K2E Canada Inc. 2023 Course Catalogue

January 1, 2023 to August 31, 2023

K2E Canada Inc.

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THANK YOU FOR CHOOSING K2E CANADA INC.

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

This catalogue summarizes many of your choices to benefit from our courses and instruction team. Our curriculum of technology-focused learning options addresses many of the needs facing business professionals today however, if you don't see a particular topic in which you're interested, just let us know, and we'll do our best to accommodate your request.

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

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

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

The K2E Canada Inc. team is proud to offer one, sixteen, eight, and four hour sessions during 2023. You can learn more about each of these sessions in this section.

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

K2E Canada Inc.

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 K2's Excel Boot Camp is for you! Using accounting-centric examples developed for accountants, Excel Boot Camp takes you through Excel from A to Z. Participate in this course, and you will elevate your use of Excel to the next level.

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

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

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

"I learned some great tips, tools, and efficiencies." R.M., CPA

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

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

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

Course Information
- **CPE credit:** Recommended for 14 hours of Computer Software and Applications
- **Instructional delivery method**: Group Live
- **Prerequisites:** Fundamental knowledge of Excel 2019 and newer
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend:** Excel users and potential Excel users who want to increase their efficiency and effectiveness with Excel

K2E Canada Inc.

K2's Advanced Excel

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

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

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

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

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

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

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

Course Information
- **CPE credit**: Recommended for 3.5 hours of Accounting and 3.5 hours of Computer Software and Applications
- **Instructional delivery methods**: Group Live and Group Internet Based
- **Prerequisites**: Experienced Excel user
- **Program level**: Advanced
- **Advance preparation**: None
- **Who should attend**: Business professionals who work with Excel 2019 or newer and want to extend their knowledge with advanced features and functions

K2E Canada Inc.

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 Internet Based and 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 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 Internet Based and 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 Budgeting And Forecasting Tools
And Techniques

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

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

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

"Excellent class!" J.F., CPA

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

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

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

Course Information
CPE credit: Recommended for 3.5 hours of Accounting and 3.5 hours of Computer Software and Applications
Instructional delivery methods: Group Live and Group Internet Based
Prerequisites: Fundamental knowledge of Microsoft Office Excel 2019 or newer
Program level: Intermediate
Advance preparation: None
Who should attend: Business professionals involved in budgeting and forecasting activities

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

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

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

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

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

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

Learning Objectives
Upon completing this course, you should be able to:
- Define the goals and activities involved in the creation of a Business Continuity Plan (BCP), and contrast a BCP with a data backup strategy
- Identify and assess critical risks to a company's operations
- Classify identified risks into four timeframes for creating disaster recovery plans
- Define three different types of data backups and explain the vital differences in how each is created and stored so that it can achieve its desired purpose

Course Information
- **CPE credit**: Recommended for 7 hours of Information Technology
- **Instructional delivery methods**: Group Live and Group Internet Based
- **Prerequisites**: Basic understanding of organizational business processes and technology terminology
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Business professionals who desire to reduce the risk associated with business disruptions

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

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

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

"This was a great course! Very useful information!" B.R., CPA

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

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

Learning Objectives
Upon completing this course, you should be able to:
- Create Excel-based BI dashboards
- List the potential shortcomings of BI solutions based wholly on Excel
- Identify and implement various Excel add-ins that might be helpful in BI applications
- Differentiate between the BI opportunities in Excel and Power BI
- Create and distribute dashboards using Power BI

Course Information
- **CPE credit**: Recommended for 7 hours of Accounting
- **Instructional delivery methods**: Group Live and Group Internet Based
- **Prerequisites**: Basic understanding of computer operations and terminology, including Microsoft Office Excel 2019 and newer
- **Program level**: Advanced
- **Advance preparation**: None
- **Who should attend**: Business professionals seeking to develop and implement BI solutions

K2's Case Studies In Fraud And Technology Controls

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

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

Summary Description

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

Major Topics

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

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- **CPE credit**: Recommended for 7 hours of Auditing (We also offer this course as a 3.5 hour session.)
- **Instructional delivery methods**: Group Live and Group Internet Based
- **Prerequisites**: Fundamental understanding of internal controls
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: CPAs and other accounting, auditing, and business professionals who are seeking to reduce fraud risk

K2's Excel Best Practices

As spreadsheets evolve, so must your 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. Join us for this program to help you utilize Excel to its fullest potential.

