Professional Development Planning Handbook

June 1, 2021 to May 31, 2022

Hello,

We are pleased to provide to you our 2021 CPE Planning Handbook. This catalog contains detailed descriptions of our seminars for accounting and financial professionals. 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 on Excel and other Microsoft Office applications, budgeting, internal controls, ethics, and other technology related topics.

Top five attended courses

- ♦ Ethics and Technology
- ♦ Technology Update
- ♦ Advanced Excel Data Magic - Managing, Analyzing, and Reporting
- ♦ Securing Your Data - Practical Tools for Protecting Information
- ♦ Business Intelligence - featuring Microsoft's Power BI Tools

Conferences

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. Full details of the conference is attached

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. For current information on our instructors please visit https://www.k2e.ca/about.html .

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:
- ♦ Suitable room with high ceiling (12' min.) which allows for a large screen
- ♦ Large quality screen at least 10'x 10' to ensure adequate viewing for participants
- ♦ High-Speed Internet access
- ♦ Projection cart
- ♦ Instructor table
- ♦ Cordless lavaliere microphone (when attendance is over 35)
- ♦ Comfortable classroom seating

Online live courses can be scheduled on your platform or using either our ON24 platform for groups up to 500 or Microsoft Teams for groups of 100 or less.

Course Scheduling and Administration

Please contact Ward Blatch directly at ward@k2e.ca or 902-706-7737 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 34 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.

K2'S 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:** Group-live demonstration and discussion – laptop friendly, with access to demonstration files. The seminar material and presentation are designed for users of Excel for Windows.
- ♦ **Prerequisites:** Fundamental knowledge of Excel 2013 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

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 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 2007 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:** Group-live demonstration and discussion – laptop friendly, with access to demonstration files. The seminar material and presentation are designed for users of Excel for Windows.
♦ **Prerequisites:** Experienced Excel user
♦ **Program level:** Advanced
♦ **Advance preparation:** None
♦ **Who should attend:** Business professionals who work with Excel 2013 or newer and want to extend their knowledge with advanced features and functions

K2'S ADVANCED EXCEL DATA MAGIC - MANAGING, ANALYZING, AND REPORTING

With tools such as Data Models, Power Query, and Power Pivot, today's versions of Excel offer unparalleled opportunities to move beyond traditional reporting techniques. If you are interested in how to advance your reporting processes and minimize your dependence on formulas, then this is the one class you cannot afford to miss.

In this session, you will learn about the importance of creating Data Models to facilitate your financial reporting processes and how you can use Power Pivot to assist in summarizing your data quickly and easily into compelling and interactive statements. You will also learn how to use Excel's Power Query feature to both link and transform data from external data sources – such as your accounting or ERP system – into Excel so that you use this data in your reports.

Learning Objectives

Upon completing this course, you should be able to:

♦ Define the term "Data Model" and identify the steps for creating Data Models in Excel
♦ Identify the steps necessary to link data from external data sources into Excel using Power Query
♦ Create transformations in Power Query to facilitate simpler and more timely reporting
♦ List the key benefits associated with using Power Pivot to manage your Data Models
♦ Create PivotTables and PivotCharts to summarize your financial data into useful reports and statements

Course Information

♦ **CPE credit:** Recommended for 7 hours
♦ **Instructional delivery method:** Group-live demonstration and discussion. This course is "laptop-friendly" and participants will have access to demonstration files. This course focuses on features found in Excel 2016 and newer for Windows. The seminar material and presentation are designed for users of Excel for Windows.
♦ **Prerequisites:** Fundamental knowledge of Excel
♦ **Program level:** Advanced
♦ **Advance preparation:** None
♦ **Who should attend:** CPAs and other financial and business professionals who are seeking quicker and more accurate ways to prepare financial reports and summaries using Excel 2016 and newer.

