

K2 Enterprises®



On-Site CPE Planning Guide

HELLO

We are pleased to provide our On-Site CPE Planning Guide. This guide contains detailed descriptions of our seminars for accounting and financial professionals. These courses and sessions are the same high quality courses and sessions we teach for over 40 state CPA societies.

ABOUT K2 ENTERPRISES

K2 Enterprises, named after the second highest mountain in the world, is a partnership of instructors formed in 1988 to teach information technology seminars. In addition to providing on-site training for companies, firms, and governmental entities, K2 Enterprises provides Continuing Professional Education to CPAs directly through over 40 state CPA societies.

ABOUT K2 ENTERPRISES INSTRUCTORS

The instructors for K2 Enterprises have a long history of teaching seminars. We have provided quality technology seminars for over 30 years. Currently, K2 Enterprises teaches courses nationally and internationally. We teach courses on Excel, Budgeting, Accounting Software, Business Analytics, Internal Controls, Paperless, computer updates, and many other technology related topics. We are frequently asked to review computer products for nationally known computer magazines and have a national audience.

GENERAL INFORMATION ON ALL SEMINARS OFFERED

Technology training and consulting is our business; it is all we do. We have been delivering high quality events for over 30 years.

- » High quality Super VGA projection (supplied by K2 Enterprises)
- » Real life examples and practical knowledge
- » Professionally prepared participant manuals and hand-outs

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

- » Room with high ceiling (12' min.) which allows for a large screen
- » Large quality screen at least 8' x 8' (10' x 10' preferred)
- » High-Speed Internet access
- » Projection cart
- » Instructor table
- » Table-top podium
- » Cordless lavalier microphone (when attendance is over 40)
- » Comfortable classroom seating

For further information or to schedule seminars, please contact:

Cheryl Perret – OFFICE (985) 542-9390 | FAX (985) 542-9397 | E-MAIL cheryl@k2e.com

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PRICING

On average, our On-Site training costs 30% to 40% less than our training offered in “public” venues. This does not include the savings from reduced travel time and expenses. If you need to reduce your CPE costs, on-site training is the answer.

We work cooperatively with the various state CPA societies to offer our full curriculum of seminars to assure you the highest quality experience. Typically the cost per 8 CPE hours of our “private” training is about 70% of the cost of similar “public” training. Accordingly, the pricing varies from state to state.

HOW TO ESTIMATE THE COST SAVINGS FOR ON-SITE CPE

Approximately 30% of our state society “public” training	\$ xxx.00
Time saved in travel	xxx.00
Other travel cost saved	+ xxx.00
Total Cost Savings Per Participant	\$ xxx.00

OTHER BENEFITS OF ON-SITE CPE

- » **Convenience** – Schedule the courses when you want and where you want. Reduce wasted travel time and select dates that are convenient for you and your staff.
- » **Guaranteed Quality** – K2 Enterprises is the nation’s leader in technology training for CPAs. We consider high quality presentations to be the cornerstone of our organization and guarantee the results.
- » **Improved Efficiency and Better Performance** – Most people are self taught and use only a small fraction of the capabilities of tools such as Excel, even though they use these tools daily. Huge potential exists to improve efficiency and performance by learning how to use these tools better.
- » **Customized to Your Needs** – Courses can be customized to include topics that are particularly relevant to your people.
- » **Team Building** – Training people together gets everyone pulling in the same direction and doing things the same way. Employees can share knowledge and help each other better understand how to take advantage of the technology tools they have. Training sessions are more productive because employees can share how they have approached specific problems that are unique to your company or firm.
- » **Reduce Risk and Eliminate Errors** – Having a better understanding of the technology tools you use daily can significantly reduce the risk of errors and the potential liability associated with such errors. One recent study indicates that 92% of business spreadsheets have at least one critical error.

REFUND POLICY

If you are not completely satisfied with a K2 seminar, K2 will refund your registration fees. Please contact cheryl@k2e.com.



COURSE CUSTOMIZATION

We frequently receive requests to customize our courses to meet the unique needs of the organization. We are absolutely willing to do this, and we offer two distinct types of customized courses as described below. However, our standard course layouts are designed as cohesive units and, unless you have truly unique needs, you will probably be better staying with the courses as they are designed.

Customization Option #1

Some organizations want to select material from more than one course and/or session and combine it into one course. For example, we recently created a custom course that was 75 percent Advanced Excel and 25 percent Outlook Essentials. This firm was primarily interested in Excel training but was also concerned that the staff was not as adept with Outlook as they needed to be. This type of course customization is easy to accommodate.

Customization Option #2

Some organizations want specialized examples or course content to meet their very specific and unique needs. We are ready and willing to do this although it may involve an additional fee for developing the new content and speaking with the client to work out the details of exactly what will be covered and how it will be covered.

A FEW OF OUR REFERENCES

Rebecca Campbell	Colorado Society of CPAs	(303) 773-2877
Debbie Cortes	Hawaii Society of CPAs	(808) 537-9475
Jennifer Oleksa	Georgia Society of CPAs	(404) 504-2950
Stacey Wilson	Indiana CPA Society	(317) 726-5015
Kathy Nicholson	Iowa Society of CPAs	(515) 223-8161
Jean Rieden	Montana Society of CPAs	(406) 442-7301
Jim Hardenberg	New Jersey Society of CPAs	(973) 226-4494
Gail Christiansen	New Mexico Society of CPAs	(505) 246-1699
Sherre Sattler	North Dakota CPA Society	(701) 775-7111
Francesca Zampaglione	Pennsylvania Institute of CPAs	(215) 496-9272
Lisa Richardson	Society of Louisiana CPAs	(504) 464-1040

Many more references are available upon request
Seminar evaluation summaries are available upon request

NASBA CERTIFICATION



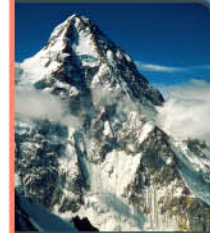
K2 Enterprises is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

COURSE LISTING

K2 offers courses that earn four, eight or sixteen hours of CPE credit. You choose the topics for your training period. Based on our experience as both speakers and implementers of technology, we design our courses to meet the practical needs of accountants and other business professionals.

		Code	Level	Hours	Page
	K2's Excel Boot Camp – Two Days of Intensive Excel Training	EBC	I	16	6
	K2's Advanced Excel	ADE	A	8	7
	K2's Budgeting and Forecasting Tools and Techniques	BFT	I	8	8
	K2's Business Continuity – Best Practices for Managing the Risks	BCO	I	8	9
	K2's Excel Best Practices	EBP	I	8	10
	K2's Excel Financial Reporting and Analysis	EFR	A	8	11
	K2's Excel PivotTables for Accountants	EPT	A	8	12
NEW!	K2's Excel Tables & Data Models – Efficiently Managing, Analyzing, & Reporting Your Data	ETD	A	8	13
	K2's Excel Tips, Tricks, and Techniques for Accountants	EXL	I	8	14
	K2's Excel-Based Dashboards	EBD	A	8	15
	K2's QuickBooks for Accountants	QBP	I	8	16
	K2's Small Business Internal Controls, Security, and Fraud Prevention and Detection	ITC	I	8	17
	K2's Technology for CPAs – Don't Get Left Behind	TEC	B	8	18
	K2's Advanced Excel Reporting – Best Practices, Tools, and Techniques	EXR-4	A	4	19
	K2's Advanced QuickBooks Tips and Techniques	AQB-4	I	4	20
	K2's Do It Yourself Business Intelligence	DIY-4	A	4	21
	K2's Introduction to Excel Macros	EXM-4	B	4	22
NEW!	K2's Microsoft Office 2016 – Improving Productivity with New Features	OFF-4	U	4	23
NEW!	K2's Microsoft Office Everywhere	MOE-4	I	4	24
	K2's QuickBooks Online – Changing the Paradigm of Small Business Accounting	QBO-4	I	4	25
	K2's Securing Your Data – Practical Tools for Protecting Information	SEC-4	I	4	26
	K2's Tech Tools and Gadgets for a More Efficient You!	TTG-4	I	4	27
	K2's Technology Update	TUP-4	I	4	28
NEW!	K2's Top PDF Features You Should Know	TPF-4	I	4	29
	On-Site Session Descriptions				31
Level Key: B – Basic I – Intermediate A – Advanced O – Overview U – Update Instructional Delivery Method: Group-Live					