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

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

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

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

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

Course Information
- **CPE credit**: Recommended for 7 hours of Computer Software and Applications
- **Instructional delivery methods**: Group Live and Group Internet Based
- **Prerequisites**: Fundamental knowledge of Microsoft Office Excel 2019 or newer
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Excel users who want to learn best practices for working with spreadsheets

K2E Canada Inc.

K2's Excel Essentials For Staff Accountants

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

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

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

"Excellent class and very valuable information!" S.B., CPA

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

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

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

Course Information
CPE credit: Recommended for 7 hours of Computer Software and Applications
Instructional delivery methods: Group Live and Group Internet Based
Prerequisites: Fundamental knowledge of Microsoft Office Excel 2019 or newer
Program level: Intermediate
Advance preparation: None
Who should attend: Accounting and financial professionals who want to use the power of Excel in common business situations to summarize and analyze data

K2's Excel 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 Internet Based and 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

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

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

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

"Excellent class and very valuable information!" S.B., CPA

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

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

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

Course Information
- **CPE credit**: Recommended for 3.5 hours of Accounting and 3.5 hours of Computer Software and Applications
- **Instructional delivery methods**: Group Live and Group Internet Based
- **Prerequisites**: Fundamental understanding of Microsoft Office Excel 2019 or newer
- **Program level**: Advanced
- **Advance preparation**: None
- **Who should attend**: Accounting and financial professionals who want to use the power of Excel PivotTables to analyze and summarize data

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

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

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

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

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

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

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

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

Course Information
- **CPE credit**: Recommended for 3.5 hours of Accounting and 3.5 hours Computer Software and Applications
- **Instructional delivery methods**: Group Live and Group Internet Based
- **Prerequisites**: Fundamental knowledge of Microsoft Office Excel 2019 or newer
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Accounting and financial professionals who want to learn how to use Excel more efficiently and effectively

K2E Canada Inc.

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

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

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

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

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

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

Course Information
- **CPE credit**: Recommended for 7 hours of Computer Software and Applications
- **Instructional delivery methods**: Group Live and Group Internet Based
- **Prerequisites**: Fundamental understanding of computer operations
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Business professionals seeking to maximize their return on investment in Microsoft 365/Office 365

K2E Canada Inc.

K2's Microsoft Access – Tables, Queries, And Beyond - **New for 2023**!

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

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

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

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

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

Course Information
- **CPE credit**: Recommended for 7 hours Information Technology
- **Instructional delivery methods**: Group Live and Group Internet Based
- **Prerequisites**: Fundamental knowledge of computer operations
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Business professionals who are interested in using Microsoft Office Access to manage data

K2's Next Generation Excel Reporting

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

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

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

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

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

Course Information
- **CPE credit**: Recommended for 7 hours of Accounting
- **Instructional delivery methods**: Group Live and Group Internet Based
- **Prerequisites**: Fundamental knowledge of Excel 2019 or newer
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Excel users who want to improve Excel-based reporting processes to create accurate reports quickly and easily

K2's Paperless Office

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

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

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

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

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

Course Information
- **CPE credit**: Recommended for 7 hours of Information Technology
- **Instructional delivery methods**: Group Live and Group Internet Based
- **Prerequisites**: Fundamental knowledge of computer operations
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Accountants and other business professionals who are seeking to improve document management processes in their organizations

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

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

For small organizations, maintaining an effective system of internal controls presents a significant challenge. Realistically, implementing many theoretical concepts surrounding internal controls may not be possible in some cases. Consequently, many internal control structures foster an environment where too much risk exists. This factor and uncontrolled information systems can often lead to disastrous results. Participate in this program to learn the necessary insights and tools to design, implement, and monitor effective internal controls, security, and anti-fraud measures in small organizations.

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

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

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

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

Course Information
- **CPE credit**: Recommended 7 hours of Auditing
- **Instructional delivery methods**: Group Live and Group Internet Based
- **Prerequisites**: Basic understanding of internal controls and accounting and administrative processes in smaller organizations
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Business professionals responsible for internal control and fraud prevention and detection

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

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

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

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

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

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

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

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

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

Course Information
- **CPE credit**: Recommended for 7 hours Computer Software and Applications
- **Instructional delivery methods**: Group Live and Group Internet Based
- **Prerequisites**: None
- **Program level**: Basic
- **Advance preparation**: None
- **Who should attend**: Accounting and financial professionals seeking to improve their knowledge of technology and the return on their investment in technology

