to simplify complex calculations, including single arrays, multi-cell arrays, comparative arrays, conditional formatting with arrays and more.
- ◆ Use the power of Excel PowerPivot, Power View, Data Models, DAX calculations and Power Map that is available in Excel 2013 Pro Plus and 2016 Pro Plus.

## *Course Information*

- ◆ **CPE credit:** Recommended for 7 hours
- ◆ **Instructional delivery method:** This course will be taught in Excel for Office 365 with reference to the differences to Excel 2010 and subsequent. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2010 or newer to follow along with the instructor.
- ◆ **Prerequisites:** Experienced Excel user
- ◆ Program level: Advanced
- ◆ Advance preparation: None
- ◆ **Who should participate:** Business professionals who work with Excel 2010 or newer and want to extend their knowledge with advanced features and functions. The focus of this session is on Excel for Windows; however, many of the Excel features discussed are also available in Excel for Mac.

# EXCEL BEYOND THE BASICS

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 content of this course draws from over twenty-five years of experience in delivering Excel training to accountants and other business professionals and throughout the program, relevant, real-world examples reinforce the major topics presented. You do not want to miss this opportunity to become more efficient and proficient in Microsoft Office Excel, the accounting and financial professional's tool of choice. This course covers advanced Excel topics found in Excel 2010 through Excel 2016.

## *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, VLOOKUP, HLOOKUP, 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 7 hours
- ◆ **Instructional delivery method:** This course will be taught in Excel for Office 365 with reference to the differences to Excel 2010 and subsequent. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2010 or newer to follow along with the instructor.
- ◆ **Prerequisites:** Experienced Excel user
- ◆ Program level: Advanced
- ◆ Advance preparation: None
- ◆ **Who should participate:** Business professionals who work with Excel 2010 or newer and want to extend their knowledge with advanced features and functions. The focus of this session is on Excel for Windows; however, many of the Excel features discussed are also available in Excel for Mac.

# EXCEL DATA MAGIC, INCLUDING ADVANCED PIVOTTABLES & POWER PIVOT *ACQUIRING, ANALYZING & VISUALIZING YOUR DATA*

Leave those manual reporting processes behind and move into the new world of automatically linking data into Excel for analyzing, reporting, and preparing visualizations. Using tools such as Power Query and Power Pivot, you can leverage your existing knowledge of PivotTables to do even more when it comes to summarizing, analyzing, and reporting potentially very large volumes of data.

In this program, you will learn how to use automated data queries to link data from external databases into Excel and then transform this data into Data Models. From there, you will learn how to use Power Pivot and CUBE formulas to streamline the process of summarizing and reporting this data. You will also learn how to take advantage of advanced features such as Data Analysis Expressions, Key Performance Indicators, Hierarchies, and Dimensions to streamline your reporting processes. Further, you will learn how to create compelling visualizations of this summarized data to help your readers understand the true meaning behind the numbers. If you currently use PivotTables on a regular basis and want to take advantage of the powerful advanced reporting features available in Excel, then sign up today for this program.

*Note: This program is taught at an advanced level; other, more fundamental coverage of PivotTables is offered in K2's Excel PivotTables for Accountants seminar. Many of the concepts taught in this course depend upon access to Power Pivot, Power Query, and Power View, available only in the Windows-based premium editions of Excel 2013 and Excel 2016.*

## *Learning Objectives*

Upon completing this course, you should be able to:

- ◆ Construct and manage links from external data sources into Excel for the automatic acquisition of data
- ◆ Define, build, and manage Data Models and build PivotTables from these objects
- ◆ Create PivotTables using Power Pivot, including PivotTables that summarize data from multiple data sources
- ◆ Utilize Data Analysis Expressions and other tools to add calculations to PivotTables
- ◆ Add features such as Key Performance Indicators, Dimensions, and Hierarchies to Power Pivot-based PivotTables
- ◆ Create compelling visualizations of the data in your Power Pivot-based PivotTables using PivotCharts and Power View

## *Course Information*

- ◆ **CPE credit:** Recommended for 7 hours
- ◆ **Instructional delivery method:** This course will be taught in Excel for Office 365 with reference to the differences to Excel 2013. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2013 or newer to follow along with the instructor.
- ◆ **Prerequisites:** Full understanding of intermediate to advanced PivotTables
- ◆ Program level: Advanced
- ◆ **Advance preparation:** Power Pivot is available in premium editions of Excel as listed at <http://bit.ly/PowerPivotMyExcel> you may download a trial of Office that includes PowerPivot from <http://bit.ly/ExcelProPlusTrial>
- ◆ **Who should participate:** Business professionals using the Windows-based premium editions of Excel 2013 and Excel 2016 who are seeking to extend their knowledge of Excel as a reporting tool



# 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 level of experience, if you use Excel, you need this course to learn more efficient and effective ways to work with Excel. In this course, you will learn 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 how to streamline report generation and printing processes.