K2'S 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:** Group-live demonstration and discussion – laptop friendly, with access to demonstration files. The seminar material and presentation are designed for users of Excel for Windows.
♦ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2010 or newer
♦ **Program level:** Intermediate
♦ **Advance preparation:** None
♦ **Who should attend:** Business professionals involved in budgeting and forecasting activities

K2'S 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:** Group-live demonstration and discussion – laptop friendly, with access to demonstration files. The seminar material and presentation are designed for users of Excel for Windows.
- ♦ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2013 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 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:** Group-live demonstration and discussion – laptop friendly, with access to demonstration files. The seminar material and presentation are designed for users of Excel for Windows.
♦ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2013 or newer
♦ **Program level:** Advanced
♦ **Advance preparation:** None
♦ **Who should attend:** Accounting and financial professionals desiring more knowledge in using Excel for financial statement preparation and analysis

K2'S 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:** Group-live demonstration and discussion – laptop friendly, with access to demonstration files. The seminar material and presentation are designed for users of Excel for Windows.
♦ **Prerequisites:** Fundamental understanding of Microsoft Office Excel 2010 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 ESSENTIALS FOR STAFF ACCOUNTANTS

NEW COURSE FOR 2021

Staff accountants have specific needs when working with Excel – needs that are often not met by their existing Excel knowledge. Chief among these are the needs to quickly summarize data, prepare accurate and aesthetically pleasing reports, and create 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 they need to maximize their efficiency and accuracy when working with Excel.

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

Learning Objectives

Upon completing this course, you should be able to:
- List five critical best practices associated with creating workbooks and construct workbooks that comply with these principles
- Utilize PivotTables and PivotCharts to quickly summarize and present data, without writing formulas
- Build sophisticated formulas to assist with reporting and analysis, including formulas 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 easily 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 – that depend upon the passage of time

Course Information

- **CPE credit**: Recommended for 7 hours Computer Software and Applications
- **Instructional delivery method**: Group-live demonstration and discussion – laptop friendly, with access to demonstration files. The seminar material and presentation are designed for users of Excel for Windows.
- **Prerequisites**: Fundamental knowledge of Microsoft Office Excel
- **Program level**: Intermediate
- **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 NEXT GENERATION EXCEL REPORTING

NEW COURSE FOR 2021

New features added to Excel beginning with the 2016 release offer tremendous opportunities to improve Excel-based reporting, for both financial and operational reporting. Data models, Power Query, Data Analysis Expressions, Power Pivot, and many other tools can help you to create more powerful reports 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 you can incorporate tools such as 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 quickly and easily format your spreadsheets to give them a polished and professional appearance. If you use Excel for any reporting process, this is a must-attend course in 2021.

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 7 hours Accounting
♦ **Instructional delivery method**: Group-live demonstration and discussion. We encourage you to participate with your laptop equipped with Excel for Windows 2016 or newer, including Excel provisioned through a Microsoft 365 or Office 365 subscription. The seminar material and presentation are designed for users of Excel for Windows.
♦ **Prerequisites**: Fundamental knowledge of Excel 2016 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 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:** Group-live demonstration and discussion – laptop friendly, with access to demonstration files. The seminar material and presentation are designed for users of Excel for Windows.
♦ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2013 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 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 might 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:** Group-live demonstration and discussion - laptop friendly, with access to demonstration files. Please download and install Power BI Desktop before class from https://k2e.fyi/PowerBIDownload . If you are using Excel 2013 you will require the installation of the add on Power Query from Microsoft https://k2e.fyi/PowerQueryDownload . The seminar material and presentation are designed for users of Excel for Windows.
- ♦ **Prerequisites:** Basic understanding of computer operations and terminology, including Microsoft Office Excel
- ♦ **Program level:** Advanced
- ♦ **Advance preparation:** None
- ♦ **Who should attend:** Business professionals seeking to develop and implement BI solutions

K2'S TECHNOLOGY FOR CPAS – DON'T GET LEFT BEHIND

How good are you with the technology you use daily? What new technology tools are available that could save you time and make you more effective? Technology continues to accelerate rapidly, and the need to keep pace is important. If you are not an information technology (IT) expert, but need a technology update to maintain and improve your skills so that you can serve your companies and/or clients more efficiently and effectively, then this course is for you!

