K2 Enterprises

*2022 Customized Learning
Solutions Planning Handbook*

K2
Enterprises

PROFESSIONAL
EDUCATION &
CONSULTING

www.k2e.com

CONTENTS

WELCOME!

Hello, and thanks for taking a few moments to learn more about **K2 Enterprises** and the custom training solutions we offer to help your team work more effectively, efficiently, and securely. For over three decades, the team of professionals at K2 Enterprises has created and presented the finest in technology-focused education. Today, our focus remains unchanged – delivering outstanding value to our customers with every interaction, whether that's a seminar, conference, web-based learning option, or just answering a simple email message.

This catalog and its learning options summarize many of the choices you have to benefit from our courses and our instruction team. We believe that you will find our curriculum of technology-focused learning options to address many of the needs facing business professionals today.

We also believe that investments in professional education can pay huge benefits in at least three areas:

1. **Efficiency and effectiveness**. Team members who receive appropriate guidance on working with business applications such as Microsoft Excel, Adobe Acrobat DC, and Microsoft Power BI are likely to be much more efficient and effective in getting their jobs done. For example, consider the Return On Investment (ROI) for a team member making $90,000 per year if that person can save just 30 minutes per week when performing job-related tasks. A $300 investment would yield cost savings of $1125 per year, or an **ROI of 375%**, without considering ancillary costs such as payroll taxes and employee benefits. Further, your company would continue to reap that return every year as long as the team member remains employed.

2. **Team member turnover**. Turnover is expensive! Further, backfilling a vacant position in today's labor market is more challenging than ever. However, you can reduce turnover by ensuring that you invest in team members' skills development. Doing so leads to happier, more productive team members and increases their satisfaction with their current position. Further, professional education helps develop team members' skills to qualify for promotions internally, reducing team member turnover. Thus, not only does investing in professional education yield productivity dividends, but it also becomes a strategy for retaining qualified talent.

3. **Today's security risks**. One of the most concerning challenges facing businesses today is the volume of cybersecurity risks they face. However, the numbers are undeniable – appropriately trained team members are much less likely to fall victim to ransomware, phishing, or another cybersecurity attack. Therefore, the importance of providing appropriate security training to team members has never been greater.

I sincerely hope you will take a few moments to consider the courses we offer 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 (tommy@k2e.com) or Pam Falconello (pam@k2e.com). We both would 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 hearing from you soon!

Tommy Stephens, CPA
Partner, K2 Enterprises

GENERAL INFORMATION:
CUSTOM LEARNING OPTIONS

The K2 Enterprises team annually develops and delivers approximately over one hundred custom learning sessions throughout North America. Ranging from "Big 4" accounting firms to Fortune 500 companies to local accounting firms, to small businesses, no matter the size of the client or the scope of the project, K2 can help you satisfy even clients with the most exacting needs.

Further, the K2 team creates and delivers customized content for state CPA organizations and other groups seeking guest speakers at conferences and meetings they produce. Often, we modify existing seminar or conference sessions to meet the client's specific needs. However, we also create new content based on the client's specifications to ensure an outstanding learning experience for all involved. Please don't hesitate to reach out to us to learn more about our custom training options.

Pricing

The pricing for each session varies, depending upon several factors. Among these are the number of participants, the length of the session, and travel costs (if any). Accordingly, we would need a bit of information to provide an accurate quote, so please reach out to us, and we'll provide a quote.

We hope the need to cancel a session never arises, but if it does, recognize that we do not charge cancellation fees if a session is canceled two weeks or more before the course date. In addition, if a participant is not completely satisfied with the K2 seminar, K2 will refund participant registration fees.

Learning Environments & Facilities

We are pleased to present in whatever environment best suits your team. That means we can deliver a session virtually through platforms such as Zoom and Teams. We can also present our content live and in person at your chosen location. With the second option, we recommend the following facility configuration.

- Suitable room with high ceiling (12' min.), which allows for a large screen
- Large screen, at least 10'x 10' to ensure adequate viewing for participants
- High-speed Internet access
- Projection cart
- Instructor table
- Cordless lavaliere microphone (when attendance is over 40)
- Comfortable classroom seating for participants

Should you have any questions or concerns regarding these recommendations, just let us know, and we will be pleased to work with you to address them.

Who To Contact With Questions

Pam Falconello | Email: pam@k2e.com | Phone: (985) 542-9390

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

The K2 Enterprises team is proud to offer forty-two sixteen, eight, and four-hour sessions during 2022. You can learn more about each of these sessions in this section.

Note that we can customize each session to meet your specific needs. We can also, in many cases, combine content from multiple sessions to ensure that your team maximizes their ROI on the learning experience.

K2's Excel Boot Camp

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

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

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

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

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

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 SUMIFS, VLOOKUP, HLOOKUP, INDEX, and MATCH functions
- List and apply various techniques for securing Excel workbooks
- Create charts in Excel that captivate audiences and communicate messages effectively
- List the six components of PivotTables and create PivotTables, including PivotTables that perform user-defined calculations
- Implement Excel's Camera function to assist in generating custom reports
- Utilize Excel's Macro Recorder tool to create simple - yet beneficial - macros that you can put to work right away

Course Information

- **CPE credit:** Recommended for 16 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites:** Fundamental knowledge of Excel 2013 and newer
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend:** Excel users and potential Excel users who want to increase their efficiency and effectiveness with Excel

K2's Advanced Excel

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

The course draws from over twenty-five years of experience delivering Excel training to accountants and other business professionals. Throughout the program, relevant, real-world examples reinforce the major topics presented. You do not want to miss 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 2013 and newer.

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

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

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- **CPE credit**: Recommended for 4 hours Accounting and 4 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Experienced Excel user
- **Program level**: Advanced
- **Advance preparation**: None
- **Who should attend**: Business professionals who work with Excel 2013 or newer and want to extend their knowledge with advanced features and functions

K2's Budgeting And Forecasting Tools And Techniques

Are your budgeting and forecasting processes working as well for you as they should? Probably not, as many organizations report that budgeting and forecasting activities consume tremendous amounts of time and yield only marginal benefits. In this course, you will learn 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. If you are involved in budgeting and forecasting activities, you will not want to miss this opportunity to learn how to reduce the amount of time you spend on these tasks while simultaneously increasing their value.