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

## *Learning Objectives*

Upon completing this course, you should be able to:

- ◆ Identify situations in which various Excel features can increase productivity and apply each of these techniques in context, such as Freeze Panes, Split Windows, selecting cells with special characteristics, AutoCorrect, the Office Clipboard, and Paste Special
- ◆ 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 various types of formulas, including formulas to manipulate text and dates, formulas containing VLOOKUP and HLOOKUP 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
- ◆ Implement procedures for producing Excel-based reports, including adjusting print settings, using the Camera feature to create report forms, and working with Custom Views to automate print settings

## *Course Information*

- ◆ **CPE credit:** Recommended for 7 hours
- ◆ **Instructional delivery method:** This course will be taught in Excel for Office 365 with reference to the differences to Excel 2010 and subsequent. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2010 or newer to follow along with the instructor.
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2010 or newer
- ◆ Program level: Intermediate
- ◆ Advance preparation: None
- ◆ **Who should participate:** Accounting and financial professionals who want to learn how to use Excel more efficiently and effectively. The focus of this session is on Excel for Windows; however, many of the Excel features discussed are also available in Excel for Mac.

# EXCEL BUDGETING AND FORECASTING TOOLS AND TECHNIQUES

Are your budgeting and forecasting processes working as well for you as they should? Probably not, as many organizations report that budgeting and forecasting activities consume tremendous amounts of time and yield only marginal benefits. In this course, you will learn how to achieve a greater return on your budgeting and forecasting activities by taking advantage of various tools and techniques available in today's market.

In addition to learning about 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. If you are involved in budgeting and forecasting activities, you will not want to miss this opportunity to learn how to reduce the amount of time you spend on these tasks, while simultaneously increasing their value.

## *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 the various methods by which Excel computes depreciation
- ◆ Compare and contrast Excel with other applications used for budgeting and forecasting activities and describe situations in which other solutions should be used to reduce the dependency on Excel as a budgeting and forecasting solution

## *Course Information*

- ◆ **CPE credit:** Recommended for 7 hours
- ◆ **Instructional delivery method:** This course will be taught in Excel for Office 365 with reference to the differences to Excel 2010 and subsequent. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2010 or newer to follow along with the instructor.
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2010 or newer
- ◆ Program level: Intermediate
- ◆ Advance preparation: None
- ◆ **Who should participate:** Business professionals involved in budgeting and forecasting activities. The focus of this session is on Excel for Windows; however, many of the Excel features discussed are also available in Excel for Mac.

# EXCEL BEST PRACTICES

As spreadsheets continue to evolve, so too must your practices for creating, editing, and auditing them. 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. Participate in this program to help ensure that you utilize Excel to its fullest potential.

This course covers features found in Excel versions 2010 and newer.

## *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 techniques 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 various techniques 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 7 hours
- ◆ **Instructional delivery method:** This course will be taught in Excel for Office 365 with reference to the differences to Excel 2010 and subsequent. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2010 or newer to follow along with the instructor.
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2010 or newer
- ◆ Program level: Intermediate
- ◆ Advance preparation: None
- ◆ **Who should participate:** Excel users who want to learn best practices for working with spreadsheets. The focus of this session is on Excel for Windows; however, many of the Excel features discussed are also available in Excel for Mac.

# EXCEL PIVOTTABLES FOR ACCOUNTANTS

PivotTables are widely considered 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 how to extend your existing knowledge of PivotTables, then you should make time to participate in this course. In this program, you will learn how to build PivotTables, how to group data inside PivotTables – including grouping options for fiscal periods – and how to create user-defined calculations in your PivotTables. You will also learn advanced PivotTable techniques, including how to build PivotTables that consolidate data from multiple data ranges and PivotTables dynamically connected to external databases and financial accounting systems. Additionally, you will learn how to take advantage of other Excel features associated with PivotTables, including Slicers, Power Query, and Power Pivot. At the end of the day, you will be a master of Excel PivotTables!

If you have been leery of working with PivotTables or have struggled to realize their many benefits, this course is for you. With a little information, guidance, and coaching from your K2 instructor, you will be ready to use PivotTables to analyze and report on very large data sets in a fraction of the time you are spending presently to complete such tasks.

## *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 techniques 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 7 hours
- ◆ **Instructional delivery method:** This course will be taught in Excel for Office 365 with reference to the differences to Excel 2010 and subsequent. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2010 or newer to follow along with the instructor.
- ◆ **Prerequisites:** Fundamental understanding of Microsoft Office Excel 2010 or newer
- ◆ Program level: Advanced
- ◆ Advance preparation: None
- ◆ **Who should participate:** Accounting and financial professionals who want to use the power of Excel PivotTables to analyze and summarize data. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

# EXCEL FINANCIAL REPORTING AND ANALYSIS

Microsoft Office Excel is a powerful tool for analyzing financial data and preparing financial reports and if you are ready to harness the power of Excel for financial reporting and analysis, then this program is for you. In this course, you will learn how to put Excel to use to deliver accounting and financial solutions in critical areas such as formatting reports and financial statements using advanced techniques, assembling and printing reports and schedules, and using templates to automate reporting processes. You will also learn options for consolidating financial data from multiple sources, how to create Excel visualizations to improve reader's comprehension of financial information, and advanced data analysis techniques such as PivotTables connected in real-time to your accounting database.

Like most powerful tools, Excel contains features and functions useful for reporting and analysis that are not immediately obvious to many users. In this course, you will uncover many of these hidden features to help you prepare computationally accurate and aesthetically pleasing reports in far less time than you might imagine possible. You do not want to miss this opportunity to learn how to take advantage of Excel to overcome many of the reporting and analysis obstacles currently facing you.