In this fast-paced, update-style course, you will survey today's IT environment, learning about computer hardware, software (including Office 2019), operating systems (including Windows 10) and what they mean for you, and peripheral devices. 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, 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 knowledge you need to harness the power of technology, both now and in the future. Register now for this "don't miss" opportunity to get the skills needed to enhance the value of your IT investment.

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- ♦ **CPE credit:** Recommended for 7 hours
- ♦ **Instructional delivery method:** Group-live demonstration and discussion
- ♦ **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 CLOUD COMPUTING

"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, Accumatica, Sage, Salesforce.com, Wave, XCM Solutions, Receipt Bank, 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 demonstration and discussion
♦ **Prerequisites:** Fundamental knowledge of computer operations
♦ **Program level:** Intermediate
♦ **Advance preparation:** None
♦ **Who should attend:** Accountants and other business professionals who want to learn more about the potential benefits and risks associated with Cloud computing

K2'S 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 demonstration and discussion
- ♦ **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 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.

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 demonstration and discussion
♦ **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 ETHICS AND TECHNOLOGY

With the explosion of technology in the workplace that has occurred over the past thirty years, a fair question to ask is "what are the ethical considerations and impacts related to this technology?" Practical technology issues such as data privacy and security no doubt carry ethical considerations, but technology also affects the ethics associated with issues such as work-life balance, the digital divide, training needs, copyrights, and fraud.

In this course, you will learn about "technoethics" and the implications this has on individuals and organizations. To that end, you will explore many of the current and emerging issues associated with ethics and technology, such as copyrights, cybercrimes, privacy versus security, and geo-tracking technologies. Given the deep implications associated with ethics and technology, this could be the most important session in which you will ever participate.

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

♦ **CPE credit:** Recommended for 4 hours
♦ **Instructional delivery method:** Group-live demonstration and discussion
♦ **Prerequisites:** None
♦ **Program level:** Basic
♦ **Advance preparation:** None
♦ **Who should attend:** CPAs who desire a deeper understanding of key ethical issues facing the profession today

K2'S TECHNOLOGY UPDATE

What technology trends significantly impact you? Which technologies will affect you and your business? This visionary session provides insights, choices, and recommendations. You will experience a summary of 5G, Wi-Fi 6E, and the latest hardware and software trends to help you make the best decisions. You are certainly going to discover at least one new technology you had not considered. This session provides strategic and tactical insight on technology choices.

Learning Objectives

Upon completing this course, you should be able to:

♦ Select current technologies from a list
♦ List current communications choices
♦ Differentiate between various products and able competitors
♦ Create strategic and tactical technology plans

Course Information

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

K2'S EMERGING TECHNOLOGIES FOR ACCOUNTANTS, INCLUDING BLOCKCHAIN AND CRYPTOCURRENCIES

Unlike technologies we use every day, many of the currently emerging technologies have the potential to change how we work in the future. This session will cover an assortment of technologies which are nearing mainstream adoption and help you understand what they do, how they work, as well as some of the potential risks and rewards they offer potential users.

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 posed to legacy businesses by these innovative yet disruptive platforms.

Learning Objectives

Upon completing this course, you should be able to:

- ♦ Define Blockchain, Artificial Intelligence, Cryptocurrency, Big Data, and Machine Learning
- ♦ Identify the Major 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 Identify How These Technologies Differ from Current Practices

Course Information

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

K2'S CASE STUDIES IN FRAUD AND TECHNOLOGY CONTROLS

Fraud continues to plague businesses at epidemic levels and technology control failures are a large reason fraud occurs. 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 of these frauds. By learning through these real-world case studies, you will be in a better position to reduce fraud risk.