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K2'S EXCEL BOOT CAMP

Two Days of Intensive Excel Training

If you are ready for two days of intensive Excel training in a “laptop optional, laptop friendly” environment, then this course is for you. By using accounting-centric examples, developed for accountants, by accountants, **Excel Boot Camp** takes you through Excel from A to Z and shows you how to elevate your use of Excel to the next level.

In addition to long-standing features in Excel such as lookup functions, the Camera tool, and formatting options, this program will highlight the number of recent improvements to Excel including additions to the function library, tables, a vastly improved charting engine, and an overhaul of PivotTable functionality. You will also learn various techniques for enhancing, not only your efficiency, but also your effectiveness, when working with Excel by taking advantage of a wide variety of “power features” to assist you in creating accurate spreadsheets in a fraction of the time previously required.

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

“I learned some great tips, tools & efficiencies.” R.M. CPA MN

For more details, please visit
www.k2e.com/ebc

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Implement various tips, tricks, and techniques in Excel to address issues, such as formatting, AutoCorrect, handling dates and times, and selecting cells with special characteristics
- ◆ Utilize Excel’s formula-building tools
- ◆ Identify how and when Excel’s table feature should be used
- ◆ Create and audit complex formulas, including those containing arrays and SUMIFS, VLOOKUP, HLOOKUP, INDEX, and MATCH functions
- ◆ List and apply various techniques for securing Excel workbooks
- ◆ Create charts in Excel that captivate audiences and communicate messages effectively
- ◆ List the six components of PivotTables and create PivotTables, including PivotTables that perform user-defined calculations
- ◆ Implement Excel’s Camera function to assist in creating custom reports
- ◆ Utilize Excel’s Macro Recorder tool to create simple, yet very useful, macros that you can put to work right away

Course Information

- ◆ **CPE credit:** Recommended for 16 hours Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection – we encourage you to bring your laptop equipped with Excel 2007 or newer
- ◆ **Prerequisites:** Fundamental knowledge of Excel 2007 or 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 content of this course draws from over twenty-five years of experience in delivering Excel training to accountants and other business professionals and throughout the program, relevant, real-world examples reinforce the major topics presented. You do not want to miss this opportunity to become more efficient and proficient in Microsoft Office Excel, the accounting and financial professional's tool of choice. This course covers advanced Excel topics found in Excel 2007 through Excel 2016.

"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

For more details, please visit
www.k2e.com/ade

Learning Objectives

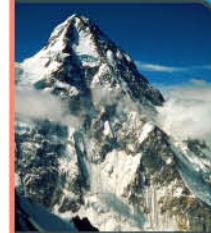
Upon completing this course, you should be able to:

- ◆ 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 Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection – laptop friendly, with access to demonstration files
- ◆ **Prerequisites:** Experienced Excel user
- ◆ **Program level:** Advanced
- ◆ **Advance preparation:** None
- ◆ **Who should attend:** Business professionals who work with Excel 2007 or newer and want to extend their knowledge with advanced features and functions

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K2'S BUDGETING AND FORECASTING TOOLS AND TECHNIQUES

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

In addition to learning about how to utilize Excel more effectively for budgeting and forecasting activities, you will also learn about other tools, such as Budget Maestro, PROPHIX, and Host Analytics, and how reducing your dependency on Excel can lead to better results. Additionally, you will learn how to account for risk and uncertainty in your budgeting and forecasting models and why doing so is a best practice for more meaningful budgets and forecasts. If you are involved in budgeting and forecasting activities, you will not want to miss this opportunity to learn how to reduce the amount of time you spend on these tasks, while simultaneously increasing their value.

For more details, please visit
www.k2e.com/bft

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- ◆ **CPE credit:** Recommended for 4 hours Accounting and 4 hours Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection – laptop friendly, with access to demonstration files
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2007 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. You will learn how to manage key issues related to staffing, how virtualization can speed recovery times, and how Cloud-based storage, synchronization, and mirrored databases can help ensure that you always have access to your critical data and applications. Most importantly, you will learn how to identify your organization's major risks and create an effective plan to address these contingencies.

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

For more details, please visit
www.k2e.com/bco

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- ◆ **CPE credit:** Recommended for 8 hours Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection
- ◆ **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

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K2'S EXCEL BEST PRACTICES

As spreadsheets continue to evolve, so too must your practices for creating, editing, and auditing them. In this program, you will gain an in-depth understanding of the best ways to work with Excel by learning best practices associated with Excel spreadsheets in each of the following areas: creating and editing Excel workbooks, securing Excel workbooks, collaborating with others in Excel, and reporting on data contained in Excel.

Today's best practices for Excel differ significantly from those used in the past and you will learn the best ways to work with Excel spreadsheets in this "must see" CPE program. Course materials include relevant examples to enhance your learning experience. Participate in this program to help ensure that you utilize Excel to its fullest potential.

This course covers features found in Excel versions 2007 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

For more details, please visit
www.k2e.com/ebp

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- ◆ **CPE credit:** Recommended for 8 hours Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection – laptop friendly, with access to demonstration files
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2007 or newer
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should attend:** Excel users who want to learn best practices for working with spreadsheets

K2'S EXCEL FINANCIAL REPORTING AND ANALYSIS

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

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

"This was an outstanding session I would highly recommend." T.K., CPA NJ

"The course was right on target. Great examples for functional application immediately upon return to the office." W.L., CPA TX

For more details, please visit
www.k2e.com/efr

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- ◆ **CPE credit:** Recommended for 8 hours Accounting
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection – laptop friendly, with access to demonstration files
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2007 or newer
- ◆ **Program level:** Advanced
- ◆ **Advance preparation:** None
- ◆ **Who should attend:** Accounting and financial professionals desiring more knowledge in using Excel for financial statement preparation and analysis

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K2'S EXCEL PIVOTTABLES FOR ACCOUNTANTS

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

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

"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

For more details, please visit
www.k2e.com/ept

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- ◆ **CPE credit:** Recommended for 4 hours Accounting and 4 hours Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection – laptop friendly, with access to demonstration files
- ◆ **Prerequisites:** Fundamental understanding of Microsoft Office Excel 2007 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 TABLES AND DATA MODELS

Efficiently Managing, Analyzing & Reporting Your Data

New Course for 2016!