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

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

Learning Objectives
Upon completing this course, you should be able to:
- Utilize processes for obtaining budget data and collaborating with others when using Excel, including Shared and Merged Workbooks, Excel's Audit Trail, controlling and validating data input, and collaborating with others
- Apply various Excel techniques for interacting with the accounting system, such as Office Data Connections, Open Database Connectivity, importing text files, and linking Internet-based data into budgeting and forecasting models
- Identify situations in which various Excel techniques are appropriately implemented, such as using Data Tables for sensitivity analysis, working with Excel's Goal Seek feature, using Solver to maximize scarce resources, working with Scenario Manager, forecasting with Regression Analysis, and analyzing risk with Monte Carlo simulations
- Implement various Excel functions – including NPV, IRR, XNPV, and XIRR – in capital budgeting situations, and identify different methods by which Excel computes depreciation
- Compare and contrast Excel with other applications used for budgeting and forecasting activities and describe conditions in which you should use other solutions to reduce the dependency on Excel as a budgeting and forecasting solution
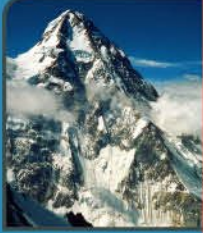
Course Information
- **CPE credit**: Recommended for 4 hours Accounting and 4 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Fundamental knowledge of Microsoft Office Excel 2013 or newer
- **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, and even sabotage and terrorism threaten businesses of all sizes today. In this course, you will learn how to develop and implement a business continuity plan (BCP) to help manage the risks associated with business interruptions. 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 a critical 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 PA

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 8 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or 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 – ranging from Excel add-ins to dedicated solutions such as Power BI – now allow you to leverage your existing knowledge and skills to create powerful, interactive dashboards and analyses unthinkable until recently.

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 data query and summarization features in Excel 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 MN

Learning Objectives

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

Course Information

- **CPE credit**: Recommended for 8 hours Accounting
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Basic understanding of computer operations and terminology, including Microsoft Office Excel 2013 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 that contribute to fraud, and what you can do to mitigate fraud risk.

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

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information
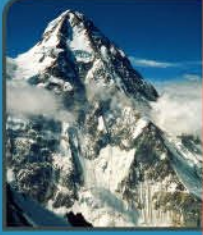
- **CPE credit**: Recommended for 8 hours Auditing
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Fundamental understanding of internal controls
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: CPAs and other accounting, auditing, and business professionals who are seeking to reduce fraud risk

K2's Excel Best Practices

As spreadsheets continue to 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. Participate in this program to help ensure that you utilize Excel to its fullest potential.

This course covers features found in Excel versions 2013 and newer.

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

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

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

Course Information
- **CPE credit**: Recommended for 8 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Fundamental knowledge of Microsoft Office Excel 2013 or newer
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Excel users who want to learn best practices for working with spreadsheets

K2's Excel Essentials For Staff Accountants

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

This session begins with a quick overview of Excel best practices. 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 used in the session. In sum, this seminar is a "must" for all staff accountants seeking to improve their efficiency and accuracy when working with Excel.

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

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

Learning Objectives

Upon completing this course, you should be able to:

- List five critical best practices associated with creating workbooks and construct workbooks that comply with these principles
- Utilize PivotTables and PivotCharts to summarize and present data quickly, without writing formulas
- Build sophisticated formulas to assist with reporting and analysis, including formulas that use functions such as VLOOKUP, XLOOKUP, SUMIFS, CHOOSE, XNPV, XIRR, PMT, IPMT, ACCRINT, and TRIM
- Create Tables from ranges of Excel data and identify the primary advantages of working with Tables
- Apply formats quickly and 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 – that involve the passage of time

Course Information

- **CPE credit**: Recommended for 8 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Fundamental knowledge of Microsoft Office Excel
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Accounting and financial professionals who want to use the power of Excel PivotTables to analyze and summarize data

K2's 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 how to extend your existing knowledge of PivotTables, then you should make time to participate in this course. In this program, you will learn how to build PivotTables, how to group data inside PivotTables – including grouping options for fiscal periods – and how to create user-defined calculations in your PivotTables. You will also learn advanced PivotTable techniques, including 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. At the end of the day, you will be a master of Excel PivotTables!

If you have been leery of working with PivotTables or have struggled to realize their many benefits, this course is for you. With a bit of 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 are spending presently to complete such tasks.

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

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

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

Course Information
- **CPE credit**: Recommended for 4 hours Accounting and 4 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Fundamental understanding of Microsoft Office Excel 2013 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
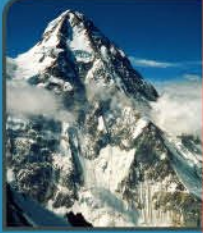
K2's Excel Tips, Tricks, And Techniques
For Accountants

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 MI

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

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 VLOOKUP and HLOOKUP functions, formulas that contain conditional calculations, and formulas that contain circular references
- Link data across multiple Excel worksheets and workbooks, update and manage links, and create sum-through formulas and rolling reports

Course Information
- **CPE credit**: Recommended for 4 hours Accounting and 4 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Fundamental knowledge of Microsoft Office Excel 2013 or newer
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Accounting and financial professionals who want to learn how to use Excel more efficiently and effectively

K2's 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 Skype for Business can change how your entire 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 be truly successful with Microsoft 365/Office 365.

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

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

K2's Next Generation Excel Reporting

New features added to Excel beginning with the 2016 release provide tremendous opportunities to improve Excel-based operational and financial. Data models, Power Query, Data Analysis Expressions, Power Pivot, and many other tools can help you create more powerful reports and schedules in less time than ever. Bundle these tools with some of Excel's "legacy" features, and you have significant new opportunities to improve your Excel-based reporting environments.

In this fast-paced seminar, you will learn about the importance of using Power Query to link data into Excel data models and how you can manage these data models to facilitate better and more efficient reporting. Additionally, you will learn how you can incorporate 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.

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

Course Information
- **CPE credit**: Recommended for 8 hours Accounting
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based. We encourage you to participate with your laptop equipped with Excel 2016 or newer, including Excel provisioned through a Microsoft 365 or Office 365 subscription. This program focuses on Excel for Windows. However, many of these features exist in Excel for Mac also.
- **Prerequisites**: Fundamental knowledge of Excel 2016 or newer
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Excel users who want to improve Excel-based reporting processes to create accurate reports quickly and easily

K2's 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 a bit of planning and guidance, you will be on your way to realizing these and other benefits of a paperless office. Of course, no one expects a completely "paperless" office, but reducing the amount of paper we shuffle can offer tremendous rewards. This course will teach you 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.