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

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

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

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

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

Learning Objectives
Upon completing this course, you should be able to:
- Define blockchain and identify an example of blockchain technology currently in use
- List examples of how blockchain uses encryption to make the resulting ledger tamper-resistant
- Identify at least four possible uses for blockchain-based ledgers
- Define cryptocurrency and list the four major cryptocurrencies used today
- List examples of benefits and risks associated with using cryptocurrencies

Course Information
- **CPE credit**: Recommended for 3.5 hours Information Technology
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: None
- **Program level**: Basic
- **Advance preparation**: None
- **Who should attend**: Accountants and business professionals who are interested in helping clients to improve their understanding of blockchain

K2'S Artificial Intelligence For Accounting And Financial Professionals

Artificial Intelligence (AI) is no longer just a theoretical concept! Instead, AI is a practical tool today to help you address and solve real-world problems. In this course, you will learn about the fundamentals of AI and how you can put this amazing technology to work today to help you and your team work more efficiently and effectively.

Participate in this course to learn about the fundamentals of AI and the specific types of problems AI can help you address. You will learn about AI features available in everyday applications – including Excel – and how to use these features in situations such as detecting fraud and identifying potential transaction errors. You will also learn how AI is changing accounting and financial professionals' work today and in the future.

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

Major Topics
- Understanding the different classes of Artificial Intelligence and when each might materialize
- Identify examples of AI options available today
- Use AI to address common issues, such as fraud detection

Learning Objectives
Upon completing this course, you should be able to:
- Identify key components of Artificial Intelligence
- Differentiate between Artificial Intelligence, Machine Learning, and Robotic Process Automation
- List examples of potential uses of Artificial Intelligence in accounting and financial environments
- Identify instances of Artificial Intelligence features in applications such as Excel

Course Information
- **CPE credit**: Recommended for 3.5 hours Information Technology
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: Fundamental knowledge of technology, including spreadsheets
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Accounting and financial professionals seeking to learn how to use Artificial Intelligence to improve business processes

K2's Best Word, Outlook, And PowerPoint Features

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

Summary Description

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

Major Topics

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

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- **CPE credit**: Recommended for 3.5 hours Computer Software and Applications
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: Fundamental understanding of Microsoft Office applications
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: CPAs and other accounting, financial, and business professionals who want to work more efficiently when using Word, Outlook, and PowerPoint

K2's Biggest Security And Privacy Concerns

Technology is a business-critical business capability in today's day and age. Any interruption to an organization's ability to use its information system poses a significant risk to its viability. Data breaches, cyber-attacks, and ransomware are among the most significant existential risks facing businesses today. There are threat actors worldwide that entirely focus on stealing organizational data, stealing economic resources, and disrupting commerce. They use complex social engineering attacks, pervasive phishing messages, intricate malware, and other highly effective techniques. For example, publically-reported data breaches now exceed 100k annually. These breaches result in compromised personal and corporate information, increase the risk for billions of dollars of organizational assets, and place countless people in harm's way.

This course covers recent security breaches, including Solarwinds, Ubiquity, Colonial Pipeline, Tecnimont SpA, Citrix, and LabCorp. It will discuss how these breaches occurred, why they occurred, and how organizations can prevent similar incidents from impacting them. Each case study examines a different security vulnerability and how to avoid it. The topics will include social engineering, auditing processes for IT Security systems, forensic accounting, password, two-factor authentication, and improvements for managerial oversight. Participants will gain real-world knowledge from the mistakes of other organizations and, from that experience, develop their own security best practices for their organizations.

Summary Description
Security and privacy issues may be the biggest concern on business professionals' minds today. In this session, you will learn about contemporary risks and, more importantly, practical and effective solutions to reduce those risks to prudently acceptable levels.

Major Topics
- Key risks that all businesses need to manage
- Leading-edge options to mitigate security and privacy risks
- Understanding how a ransomware attack differs from other forms of cybersecurity incidents

Learning Objectives
Upon completing this course, you should be able to:
- Define social engineering and identify how to avoid becoming a victim of this threat
- List examples of password management procedures and identify related best practices
- Identify examples of best practices for securing technology assets, including Windows
- List examples of tactics that can minimize risks associated with ransomware and phishing

Course Information
- **CPE Credit**: Recommended for 3.5 hours Information Technology
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: None
- **Program level**: Basic
- **Advanced preparation**: None
- **Who should attend**: Professionals who are interested in improving security procedures

K2's Case Studies In Fraud And Technology Controls

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

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

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

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

Learning Objectives
Upon completing this course, you should be able to:
- Define information technology general controls and information technology application controls and distinguish between the two
- List examples of critical information technology controls
- Recognize control failures and weaknesses that can lead to fraud
- List recommendations for improving internal controls in an organization