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

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

For more details, please visit
www.k2e.com/etd

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

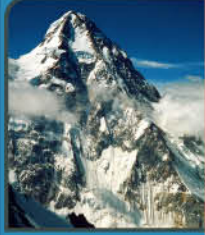
- ◆ **CPE credit:** Recommended for 2 hours of Accounting and 6 hours of Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion – laptop friendly, with access to demonstration files
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2007 or newer
- ◆ **Program level:** Advanced
- ◆ **Advance preparation:** None
- ◆ **Who should attend:** Accounting and business professionals seeking to manage, analyze, and report more efficiently using Excel

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K2'S EXCEL TIPS, TRICKS, AND TECHNIQUES FOR ACCOUNTANTS

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

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

"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

For more details, please visit
www.k2e.com/exl

Learning Objectives:

Upon completing this course, you should be able to:

- ◆ Identify situations in which various Excel features can increase productivity and apply each of these techniques in context, such as Freeze Panes, Split Windows, selecting cells with special characteristics, AutoCorrect, the Office Clipboard, and Paste Special
- ◆ Implement tools and techniques for formatting data in Excel, including multiline column headings, the Accounting Format, custom date and number formats, and Conditional Formatting
- ◆ Customize Excel's user environment, including the Ribbon and the Quick Access Toolbar, adjust Excel's Options to improve efficiency, and create and use Templates to increase efficiency and productivity
- ◆ Utilize various formula building tools to create formulas more efficiently and create various types of formulas, including formulas, to manipulate text and dates, formulas containing VLOOKUP and HLOOKUP functions, formulas that contain conditional calculations, and formulas that contain circular references
- ◆ Link data across multiple Excel worksheets and workbooks, update and manage links, and create sum-through formulas and rolling reports
- ◆ Implement procedures for producing Excel-based reports, including adjusting print settings, using the Camera feature to create report forms, and working with Custom Views to automate print settings

Course Information

- ◆ **CPE credit:** Recommended for 4 hours Accounting and 4 hours Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection – laptop friendly, with access to demonstration files
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2007 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 EXCEL-BASED DASHBOARDS

Dashboard reporting is rapidly becoming the norm for organizations seeking to improve financial and operational reporting processes; and in this program, you will learn how to create Excel-based dashboards that provide users with real-time access to mission-critical data. Much more than just a program on charting, this course will demonstrate how to put advanced Excel features, such as data queries, Power Query, PivotTables, and even macros, to work so that you can build Excel-based dashboards that will enhance your financial and operational reporting processes.

Key topics covered in this course include extracting and summarizing data stored in various databases; visualization techniques to present your data more effectively, including advanced charting tools and techniques; identifying and highlighting trends in data; distributing dashboard reports throughout the organization; and using Excel add-ins to enhance the dashboard reporting process. As a means of improving your reporting processes, you do not want to miss this chance to learn how to create and implement Excel-based dashboards in your organization reports.

"Great presentation – lots of good stuff to implement." C.K., CPA MI

"One of the best classes I've taken. Very practical skills that I can use for my job." B.C., CPA MI

For more details, please visit
www.k2e.com/ebd

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Implement building blocks of Excel-based dashboards such as Open Database Connectivity, conditional formatting, tables and data models, defined names and dynamic defined names, form controls, and Excel's RANK function
- ◆ Identify the processes for creating, formatting, and manipulating charts in Excel, including charts based on tables, charts that incorporate dynamic text, charts with conditional formatting, interactive charts, and drill-down charts; additionally, enhance reader's comprehension of trends by using Sparklines for trend analysis
- ◆ Define the relevance of PivotTables and PivotCharts in Excel-based dashboards and create PivotTables and PivotCharts for use in dashboards; additionally, apply specific PivotTable and PivotChart features, such as Slicers, Field Settings, Calculated Fields, and Calculated Items in an Excel-based dashboard environment
- ◆ Describe how to assemble an Excel-based dashboard using the techniques learned throughout this program

Course Information

- ◆ **CPE Credit:** Recommended for 4 hours Accounting and 4 hours Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection – laptop friendly, with access to demonstration files
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2007 or newer
- ◆ **Program level:** Advanced
- ◆ **Advance preparation:** None
- ◆ **Who should attend:** Accounting and financial professionals seeking to improve financial reporting processes

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K2'S QUICKBOOKS FOR ACCOUNTANTS

QuickBooks is an extremely powerful product with features and capabilities of which many users are either not aware or do not know how to utilize effectively. This course helps you get more out of QuickBooks and QuickBooks Online and to resolve the issues with which even experienced QuickBooks users often struggle, such as locking down prior periods. This program starts out fast with a chapter covering the top issues accountants face with QuickBooks. The day continues with practical guidance and solutions designed to help accountants get the most out of QuickBooks for themselves and/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. In addition, 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.

Despite the product's user-friendly design, the most common QuickBooks problems involve recording transactions incorrectly. To prevent these and other problems, adequate training is necessary. Help your company or client put the power of QuickBooks to work, the right way. Register for this professional educational seminar today!

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

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

For more details, please visit
www.k2e.com/qbp

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
- ◆ Work with various QuickBooks Lists, including entering and editing list data, techniques for managing lists, and importing and exporting list data
- ◆ Identify techniques for creating reports and analyzing data in QuickBooks, including creating and customizing Reports, and exporting reports to Excel
- ◆ Utilize QuickBooks tools to enhance management control, including budgeting and forecasting, depreciating fixed assets, and tracking loans and notes payable
- ◆ 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 Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection
- ◆ **Prerequisites:** Fundamental understanding of basic QuickBooks operations
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should attend:** Accounting 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 on a daily basis. However, internal controls present a challenge for many smaller organizations. In this program, you will learn how to evaluate, develop, and implement an effective internal control structure in a small business environment. You will identify how to assess risk in smaller organizations and how to implement preventive, detective, deterrent, and compensating controls to mitigate these risks, even in the absence of proper segregation of duties. Additionally, by participating in this program, you will learn technology-focused techniques for preventing and detecting fraud as well as securing information systems and sensitive data. As a participant, you will benefit from the case studies used in class in which theoretical concepts are implemented and demonstrated in leading small business accounting software programs, such as QuickBooks and QuickBooks Online, Sage 50/Peachtree, Microsoft Dynamics GP, and Sage 100.

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

“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

“Good information & practical examples.” T.H., CPA CA

For more details, please visit www.k2e.com/itc

Learning Objectives

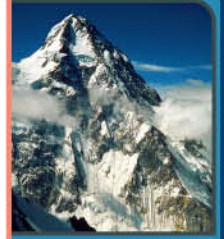
Upon completing this course, you should be able to:

- ◆ Cite internal control fundamentals, including definitions and concepts, types of internal control activities, and the need for internal controls
- ◆ Identify common small business control deficiencies and issues, including concentration of ownership and inadequate segregation of duties, and list five key risk areas for small businesses
- ◆ Recognize the common types of fraud schemes occurring in small business and implement internal control measures to reduce the threat of becoming a victim
- ◆ List the objectives and common deficiencies of small business accounting systems
- ◆ Define the purpose of general controls and list examples of common general controls in small businesses
- ◆ Identify relevant internal control procedures over revenues, cash, purchasing, payables, payroll, inventory, and fixed assets in small businesses
- ◆ Implement technology tools to prevent and detect occupational fraud
- ◆ List opportunities to enhance security over information systems and sensitive data
- ◆ Define alternative control procedures and describe their significance in small businesses

Course Information

- ◆ **CPE credit:** Recommended 8 Hours Accounting
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection
- ◆ **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

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

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

In this fast-paced, update-style course, you will survey today's IT environment, learning about computer hardware, software (including Office 2016), operating systems (including Windows 10) and what they mean for you, and peripheral devices. You will also learn about significant trends in information technology and how to take advantage of the opportunities presented by these trends. Examples include the latest Excel features, working with PDF files, and security and privacy issues. Additionally, you will learn how to improve the overall performance of your IT investment, thereby increasing your return on investment.