Learning Objectives
Upon completing this course, you should be able to:
- Define key paperless terms such as Document Management, Records Management, and Business Process Management
- Estimate the Return on Investment of moving to a paperless environment
- Create a Records Retention Policy appropriate for your organization
- Identify the three components of a successful document management initiative
- List key characteristics of Electronic File Cabinet solutions and Document Management solutions and typical costs associated with these systems
- Identify essential hardware and software requirements for successful document management, including scanners, storage, memory, operating systems, and network considerations
- Describe critical data backup, disaster recovery, and business continuity issues and identify key vendors in this area and the solutions they offer
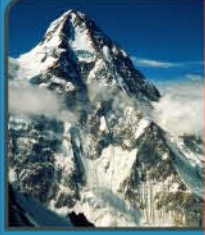
Course Information
- **CPE credit**: Recommended for 8 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Fundamental knowledge of computer operations
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Accountants and other business professionals who are seeking to improve document management processes in their organizations

K2's QuickBooks For Accountants

The QuickBooks platform is robust with features and capabilities that many users are unaware of or do not know how to utilize effectively. This course helps you get more out of QuickBooks Desktop and QuickBooks Online and resolve the issues that even experienced QuickBooks users struggle with, such as locking down prior periods. This program starts fast with a chapter covering the top issues accountants face with QuickBooks. Then, the day continues with practical guidance and solutions designed to help accountants get the most out of QuickBooks for themselves or their clients. You will learn about issues, such as setting up a new company, configuring and customizing QuickBooks preferences, and enabling system security and password protection features. Also, you will learn how to lock down transactions in prior periods, the audit trail, customizing reports, exporting reports to Excel, and extending QuickBooks' usefulness with tools such as the Fixed Asset Manager and Loan Manager.

"Instructors always include tips, etc., to streamline the use of the product." S.M., CPA MN

"Wow, I felt like I got my money-worth after the first hour." B.S., CPA WA

Learning Objectives
Upon completing this course, you should be able to:

- Identify appropriate responses to common QuickBooks user issues, such as closing accounting periods, eliminating payables and receivables from cash-basis financial statements, purging old transactions from QuickBooks, voiding checks in prior periods, viewing underlying debit and credit entries, and recommended end-of-period procedures
- List new features added to recent versions of QuickBooks and QuickBooks Online and apply these features; additionally, differentiate between the different products in the QuickBooks family
- Define appropriate procedures for setting up client data files in QuickBooks, including converting data from other accounting applications, creating data files, using templates, entering beginning balances, establishing user access and security rights and privileges, and establishing preferences
- Identify techniques for making reports and analyzing data in QuickBooks, including creating and customizing reports and exporting reports to Excel
- Identify situations where QuickBooks Online may be an appropriate solution for a business currently using or considering using QuickBooks

Course Information
- **CPE credit**: Recommended for 4 hours Accounting and 4 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Fundamental knowledge of basic QuickBooks operations
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Accountants and other business and financial professionals who use or support clients who use QuickBooks

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

Internal controls are more important than ever, and their importance increases seemingly 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. Implementing many of the theoretical concepts surrounding internal controls may not be possible in some cases. Consequently, many small businesses' current internal control structure fosters an environment where too much risk exists. This factor, coupled with the presence of 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 MN

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

Course Information
- **CPE credit**: Recommended 8 hours Auditing
- **Instructional delivery method**: Group Live demonstration and discussion or 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 there new technology tools available to save you time and make you more effective? Technology continues to accelerate rapidly, and the need to keep 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 10), and what they mean for you, and peripheral devices. You will also learn about significant trends in information technology and how to take advantage of the opportunities presented by these trends. Examples include the latest Excel features, best practices for working with PDF files, and security and privacy issues. Additionally, you will learn how to improve the overall performance of your IT investment, thereby increasing your return on investment.

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

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

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

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

Course Information
- **CPE credit**: Recommended for 8 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or 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 2022'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 examples of 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 resulted in releasing the personal information of millions of people worldwide, billions of dollars of compromised organizational assets, and putting countless people in harm's way.

This course covers recent major 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 form of 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.

NEW SEMINAR FOR 2022!

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 4 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: None
- **Program level**: Basic
- **Advanced preparation**: None
- **Who should attend**: Professionals who are interested in improving security procedures

K2's Advanced QuickBooks Tips And Techniques

QuickBooks remains one of the leading accounting solutions for small and growing businesses, and Intuit has added numerous advanced features to the application over the past few releases. This seminar will teach you how to take advantage of many of QuickBooks' new and advanced features to solve critical issues. For example, you will learn advanced inventory management techniques, including changing the default costing methodology and implementing lot and serial number tracking. You will also learn how to build complete sets of financial statements in Excel that link in real-time to underlying QuickBooks data files and how to create multi-company financial statements. Additionally, you will learn how to use the Client Data Review feature to streamline identifying and correcting errors and closing accounting periods in QuickBooks.

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

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

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

Course Information
- **CPE Credit**: Recommended for 4 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Fundamental knowledge of QuickBooks
- **Program level**: Advanced
- **Advanced preparation**: None
- **Who should attend**: Accounting and financial professionals who want to learn about advanced features and techniques associated with QuickBooks

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 every day to help improve their existing operations through its ledger capabilities or executing smart contracts. Cryptocurrency is one example of blockchain technology. Its growth and value have exploded to over $2 trillion in the last few years. This growth has helped to fuel widespread adoption amongst Wall Street and regular investors alike.

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. In fact, 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 on getting started.

NEW SEMINAR FOR 2022!

Learning Objectives

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

Course Information
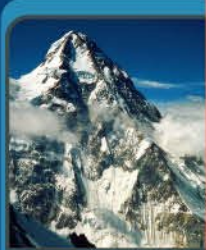- **CPE credit**: Recommended for 4 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: None
- **Program level**: Basic
- **Advance preparation**: None
- **Who should attend**: Accountants and business 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 available 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 specific types of problems AI can help you address. You will learn about AI features available in everyday applications – including Excel – and how you can use these features in situations such as detecting fraud and identifying potential errors in transactions. You will also learn how AI is changing how accounting and financial professionals work, both today and in the future.

NEW SEMINAR FOR 2022!

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 4 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **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 in these three components of Microsoft Office. If that describes you, then make sure you carve time out of your schedule to participate in this four-hour session because, in it, you will learn how you can work much more efficiently when using these tools.

Learning Objectives
Upon completing this course, you should be able to:
- Recognize the benefits associated with using Styles in a Word document
- Identify the key characteristics of effective PowerPoint presentations and the steps required to create them
- List features in Outlook that can improve personal and team productivity
- Identify key Options and Settings in Word, Outlook, and PowerPoint and the steps necessary to manage them

Course Information
- **CPE credit**: Recommended for 4 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **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 Building A Cutting-Edge
Virtual Office

The Internet and mobile technologies have revolutionized the way that businesses operate. We are no longer constrained by working from a specific location or during typical business hours. Instead, organizations can now effectively communicate and do business with customers and staff based anywhere in the world. One of the most critical aspects of this changing workplace is the virtual office, which allows a user to work anywhere in the world.