## *Learning Objectives*

Upon completing this course, you should be able to:

- ◆ Implement techniques such as Custom Formats, Conditional Formatting, and the Accounting Format for formatting financial statements and other Excel-based reports more efficiently
- ◆ Identify opportunities to streamline report assembly and printing with tools such as Camera, Custom Views, linked and embedded objects, and working with Excel-based reports saved as PDF documents
- ◆ Differentiate between Excel's default templates and templates for financial reporting and analysis; create templates and apply them to financial reporting and analysis situations
- ◆ Apply Excel features, such as Sorting, Data Tables, Subtotal, Filters, and PivotTables to aid in financial reporting and analysis
- ◆ List and apply four techniques for consolidating data in Excel
- ◆ Create visualizations in Excel to aid in communicating financial data information to consumers, including differentiating between different types of charts and identifying the circumstances under which certain types of charts are preferable

## *Course Information*

- ◆ **CPE credit:** Recommended for 7 hours
- ◆ **Instructional delivery method:** This course will be taught in Excel for Office 365 with reference to the differences to Excel 2010 and subsequent. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2010 or newer to follow along with the instructor.
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2010 or newer
- ◆ Program level: Advanced
- ◆ Advance preparation: None
- ◆ **Who should participate:** Accounting and financial professionals desiring more knowledge in using Excel for financial statement preparation and analysis. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

# EXCEL TABLES AND DATA MODELS EFFICIENTLY MANAGING, ANALYZING & REPORTING YOUR DATA

To efficiently manage, analyze, and report in Excel, you need more than traditional ranges of data – you need tables and data models! Two of Excel’s best features about which most users know very little, tables and data models allow you to process large volumes of data into dynamic reports and analytical elements with unsurpassed ease, accuracy, and speed.

Far more than just a formatting tool, tables should revolutionize how you work with data in Excel, including serving as dynamically re-sizing ranges of data, providing a simplified means of writing formulas, and facilitating quick and easy sorting of large volumes of data. Couple tables with data models – a means of joining, or relating, two or more tables together – and you have the recipe for unparalleled efficiency when managing, analyzing, and reporting with Excel, even if your source data lies in other data sources! You do not want to miss this chance to learn how to harness the power of these tools by participating in this program!

## *Learning Objectives*

Upon completing this course, you should be able to:

- ◆ List the key features and advantages of working with tables and data models
- ◆ Create tables and data models in Excel, including using Power Query to reference data from external data sources into tables and data models
- ◆ Construct formulas in tables using Structured References, including formulas that refer to tables in other worksheets and workbooks
- ◆ Build Data Analysis Expressions in Data Models to extend their usefulness
- ◆ Use tables as automatic re-sizing data sources for other objects, including PivotTables and PivotCharts
- ◆ Use Excel’s Power Pivot tools to summarize large data models with extreme ease
- ◆ Sort and filter data in tables, including applying Slicer filters
- ◆ Generate financial reports and data analyses – including PivotTables – which reference information from tables and data models and update dynamically

## *Course Information*

- ◆ **CPE credit:** Recommended for 7 hours
- ◆ **Instructional delivery method:** This course will be taught in Excel for Office 365 with reference to the differences to Excel 2013 and subsequent. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2013 or newer to follow along with the instructor.
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel
- ◆ Program level: Advanced
- ◆ **Advance preparation:** For users of Excel 2013 download and install the free Power Query for Excel add-in from [http://bit.ly/K2E\\_PowerQuery](http://bit.ly/K2E_PowerQuery)
- ◆ **Who should participate:** Accounting and business professionals who use Windows-based versions of Excel 2013 and subsequent and are seeking to manage, analyze, and report data more efficiently using Excel

# BUSINESS INTELLIGENCE, FEATURING MICROSOFT'S POWER BI TOOLS

In today's business climate, Business Intelligence (BI) is perhaps the hottest topic in most professional circles. Increasingly, organizations of all sizes are seeking to take advantage of the data that is 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 – ranging 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.

In this program, you will learn how to implement “do it yourself business intelligence” using a variety of techniques and tools. You will learn how to work with some of the advanced data query and summarization features in Excel to create Excel-based dashboards and then you will learn how to leverage that knowledge to build even more powerful BI objects using Microsoft's Power BI tools. If gaining greater insights into your data to make better decisions is of interest to you, then join us for a fast-paced look at how you can take advantage of these fantastic tools.

## *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 are useful 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 7 hours
- ◆ **Instructional delivery method:** This course will be taught in Excel for Office 365 and Power BI Desktop with reference to the differences to Excel 2013 and subsequent. The program focuses on Excel for Windows and Power BI desktop and we encourage you to bring your windows laptop equipped with Excel 2010 or newer, Power BI Desktop and Power Query to follow along with the instructor.
- ◆ **Prerequisites:** Basic understanding of computer operations and terminology, including Microsoft Office Excel
- ◆ Program level: Advanced
- ◆ **Advance preparation:** Download and install the free Power BI desktop application from <https://powerbi.microsoft.com/en-us/desktop/> . For users of Excel 2010 and 2013 download and install the free Power Query for Excel add-in from [http://bit.ly/K2E\\_PowerQuery](http://bit.ly/K2E_PowerQuery)
- ◆ **Who should participate:** Business professionals seeking to develop and implement BI solutions

# CLOUD COMPUTING

## *THE FUTURE IS HERE!*

“Cloud Computing.” You’ve heard the term, but what does it really mean and how does it impact you both personally and professionally? In this seminar, you will learn the fundamentals of Cloud computing, including what Cloud computing really is and what it is not. More importantly, you will learn necessary skills to determine if Cloud computing might be right for your organization or for your clients. Additionally, during the seminar you will learn how to migrate to Cloud-based solutions and how to avoid the major pitfalls along the way.