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

"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

For more details, please visit
www.k2e.com/tec

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- ◆ **CPE credit:** Recommended for 8 hours Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection
- ◆ **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 ADVANCED EXCEL REPORTING

Best Practices, Tools, and Techniques

(1/2 Day – 4 CPE Hour Course)

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

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

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

"Identified several new tools to use in future reporting – looking forward to "play" with the new tools." K.B., CPA IA

"Excellent presentation! This class is just right for my level and answered many of my questions." X.W., CPA WY

For more details, please visit
www.k2e.com/exr-4

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

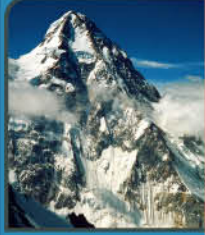
- ◆ **CPE credit:** Recommended for 4 hours Accounting
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection – laptop friendly, with access to demonstration files
- ◆ **Prerequisites:** Strong working knowledge of Excel 2007 or newer
- ◆ **Program level:** Advanced
- ◆ **Advance preparation:** None
- ◆ **Who should attend:** Accounting and financial professionals who use Excel for reporting and want to reduce the risk of errors, simplify reporting processes, and improve the quality of reports

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K2'S ADVANCED QUICKBOOKS TIPS AND TECHNIQUES

(1/2 Day – 4 CPE Hour Course)

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. In this seminar, you will learn how to take advantage of many of QuickBooks' new and advanced features to solve important issues. For example, you will learn advanced inventory management techniques, including the ability to change the default costing methodology in QuickBooks, 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 put the Client Data Review feature to work to streamline the process of 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

For more details, please visit
www.k2e.com/aqb-4

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 list the advantages associated with QuickBooks' Advanced Inventory add-in
- ◆ Differentiate between key 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 Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection
- ◆ **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 DO IT YOURSELF BUSINESS INTELLIGENCE

(1/2 Day – 4 CPE Hour Course)

Perhaps no term receives more coverage in business circles today than “business intelligence (BI).” With Microsoft’s “Power BI” tools, you can now create powerful, interactive, and visually compelling summaries of potentially vast quantities of data directly from your computer and without the assistance of your technology team. In this course, you will learn how to use Microsoft’s Power BI tools to solve many of the financial and operational reporting issues you face each day. More specifically, you will learn how to leverage your existing understanding of Microsoft Excel to harness the power of tools such as Power Query, Power View, Power Map, and Power Pivot.

Using “do it yourself business intelligence,” provided by Power BI, will enable you to quickly and easily create reports and dashboards that might have taken days or even weeks in the past. With the knowledge you glean from these reports and dashboards, you will have insights into your data that can help you make more-informed and more profitable decisions while still retaining full control over your data. Perhaps best of all, most Excel users will be able to implement Power BI without any additional investment in hardware or software!

Very good course. Valuable tool. L.C., CPA TN

For more details, please visit
www.k2e.com/diy-4

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Utilize Power Query to extract financial and operational data from multiple data sources
- ◆ Summarize data in Power Pivot, including data found in the Data Model feature of Excel 2013
- ◆ Prepare stunning, interactive visualizations of data using Power Map and Power View
- ◆ Share your BI reports and dashboards and collaborate with team members using tools such as Power BI Sites
- ◆ Use Power BI’s Q&A feature to “ask” natural language questions of your BI reports and dashboards

Course Information

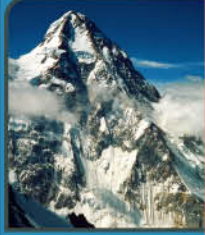
- ◆ **CPE Credit:** Recommended for 4 Hours Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection – laptop friendly, with access to demonstration files
- ◆ **Prerequisites:** Basic understanding of computer operations, including Microsoft Office Excel 2010 or newer
- ◆ **Program level:** Advanced
- ◆ **Advanced preparation:** None
- ◆ **Who should attend:** Business professionals who are seeking to improve decisions by creating interactive BI reports

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K2'S INTRODUCTION TO EXCEL MACROS

(1/2 Day – 4 CPE Hour Course)

Course Description

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

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

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

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

For more details, please visit

www.k2e.com/exm-4

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- ◆ **CPE Credit:** Recommended for 4 Hours Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection – laptop friendly, with access to demonstration files
- ◆ **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 MICROSOFT OFFICE 2016

Improving Productivity with New Features

(1/2 Day – 4 CPE Hour Course)

New Course for 2016!

It's here! Microsoft Office 2016 is now available to businesses of all sizes and if you are considering upgrading or have already upgraded, then you will no doubt want to join us for this four-hour seminar in which you will learn about the new features in Office 2016 and how you can, and should, put them to use. Included in Office 2016 are subtle, but important changes to the user interface, such as the following:

- The new "Tell Me " tool that should help you to find "hidden" functionality;
- A major upgrade to Outlook to enhance collaboration;
- Real-time co-editing with other team members in Word;
- New presentation tools with Microsoft Sway; and
- Built-in and improved business intelligence options in Excel with Power Query and enhanced visualization capabilities.

Don't waste a moment of your valuable time trying to learn Office 2016 on your own; instead, let the team at K2 Enterprises assist you in maximizing your return on your investment in Office 2016!

For more details, please visit
www.k2e.com/off-4

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Choose the version of Office 2016 that is the best fit
- ◆ List and work with key new features in Office 2016, including those that facilitate collaboration
- ◆ Configure Office 2016 to enable optimal efficiency
- ◆ Identify potential issues associated with upgrading to Office 2016, including incompatibilities with other applications

Course Information

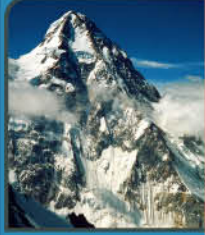
- ◆ **CPE Credit:** Recommended for **4 hours** Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion – laptop friendly, with access to demonstration files
- ◆ **Prerequisites:** Basic understanding of Microsoft Office
- ◆ **Program level:** Update
- ◆ **Advance preparation:** None
- ◆ **Who Should Attend:** Business Professionals who work with Microsoft Office and are considering or have already upgraded to Office 2016

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K2'S MICROSOFT OFFICE EVERYWHERE

(1/2 Day – 4 CPE Hour Course)

Course Description

New Course for 2016!

Finally, you can take it with you! Microsoft now provides tools – many of which are free – to access familiar Microsoft Office applications on virtually all devices, anytime, anyplace, and anywhere. Whether through free apps for your smartphone or tablet, using a web-based service known as Microsoft Office Online, or by synchronizing your data through the Cloud, you can now access applications such as Excel, Word, PowerPoint, and OneNote on your own terms.

Participate in this program to learn how to work with Microsoft Office applications and data on almost every device you use. Further, in this program, you will learn how to use the collaboration features available in Office applications to collaborate securely with other team members and even external contributors. Additionally, you will learn where and how tools, such as OneDrive, OneDrive for Business, SharePoint, Zoho, and Google Drive, fit into the Microsoft Office Everywhere revolution. If you are looking to work with Microsoft Office applications and data from multiple devices and platforms, then this is your chance to learn the best practices for doing so.