This course helps you identify how an organization can improve collaboration, communication, and operations by implementing virtual office technology. We'll look at solutions to simplify and streamline communications, business process management, going paperless, and more. We'll also cover the benefits and risks of implementing a virtual workplace and discuss innovative technologies you can use to revolutionize your organization.

New Course for 2022!

Learning Objectives

Upon completing this course, you should be able to:

- Identify the characteristics of the virtual office and describe how the different components work independently and together
- Determine what technology should be implemented into your organization to build your own virtual office
- Compare various virtual collaboration tools and determine which tools would be a good fit for your organization
- Identify and utilize fantastic new apps, websites, and services to gain efficiency in your personal life and better meet organizational needs
- Contrast the benefits and drawbacks of the virtual office and telecommuting
- Identify how to implement a unified communications platform using Google Workspace, Microsoft 365, or a custom solution

Course Information

- **CPE credit**: Recommended for 4 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **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
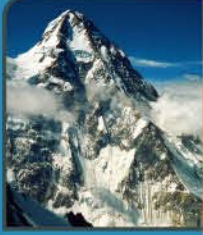
K2's Case Studies In Fraud And Technology Controls

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 of these frauds. By learning through these real-world case studies, you will be better positioned to reduce fraud risk.

Learning Objectives

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

Course Information

- **CPE credit**: Recommended for 4 hours Auditing
- **Instructional delivery method**: Group Live demonstration and discussion or 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 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 the field of auditing, where internal and external auditors are increasingly turning 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!

NEW SEMINAR FOR 2022!

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- **CPE Credit**: Recommended for 4 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Instructional delivery method**: Group-live demo and discussion using color computer projection
- **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 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.

Learning Objectives

Upon completing this course, you should be able to:

- Define Blockchain, Artificial Intelligence, Cryptocurrency, Big Data, and Machine Learning
- Identify the Major Similarities and Differences Between Big Data, Artificial Intelligence, and Machine Learning
- List Examples of Potential Use Cases for Each of the Technologies Discussed in this Session and Identify How These Technologies Differ from Current Practices
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Course Information

- **CPE Credit**: Recommended for 4 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Instructional delivery method**: Group-live demo and discussion using color computer projection
- **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 that has occurred over the past thirty years, a fair question to ask is, "what are the ethical considerations and impacts related to this technology?" 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.

NEW SEMINAR FOR 2022!

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 on 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
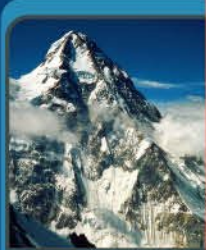- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Instructional delivery method**: Group-live demo and discussion
- **Prerequisites**: None
- **Program level**: Basic
- **Advanced preparation**: None
- **Who should attend**: CPAs who desire a deeper understanding of critical ethical issues facing accountants today

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

Google is one of the largest, most widely used and vital technology companies on the planet. Their 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 productivity suite used by a growing number of businesses worldwide. Google brings together 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. Beginners to advanced users of Google products will leave this course with a much deeper understanding of the services, time-saving tips to use the products more effectively, and practical advice on how to best leverage their incredible technology.

NEW SEMINAR FOR 2022!

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 4 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **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 when creating charts and other visualizations in Excel. 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. If you are looking to improve your communication skills, this seminar is a must for you.

Learning Objectives

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

Course Information

- **CPE credit**: Recommended for 4 hours Computer Software and Application
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **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 Hands-On With QuickBooks Online Accountant For Public Accounting

The number of accounting applications available today can be staggering for businesses with up to $15 million in annual revenue! In addition, cloud-based solutions such as QuickBooks Online, Xero, Accounting Power, and Wave are growing in breadth and depth. At the same time, traditional desktop and client-server applications continue to add more features, including hosted options. On top of all of this, financial reporting and other add-on solutions can further complicate your decision as to which tools you/your clients should use.

In this course, we will take a deep look into setting up a Quickbooks Online Accountant (QBOA) account. We will examine all the various firm, staff, and client configuration options for getting this to work inside your organization. This session focuses specifically on the configuration options for the financial professional. QBO is an extensive application, requiring you to ensure you've correctly set up your firm and client files. Additionally, we will look at the various import/export functionality for getting your data into or out of QBO and some of the best 3rd party tools in the Intuit App Marketplace. Participants will leave this class supercharged with the knowledge of getting the most out of their QBOA subscription.

NEW SEMINAR FOR 2022!

Learning Objectives

Upon completing this course, you should be able to:

- Outline the QuickBooks Online Accountant (QBOA) platform and the value to the CPA firm - specifically, all the unique features and functions of QBOA
- Demonstrate the enhanced tools provided in QBOA such as client dashboard, accountant toolbox, and the document center
- Creating firm user accounts and client accounts for use within QBO
- Evaluate the different methods of importing and exporting accounting data to and from QBO
- Evaluate the benefit and value of using the QBO thin client application on your Windows or Mac computer

Course Information

- **CPE credit**: Recommended for 4 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: None
- **Program level**: Basic
- **Advance preparation**: None
- **Who should attend**: Accountants and business professionals who are interested in improving their QuickBooks Online skills

K2's Implementing Internal Controls In QuickBooks Environments

The QuickBooks ecosystem of accounting tools remains the most widely-used set of accounting applications in use by small businesses. Yet, many of these organizations struggle because of inadequate internal controls. In this seminar, you will learn options for how you can improve internal controls in small businesses running QuickBooks Pro, Premier, Enterprise, or Online.

Through participating in this program, you will learn the importance of maintaining a robust system of internal controls in a small business environment, including businesses using QuickBooks accounting solutions. You will also learn about the four common types of internal controls and how to assess the relative condition of the internal control structure of a small business. With this background in place, the focus then shifts to discovering the opportunities to enhance internal controls in QuickBooks-based environments using features found in the application. In addition, you will learn about additional internal control procedures for situations where you cannot establish adequate controls in QuickBooks. In sum, while many believe that QuickBooks-based organizations will forever face weak internal control structures, by participating in this session, you will learn how QuickBooks-based businesses can benefit from strong internal controls.