Course Information
- **CPE credit**: Recommended for 3.5 hours Auditing (We also offer this course as an 7-hour session.)
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: Fundamental understanding of internal controls
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: CPAs and other accounting, auditing, and business professionals who are seeking to reduce fraud risk

K2's Data Analytics For Accountants And Auditors

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

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

Summary Description

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

Major Topics

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

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- **CPE Credit**: Recommended for 3.5 hours Information Technology
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: Basic knowledge of technology strategy and standards
- **Program level**: Intermediate
- **Advanced preparation**: None
- **Who should attend**: Practitioners and business executives who need to know more about data analytics and their importance

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

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

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

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

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

Learning Objectives
Upon completing this course, you should be able to:
- Define blockchain, artificial intelligence, cryptocurrency, Big Data, and machine learning
- Identify significant similarities and differences between Big Data, artificial intelligence, and machine learning
- List examples of potential use cases for each of the technologies discussed in this session and how their use differs from current practices

Course Information
- **CPE Credit**: Recommended for 3.5 hours Information Technology
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: Basic knowledge of technology strategy and standards
- **Program level**: Intermediate
- **Advanced preparation**: None
- **Who should attend**: Practitioners and business executives who need to know more about emerging technologies, including blockchain and cryptocurrencies

K2's Ethics And Technology

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

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

Summary Description

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

Major Topics

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

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

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

K2's Everything Google! Their Most Effective Tools, Apps & Services

Google is one of the world's largest, most widely used and vital technology companies. The company's name has become synonymous with search, knowledge, and cutting-edge technology. Google developed and maintains a wide range of products that have changed how we learn, find things in our community, and communicate with the world. Further, Google offers a business-ready Cloud-based productivity suite used by many businesses worldwide. Google combines a wide range of communication and business tools under one roof to serve as the backbone of an organization's technology infrastructure.

Most users are familiar with Google's search service or Gmail but are unaware of the other services they provide. Additionally, most users barely scratch the surface of the functionality of Google's tools and services. This course looks at the most valuable features, apps, and services of Google that the busy working professional could better utilize. Course participants will learn to find better web results using search operators and tools. Further, they will understand Workspace and use it as an organization's back office. They will learn to create dynamic, creative, and useful business documents using Google tools. They will learn to back up and sync their electronic documents to the Cloud using Google Drive. Finally, they will learn to grow their business and expand their marketing using Google's marketing and website tools. This session finishes with a top-five list of Google's best-hidden secrets and functionalities. All participants will leave this course with a much deeper understanding of Google's services, time-saving tips to use the products more effectively, and practical guidance on leveraging their incredible technology.

Summary Description
Almost all business professionals use some Google apps and services, but most don't take full advantage of all Google tools offer. If you want to enhance your efficiency and effectiveness when working with Google tools, you should plan to participate in this session.

Major Topics
- Understanding the options available from Google and differentiating them from those offered by competitors
- Working more efficiently when using Google-based tools
- Collaborating with others when using Google's platform

Learning Objectives
Upon completing this course, you should be able to:
- List the business-focused services and functionalities of Google Workspace and the value they can deliver to an organization
- Use Google Search operators to find better results using Google search
- Create documents, spreadsheets, presentations, and more using Google technologies
- List examples of Google mobile apps and how a busy professional would use them on the go
- Demonstrate how to back up, share and sync files using Google Drive
- Implement Google's marketing and website tools to improve their organization's web presence and search appearance
- Utilize Google's various hidden functionalities that can significantly improve productivity

Course Information
- **CPE credit**: Recommended for 3.5 hours Computer Software and Applications
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: None
- **Program level**: Basic
- **Advance preparation**: None
- **Who should attend**: CPAs and other business professionals who are interested in improving office production and efficiency

K2's Excel Charting And Visualizations

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

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

Summary Description

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

Major Topics

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

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- **CPE credit**: Recommended for 3.5 hours Computer Software and Application
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: Fundamental understanding of creating charts in Microsoft Office applications
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: CPAs and other accounting, financial, and business professionals who want to learn how to create more effective charts and visualizations in Excel

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

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

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

Summary Description

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

Major Topics

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

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- **CPE credit**: Recommended for 3.5 hours Computer Software and Applications
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: Fundamental knowledge of computer applications and the Microsoft 365/Office 365 subscription models
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: CPAs and other business professionals who are seeking to leverage their Microsoft 365/Office 365 subscriptions by taking advantage of some of the Cloud-based features available in these environments

K2's Integrating Data For Improved Efficiency And Control

In today's business climate, ***data is king***! Organizations of all sizes collect and manage more data than ever, and that trend will continue. The number of apps, services, and platforms we use increases yearly in this environment. Thus, we must 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 and effectiveness and reduce costs and errors within your organization. This course will teach you 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 to truly integrate your data and reap the benefits of improved efficiency and control.