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 key 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 3.5 hours
- ♦ **Instructional delivery method:** Group-live demonstration and discussion
- ♦ **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 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 demonstration and discussion
- ♦ **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 SMALL BUSINESS ACCOUNTING SHOOTOUT

NEW COURSE FOR 2021

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 to make an informed decision about the future direction of your accounting platform.

Solutions from companies such as Intuit, Sage, Xero, and Wave will be reviewed and compared to help you decide whether you should remain with your current platform or perhaps switch to a different one. Additionally, various third-party add-ins will be covered to help you make informed decisions about issues such as automated data entry, 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 in which you will participate this year.

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 3.5 hours Accounting
- **Instructional delivery method:** Group-live demonstration and discussion
- **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 AI ACCOUNTING – BRINGING AI TO ACCOUNTING

NEW COURSE FOR 2021

The term AI (artificial intelligence) seems to be part of every product or service description today. This course will define AI and its impact on accounting and workflow in today's modern office. Throughout the course you will learn what tools are available today to dramatically improve workflow, efficiency, and accuracy by brining AI to your accounting systems.

Learning Objectives

Upon completing this course, you should be able to:

- ♦ Define artificial intelligence
- ♦ List three accounting tools available today that use AI
- ♦ List three no-code/low-code automation tools
- ♦ List three places automation and machine learning can be used in accounting

Course Information

- ♦ **CPE credit:** Recommended for 3.5 hours
- ♦ **Instructional delivery method:** Group-live demonstration and discussion
- ♦ **Prerequisites:** None
- ♦ **Program level:** Basic
- ♦ **Advance preparation:** None
- ♦ **Who should attend:** Business professionals who are seeking to improve accounting through automation and AI

K2'S INTEGRATING DATA FOR IMPROVED EFFICIENCY AND CONTROL

NEW COURSE FOR 2021

In today's business climate, data is king! Organizations of all sizes are collecting and managing more data than ever, and that trend is sure to continue. In this environment, the number of apps, services, platforms, etc. that we use also increases every year. Thus, there is a need to standardize, streamline, and optimize our ability to manage the ever-growing list of systems and their data, and in this session, you will learn how to do precisely that.

Conquering your data can help improve efficiency, effectiveness, and reduce cost and errors within your organization. In this course, you will learn various ways of sharing data easily between different applications, platforms, and services. Further, you will learn about various tools, desktop application functionalities, and programming tools to manage this process. Participate in this session so that you can truly integrate your data and reap the benefits of improved efficiency and control.

Learning Objectives

Upon completing this course, you should be able to:

♦ Define and identify where your organization keeps its data and how to access that data
♦ List various tools, services, and programs to manage data and share it with other systems
♦ Identify the cost and benefits of various data sharing techniques and approaches
♦ Construct and build data sharing and integration processes using widely available tools such as Power Query, Power BI, and more

Course Information

♦ **CPE credit:** Recommended for 3.5 hours
♦ **Instructional delivery method:** Group-live demonstration and discussion
♦ **Prerequisites:** Basic understanding of computer operations and terminology
♦ **Program level:** Intermediate
♦ **Advance preparation:** None
♦ **Who should attend:** Business professionals seeking to leverage technology by integrating data across multiple applications to improve efficiency and control

K2'S WORKING REMOTELY – THE NEW NORMAL

NEW COURSE FOR 2021

Whether by choice or necessity, many team members now find themselves working remotely. In this new normal, questions abound surrounding remote access to desktops and data, security, communications, collaboration, and other considerations. When implemented correctly, remote work strategies can be a "win-win" for all involved; on the other hand, failed implementations may lead to inefficiencies, security issues, and dissatisfied team members.

In this session, you will learn today's best practices for working remotely. Specifically, you will learn about various remote access tools available to you, communication and collaboration options, and security best practices. You will also learn about the need to manage and monitor workflows in remote work environments and tools that you can use for that purpose. After completing this session, you should be able to implement a remote work strategy that yields efficiency, security, and satisfaction to all involved.