Learning Objectives

Upon completing this course, you should be able to:

- Identify the importance of internal controls in QuickBooks environments
- List four common types of internal controls and provide examples of each
- Assess the relative strength or weakness of a QuickBooks-based organization's internal control structure
- Create and implement appropriate internal controls using tools and features found in various editions of QuickBooks
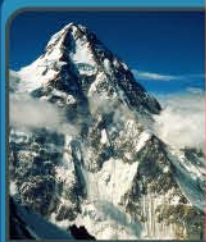
Course Information

- **CPE Credit**: Recommended for 4 hours Auditing
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Fundamental knowledge of internal controls and QuickBooks solutions
- **Program level**: Intermediate
- **Advanced preparation**: None
- **Who should attend**: Accountants and other business professionals who want to improve internal controls in QuickBooks and QuickBooks Online environments

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

Many Office 365/Microsoft 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 now to attend this session so that you can learn about the "rest" of Office 365 and how these cloud-based applications can enhance personal and team productivity while simultaneously facilitating remote working arrangements. Don't miss this opportunity to get all the knowledge and guidance necessary to take full advantage of your investment in Office 365.

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- **CPE credit**: Recommended for 4 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Fundamental knowledge of computer applications and the Office 365/Microsoft 365 subscription models
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: CPAs and other business professionals who are seeking to leverage their Office 365/Microsoft 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 is sure to continue. The number of apps, services, and platforms we use also increases every year in this environment. Thus, there is a need to standardize, streamline, and optimize our ability to manage the ever-growing list of systems and their data, and in this session, you will learn how to do precisely that.

Conquering your data can help improve efficiency 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 so that you can truly integrate your data and reap the benefits of improved efficiency and control.
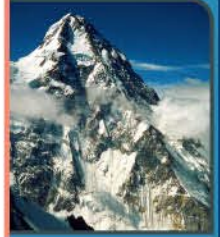
Learning Objectives
Upon completing this course, you should be able to:
- Define and identify where your organization keeps its data and how to access that data
- List various tools, services, and programs to manage data and share it with other systems
- Identify the cost and benefits of multiple data sharing techniques and approaches
- Construct and build data sharing and integration processes using widely available tools such as Power Query, Power BI, and more
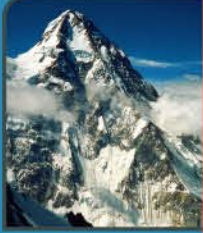
Course Information
- **CPE credit**: Recommended for 4 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Basic understanding of computer operations and terminology
- **Program level**: Intermediate
- **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 Lotus before that. During this time, you have said repeatedly, "One day, I'll learn how to write macros." Well, that time has arrived because this four-hour program will introduce you to the wide world of macros and Visual Basic for Applications (VBA) in Excel.

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

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

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

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

Course Information
* **CPE Credit**: Recommended for 4 hours Computer Software and Applications
* **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
* **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 of the 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, how to harness the power of the **AGGREGATE** function, and how to create more accurate forecasts with Excel's **FORECAST.ETS** function. No matter your level of experience working with Excel, participating in this course is sure to help you work more efficiently and effectively in Excel.
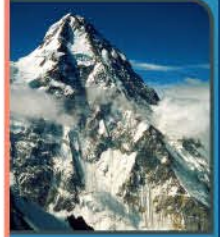
Learning Objectives
Upon completing this course, you should be able to:
- List examples of best practices for constructing formulas in Excel spreadsheets
- Identify situations in which each of the following functions might be useful: SUMIFS, SWITCH, and STOCKHISTORY
- Distinguish between the XLOOKUP function and legacy Excel functions such as VLOOKUP, HLOOKUP, INDEX, and MATCH
- Cite examples of when using Dynamic Arrays would be useful
- Differentiate between Excel's AGGREGATE and SUBTOTAL functions
- Identify conditions in which the FORECAST.ETS function is preferable to the FORECAST function
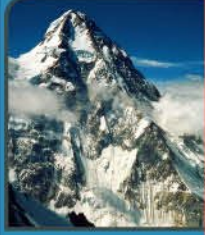
Course Information
- **CPE credit**: Recommended for 4 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Fundamental knowledge of Excel 2016 or newer
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: Business professionals who work with Excel and want to extend their knowledge of advanced features and functions to become more accurate, effective, and efficient with spreadsheets

K2's Microsoft Teams

Microsoft Teams is one of the most exciting personal and organizational productivity tools to ever appear 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 with deploying and using Teams.

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

Learning Objectives

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

Course Information

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

K2's Remote Access For Small Businesses

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

You will learn about practical solutions for facilitating remote access in small businesses in this course. Among other items included in this program is a detailed review of various solutions to enable remote access to a desktop, work securely from remote locations, key considerations when selecting Cloud-based solutions, and communicate and collaborate in remote environments.

Learning Objectives

Upon completing this course, you should be able to:

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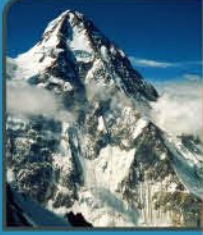
Course Information

- **CPE credit**: Recommended for 4 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Fundamental understanding of personal computer operations
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend**: CPAs and other accounting, financial, and business professionals who want to work efficiently and securely from remote locations

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. In this program, you will learn about the latest tools and techniques for securing your data, including encryption, virus protection, secure communications, electronic signatures, secure authentication, and more. You will also learn how to implement a practical, five-step approach to securing your PC and the types of 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. What security tools do you need, and how should you use them to secure your sensitive data and systems? Can you afford to take the risk of attempting to manage today's threats by using yesterday's techniques? Participate in this program to learn how to implement viable and practical solutions to mitigating today's security threats.

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

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

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

K2's Small Business Accounting Shootout

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

Solutions from Intuit, Sage, Xero, Wave, and others will be reviewed and compared to help you decide whether you should remain with your current platform or perhaps switch to a different one. Additionally, 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.
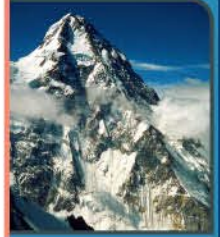
Learning Objectives
Upon completing this course, you should be able to:
- Create a list of needed features and functions for a small business accounting application
- Identify solutions that represent a potential "good fit" for an organization
- Estimate the investment required to implement a specific solution
- List examples of third-party add-ins to provide necessary additional functionality
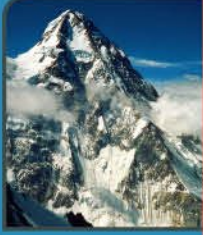
Course Information
- **CPE credit**: Recommended for 4 hours Accounting
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: General understanding of accounting practices in use in small businesses
- **Program level**: Intermediate
- **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:
- 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 going to take just one technology-focused training session this year, this is the one!