Summary Description
Data may be most organizations' most valuable asset, but most don't leverage it as they should. Participate in this session to learn various techniques for managing and integrating your data to realize improved efficiency and control.

Major Topics
- How to take advantage of the data available to you
- Managing data, including avoiding duplication
- Sharing data across multiple applications

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 multiple 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 Information Technology
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **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 Introduction To Excel Macros

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

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

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

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

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

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

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

Course Information
- **CPE Credit**: Recommended for 3.5 hours Computer Software and Applications
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: None
- **Program level**: Basic
- **Advanced preparation**: None
- **Who should attend**: Business professionals seeking to extend Excel's functionality with simple yet highly effective macros

K2's Mastering Advanced Excel Functions

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

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

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

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

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

Course Information
- **CPE credit**: Recommended for 3.5 hours Computer Software and Applications
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: Fundamental knowledge of Excel 2019 or newer
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Business professionals who work with Excel and want to extend their knowledge of advanced features and functions to become more accurate, effective, and efficient with spreadsheets

K2E Canada Inc.

K2's Microsoft Teams

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

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

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

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

Learning Objectives
Upon completing this course, you should be able to:
- Identify critical potential benefits associated with using Microsoft Teams
- List various elements of functionality offered by Teams
- Differentiate between "guest" and "external" users in Teams
- Cite examples of additional applications that you can incorporate into Teams
- Name examples of communication options available in Teams
- Specify examples of security measures available in Teams

Course Information
- **CPE credit**: Recommended for 3.5 hours Computer Software and Applications
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: Fundamental knowledge of computer applications and MS365
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: CPAs and other business professionals who are seeking to leverage their Office 365/Microsoft 365 subscriptions by taking advantage of Teams for improved communication and collaboration

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

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

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

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

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

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

Learning Objectives
Upon completing this course, you should be able to:
- Assess the relevant security risks in your organization
- Identify specific tools and techniques to protect sensitive data
- List five specific steps to improve PC security
- Differentiate between security procedures to improve organizational security

Course Information
- **CPE credit**: Recommended for 3.5 hours Information Technology
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: Basic understanding of computer operations
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Business professionals seeking to secure sensitive data

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K2's Small Business Accounting Shootout

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

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

Summary Description

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

Major Topics

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

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- **CPE credit**: Recommended for 3.5 hours Accounting
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: General understanding of accounting practices in use in small businesses
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Business professionals and advisors seeking to identify an accounting solution that is the "right fit" for a small business organization

K2's Technology Update

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

In this session, you will learn about significant issues such as:
- Hardware trends,
- Software innovations,
- Communication and collaboration tools,
- Security issues and solutions,
- Key products to consider for implementation, and
- Unusual and emerging technologies you may have missed.

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

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

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

Learning Objectives
Upon completing this course, you should be able to:
- Identify major hardware trends and software developments
- List examples of technologies that can improve communications and data transfers
- Differentiate between various communication tools and platforms
- List key security issues and identify appropriate responses

Course Information
- **CPE credit**: Recommended for 3.5 hours Information Technology
- **Instructional delivery methods**: Group Live and Group Internet Based
- **Prerequisites**: General understanding of technology in business settings
- **Program level**: Basic
- **Advance preparation**: None
- **Who should attend**: Business professionals and advisors seeking to learn more about technologies impacting accounting and financial professionals

K2's Testing And Auditing Excel Workbooks

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

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

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

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

Learning Objectives
Upon completing this course, you should be able to:
- List common causes of spreadsheet errors and the potential impact of these errors
- Identify best practices to reduce the number of errors in Excel workbooks
- Cite examples of Excel Add-ins to identify spreadsheet errors programmatically

Course Information
- **CPE Credit**: Recommended for 3.5 hours Information Technology
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: Fundamental understanding of Microsoft Office Excel 2019 and newer
- **Program level**: Intermediate
- **Advanced preparation**: None
- **Who should attend**: Business professionals seeking to reduce errors and improve accuracy and efficiency when working with Microsoft Office Excel. Although many of the concepts in this program apply to Microsoft Office Excel for the Mac, this course focuses on techniques found in Microsoft Office Excel for Windows