Throughout this program, leading solutions from organizations such as Microsoft, Google, Zoho, Thomson Reuters, CCH, Intuit, Acumatica, Sage, Salesforce.com, Wave, XCM Solutions, Bill.com, Amazon, Xero, and many others will be reviewed to help you understand the opportunities that exist today to move your organization forward and begin increasing the return on your investment in technology. A special focus of this seminar is the impact that Cloud computing has on the accounting profession, regardless of whether you work in public accounting, industry, or for governmental, educational, or not-for-profit institutions. Don’t miss this chance to learn about Cloud computing and the potential for you to improve information services within your organization while improving efficiency and driving down costs!

### *Learning Objectives*

Upon completing this course, you should be able to:

- ◆ Define “Cloud computing” and distinguish between various Cloud computing services
- ◆ Determine if Cloud computing is right for your organization
- ◆ Identify the major Cloud computing vendors and the key solutions provided by each of these vendors
- ◆ Create a road map for selecting a Cloud-based solution and migrating to it
- ◆ Recognize the potential pitfalls associated with Cloud-based solutions – such as security and data availability – and identifying means of avoiding these hazards
- ◆ Establish an appropriate strategy for storing data in the Cloud

### *Course Information*

- ◆ **CPE credit:** Recommended for 7 hours
- ◆ **Instructional delivery method:** Group-live demo and discussion
- ◆ **Prerequisites:** Fundamental knowledge of computer operations
- ◆ Program level: Intermediate
- ◆ Advance preparation: None
- ◆ **Who should participate:** Accountants and other business professionals who want to learn more about the potential benefits and risks associated with Cloud computing



# PAPERLESS OFFICE

Would you like to find important documents in 10 seconds or less? Would you like to ensure that all your digital information is safe and secure? Would you like to improve efficiency in workflow? Of course you would, and with a little planning and guidance, you will be on your way to realizing these and other benefits associated with a paperless office. No one expects a completely “paperless” office, but reducing the amount of paper we shuffle can lead to tremendous rewards and in this course, you will learn best practices and proven processes for effective document management.

By participating in this program, you will learn how you can implement simple, inexpensive document management systems at an individual, work group, or small business level. You will also learn how you can implement more sophisticated and comprehensive document management systems – complete with automated workflow processing – that would be appropriate for larger offices and organizations. Your instructor will guide you through issues such as digitizing hard copy files, exporting and importing data from specialized applications into a document management system, key 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 of how to implement your own version of the Paperless Office.

## *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 key hardware and software requirements for successful document management, including scanners, storage, memory, operating systems, and network considerations
- ◆ Describe key 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 7 hours
- ◆ **Instructional delivery method:** Group-live demo and discussion
- ◆ **Prerequisites:** Fundamental knowledge of computer operations
- ◆ Program level: Intermediate
- ◆ Advance preparation: None
- ◆ **Who should participate:** Accountants and other business professionals who are seeking to improve document management processes in their organizations

# MICROSOFT ACCESS FOR ACCOUNTANTS

Microsoft Access has the potential to be an extremely useful tool for many accountants, yet it remains among the least utilized of the Office applications. This is unfortunate because Access is a truly powerful application that is relatively easy to learn and use. Once you understand the basic components of Access (i.e., tables, queries, forms, reports, and relationships) and how they work together, it is often much easier and faster to use Access than Excel to perform many accounting tasks.

Access and Excel work well together. They can frequently be used together to create solutions that are easier to use and that produce higher quality results. For accountants, learning to use Access will make Excel an even more useful and powerful tool.

The course does not assume that participants have any prior experience with Access. However, we will go beyond the basics in the areas of queries, reports, and forms. Additionally, accountants who work with Excel lists that have been exported from accounting software or keyed into an Excel spreadsheet need this course.

## *Learning Objectives*

- ◆ Understanding database design basics
- ◆ Describe processes for building and working with tables including linked tables, creating and working with queries, building and managing relationships between tables and building data input controls
- ◆ Understand how to design forms to improve the accuracy and efficiency of data entry, and work with multi-table queries
- ◆ Describe how to use Access to work with data that resides in your accounting software
- ◆ Identify and understand how to create PivotTables in Excel using Access data
- ◆ Understand how to design and modifying Access reports
- ◆ Identify how to use Excel and Access together to manage data and to prepare reports
- ◆ Using list boxes, combo boxes, and other advanced techniques in input forms
- ◆ Identify how to secure your Access databases