Learning Objectives

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

Course Information

- **CPE credit**: Recommended for 4 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or 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 emerging technologies

K2's Testing And Auditing Excel Workbooks

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

Learning Objectives
Upon completing this course, you should be able to:
- List common causes of spreadsheet errors and the potential impact of these errors
- Identify best practices to reduce the number of errors in Excel workbooks
- Cite examples of Excel Add-ins to identify spreadsheet errors programmatically
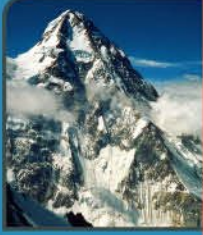
Course Information
- **CPE Credit**: Recommended for 4 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Fundamental Understanding of Microsoft Office Excel 2013 and newer
- **Program level**: Intermediate
- **Advanced preparation**: None
- **Who should attend**: Business professionals seeking to reduce errors and improve accuracy and efficiency when working with Microsoft Office Excel. 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, catalogs, 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 NE

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
- Differentiate between options for converting PDF documents to Word and Excel files

Course Information
- **CPE credit**: Recommended for 4 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **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 find themselves working 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 available to you, communication and collaboration options, and security best practices. You will also learn about managing and monitoring workflows in remote work environments and tools that you can use for that purpose. After completing this session, you will be able to implement a remote work strategy that yields efficiency, security, and satisfaction to all involved.

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

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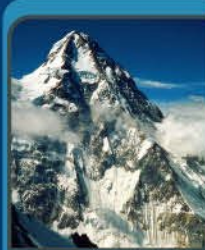- **CPE credit**: Recommended for 4 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites**: Fundamental knowledge of computer applications
- **Program level**: Intermediate
- **Advance preparation**: None
-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

Title	Level	Hours	Page
K2's Excel Boot Camp	I	16	4
K2's Advanced Excel	A	8	5
K2's Budgeting And Forecasting Tools And Techniques	I	8	6
K2's Business Continuity – Best Practices For Managing The Risks	I	8	7
K2's Business Intelligence, Featuring Microsoft's Power BI Tools	A	8	8
K2's Case Studies In Fraud And Technology Controls	I	8	9
K2's Excel Best Practices	I	8	10
K2's Excel Essentials For Staff Accountants	I	8	11
K2's Excel PivotTables For Accountants	A	8	12
K2's Excel Tips, Tricks, And Techniques For Accountants	I	8	13
K2's Microsoft Office 365 - All The Things You Need To Know	I	8	14
K2's Next Generation Excel Reporting	I	8	15
K2's Paperless Office	I	8	16
K2's QuickBooks For Accountants	I	8	17
K2's Small Business Internal Controls, Security, And Fraud Prevention And Detection	I	8	18
K2's 2022'S Biggest Security And Privacy Concerns	B	4	20
K2's Advanced QuickBooks Tips And Techniques	A	4	21
K2's An Accountant's Guide To Blockchain And Cryptocurrency	B	4	22
K2'S Artificial Intelligence For Accounting And Financial Professionals	I	4	23
K2's Best Word, Outlook, And PowerPoint Features	I	4	24
K2's Building A Cutting-Edge Virtual Office	B	4	25
K2's Case Studies In Fraud And Technology Controls	I	4	26
K2's Data Analytics For Accountants And Auditors	I	4	27
K2's Emerging Technologies For Accountants, Including Blockchain And Cryptocurrencies	I	4	28
K2's Ethics And Technology	B	4	29
K2's Everything Google! Their Most Effective Tools, Apps & Services	B	4	30
K2's Excel Charting And Visualizations	I	4	31
K2's Hands-On With QuickBooks Online Accountant For Public Accounting	B	4	32
K2's Implementing Internal Controls In QuickBooks Environments	I	4	33
K2's Improving Productivity With Office 365/Microsoft 365 Cloud Applications	I	4	34
K2's Integrating Data For Improved Efficiency And Control	I	4	35
K2's Introduction To Excel Macros	B	4	36
K2's Mastering Advanced Excel Functions	I	4	37
K2's Microsoft Teams	I	4	38
K2's Remote Access For Small Businesses	I	4	39
K2's Securing Your Data: Practical Tools For Protecting Information	I	4	40
K2's Small Business Accounting Shootout	I	4	41
K2's Technology Update	I	4	42
K2's Testing And Auditing Excel Workbooks	I	4	43
K2's Top PDF Features You Should Know	I	4	44
K2's Working Remotely – The New Normal	I	4	45

ONE AND TWO-HOUR SESSIONS

In addition to the sixteen, eight, and four-hour sessions detailed previously, the K2 Enterprises team is proud to offer a variety of one and two-hour sessions to accommodate more specialized and focused needs. These sessions provide timely and relevant content along with extreme scheduling flexibility!

TIP: Consider scheduling three or four of these sessions on the same day to create a focused, customized learning experience to meet your team's specific needs.

K2's Tech Update 2022

The speed of technology change has been accelerating. But unfortunately, we can't keep up, and we don't know what to do about it. This visionary session provides insights, choices, and recommendations to help you decide how rapidly to move, which technologies will affect your business, and how to separate sales pitches from innovative ideas.

This session will explore emerging and evolving technologies important to accounting professionals. We will cover the benefits and risks of adopting new technologies in various areas, ranging from software applications to hardware devices. You'll also learn how to develop a balanced technology strategy that includes current, emerging, and future technology choices for your firm or business.

Major Topics
- Hardware trends
- Software innovations
- Communication and collaboration tools
- Key products to consider for implementation

Learning Objectives
Upon completing this course, you should be able to:
- Select hardware and software that can enhance productivity and security
- Evaluate current communications choices to improve efficiency
- Differentiate between key products & able competitors to pick the best tools for the job
- Create strategic and tactical benefit lists that benefit you and your business

Course Information
- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites:** Fundamental understanding of technology in business settings
- **Program level**: Update
- **Advance preparation**: None
- **Who should attend:** Business professionals seeking to understand the latest trends and developments in business-oriented technologies

K2's Options To Automate Your Tax Preparation Workflow

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

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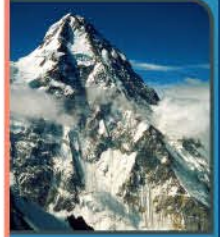- Leave with a checklist of tools to consider your tax practice

Learning Objectives
- Identify key tax return preparation processes that have technology automation solutions
- Differentiate between vendor options for key tax return preparation processes
- List examples of how preparers can use RPA to automate tax processing
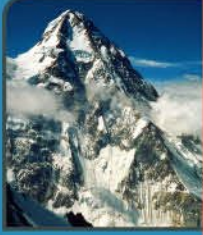
Course Information
- **CPE credit:** Recommended for 2 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites:** Fundamental understanding of tax return preparation software
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend:** Accounting and tax professionals interested in the latest developments in automation technologies for tax practices

K2's Eight Awesome PivotTable Features

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

Major Topics

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

Learning Objectives

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

Course Information

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

K2's Emerging Topics In Blockchain
And Cryptocurrency

Blockchain is one of the most-watched emerging technologies. Yet, few accountants understand how to use this technology to make existing ledger-based systems more efficient, effective, and tamper-resistant. In this session, you will learn the basics of blockchain-based ledgers. You will also learn about the fundamentals of cryptocurrencies such as Bitcoin and Ripple. Additionally, you will learn about emerging issues in these fields, such as stablecoins, central bank-issued digital currencies, smart contracts, and sovereign identity management. By attending this session, you will see how blockchain-based technologies will change your work with others.