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 3.5 hours Information Technology
- ♦ **Instructional delivery method:** Group-live demonstration and discussion
- ♦ **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 REMOTE ACCESS FOR SMALL BUSINESS

Small businesses have unique and specific technology needs, including those around remote access. Whether team members need remote access to desktops, data, voice services, instant messaging, or Cloud-based services, sometimes the list of available options can be overwhelming!

In this course, you will learn about practical solutions for facilitating remote access in small businesses. Among other items, included in this program is a detailed review of various solutions to provide remote access to a desktop, how to work securely from remote locations, key considerations when selecting Cloud-based solutions, and how to facilitate communication and collaboration in remote environments.

Learning Objectives

Upon completing this course, you should be able to:
♦ Differentiate between options for remotely accessing your computer
♦ 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 3.5 hours Information Technology
♦ **Instructional delivery method:** Group-live demonstration and discussion
♦ **Prerequisites:** Fundamental understanding of personal computer operations
♦ **Program level:** Intermediate
♦ **Advance preparation:** None
♦ **Who should attend:** CPAs and other accounting, financial, and business professional who want to work efficiently and securely from remote locations

K2'S MICROSOFT OFFICE 365 - ALL THE THINGS YOU NEED TO KNOW

Microsoft Office 365 continues to grow and evolve, yet most Office 365 users are utilizing only a fraction of the tools available in their subscription. Powerful resources such as SharePoint Online and Microsoft Teams can change how your entire organization communicates and collaborates, while more personal apps such as 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 means 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 Office 365 applications such as Excel, Word, and Outlook and unleash all the Office 365 has to offer? Join us in this fast-paced and highly interactive seminar where you will learn the things you need to know to be truly successful with Office 365.

Learning Objectives

Upon completing this course, you should be able to:
- ♦ Implement tools and techniques for securing your Office 365 implementations
- ♦ List key Office 365 apps that can improve collaboration and productivity
- ♦ Identify opportunities to utilize SharePoint Online to improve team efficiency
- ♦ Utilize Office 365 apps to communicate more effectively with others

Course Information

- ♦ **CPE credit:** Recommended for 3.5 hours
- ♦ **Instructional delivery method:** Group-live demonstration and discussion
- ♦ **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 Office 365

K2'S IMPROVING PRODUCTIVITY WITH MICROSOFT/OFFICE 365 CLOUD APPLICATIONS

NEW COURSE FOR 2021

Many Office 365/Microsoft 365 subscriptions include powerful 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.

Make plans now to attend this session, so that you can learn about the "rest" of Office 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 take full advantage of your investment in Office 365.

Learning Objectives

Upon completing this course, you should be able to:

♦ Identify relevant, Cloud-based components of the Office 365/Microsoft 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 an Office 365/Microsoft 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 3.5 hours
♦ **Instructional delivery method:** Group-live demonstration and discussion. This session is "laptop-friendly," and we encourage participants to follow along on their own devices.
♦ **Prerequisites:** Fundamental Understanding of Computer Operations and the Office 365/Microsoft 365 subscription models
♦ **Program level:** Intermediate
♦ **Advance preparation:** None
♦ **Who should attend:** CPAs and other business professionals who are seeking leverage their Office 365/Microsoft 365 subscriptions by taking advantage of some of the Cloud-based features available in these environments

K2'S MICROSOFT TEAMS

NEW COURSE FOR 2021

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

In this session, you will learn how you can get up and running quickly in Teams so that you can take full advantage of this powerful tool. More specifically, you will learn how you can get started in Teams and critical decisions that will affect your deployment. Also, you will learn how to work in Teams, including how to take advantage of the chat, voice, and video call services and how to share documents securely with others. Moreover, you will learn how you can extend your Teams platform to external organizations for improved communication and collaboration. Additionally, you will identify how you can add other applications into Teams and how you can optimize the configuration of your Teams environment for 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!