K2's Top PDF Features You Should Know

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

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

"Very helpful, more tools than expected." C.L., CPA

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

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

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

Course Information
- **CPE credit**: Recommended for 3.5 hours Computer Software and Applications
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: Fundamental knowledge of basic PDF operations
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Business professionals who are seeking to become more efficient and effective when working with PDF documents

K2's Working Remotely – The New Normal

Many team members now work remotely, whether by choice or necessity. As a result, questions abound about remote access to desktops and data, security, communications, collaboration, and other considerations in this new normal. When implemented correctly, remote work strategies can be a "win-win" for all involved; 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, communication and collaboration options, and security best practices. You will also learn about managing and monitoring workflows in remote work environments and tools you can use for that purpose. After completing this session, you can implement a remote work strategy that yields efficiency, security, and satisfaction to all involved.

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

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

Learning Objectives
Upon completing this course, you should be able to:
- Differentiate between options for remotely accessing your computer, applications, and data
- Identify recommended security practices for remote access and related tools and services
- List examples of Cloud-based services and suites that can contribute to working remotely
- Distinguish between communication and collaboration tools for remote workers

Course Information
- **CPE credit**: Recommended for 3.5 hours Information Technology
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites**: Fundamental knowledge of computer applications
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: CPAs and other business professionals who are seeking the best ways to implement remote work and work-from-home strategies

K2'S 2023 TECHNOLOGY CONFERENCE

For over thirty years, the K2E Canada team has delivered the market-leading technology conference to accounting and financial professionals throughout the United States and Canada. For 2023, we're pleased to offer what we think will be our best Conference yet. Following is the "standard" layout for the two-day conference. Note that we can also present the Conference as a two-track event. Further, should your situation warrant, we can deliver the Conference as a one-day option.

K2E Canada 2023 Standard Two-Day Conference Layout		
Day One		
K2's Tech Update *(100 minutes)*		
K2's CPA Firm Update *(100 minutes)*	K2's Now Is The Time To Automate *(100 minutes)*	K2's Using OneNote More And Email Less *(100 minutes)*
Lunch		
K2's Collaboration – Portals, Payments, And Signatures *(100 minutes)*	K2's Shredding Your Servers And Going Virtual *(100 minutes)*	K2's Taking Another Look At PDFs *(100 minutes)*
K2's The Best Kept Secrets Of Microsoft 365 *(100 minutes)*		
Day Two		
K2's Ripped From The Headlines: Outrageous Tales Of Cybercrime *(100 minutes)*		
K2's Accounting Solutions And Add-Ons For Small Businesses *(100 minutes)*	K2's The Digital Home *(100 minutes)*	K2's Top Ten Outlook Tips *(100 minutes)*
Lunch		
K2's Accounting Solutions: Mid-Market *(50 minutes)*	K2's Simplifying And Economizing Your Tech Stack *(50 minutes)*	K2's Six Essential Teams Features *(50 minutes)*
K2's Kicking It Up A Notch With KPIs *(50 minutes)*	K2's Understanding Your Ransomware Risk *(50 minutes)*	K2's OneDrive's Best Practices *(50 minutes)*
	K2's Ten Must Know Features In Excel *(100 minutes)*	

You will find summary descriptions for each of the nineteen sessions listed above on the following pages.

K2's Tech Update

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

Summary Description

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

Major Topics

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

Learning Objectives

Upon completing this course, you should be able to:

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

Session Information

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

K2's CPA Firm Update

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

Summary Description

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

Major Topics

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

Learning Objectives

Upon completing this course, you should be able to:

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

Session Information

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

K2's Now Is The Time To Automate

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

Summary Description

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

Major Topics

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

Learning Objectives

Upon completing this course, you should be able to:

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

Session Information

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

K2E Canada Inc.

K2's Using OneNote More And Email Less

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

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

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

Learning Objectives
Upon completing this course, you should be able to:
- List tasks for which you might choose to use OneNote
- Identify ways to reduce email and use OneNote for yourself and your group or team
- Cite examples of how you can use OneNote for storing and retrieving important reference information
- Identify the process for acquiring OneNote

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

K2's Collaboration – Portals, Payments, And Signatures

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

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

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

Learning Objectives
Upon completing this course, you should be able to:
- Identify portal products that fit your needs
- Differentiate between vendor options for payment processes
- List examples of eSignature needs and features

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

K2's Shredding Your Servers And Going Virtual

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

Summary Description

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

Major Topics

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

Learning Objectives

Upon completing this course, you should be able to:

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

Session Information

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

K2's Taking Another Look At PDFs

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

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

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

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

Learning Objectives
Upon completing this course, you should be able to:
- List examples of PDF software vendors
- Differentiate between PDF options available from Adobe
- List at least two ways you can use PDFs in collaborative environments
- Identify critical steps in the process used to create fillable PDF forms

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

K2E Canada Inc.