Major Topics
- Blockchain basics and regulations
- Cryptocurrencies, stablecoins, and blockchain-enabled central bank digital currencies
- Smart contracts, sovereign identity management, cross-border funds transfer
- Emerging uses for blockchain-based ledgers

Learning Objectives
- Select the correct definitions for key terms associated with blockchain-based ledgers
- Differentiate the features of a cryptocurrency, a stablecoin, and a central bank-issued digital currency
- Identify key features associated with a smart contract, distributed finance, and sovereign identity
- Select from a list at least three different uses for blockchain-based ledgers covered in the course
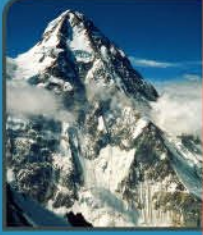
Course Information
- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites:** Fundamental understanding of information technology
- **Program level**: Update
- **Advance preparation**: None
- **Who should attend:** Business professionals seeking to improve their knowledge of blockchain and cryptocurrency technologies

K2's CPA Firm Technology For The Future

The next five years are going to be eventful for CPA firms. The profession has never seen such rapid change, with new and changing technologies appearing almost daily! So, what will your firm do?

How can you keep up without getting overwhelmed by these fast-paced transformations in the profession and stay profitable during this turmoil? What are the best technologies to handle client interactions, PBC lists, electronic signatures, and Advisory services? How do the cloud, next-generation accounting software, and client demands affect partner profitability? Attend this session to get an independent overview of the state of technology in the profession.

Major Topics
- CPA firm centric hardware
- Software changes
- Technology options for your firm
- Specific technologies to improve productivity and profitability
- Strategic products to consider for implementation

Learning Objectives
- Select new technologies for your firm from a road map
- List top niche markets
- Differentiate between products that are ready to implement and those that need time
- Create a transformative plan for your firm

Course Information
- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites:** Working knowledge of technology and workflows in CPA firm environments
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend:** Public accounting practitioners seeking to prepare their firm for future technologies

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

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

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

Major Topics

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

Learning Objectives

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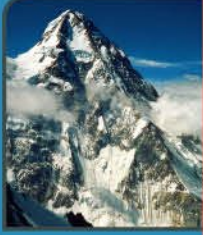
Course Information

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

K2's Tales Of True Tech Crimes Ripped From The Headlines

We're all familiar with the headlines describing how criminals use new and creative approaches to commit their crimes. But what you may not know is that these same criminal elements also target accounting professionals. Unfortunately, accountants are one of the most targeted groups on the Internet!

In this session, you will learn how high-profile failures occurred due to control malfunctions. In turn, hackers gained full reign over entire networks that contained sensitive information such as financial data stored online. Attend this session so you can be more effective at preventing crimes such as theft, malware, ransomware, phishing, and hacking.

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 resulting in the theft of assets, or unauthorized data manipulation

Learning Objectives
- List at least three major security incidents reported in the headlines in the last year and explain at least one primary control design or operation flaws that allowed the hack to occur
- Select the correct definitions from a list of standard security terms such as attack surface, vulnerability, exploit, social engineering, phishing, malware, heuristics, biometrics, and multi-factor authentication
- List at least three best practices learned because of reviewing the incidents cited in the case studies

Course Information
- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites:** Basic knowledge of cybersecurity risks
- **Program level**: Update
- **Advance preparation**: None
- **Who should attend:** Accounting and business professionals seeking to learn more about cybersecurity risks and solutions

K2's Windows 11 – What End Users Need To Know

A burning question on the minds of many is, "What features should I use in Windows 11?" Presented with end-users in mind, in this session, you will get the answer you need to that question and others, all delivered in the context of improving productivity and security.

Among other topics, you will learn about improvements in virtual desktops, changes to the user interface, customization options, and more. If you're using Windows 11 now or plan to upgrade soon, this is a must-see session to help you make the most of your upgrade.

Major Topics

- Productivity improvements in Windows 11
- How to work with virtual desktops
- Customizing the user environment
- Improved security tools available in Windows 11

Learning Objectives

- Identify the process for managing open windows in Windows 11 using Snap Assist
- List an example of a security improvement in Windows 11
- Identify the process of re-positioning the taskbar
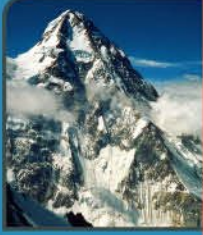- Define "widgets" in Windows 11 and identify how to add them

Course Information

- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites:** Working knowledge of Microsoft's Windows operating system
- **Program level**: Update
- **Advance preparation**: None
- **Who should attend:** Accounting and business professionals seeking to learn more about the newest release of Microsoft Windows

K2's Security Risks And Solutions Roundtable

Security remains one of the top issues on the minds of most business professionals today – and for a good reason! Unfortunately, given the ever-increasing volume of sensitive data our organizations store and manage, we have become prime targets for cybersecurity attacks. Fortunately, we can take steps to reduce our risks significantly. This session will teach you which measures will benefit you and your organization the most.

In a roundtable format, you will learn about security risks and solutions from the breadth and depth of experience of the K2 Enterprises team. A vital aspect of this session is the opportunity to ask questions of your presenters.

Major Topics
- Today's major cybersecurity threats
- Examples of data breach issues that should be concerning
- Practical solutions that you should consider implementing to reduce risk

Learning Objectives
- Identify leading cybersecurity risks that businesses face today
- List examples of critical solutions you should consider implementing
- Differentiate between risk and solution profiles, depending on the size of a business

Course Information
- **CPE credit:** Recommended for 2 hours Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites:** Basic understanding of technology in business settings and related security risks
- **Program level**: Intermediate
- **Advance preparation**: None
- **Who should attend:** Accounting and business professionals seeking to learn more about security risks and solutions in today's business climate

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

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

Major Topics

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

Learning Objectives

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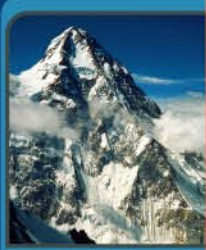
Course Information

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

K2's Automation For Increasing Personal Efficiency And Effectiveness

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

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

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

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

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

K2's The Best Small Business Accounting Tools

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. So, whether you work with a startup or an established small business, attend this session to find out which tools can help you achieve your financial goals.

