

K2's 2024 Standard Technology Conference Sessions

DAY ONE			
General Session (100 minutes)	K2's Tech Update		
Break (10 minutes)			
Breakout Sessions (100 minutes)	K2's Office Scripts - The New Macros	K2's Getting Started With Artificial Intelligence	K2's The ABCs of Automation With Microsoft's Power Platform
Lunch Break			
Breakout Sessions (100 minutes)	K2's What's Now, What's Next: Emerging Technologies	K2's Accessing Your Company's Data With Power Query And Power BI	K2's CPA Firm Technology And Management Update
Break (10 minutes)			
Closing Session (100 minutes)	K2's Excel Best Practices And Features		
DAY TWO			
General Session (100 minutes)	K2's Time To Advance Automation		
Break (10 minutes)			
Breakout Sessions (100 minutes)	K2's Optimizing Your Tech Stack	K2's Advanced Collaboration Solutions	K2's Small Business Accounting Solutions
Lunch Break			
Breakout Sessions (50 minutes)	K2's Consumer Electronics Show 2024 Review	K2's AI Confidential? Privacy And AI	K2's Better Reporting With QuickBooks Online
Break (10 minutes)			
Breakout Sessions (50 minutes)	K2's Harnessing ChatGPT	K2's Effective Automation And Outsourcing	K2's Saving Time With Electronic Forms
Break (10 minutes)			
Closing Session (100 minutes)	K2's Ripped From The Headlines: Lessons From Interesting Crimes		

K2's 2024 Standard Technology Conference Sessions

K2's Tech Update

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

Major Topics

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

Learning Objectives

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

Who Should Attend

This course is essential for accounting professionals eager to stay current with technological evolution and apply these advancements in their practices.

Program Level

Update

CPE Credit Hours

2

Field Of Study

Information Technology

Advance Preparation:

None

Delivery Methods:

Group Internet-based, Group Live

Recommended CPE Credit: 2 hours

K2's 2024 Standard Technology Conference Sessions

K2's Office Scripts – The New Macros

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

Accounting and business professionals who want to use Office scripting to automate routine processes

Program Level:

Intermediate

CPE Credit Hours:

2

Field Of Study:

Computer Software and Applications

Advance Preparation:

None

Delivery Methods:

Group Internet-based, Group Live

Recommended CPE Credit: 2 hours

K2's 2024 Standard Technology Conference Sessions

K2's Getting Started With Artificial Intelligence

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

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

Business professionals seeking to learn how to work with AI tools

Program Level:

Basic

Field Of Study:

Information Technology

Advance Preparation:

Fundamental understanding of business-related technology

Delivery Methods:

Group Live, Group-Internet Based

Recommended CPE Credit: 2 hours

K2's 2024 Standard Technology Conference Sessions

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

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

- Accounting and financial professionals who want better control of business processes and who want to make those processes as effective and efficient as possible

Program Level:

- Basic

Field Of Study:

- Information Technology

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 2 hours

K2's 2024 Standard Technology Conference Sessions

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

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

- Accounting professionals who have decision-making or influence on the use of accounting technology in their organization

Program Level:

- Intermediate

Field Of Study:

- Computer Software and Applications

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 2 hours

K2's 2024 Standard Technology Conference Sessions

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

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

- Financial professionals who want to save time, improve accuracy, and promote efficiency with their reporting projects

Program Level:

- Intermediate

Field Of Study:

- Computer Software and Applications

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 2 hours

K2's 2024 Standard Technology Conference Sessions

K2's CPA Firm Technology And Management Update

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

- This course is indispensable for partners, managers, and IT professionals in CPA firms responsible for adopting and managing innovative applications and strategies.

Program Level:

- Update

Field Of Study:

- Business Management and Organization

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 2 hours

K2's 2024 Standard Technology Conference Sessions

K2's Excel Best Practices And Features

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

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

- Business professionals seeking to use Microsoft Office Excel more effectively

Program Level:

- Intermediate

Field Of Study:

- Computer Software and Applications

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 2 hours

K2's 2024 Standard Technology Conference Sessions

K2's Time To Advance Automation

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

- This course is ideal for accounting and financial professionals keen to improve their organization's efficiency and accuracy through advanced automation strategies and tools.

Program Level:

- Intermediate

Field Of Study:

- Information Technology

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 2 hours

K2's 2024 Standard Technology Conference Sessions

K2's Optimizing Your Tech Stack

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

- Accounting, financial, and business professionals who want to refine their tech stack to achieve maximum efficiency at a minimal cost

Program Level:

- Intermediate

Field Of Study:

- Information Technology

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 2 hours

K2's 2024 Standard Technology Conference Sessions

K2's Advanced Collaboration Solutions

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

Accounting and financial professionals who want to leverage the latest collaboration technologies, including advanced portals, payments, eSignatures, and more, to enhance their practice's efficiency and client satisfaction.

Program Level:

- Intermediate

Field Of Study:

- Computer Software and Applications

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 2 hours

K2's 2024 Standard Technology Conference Sessions

K2's Small Business Accounting Solutions

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

- This course is ideal for accountants, financial advisors, and consultants who specialize in or are interested in small business finance, seeking comprehensive knowledge of the latest accounting tools and their applications.

Program Level:

- Update

Field Of Study:

- Computer Software and Applications

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 2 hours

K2's 2024 Standard Technology Conference Sessions

K2's Consumer Electronics Show 2024 Review

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

- Accounting professionals, tech industry professionals, entrepreneurs, investors, gadget enthusiasts, and anyone interested in the latest trends in consumer electronics.

Program Level:

- Update

Field Of Study:

- Information Technology

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 1 hour

K2's 2024 Standard Technology Conference Sessions

K2's AI Confidential? Privacy And AI

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

- Individuals who want to protect their organizations from unreasonable privacy policies and contract terms in boilerplate agreements.

Program Level:

- Intermediate

Field Of Study:

- Information Technology

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 1 hour

K2's 2024 Standard Technology Conference Sessions

K2's Better Reporting With QuickBooks Online

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

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

- QuickBooks Online users seeking to improve reporting processes

Program Level:

- Intermediate

Field Of Study:

- Accounting

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 1 hour

K2's 2024 Standard Technology Conference Sessions

K2's Harnessing ChatGPT

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

- Ideal for financial professionals, accountants, bookkeepers, and industry practitioners.

Program Level:

- Basic

Field Of Study:

- Information Technology

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 1 hour

K2's 2024 Standard Technology Conference Sessions

K2's Effective Automation And Outsourcing

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

- Accounting professionals who are considering the use of automation and outsourcing in their work

Program Level:

- Intermediate

Field Of Study:

- Information Technology

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 1 hour

K2's 2024 Standard Technology Conference Sessions

K2's Saving Time With Electronic Forms

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

- Accounting professionals who want to collect, aggregate, and report on data from employees, vendors, and customers more effectively.

Program Level:

- Intermediate

Field Of Study:

- Computer Software and Applications

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 1 hour

K2's 2024 Standard Technology Conference Sessions

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

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

Major Topics:

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

Learning Objectives:

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

Who Should Attend:

- Managers, owners, and accounting professionals who want to learn from computer crime incidents best practices that can be used to enhance their organization's security posture

Program Level:

- Intermediate

Field Of Study:

- Information Technology

Advance Preparation:

- None

Delivery Methods:

- Group Internet-based, Group Live

Recommended CPE Credit: 2 hours