K2's The Best Kept Secrets Of Microsoft 365

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

Summary Description

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

Major Topics

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

Learning Objectives

Upon completing this course, you should be able to:

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

Session Information

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

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

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

Summary Description

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

Major Topics

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

Learning Objectives

Upon completing this course, you should be able to:

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

Session Information

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

K2's Accounting Solutions And Add-Ons For Small Businesses

Working with a small business, you know that keeping the company's finances in order is critical to success. While numerous software programs and tools are available to help you do this, they vary substantially in many significant aspects. In addition to conventional options like QuickBooks and Sage 50, you can choose from Cloud-based tools such as Zoho Books, QuickBooks Online, Spire Systems, Xero, Accounting Suite, Accounting Power, and many more. In this session, we'll look at the best accounting tools for small businesses and discuss the benefits of each one. This session covers accounting solutions that should work for startups and companies with up to $10 million in annual revenue. We also cover various add-on solutions that can enhance the overall functionality of your accounting platform. Join us to learn your options for achieving your small business management financial goals.

Summary Description

Small business accounting solutions have never been better, with many new features available to handle everyday issues. Participate in this session to learn how to improve small business accounting processes. Don't remain stuck with a dated solution that no longer meets your needs!

Major Topics

- Overview of small business accounting solutions
- Strengths and shortfalls of various accounting and add-on solutions
- Setup and configuration tips

Learning Objectives

Upon completing this course, you should be able to:

- List the top five products in the small business market
- Identify shortfalls in typical small business solutions
- Differentiate between products based on strengths and weaknesses
- List examples of add-on solutions that can fill functionality gaps

Session Information

- **CPE credit:** Recommended for 2 hours Computer Software & Applications
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** None
- **Program level**: Update
- **Advance preparation**: None
- **Who should attend:** Accounting professionals seeking to understand their options in the entry-level accounting software market

K2's The Digital Home

Your home is now the digital center of your world, and even if you go to an office every day, you have more options to help you manage everything from shopping lists to email accounts. Unfortunately, many new devices your family connects to your WiFi can create security risks and may make remote work and school less secure. For example, tracking devices and services can help parents monitor children and seniors, but outsiders can use the same tools to stalk their loved ones digitally. This session will help you learn about devices, services, and app suites for families, share files, organize photos, manage passwords, and keep your home secure. Attend this breakout and learn about innovative new tools to help you stay safe and make the most of your time away from the office.

Summary Description

Technology options for home environments have never been better. And with remote and hybrid work environments now standard, the availability of great technology in the home is more important now than ever. Participate in this session to learn your best technology options to power your home.

Major Topics

- Configuring your router and network to make it more secure
- Review online services to help your family share information and stay in touch
- Take advantage of the latest home gadgets and devices from CES 2023 and understand what technologies are "ready for prime time" and which ones you should skip

Learning Objectives

Upon completing this course, you should be able to:

- List at least one of the services mentioned to help your family stay in touch and manage a shared calendar
- Identify at least two key features and settings needed in your home's wireless router
- Name at least two services to help you take better advantage of your entertainment service subscriptions

Session Information

- **CPE credit:** Recommended for 2 hours Computer Software & Applications
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** None
- **Program level**: Basic
- **Advance preparation**: None
- **Who should attend:** People who want to learn best practices for protecting their family and enhancing the ability to communicate with one another

K2's Top Ten Outlook Tips

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

Summary Description

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

Major Topics

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

Learning Objectives

Upon completing this course, you should be able to:

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

Session Information

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

K2's Accounting Solutions: Mid-Market

Many businesses are being held back by legacy solutions. The old way of doing things doesn't work anymore. Instead, Software as a Service (SaaS) has transformed many mid-market companies. In this new world of cloud-based, workflow-enabled, data-centric, and connected solutions, you can solve existing and future business problems in new ways without being bogged down by paper-centric environments. This session covers integrated and ERP solutions that should work for businesses in the $10 Million to $1 Billion range. If your existing system has been in place for seven or more years, it is time to consider upgrading or replacing it. Leverage your instructor's knowledge of the market to minimize your risk.