## *Course Information*

- ◆ **CPD credit:** Recommended for 7 hours
- ◆ **Instructional delivery method:** This course will be taught in Access for Office 365 with reference to the differences to Access 2010 and subsequent. We encourage you to bring your windows laptop equipped with Excel 2010 or newer to follow along with the instructor.
- ◆ **Prerequisites:** None
- ◆ **Program level:** Basic
- ◆ **Advance preparation:** None
- ◆ **Designed for:** Accountants who work with hundreds or thousands of rows of data and who want to save time and to improve efficiency and effectiveness
- ◆ **Who should participate:** Accountants who would like to use Microsoft Access as well as accountants who are already using Microsoft Access, but who have had limited or no training in using Access

# SMALL BUSINESS INTERNAL CONTROLS, SECURITY, AND FRAUD PREVENTION AND DETECTION

Internal controls are more important than ever, and their importance increases seemingly on a daily basis. However, internal controls present a challenge for many smaller organizations. In this program, you will learn 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 how to implement preventive, detective, deterrent, and compensating controls to mitigate these risks, even in the absence of proper segregation of duties. Additionally, by participating in this program, you will learn technology-focused techniques for preventing and detecting fraud as well as securing information systems and sensitive data. As a participant, you will benefit from the case studies used in class in which theoretical concepts are implemented and demonstrated in leading small business accounting software programs, such as QuickBooks and QuickBooks Online, Sage 50, and Adagio.

For small organizations, maintaining an effective system of internal controls presents a significant challenge. Implementing many of the theoretical concepts surrounding internal controls – such as segregation of duties – may not be practical or even possible in some cases. Consequently, the current internal control structure of many small businesses fosters an environment in which too much risk is present. This, coupled with the presence of uncontrolled information systems and computerized accounting software, can often lead to disastrous results. Participate in this program to learn the necessary insights and tools to design, implement, and monitor effective internal controls, security, and anti-fraud measures in small organizations.

## *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 business 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 common general controls in small businesses
- ◆ Identify relevant internal control procedures over revenues, cash, purchasing, payables, payroll, inventory, and fixed assets in small businesses
- ◆ Implement technology tools to prevent and detect occupational fraud
- ◆ List opportunities to enhance security over information systems and sensitive data
- ◆ Define alternative control procedures and describe their significance in small businesses

## *Course Information*

- ◆ **CPE credit:** Recommended 7 hours
- ◆ **Instructional delivery method:** Group-live demo and discussion
- ◆ **Prerequisites:** Basic understanding of internal controls and accounting and administrative processes in smaller organizations
- ◆ Program level: Intermediate
- ◆ Advance preparation: None
- ◆ **Who should participate:** Business professionals responsible for internal control and fraud prevention and detection

# EXCEL MACROS DEMYSTIFIED

You have used Excel for years and Lotus prior to that. During this time, you have said repeatedly, “One day, I’ll learn how to write macros.” Well, that time has arrived because this 3.5 hour program will introduce you to the wide world of macros and Visual Basic for Applications (VBA) in Excel.

Designed for those with little, if any, experience working with macros, this course will teach the fundamentals of creating and working with macros in Excel. More specifically, you will learn how to use Excel’s Macro Recorder to write simple, yet effective, macros; how to secure and share macros with other Excel users; how to create user-defined functions to solve specific accountant-centric problems in Excel; and how to create macros that run automatically when a user opens a workbook. You will also learn the basics of VBA, including many necessary elements to write macros that can make you and your team more effective and productive with Excel. Don’t miss this unique opportunity to learn how to begin working with macros – one of Excel’s most powerful tools.

## *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 key limitations of the Macro Recorder; additionally, modify Excel’s Quick Access Toolbar and the Ribbon to provide shortcuts to macros
- ◆ List the nine key 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 3.5 hours
- ◆ **Instructional delivery method:** This course will be taught in Excel for Office 365 with reference to the differences to Excel 2010 and subsequent. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2010 or newer to follow along with the instructor.
- ◆ Prerequisites: None
- ◆ Program level: Basic
- ◆ Advanced preparation: None
- ◆ **Who should participate:** Business professionals seeking to extend Excel’s functionality with simple, yet highly-effective, macros. The program focuses on Excel for Windows.

# ADVANCED EXCEL REPORTING

## *BEST PRACTICES, TOOLS, AND TECHNIQUES*

If you need to build advanced Excel reports, including reports where the source data resides in your accounting software or another database, then this program should be at the top of your CPE list! In this seminar, you will learn how to use Open Database Connectivity (ODBC) and Online Analytic Processing (OLAP) to connect Excel to external data sources, such as your accounting software database, to extract data for reporting and analysis. You will also learn how to incorporate PivotTables into your reporting routines, including how to add calculations to your PivotTables, how to group PivotTable data into fiscal reporting periods, and how to filter your PivotTables using Slicers.

You will also learn best practices for presenting compelling and captivating Excel-based reports and charts, and how to use two Excel add-ins – BizNet’s Excel Business Information Suite and Microsoft’s Power Pivot – to streamline and automate many of the manual processes associated with building Excel-based reports. In sum, if you generate financial or operational reports in Excel, you cannot afford to miss this program!

Many accounting and financial professionals spend far too much time in Excel accessing and converting financial data into useful reports. If there is the chance you may not be taking full advantage of all that Excel has to offer as a reporting tool, then you should make plans to participate in this program.