For more details, please visit

www.k2e.com/moe-4

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Create, access, and edit Microsoft Office documents on virtually any device
- ◆ Synchronize Office data files across multiple devices
- ◆ Collaborate on Excel, Word, and PowerPoint with selected users
- ◆ Collect data via web-based forms and publish web-based reports
- ◆ Use OneNote to facilitate team collaboration
- ◆ Integrate Office documents across other platforms, including Zoho and Google Drive

Course Information

- ◆ **CPE credit:** Recommended for 4 hours of Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion – laptop friendly, with access to demonstration files
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office applications
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should attend:** Accounting and business professionals who want to work with Microsoft Office anytime, anyplace, and anywhere

K2'S QUICKBOOKS ONLINE

Changing the Paradigm of Small Business Accounting

(1/2 Day – 4 CPE Hour Course)

QuickBooks Online (QBO) has come a long way since its initial release in 2000 and now provides a reliable and robust set of tools for assisting small businesses in managing their finances. In this program, you will learn how to put the power of QBO to work, for you, right from the start. More specifically, you will learn how to setup companies in QBO, how to convert existing QuickBooks to QBO, and how to record common transactions in QBO. You will also learn how to create and distribute reports using QBO and how to work with the powerful features found in QBO for Accountants. Additionally, you will learn the types of companies that are ideal candidates for QBO and the types of companies that should likely avoid using the service.

From basic accounting transactions to accounting for inventory to managing payroll, QBO provides access to many of the tools small businesses need to manage operations more efficiently and profitably. If you are considering converting from another accounting program or Cloud-based accounting service, or if you are curious about Cloud-based accounting options, learn how to put the power of QBO to use by participating in this program.

Good mix of high level commentary and more basic how to info. T.H., NE

For more details, please visit
www.k2e.com/qbo-4

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Identify situations for which QuickBooks Online might be the optimal accounting solution and the potential advantages of Cloud-based, collaborative accounting
- ◆ Differentiate between the various QuickBooks Online service options
- ◆ Identify and utilize various features to improve the accounting function in small businesses
- ◆ Create customized financial and operational reports using QuickBooks Online
- ◆ Convert existing QuickBooks desktop data into QuickBooks Online and download data from QuickBooks Online into the desktop version of QuickBooks

Course Information

- ◆ **CPE credit:** Recommended for 4 hours of Accounting
- ◆ **Instructional delivery method:** Group – live demo and discussion using color computer projection
- ◆ **Prerequisites:** Basic understanding of computer operations and accounting software
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should attend:** Business professionals seeking to utilize QuickBooks Online to its fullest potential

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K2'S SECURING YOUR DATA

Practical Tools for Protecting Information

(1/2 Day – 4 CPE Hour Course)

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

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

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

For more details, please visit
www.k2e.com/sec-4

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Assess the relevant security risks in your organization
- ◆ Identify specific tools and techniques to protect sensitive data
- ◆ List five specific steps to improve PC security
- ◆ Implement security procedures to improve organizational security

Course Information

- ◆ **CPE credit:** Recommended for 4 hours of Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group – live demo and discussion using color computer projection
- ◆ **Prerequisites:** Basic understanding of computer operations
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should attend:** Business professionals seeking to secure sensitive data

K2'S TECH TOOLS AND GADGETS FOR A MORE EFFICIENT YOU!

(1/2 Day – 4 CPE Hour Course)

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

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

For more details, please visit
www.k2e.com/ttg-4

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

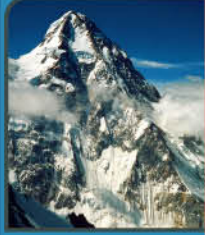
- ◆ **CPE credit:** Recommended for 4 hours of Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group – live demo and discussion using color computer projection
- ◆ **Prerequisites:** Fundamental knowledge of computer operations
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should attend:** Business professionals seeking to leverage technology for improved personal and team productivity

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K2'S TECHNOLOGY UPDATE

(1/2 Day – 4 CPE Hour Course)

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

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

“Excellent class, full of pertinent and useful information.” G.P., CPA AL

For more details, please visit
www.k2e.com/tup-4

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- ◆ **CPE credit:** Recommended for 4 hours Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection
- ◆ **Prerequisites:** Fundamental understanding of basic technology concepts
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should attend:** Business professionals who are interested in how technology affects them and seek an update of relevant technology trends, tools, and techniques

K2'S TOP PDF FEATURES YOU SHOULD KNOW

(1/2 Day – 4 CPE Hour Course)

New Course for 2016!

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

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

For more details, please visit
www.k2e.com/tpf-4

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- ◆ **CPE credit:** Recommended for 4 hours Specialized Knowledge and Applications
- ◆ **Instructional delivery method:** Group-live demo and discussion – laptop friendly, with access to demonstration files
- ◆ **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

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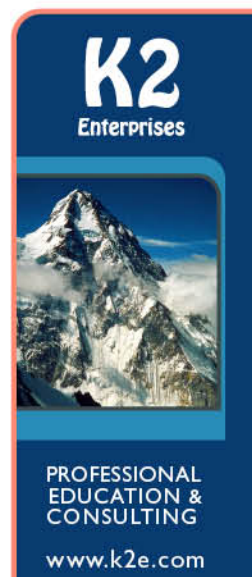
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ON-SITE SESSION DESCRIPTIONS

K2 offers the following sessions, which are typically one to two hours in length and enable you to choose a variety of topics for your eight-hour day. Based on our experience as both speakers and implementers of technology, we design our sessions to meet the practical needs of accountants and other business professionals.

Although we have spent considerable time and effort refining both the session titles and descriptions, we are often able to modify both the session titles and/or the session descriptions to meet the unique needs of your audience. For example, you may wish to change “Technology Update” to “Technology Update for Auditors.” Depending on the instructor and the session, we are sometimes able to make modifications to the actual content of the materials presented. If you are interested in substantially changing the content of a session, we will be glad to have the instructor discuss these changes directly with you.



A New Day, A New Technology Way

As technology continues to evolve, so too must our business practices. Failing to capitalize on new ways and techniques for completing tasks mean that we may be leaving tremendous amounts of productivity on the table. Further, not matching our business processes to today's technologies can jeopardize the security of sensitive information. In both of these cases, the end result is that our organizations are not as competitive as they can and should be.

Don't get left behind! Join us for this session to examine how you can take full advantage of today's technologies to advance your business practices, processes, and workflows so that you and your team are working at peak efficiency.

Accounting Software Update

The world of accounting software has changed, radically, over the last five years. While Cloud offerings have held the spotlight in the recent past, the traditional software vendors have responded with hosted and hybrid Cloud offerings of their own. These new options give businesses of all sizes the ability to access data and collaborate from anywhere, with some providing near real time reporting of key performance indicators. Join us in this session to learn about available accounting, reporting, and analytics options for your organization and/or your clients.

Adobe Acrobat DC – Big Changes for PDFs

With the introduction of Adobe Acrobat DC, Adobe changed the game on how we work with PDF documents. More than just “another new software version,” Acrobat DC offers a number of new outstanding productivity features that you will want to take advantage of including the ability to collect and send documents for e-signatures, fill and sign forms on mobile devices, and collaborate with other users through the Cloud. Features such as these, coupled with significant changes in licensing, means that Acrobat DC is a substantially different product than its predecessors. Join us in this session to learn how to take advantage of all that Acrobat DC has to offer.

Backups – Critical to Every Organization

As long as you have your data, you can recover from business interruptions and disasters. However, are you sure you have all of your data properly backed up? Participate in this session to learn the best ways to backup your data, including using the Cloud, backup appliances, and other techniques. Think about it: can you really afford to take chances with your data?



ON-SITE SESSION DESCRIPTIONS

Best Technologies for Small Businesses

Small businesses face unique challenges when attempting to implement technology. Is the Cloud the right place to do business? What about licensing issues? Should I upgrade my hardware and software? How much is all of this going to cost? Each of these questions – and many more – has likely been asked countless times in small business environments regarding technology. In this session, you will get the answers you need to make better technology decisions for your small business. Join us in this session to gain a unique perspective on the best technologies for small businesses.