Major Topics

- Overview of small business accounting solutions
- Traditional desktop and SaaS small business products
- Shortfalls of specific accounting solutions
- Strengths and weaknesses of various solutions
- Setup and configuration tips

Learning Objectives

- 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
- Create a software strategy for your small business
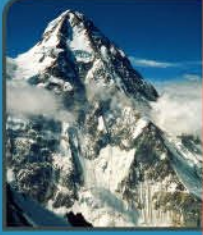
Course Information

- **CPE credit:** Recommended for 2 hours Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites:** Basic understanding of small business accounting needs and processes
- **Program level**: Update
- **Advance preparation**: None
- **Who should attend:** Business professionals desiring to improve personal and team efficiency and effectiveness

K2's Accounting Automation

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

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

Major Topics

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

Learning Objectives

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

Course Information

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

K2's How To Run Microsoft Office From The Cloud

Cloud-based options of familiar Microsoft Office applications have been available for over a decade. Moreover, these tools have matured to the point where their functionality rivals desktop-based options. Further, the ease of deploying, accessing, and using these tools is striking.

In this session, you will learn about Cloud-based alternatives to everyday desktop applications and why you should consider adding them to your toolbox. You will also learn about the relative strengths of competitive services available from Zoho and Google and why you should consider these tools. Knowing all your options is imperative in the new cloud-connected world!

Major Topics
- How to acquire and access Cloud-based Microsoft Office tools
- The relative strengths and limitations of Cloud-based services compared to their desktop counterparts
- Data storage requirements and options
- Cloud-based options available from Zoho and Google

Learning Objectives
- List at least three benefits of using Cloud-based services for traditional computing activities, such as spreadsheets and word-processing
- Differentiate between the features available in Cloud-based options relative to their desktop counterparts
- List at least two means by which you can access Microsoft's Cloud-based tools
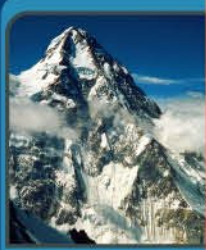
Course Information
- **CPE credit:** Recommended for 1 hour Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites:** None
- **Program level**: Basic
- **Advance preparation**: None
- **Who should attend:** Business professionals desiring to learn options for deploying Microsoft Office applications

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

Data Loss Prevention (DLP) is a means of creating and enforcing security policies in an organization. For example, you can create DLP rules that programmatically block all outbound email messages containing Social Security or credit card numbers. Unfortunately, most business professionals have yet to discover DLP and how it improves security.

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

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

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

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

K2's Choosing Your Mid-Market Accounting Solution

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.

Major Topics

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

Learning Objectives

- 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
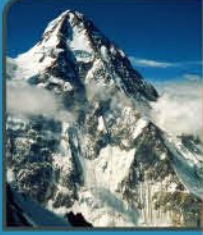- Create an implementation plan for your business

Course Information

- **CPE credit:** Recommended for 1 hour Computer Software and Applications
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites:** Basic understanding of accounting needs and solutions in mid-market settings
- **Program level**: Update
- **Advance preparation**: None
- **Who should attend:** Business professionals seeking to learn more about accounting and ERP solutions available for mid-market companies

K2's Supercharging Your Spreadsheet Collaboration

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

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

Major Topics

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

Learning Objectives

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

Course Information

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

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

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

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

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

Learning Objectives
- Identify examples of critical privacy threats
- Cite examples of how your data becomes compromised through web browsers and search engines
- List maneuvers you can make to reduce your privacy risk
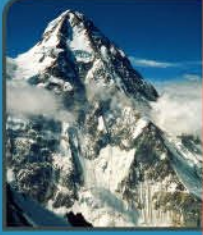
Session Information
- **CPE credit:** Recommended for 1 hour Information Technology
- **Instructional delivery method**: Group Live demonstration and discussion or Group Internet Based
- **Prerequisites** Fundamental understanding of privacy and cybersecurity risks
- **Program level**: Update
- **Advance preparation**: None
- **Who should attend:** Accounting and financial professionals seeking to enhance their understanding of today's privacy issues

K2's The K2 Team's Top Tech Productivity Tips And Tricks

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

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

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

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

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

PRIOR YEAR CONFERENCE SESSIONS

In addition to our lineup of 2022 conference sessions, many of the conference sessions we developed, produced, and delivered in prior years are still relevant and in demand. Following is a list of the preceding year's sessions that remain in demand. If you are interested in any of these sessions, please get in touch with us, and we'll be pleased to provide you with full descriptions.

- K2's Selecting And Vetting Technology Vendors
- K2's Online Meeting And Collaboration Tools
- K2's Formatting Excel Spreadsheets The Right Way
- K2's Ten Teams Features You Can't Afford To Miss
- K2's The Power Of Array Formulas In Excel
- K2's Password Management Tools – Why And How You Should Use Them
- K2's Amazing Accounting Add-Ons
- K2's Hosting, Self-Service, And Managed Service Options
- K2's Excel's Best New Features
- K2's Selecting Small Business Management Systems
- K2's Technology Planning For A Post-Pandemic Environment
- K2's Power Automate Your Approvals
- K2's Backups Done Right
- K2's Turbocharging Small Business Reporting With Power Query
- K2's Mastering Advanced Excel Functions And Formulas
- K2's Integrating And Sharing Data
- K2's Technoethics
- K2's Improving Productivity With Microsoft 365/Office 365 Cloud Applications
- K2's The Very Real Risk Of Ransomware
- K2's Advanced Topics In Power BI
- K2's Understanding Workflow And Automation Essentials
- K2's The Perfect Storm – Data Governance And Privacy Regulations
- K2's The How's And Why's Of Creating User-Defined Functions In Excel
- K2's Implementing Security And Privacy Policies
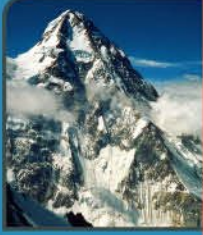- K2's Next Generation Excel Reporting

ABOUT 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. Our goal is to produce and deliver the highest quality technology seminars and conferences available to accounting, financial, and other business professionals. In addition, the entire K2 team seeks to maintain the highest level of integrity, family values, and friendship among all involved.

K2 Enterprises is one of the largest providers of technology-focused education to accounting and financial professionals in North America. 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. Collectively, 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 available technology-focused CPE available. Further, our instructional team is routinely hailed as being among the best in the business, as evidenced by the fact that most have received numerous awards for their presentation skills.