### *Learning Objectives*

Upon completing this course, you should be able to:

- ◆ Link and import data from external databases – including multi-table databases – into Excel
- ◆ Use Tables and PivotTables to create accurate financial reports and analyses
- ◆ List and apply Excel shortcuts for formatting financial reports
- ◆ Implement Excel templates to improve reporting productivity
- ◆ Identify opportunities to work with third-party tools to streamline reporting in Excel

### *Course Information*

- ◆ **CPE credit:** Recommended for 3.5 hours
- ◆ **Instructional delivery method:** This course will be taught in Excel for Office 365 with reference to the differences to Excel 2010 and subsequent. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2010 or newer to follow along with the instructor.
- ◆ **Prerequisites:** Strong working knowledge of Excel 2010 or newer
- ◆ Program level: Advanced
- ◆ Advance preparation: None
- ◆ **Who should participate:** Accounting and financial professionals who use Excel for reporting and want to reduce the risk of errors, simplify reporting processes, and improve the quality of reports. The focus of this session is on Excel for Windows; however, many of the Excel features discussed are also available in Excel for Mac.

# ADVANCED PIVOT TABLES, INCLUDING POWER PIVOT

PivotTables are Excel's most powerful feature and if you are looking to raise your game with PivotTables, then you should plan to participate in this half-day session that will surely elevate your skills. Designed for those who already work extensively with PivotTables, this program shows how you can do even more with PivotTables to summarize, report, and analyze potentially very large volumes of data.

In this program, you will learn how to build PivotTables from Data Models and how to leverage PowerPivot to take advantage of even more advanced features and functions, such as Data Analysis Expressions, Key Performance Indicators, Hierarchies, Dimensions, and OLAP reporting. If you currently use PivotTables on a regular basis and want to take advantage of the powerful advanced features available in this tool, then sign up today for this program.

**Note:** This program is taught at an advanced level; other, more fundamental coverage of PivotTables is offered in our *Excel PivotTables for Accountants* seminar. Many of the concepts taught in this course depend upon access to PowerPivot, available only in the Professional Plus editions of Excel 2013 and Excel 2016.

## *Learning Objectives*

Upon completing this course, you should be able to:

- ◆ Define Data Models and build PivotTables from these objects
- ◆ Create PivotTables using PowerPivot, including PivotTables that summarize data from multiple data sources
- ◆ Utilize Data Analysis Expressions and other tools to add calculations to PivotTables
- ◆ Add features such as Key Performance Indicators, Dimensions, and Hierarchies to PivotTables

## *Course Information*

- ◆ **CPE credit:** Recommended for 3.5 hours
- ◆ **Instructional delivery method:** This course will be taught in Excel for Office 365 with reference to the differences to Excel 2013 and subsequent. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2013 or newer to follow along with the instructor.
- ◆ **Prerequisites:** Full understanding of intermediate to advanced PivotTables
- ◆ Program level: Advanced
- ◆ **Advance preparation:** Power Pivot is available in premium editions of Excel as listed at <http://bit.ly/PowerPivotMyExcel> you may download a trial of Office that includes PowerPivot from <http://bit.ly/ExcelProPlusTrial>
- ◆ **Who should participate:** Business professionals using premium editions of Excel 2013 and subsequent who are seeking to extend their knowledge of PivotTables

# DO IT YOURSELF BUSINESS INTELLIGENCE

Microsoft has created an alternative environment for creating user-interactive reports using rich visuals without Excel. The free Power BI Desktop application allows business professionals to create analysis from your raw data using quick and easy drag-and-drop processes, similar to Excel's Power View, but without the need to invest in Excel 2013/2016. If you have an older version of Office, are using a Mac, or have large data sets that require the additional memory space of a 64-bit application, Power BI Desktop is for you. It has more than twice the data visualizations available in Power View, connects to many more external data sources, includes all of the data connections and transformation capabilities of Power Query, and allows completed analysis to be shared or published to PowerBI.com. Power BI Desktop opens a new era in data analysis and reporting. Don't miss this opportunity to see this amazing new reporting tool in action.

## *Learning Objectives*

Upon completing this course, you should be able to:

- ◆ Describe the advantages of working with Power BI Desktop and list the relevant limitations associated with using Power View to produce similar reports;
- ◆ Identify how to acquire Power BI Desktop and a PowerBI.com subscription;
- ◆ Explain data models and how to create and work with them in Power BI Desktop;
- ◆ List several ways in which data can be displayed and presented on a Power BI report; and
- ◆ Describe how Power BI reports present information better than ordinary tabular reports>Create Excel-based BI dashboards

## *Course Information*

- ◆ **CPE credit:** Recommended for 3.5 hours
- ◆ **Instructional delivery method:** This course will be taught in Power BI Desktop for Windows. The program focuses on Power BI desktop and we encourage you to bring your windows laptop equipped with Power BI Desktop to follow along with the instructor. Currently there is no Power BI Desktop for macOS.
- ◆ **Prerequisites:** Basic understanding of computer operations and terminology, including Microsoft Office Excel.
- ◆ Program level: Advanced
- ◆ **Advance preparation:** Download and install the free Power BI desktop application from <https://powerbi.microsoft.com/en-us/desktop/>.
- ◆ **Who should participate:** Business professionals seeking to develop and implement Power BI.