Best Tools for Collaboration

Perhaps no technology topic receives more attention today than that of “collaboration,” and for good reason – countless tools exist to facilitate collaboration among multiple parties, including those external to your organization. In this session, you will learn about collaboration tools available from technology leaders, including Google, Microsoft, and Citrix, and how these tools can help you and your team work more efficiently and effectively, regardless of the distance between team members. You will also learn how you can share documents so that each collaborator can access and edit information in real time, without creating multiple copies of the same file.

Beyond Entry-Level Accounting, Reporting, and Analytics

For organizations that are beyond small business accounting software, the choices are seemingly endless. Innovations in on-premise deployments, coupled with a growing list of Cloud-based options change how you should select and deploy your accounting, reporting, and analytics solutions. If you are curious about your accounting, reporting, and analytics options, join us in this session to discover the products and services that represent the best fit for you, your organization, or your clients.

CPA Firm Technology Solutions

Would you like to work less while continuing to provide great client service, superior team member experiences, and the right partner profitability? Applying the right technology to the problems of your firm can accomplish all three of these objectives. In this session, learn about the new and best approaches in technology for CPA firms.

Create Stunning Dashboards with Power BI Desktop

Microsoft has created an alternative environment for creating user-interactive dashboards without Excel. The free Power BI Desktop application allows business professionals to create stunning dashboards using quick and easy drag-and-drop processes, similar to Power View, but without the need to invest in a premium-priced version of Microsoft Office. Power BI Desktop opens a new era in data analysis and reporting. Don't miss this opportunity to see this amazing new reporting tool in action.

Critical Tips for Avoiding Identity Theft

Identity theft is the fastest growing crime in the United States, with approximately 10 million occurrences every year. On average, it will cost the victim several hundred dollars and dozens of hours to resolve. It can cause irrevocable damage to an organization's reputation and change public opinion. This session will examine the major causes, factors, and outcomes of identity theft and organizational security breaches. Participants will be presented with current examples from a wide range of industries and attack types. This session will describe how to identify when theft occurs, what information is most at risk, where the stolen information is used, and best practices on how to prevent it from occurring.

ON-SITE SESSION DESCRIPTIONS

Data Security – Need We Say More?

With so many data breaches and targeted attacks, you should be concerned about the security of your data, and the rapidly-growing volume of data you store, likely, only increases your concerns. In this session, you will learn about some of the recent high profile attacks and how these crimes occurred. More importantly, you will learn about critical security concepts and techniques that will help you minimize the risks of similar attacks affecting you and your organization. In addition, you will learn about the relative strengths and weaknesses of data security in the Cloud, compared to on-premise solutions and storage. If you are concerned about data security – and who isn't – the information you will learn in this session will help address your data security concerns.

Everything iOS

Do you have an iPhone or an iPad? If so, your device runs Apple's iOS as its operating system. Regardless of which release of iOS you have, many business-oriented features of the operating system remain overlooked and underutilized. Join us for "Everything iOS" to learn about all of the practical ways you can put iOS to work, how you can secure your iOS-powered device, and how you can overcome some of the issues related to using iOS in a Windows-dominated world. This is a must session for any iOS user.

Excel's Top 15 All Time Hints and Tips

Take your Excel productivity and efficiency to a new level by learning about fifteen of Excel's greatest features and functions. In this session, you will learn how to turbocharge your Excel workbooks with features such as Fuzzy Lookups and Inquire, along with tips for solving rounding issues and reducing spreadsheet errors. After you complete this session and implement the tips you learn in it, your Excel productivity will be at levels you may have never thought possible.

Five Common Sense Steps to Secure Your PC

Security is paramount to success in today's world, yet most users do very little to take advantage of common sense approaches to securing their PCs. In this session, you will learn how to implement five simple, yet proven steps that will dramatically reduce the risk of data on your computer becoming compromised. Regardless of experience, all participants will be able to implement the tools discussed and demonstrated in this session. Don't miss this chance to stop hackers in their tracks!

Fraud in the Cloud – New Risks in a New Environment

Cloud-based applications have changed the way we work, play, and access information. The benefits and risks associated with software-as-a-service (SaaS) and hosted applications are very different than traditional on-premise information technology.

Some traditional items used in an on-premises forensic investigation, like the transaction audit trail, user access logs, and computer access logs, are often difficult to obtain for Cloud solutions, and may even be unavailable by the time you or your client suspect a crime. In this session, you will learn about some of the new risks associated with Cloud solutions as well as some techniques which can be used to limit these risks.

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ON-SITE SESSION DESCRIPTIONS

Get Organized with Evernote and OneNote

Evernote and OneNote are two of the best tools available for managing your daily activities and related data. Yet few business professionals take advantage of either of these tools and, consequently, items seem to “slip through the cracks.”

Participate in this session to learn how to take advantage of Evernote and OneNote to become better organized in your professional and personal lives. Beyond basic note-taking, you will learn how to link and embed other documents – even including audio and video files – into your notebooks and even how to use Evernote and OneNote in multi-user environments. If you are seeking to stay in control of the ever-rising volume of information to which you are entrusted, then this session is a must for you!

How to Prevent and Detect Spreadsheet Errors

Most who study the topic estimate that approximately 90% of spreadsheets have errors in them! In this session, you will learn how to take advantage of key features available with all editions of Excel to prevent spreadsheet errors. You will also learn how to incorporate tools that became available in Excel 2013 and several add-ins for Excel that can help you to detect errors in your own spreadsheets or in those of your clients. If you are concerned about the accuracy of the results generated by Excel, this session is “must-see CPE!”

Integrating Excel with Word and PowerPoint

Excel is the accountants' tool of choice for analyzing data, and their analyses often find their way into formal reports and presentations. Most accountants and business professionals use simple cut-and-paste processes or re-key their analyses to integrate them into Word and PowerPoint, but these Microsoft Office products offer a full range of options for integrating data among and between them. This session contains all of the tips, tricks, and techniques necessary to ease the process of integrating Excel with Word and PowerPoint.

Our Favorite Apps

Apps are the new way to solve many different business issues. How can you find appropriate apps? How should apps be integrated with legacy systems? Should you create your own apps? Can apps do as much as traditional systems? Attend this session to get a broad overview of useful apps.

Payment Technologies

Though you may not be aware of it, movements are underway to dramatically change how companies of all sizes receive payments from customers and make payments to vendors. One in particular – the EMV initiative – affects every business in the US that accepts credit card payments and will take effect on October 1; businesses that fail to act before the deadline will face enormous risks associated with accepting credit card payments. Other movements focus on alternative payment streams, including PayPal and even Bitcoin. Participate in this session and learn how emerging payment technologies can affect your cash flow and risk.

ON-SITE SESSION DESCRIPTIONS

Personal Technologies

New and exciting technologies appear every year. Though a large portion of these target business users, some are better suited for personal use. New audio and video devices, home security tools, electronic convenience gadgets, and Internet-based finance and personal organization tools are among the personal technologies you will learn about in this session. If you are interested in how to use personal technologies to help manage an increasingly busy lifestyle, then join us for this session, which will surely have a positive impact on you.

PivotTable Refresher

PivotTables remain Excel's most powerful feature, yet, many business professionals continue to avoid using them. In this session, you will learn why you should work with PivotTables and how you can create simple, yet powerful PivotTables with ease. And perhaps best of all, once you master fundamental PivotTables, you will set the stage for even greater productivity by continuing to leverage their usefulness!