Summary Description
Mid-market businesses have fantastic accounting and ERP options available today. If you're interested in your choices to upgrade your business management solution, make plans today to participate in this session!

Major Topics
- Overview of mid-market solutions
- Probable third-party solutions required
- Accounting solutions for specific industries
- Specific strategies to use in selecting a system
- Guidance on preparatory steps and conversions

Learning Objectives
Upon completing this course, you should be able to:
- List the top five products in the mid-market
- Identify standard third-party solutions needed
- Differentiate between a nice-to-have upgrade and a genuine business need
- Create an implementation plan for your business

Session Information
- **CPE credit:** Recommended for 1 hour Computer Software & Applications
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** None
- **Program level**: Update
- **Advance preparation**: None
- **Who should attend:** Accounting professionals who need to understand the changes and options in Mid-Market accounting software

K2E Canada Inc.

K2's Simplifying And Economizing Your Tech Stack

All business professionals need access to the necessary technology to help them perform their jobs efficiently and effectively. Yet, no one should overpay for their tech stack. Unfortunately, though, many are overpaying and have yet to realize it. In this session, you will learn valuable tips to help you simplify and economize your technology stack. Participate in this session to avoid the risk of overpaying for your tech tools.

Summary Description
In an era where new tools appear seemingly every day, it is all too easy to add to our technology stacks and pay for many applications and services we no longer use. Participate in this session to learn how to regain control of your technology and mitigate "stack creep."

Major Topics
- Taking an inventory of installed applications and tools
- Identifying the tech tools you need and those you don't
- Canceling unnecessary licenses and subscription services

Learning Objectives
Upon completing this course, you should be able to:
- Identify tech tools installed in business environments
- List examples of features in tech stacks often duplicated across applications
- Cite examples of applications and services that are less expensive alternatives to traditional technologies
- Calculate the total cost of ownership of specific tech tools

Session Information
- **CPE credit:** Recommended for 1 hour Information Technology
- **Instructional delivery methods**: Group Live, Group Internet Based, and QAS Self Study
- **Prerequisites:** Basic knowledge of technology and software licensing
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend:** Accounting and financial professionals seeking to ensure they have the tech tools they need without overspending

K2's Six Essential Teams Features

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

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

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

Learning Objectives
Upon completing this course, you should be able to:
- List steps for creating effective Teams and Channel structures
- Identify how to setup file management columns for more information within Teams
- Specify examples of how to work with Microsoft Planner within Teams
- Identify how Lists work and why they can be better than spreadsheets
- Identify options for incorporating Power Automate into Teams
- Cite examples of how to use Microsoft Forms within Teams

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

K2's Kicking It Up A Notch With KPIs

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

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

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

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

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

K2E Canada Inc.

K2's Understanding Your Ransomware Risk

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

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

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

Learning Objectives
Upon completing this course, you should be able to:
- Distinguish between various options to mitigate risk
- Identify practical actions for reducing ransomware risk
- List examples of high-profile ransomware attacks and how they occurred

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

K2's OneDrive's Best Practices

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

Summary Description

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

Major Topics

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

Learning Objectives

Upon completing this course, you should be able to:

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

Session Information

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

K2E Canada Inc.

K2's Ten "Must-Know" Features In Excel

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

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

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

Learning Objectives
Upon completing this course, you should be able to:
- List at least three primary features associated with Power Query
- Identify the steps necessary to utilize modern collaboration options in Excel
- Cite examples of the benefits related to using dynamic arrays
- Differentiate between Solver and Scenario Manager as optimization tools
- Identify at least three benefits of protecting your data with Sensitivity Labels

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

ABOUT K2E CANADA INC. AND K2 ENTERPRISES

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

K2 Enterprises and K2E Canada Inc. are one of North America's largest providers of technology-focused education to accounting and financial professionals. Additionally, our team has delivered educational content to locations as far away as Great Britain, Israel, Australia, and South Africa. Our curriculum includes sessions on Excel and other Microsoft Office applications, budgeting, QuickBooks, internal controls, artificial intelligence, and other technology-related topics.

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

K2's content is among the best in the business. K2 team members invest thousands of hours each year to research, write and rehearse the various seminar and conference sessions we present. As a result, our content is highly regarded and is among the best technology-focused CPE available. Further, our instructional team is routinely hailed as among the best in the business, as evidenced by the fact that most have received numerous awards for their presentation skills.