# WORD, OUTLOOK, AND POWERPOINT

## *TIPS AND TRICKS FOR ENHANCING PRODUCTIVITY*

Most likely you work with Microsoft Office Word, Outlook, and PowerPoint frequently, yet probably have never received any training on how to use these tools to their fullest.

In this half-day session, you will learn the best ways to work with Word, Outlook, and PowerPoint, and increase your productivity in the process. Among the topics covered in this seminar are Styles – Word's best feature; exporting a Word document to a PowerPoint presentation; how to manage the email avalanche in Outlook; and using Office Online, OneDrive, and OneDrive for Business to work with your data anytime, anywhere on any device.

Do not miss this chance to ramp-up your Microsoft Office productivity by learning the best practices for working in Word, Outlook, and PowerPoint.

### *Learning Objectives*

Upon completing this course, participants should be able to:

- ◆ Describe how to increase efficiency by using key, accountant-centric features in Word, Outlook, and PowerPoint
- ◆ Discuss the advantages and risks associated with storing Microsoft Office information in the Cloud
- ◆ Discuss how to incorporate Office Online into an overall strategy for working with Microsoft Office
- ◆ Integrate data between various components of Microsoft Office

### Course Information

- ◆ **CPE credit:** Recommended for 3.5 hours
- ◆ **Instructional delivery method:** This course will be taught in the Office 365 desktop applications with reference to the differences to Office 2010 and subsequent. The program focuses on Office for Windows and we encourage you to bring your windows laptop equipped with Office 2010 or newer to follow along with the instructor.
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office applications
- ◆ Program level: Intermediate
- ◆ Advance preparation: None
- ◆ **Who should participate:** Accounting and financial professionals who want to learn more about using Outlook, Word, and PowerPoint in their business. The focus of this session is on Office for Windows; however, many of the Office features discussed are also available in Office for Mac.



# TECHNOLOGY UPDATE

Are you ready to learn about the latest trends in technology? Do you sometimes feel lost in the technology jungle? Would you like clear guidance regarding Windows, Office, the Cloud, security, and other technology-related issues? If you answered “yes” to any of these questions, then make plans now to invest in this fast-paced and highly informative seminar that is sure to ramp up your return on technology investment.

The technology tools available to businesses have never been better, but many are not taking full advantage of these tools. This course helps professionals, at all levels, understand the major trends in hardware, software, and services and how to utilize these tools to meet organizational objectives both efficiently and effectively. More than just a seminar on the latest computers, you will learn about the full spectrum of practical technology available to you and your team and how to implement these tools for maximum impact.

## *Learning Objectives*

Upon completing this course, you should be able to:

- ◆ List and describe key features of Windows 10 and identify situations where upgrading might be advantageous
- ◆ Analyze developments in mobile technologies and develop an optimal mobile strategy
- ◆ Identify security issues facing business professionals and list options for mitigating risk
- ◆ List and describe key features of Office 2016 and determine an optimal time to upgrade
- ◆ Identify major trends in hardware, including desktops, laptops, servers, tablets, storage, and printing
- ◆ Develop strategies for successful Cloud implementations, including accounting and tax, document management, workflow, and data storage and synchronization applications
- ◆ Define *virtualization* and identify how it potentially changes the technology infrastructure in your office

## *Course Information*

- ◆ **CPE credit:** Recommended for 3.5 hours
- ◆ **Instructional delivery method:** Group-live demo and discussion
- ◆ **Prerequisites:** Fundamental understanding of basic technology concepts
- ◆ Program level: Intermediate
- ◆ Advance preparation: None
- ◆ **Who should participate:** Business professionals who are interested in how technology affects them and seek an update of relevant technology trends, tools, and techniques

# TECH TOOLS AND GADGETS FOR A MORE EFFICIENT YOU!

Technology – specifically the ever-evolving world of tools, gadgets, and apps – continues to awe and amaze while “The Internet of Things” is rapidly turning this evolution into a revolution. By learning how to utilize these tools and gadgets, you can enhance both personal and team productivity and, in this program, you will learn how to take advantage of many features in tools that you likely already own – such as Microsoft Windows and Microsoft Office – to become more productive. You will also learn about numerous applications and services to help with managing personal finances, creating and organizing notes and to-do lists, speaking text into your computer, invoking handwriting recognition, and improving personal information security. You will witness demonstrations of leading tools, gadgets, and apps – many of which are free – all designed to make you more efficient, effective, and productive.

All too often, we get “locked-in” to static means of completing personal and business-oriented tasks even though a vast set of other options is available. If you are curious about the tools and gadgets that are available today to get more work done in less time, then make plans to participate in this program – you will walk away amazed at the opportunities that are available to you!