Profiting with Excel's Best New Features

Excel is a staple of the business professional's toolbox, yet, all too often, new features remain undiscovered and underutilized, leading to inefficiencies and errors. In this session, you will learn about key new features added to Excel 2013 and Excel 2016 and how to put these features to work. Among the new tools you will learn about are Data Models, Flash Fill, and Enhanced Drill-Down and Around on PivotTables. You will also learn about six new charts added in Excel 2016 and how to use PowerPivot, Power Query, and Power View for business intelligence. Join us in this session to learn about the best new features recently added to Excel and how to put them to work for you and your team to increase productivity, accuracy, and profit.

QuickBooks Online – Advanced Features and Functions

With approximately 1.5 million small businesses now running QuickBooks Online (QBO), accounting professionals must recognize that Cloud-based accounting is here to stay and begin to understand some of the advanced features in QBO that can help small businesses succeed. In this session, you will learn about many of the advanced features available in QBO such as inventory management, audit trails, customized reports, importing and exporting data, bank feeds, and linking QBO data directly into Excel. If you are not using QBO to its fullest or, are a bit curious about the advanced features available in the service, then you should make plans to participate in this session to learn more about what QBO can do for small businesses.

Remote Access Best Practices

Team members want to be able to work from anywhere, anytime on any device. This is one of the marketing messages of public Cloud hosting providers. Internal networks can provide the same style of remote access by using Citrix, Virtual Desktop Infrastructure, or Remote Desktop Services. In this session, you will learn the techniques that will give your users the best experience using what you currently have, and what you should consider for future upgrades.

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ON-SITE SESSION DESCRIPTIONS

Risks and Rewards of Hosted, On-Premise, and Hybrid Solutions

Great hype surrounds the Cloud and Cloud implementations. Yet, you wonder is the Cloud right for your organization? What are the pros and cons of this approach? What are the benefits of remaining with an on-premise solution? Perhaps mixing the Cloud with some on-premise technologies to create a hybrid solution is the optimal approach for you. Attend this session to understand your options, costs, risks, and rewards, and how to implement and manage the solution best for you and your team.

Securing the Perimeter – A Management View

Security is, and should be, on everyone's radar. Whether you control security choices or not, you can raise your awareness and ask the right questions by attending this session. Understand the changes in firewalls, anti-virus, encryption and other tools so you can ask the right questions of your team or contractors. This session will also help you understand the risks you currently have and provide ideas on how to mitigate and minimize your exposure.

Should Your Next Computer Even Be a Computer?

With ever-increasing power built into tablets, convertibles, and smartphones, do you really need a desktop or laptop computer anymore? If you could run all of your applications and services from a mobile device that is connected to a full-size monitor and keyboard, would this cause you to re-think future computer purchases? Across the spectrum of major mobile operating systems – Android, iOS, and Windows Mobile – it is becoming increasingly possible to operate exclusively from a single mobile device and, in this session, you will learn just how practical it may be for you to do precisely that. If you are trying to simplify your technology footprint, join us in this session to learn whether you really need, yet, another new computer.

Tech Update

There is more new technology to consider this year than almost any other year in the last decade. Hardware and software businesses are changing quickly, the Cloud impacts business decisions, mobile strategies are becoming more clear, and the Internet of Things is a game-changer on all fronts. In this keynote session, you will learn how to create a technology roadmap that helps improve organizational efficiency and avoid pitfalls.

Technology Policies to Protect Your Organization

With so many internal and external threats to your organization, complicated by the mixture of Cloud, on-premise, and hybrid solutions, the complexity of protecting your data is increasing. More than ever, your policies and internal control procedures can help protect your sensitive and confidential data. In this session, you will learn about critical policies that you need to have in place, including acceptable use policies, encryption policies, and mobile device management policies. You will also receive samples of recommended policies, along with guidance for implementing them, and the potential impact of inaction. One idea or recommended action learned in this session could prevent a catastrophic loss in your firm.

The Internet of Things

We live and work in an Internet-connected world and, increasingly, various Internet-connected devices are appearing to help us solve countless problems. Collectively, these devices constitute “The Internet of Things (IoT).” In this session, you will learn about IoT along with how to deploy plans for connectivity, privacy, security, and management. Additionally, you will learn numerous apps and services that can assist with specific tasks, without requiring additional hardware.

ON-SITE SESSION DESCRIPTIONS

Top Ten Technology Articles You Should Have Read

K2 Enterprises team members are often asked how they keep up with the rapid and never-ending changes in the world of business technology. The answer is simple – hard work and lots of reading and research. In this session we share what we think are the best of the best with respect to articles about technology changes, trends, and significant advances. The list of articles chosen are a consensus of the K2 team and represent what we think are the best of the best with respect to explaining practical new technologies and technology trends.

Using Tables, PivotTables, and Queries to Automate Reporting

Many accounting reports start out as lists of information. Users push this data into Excel from a general ledger, ERP, or some other database. Then they transform the data into reports by inserting and deleting rows and columns and adding calculations. This approach takes lots of time and is highly prone to errors. Using the database features of the Excel's Table feature, you can streamline this process and at the same time significantly reduce the risk of errors. Combine these new capabilities with live data queries and Excel reporting can be faster and easier than you ever imagined. Attend this session to find out how to create better Excel reports with less time and effort.

Welcome to the New World of Microsoft

In quiet and not-so-quiet ways, Microsoft has changed. Previously considered to be a software company, Microsoft now sells hardware, software, and subscription-based and Cloud-based services. With the Surface and Surface Pro and the acquisition of Nokia's phone business, Microsoft is making waves with tablets and mobile phones. In the traditional software market, Microsoft Office, Microsoft Dynamics solutions, the venerable Windows operating system, Windows Server, and many other titles remain available, but licensing options have changed. In the Cloud, tools such as Azure, OneDrive, and OneDrive for Business continue to gain traction. In this session, you will learn about many of the tools and services available from Microsoft, how they can increase productivity, enhance security, and provide greater access to mission-critical information. You will also learn strategies for managing licensing costs and how to deploy Microsoft hardware and software most effectively.

Windows 10 Tips and Tricks

You've made the move to Windows 10. The Start Menu has returned and its Cloud integration is obvious, but most everything else is unfamiliar. This session will help you setup and customize Windows 10 and improve its performance, security, and privacy. From navigation to setting default applications to configuring backup, this session provides the needed guidance. Plus, we will introduce you to virtual desktops, the digital assistant, the unified notifications area, and provide a detailed overview of the Settings area – where you can configure the core of Windows 10 settings. Don't miss this opportunity to jump start your transition to Windows 10.

Workflow to Benefit You and Your Clients

Workflow provides an opportunity to improve your practice along with team member and client experience. Improvement in both manual and automated processes can minimize missed deadlines and due dates, improve scheduling of resources, and reduce the amount of effort required to complete engagements. This overview will list opportunities in your firm where workflow can make a difference in the amount of effort from your team to provide client deliverables. Learn how to develop your own customized workflows for your practice, and discover tools and techniques for implementation.

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INSTRUCTORS AND STAFF

Experience of K2 Enterprises Instructors

Every instructor for K2 Enterprises has had a long history of teaching seminars. We have been providing quality technology seminars for over 30 years. As you can see from our instructor biographies, our teaching team is made up of highly experienced, nationally recognized speakers. We are anxious to do whatever it takes to meet your needs. We encourage you to call our home office at **(888) 542-9390** for all seminar orders, questions, problems, or to contact an instructor.