Learning Objectives

Upon completing this course, you should be able to:
- ♦ Identify key 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 3.5 hours Computer Software and Applications
- ♦ **Instructional delivery method:** Group-live demonstration and discussion. This session is "laptop-friendly," and we encourage participants to follow along on their own devices.
- ♦ **Prerequisites:** Fundamental knowledge of computer applications and the Office 365/Microsoft 365 subscription models
- ♦ **Program level:** Intermediate
- ♦ **Advance preparation:** None
- ♦ **Who should attend:** CPAs and other business professionals who are seeking leverage their Office 365/Microsoft 365 subscriptions by taking advantage Teams for improved communication and collaboration

K2'S 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:** Group-live demonstration and discussion – laptop friendly, with access to demonstration files. The seminar material and presentation are designed for users of Excel for Windows.
♦ **Prerequisites:** Strong working knowledge of Excel 2013 or newer
♦ **Program level:** Advanced
♦ **Advance preparation:** None
♦ **Who should attend:** 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

K2'S MASTERING ADVANCED EXCEL FUNCTIONS

NEW COURSE FOR 2021

With approximately 500 functions now available in Excel, it is easy to overlook some of the newer and more powerful tools available. But, if you do that, your productivity will suffer. In this session, you will learn how you can take advantage of many of Excel's more advanced features – some of which are new, and some of which are 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, how to harness the power of the AGGREGATE function, and how to create more accurate forecasts with Excel's FORECAST.ETS function. No matter your level of experience working with Excel, participating in this course is sure to help you work more efficiently and effectively 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 3.5 hours Computer Software and Applications
- **Instructional delivery method:** Group-live demonstration and discussion. We encourage you to participate with your laptop equipped with Excel 2016 or newer, including Excel provisioned through a Microsoft 365 or Office 365 subscription. The seminar material and presentation are designed for users of Excel for Windows.
- **Prerequisites:** Fundamental knowledge of Excel 2016 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 EXCEL CHARTING AND VISUALIZATIONS

Charts and graphs are nothing new. However, many professionals struggle with building effective visualizations. If that statement describes you, take part in this session to improve your skills when building charts and other visualizations in Excel. As a result of doing so, you will be able to create visualizations that will enhance your communication skills.

This 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. If you are looking to improve your communication skills, this seminar is a must for you.

Learning Objectives

Upon completing this course, you should be able to:

♦ Identify the types of visualizations that should be used to communicate specific messages
♦ List the steps to creating effective 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 3.5 hours
♦ **Instructional delivery method:** Group-live demonstration and discussion. This course is "laptop-friendly" and participants will have access to demonstration files. The seminar material and presentation are designed for users of Excel for Windows..
♦ **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 INTRODUCTION TO EXCEL MACROS

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 four-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**: Group-live demonstration and discussion – laptop friendly, with access to demonstration files. The seminar material and presentation are designed for users of Excel for Windows.
- ♦ **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 TESTING AND AUDITING EXCEL WORKBOOKS

Excel errors continue to plague organizations of all sizes and as spreadsheets become ever-more common, the effects of 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 they adversely affect reports and decision-making processes.

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

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
♦ Implement Various Excel Add-ins to Programmatically Identify Spreadsheet Errors

Course Information

♦ **CPE Credit:** Recommended for 3.5 hours
♦ **Instructional delivery method**: Group-live demonstration and discussion - laptop friendly, with access to demonstration files. The seminar material and presentation are designed for users of Excel for Windows.
♦ **Prerequisites:** Fundamental Understanding of Microsoft Office Excel 2013 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.

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 been exposed to the best features of these three applications. Consequently, they often use "brute force," inefficient means when working in these three components of Microsoft Office. If that describes you, then make sure you carve time out of your schedule to participate in this half day session, because in it, you will learn how you can work much more efficiently when using these tools.

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 3.5 hours
- ♦ **Instructional delivery method:** Group-live demonstration and discussion
- ♦ **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 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:** Group-live demonstration and discussion – laptop friendly, with access to demonstration files. The course uses Adobe Acrobat Pro DC, a trial is available at https://k2e.fyi/AcrobatTrial
♦ **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