## *Learning Objectives*

Upon completing this course, you should be able to:

- ◆ Identify opportunities to implement free and inexpensive solutions to address and solve common personal and business issues, including security
- ◆ Recognize opportunities to use the Cloud as the backbone of a business technology infrastructure
- ◆ Implement smartphone and tablet apps to connect to, and more efficiently manage, information
- ◆ Discover hidden features in applications you already own
- ◆ Troubleshoot and maintain your computer with free and inexpensive tools

## *Course Information*

- ◆ **CPE credit:** Recommended for 3.5 hours
- ◆ **Instructional delivery method:** This course will be taught in the Office 365 desktop applications with reference to the differences to Office 2010 and subsequent. The program focuses on Office for Windows and we encourage you to bring your windows laptop equipped with Office 2010 or newer to follow along with the instructor.
- ◆ **Prerequisites:** Fundamental knowledge of computer operations
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals seeking to leverage technology for improved personal and team productivity

# SECURING YOUR DATA

## *PRACTICAL TOOLS FOR PROTECTING INFORMATION*

Security is not optional and yesterday's security techniques are not working to minimize today's security threats. Therefore, now is the time for you to tune up what you know about protecting sensitive data. In this program, you will learn about the latest tools and techniques for securing your data, including encryption, virus protection, secure communications, electronic signatures, secure authentication, and more. You will also learn how to implement a very practical, five-step approach to securing your PC and the types of questions you should be asking of your staff to ensure server-based information remains protected. Extensive demonstrations will be used by your K2 instructor to teach the techniques and concepts presented.

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

### *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
- ◆ Implement security procedures to improve organizational security

### *Course Information*

- ◆ **CPE credit:** Recommended for 3.5 hours
- ◆ **Instructional delivery method:** Group-live demo and discussion
- ◆ **Prerequisites:** Basic understanding of computer operations
- ◆ Program level: Intermediate
- ◆ Advance preparation: None
- ◆ **Who should participate:** Business professionals seeking to secure sensitive data

# 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, and even 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. You will learn how to manage key 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 how to identify your organization's major risks and create an effective plan to address these contingencies.

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

### *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 critical differences in how each is created and stored so that it can achieve its desired purpose

### *Course Information*

- ◆ **CPE credit:** Recommended for 3.5 hours
- ◆ **Instructional delivery method:** Group-live demo and discussion
- ◆ **Prerequisites:** Basic understanding of organizational business processes and technology terminology
- ◆ Program level: Intermediate
- ◆ Advance preparation: None
- ◆ **Who should participate:** Business professionals who desire to reduce the risk associated with business disruptions

# PLANNING AND MANAGING YOUR TEAM'S TECHNOLOGY

Isn't it time you took control of information technology (IT) within your organization? With IT being both a significant cost and a strategic expenditure, what can you do to manage ROI? What steps are available to maximize the impact of technology, controlling costs where possible, while still benefiting from leveraging that technology to improve profits? How can you set reasonable budgets and manage your team and vendors to ensure that your technology is functioning as intended and on budget? What can we do to stay current enough on the options and conversant enough to speak with computer people?

Join us in this seminar to learn the best ways to plan and manage your team's technology. The program is specifically designed for the manager who does not have a technology background, but who is now charged with leading and managing the technology investment in a small to mid-sized organization, including a CPA firm. If you are in that role, can you really afford to miss this program?

## *Learning Objectives*

Upon completing this course, you should be able to:

- ◆ Identify the major cost components associated with technology
- ◆ Plan budgets to acquire the necessary resources needed for success
- ◆ Differentiate between various opportunities for leveraging Cloud-based tools
- ◆ Identify optimal software licensing strategies in an organization
- ◆ Prepare and implement appropriate technology policies in a business

## *Course Information*

- ◆ **CPE credit:** Recommended for 3.5 hours
- ◆ **Instructional delivery method:** Group-live demo and discussion
- ◆ **Prerequisites:** Basic understanding of computer operations and terminology
- ◆ Program level: Intermediate
- ◆ Advance preparation: None
- ◆ **Who should participate:** Business professionals who manage technology investments and applications in small to mid-sized organizations, including CPA firms

# TOP PDF FEATURES YOU SHOULD KNOW

Stop struggling with PDFs! Using Adobe Acrobat, and other PDF tools, provides access to a number of features, which make working with these common files a breeze. In this course, you will learn how to use tools and features, such as PDF forms, redaction, converting PDFs to Word and Excel files, electronic signatures, creating and applying tick marks, building indices and catalogs, portfolios, and securing PDF documents, to their fullest in order to work more effectively and efficiently with PDF documents.

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

## *Learning Objectives*

Upon completing this course, you should be able to:

- ◆ Reorganize and manipulate PDF documents – including applying bookmarks – to meet specific needs
- ◆ Create and distribute PDF forms and automate the process of collecting and summarizing form response data
- ◆ Markup and edit PDF documents and apply tick marks
- ◆ Secure PDF documents and facilitate electronic approvals and signatures
- ◆ Convert PDF documents to Word and Excel files

## *Course Information*

- ◆ **CPE credit:** Recommended for 3.5 hours
- ◆ **Instructional delivery method:** This course will be taught in Adobe Acrobat DC. The program focuses on Adobe Acrobat DC for Windows and we encourage you to bring your windows laptop equipped with Adobe Acrobat DC to follow along with the instructor.
- ◆ **Prerequisites:** Fundamental knowledge of basic PDF operations
- ◆ Program level: Intermediate
- ◆ **Advance preparation:** Installation of Adobe Acrobat DC, a 7 day trial is available at <http://bit.ly/AdobeAcrobatTrial>
- ◆ **Who should participate:** Business professionals who are seeking to become more efficient and effective when working with PDF documents

# INSTRUCTORS AND STAFF

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## *Instructors*

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