Instructors

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Randolph P. Johnston, MCS	Hutchinson, KS	39
Val D. Steed, CPA.CITP, MA	Centerville, UT	40
Thomas G. Stephens, CPA.CITP	Woodstock, GA	41
John K. Keegan, CPA.CITP	Oakhurst, NJ	42
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Steven M. Phelan, CPA.CITP	Oklahoma City, OK	44
Brian F. Tankersley, CPA.CITP	Farragut, TN	45
Stephen M. Yoss, Jr., CPA	Claremont, CA	46

Support Staff

Caron Choate – Accounting	Hammond, LA
Pam Falconello – Brochures and Manuals	Hammond, LA
Casey Sims – Materials	Hammond, LA
Cheryl Perret – Scheduling and Reservations	Hammond, LA
Regina Bankston – Course Monitoring	Hammond, LA

RANDOLPH P. (RANDY) JOHNSTON, MCS

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Randy Johnston is a nationally recognized educator, consultant, and writer with over 30 years' experience in Strategic Technology Planning, Accounting Software Selection, Paperless, Systems and Network Integration, Business Continuity and Disaster Recovery Planning, Business Development and Management, Process Engineering and outsourced managed services.

K2 Enterprises
(K2E.com)
1990 – Present
Hammond, LA

Network Management Group, Inc.
(NMGI.com)
1983 – Present
Hutchinson, KS

Hutchinson Community College
1977 - 1997
Professional Data Services
1978 - 1981

Farmland Industries
1977 - 1978

Hutchinson Community College, 1975
Kansas State University, 1977
Wichita State University, 1981

Accounting Today
CPA Practice Advisor
Accounting Technology
AICPA Technology Conference
Who's Who in Business & Industry –
1990-2016; in Computing 1987-2016

Microsoft Corporation
Novell Corporation
AutoDesk, 3Com, Entre'

Various publications 1978 - Present

Mitchell Publishing - 1981
Random House - 1982
McGraw Hill - 1984
John Wiley & Sons Publishing - 2002
K2 Enterprises – 2003-2012

EXPERIENCE

Executive Vice President, Shareholder – Nation's leading technology CPE provider to CPA professionals. Consults to high profile technology vendors. Delivers national seminars to CPAs, business groups and IT leaders on technologies in accounting, healthcare and banking. Creates and presents seminars and articles on 30+ technology topics including CPA Firm Technology, Cloud, Paperless, Business Continuity, Accounting Software and Business Strategies leveraging technology.

Chairman & CEO, Stockholder – Consults and specializes in Strategic Technology including planning, selection and implementation. Expertise: CPA Firm Technology and strategy; Paperless; Accounting Software, Business Intelligence and CRM; Infrastructure including: Cloud, Business Continuity, Virtualization, Backup, and remote management.

Department Chair, Professor, Adjunct - Mathematics & MIS Depts. Designed and taught courses in all areas of mathematics & computing.

Programmer and system designer - Developed a medical system including the first paperless claims in Kansas, appointments and collection systems. Owned ComputerLand, Entre' and Connecting Point stores, received first IBM PC and first Compaq portable in Kansas
Programmer and system designer - Developed and maintained P&L, Credit Union and Feedlot accounting

EDUCATION

A.A. in Computer Science, Math
B.S., summa cum laude, in C.S., Math, Science
Masters of Computer Science, 60+ post graduate hours

ACKNOWLEDGEMENTS

Listed as one of the 2004-2015 Top 100 Most Influential People
Accounting Hall of Fame 2011, Top 25 Thought Leader 2011-2016
Listed as one of the top nine technology stars in the industry
Past Chair and featured Speaker for the past 29 years.
Acknowledged as leading business professional and as a leading computing professional

CERTIFICATIONS

Microsoft Certified Professional – MCP
Certified Network Administrator – CNA
Certified CAD specialist, Network Professional, Data Communications

PUBLICATIONS

CPA Practice Advisor monthly columnist, Journal of Accountancy, CRN, Accounting Technology, PCWeek, InfoWorld, Interface, State Society newsletters, frequent quotes in accounting and computer press.

Basic Using Micros

Business Computing Systems

Computers: An Introduction

Technology Best Practices

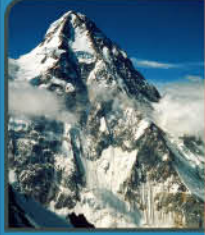
Accounting Software Solutions

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www.k2e.com



VAL D. STEED, CPA.CITP, MA

Shareholder, K2 Enterprises

Centerville, Utah

val@k2e.com

Awards and Recognition

- *Accounting Today's* Top 100 Influential Accounting Professionals
- AICPA Certificate of Appreciation - Strategic Planning Committee
- Alumni Professional Achievement Award – Utah State University
- Outstanding Discussion Leader Award – Indiana Society of CPAs
- Outstanding Discussion Leader Award – Utah Association of CPAs
- Three year recipient of AICPA Outstanding Discussion Leader Award

Professional Service

- Three-year Member - ***AICPA's Strategic Planning Committee***
- Four-year Member - ***AICPA's Information Technology Executive Committee***
- Five-year Member - ***AICPA's Microcomputer Conference Committee***
- **Chair** of the ***AICPA's Technology Conference***
- Two-term **Chairperson** of the ***Consulting Services Committee***
- Two-term **Chairperson** - ***CPE Committee for the Utah Association of CPAs***
- Life-Loyal Sigma Chi

Val Steed graduated from Utah State University where he received both his Bachelors of Science (BS) in Accounting and his Masters of Accounting (MA).

After college, Val worked for **Deloitte Haskins and Sells** of Salt Lake City, Utah, and then with **Hansen, Steed, Bradshaw & Malmrose P.C.** of Salt Lake City. Val was with **Hansen, Steed, Bradshaw & Malmrose P.C.** for eleven years and was a shareholder for six years before leaving to start **K2 Enterprises**. Currently, Val is the CEO of K2 Enterprises which is a national technology training and consulting organization. He has twelve years experience in public practice and has been involved with the accounting technology industry for more than 30 years.

THOMAS G. (TOMMY) STEPHENS, CPA.CITP, CGMA

Shareholder, K2 Enterprises

Woodstock, Georgia

tommy@k2e.com

Thomas G. Stephens, Jr., received a Bachelor of Science in Business Administration degree (Major in Accounting) from Auburn University in 1985. Upon graduation, Mr. Stephens began working for an Atlanta-based public accounting firm. After earning his designation as a Certified Public Accountant, Mr. Stephens worked for BellSouth Corporation in Atlanta as an Internal Auditor. After two years as an auditor, he was promoted to Staff Manager and then Operations Manager of the Internal Audit Group. In 1991, he transferred to the Comptrollers' department of BellSouth and served as Manager of the Cost Accounting organization. While working full-time at BellSouth Corporation, Mr. Stephens also attended graduate school, earning a Masters of Science (Major in Finance) from Georgia State University in 1992.

Mr. Stephens left BellSouth in 1994 and opened his public accounting practice in the metropolitan Atlanta area. In his practice, Mr. Stephens provided accounting, tax, and consulting services to individuals and a wide variety of small and emerging businesses. As part of his practice, he developed a successful consulting practice providing installation and support services of small business accounting software. Additionally, he began authoring and presenting continuing professional education courses to accounting and finance professionals. In 2003, Mr. Stephens affiliated with K2 Enterprises and in 2007 he joined the firm as a partner. To date, he has lectured nationally on subjects such as internal controls for small businesses, technology strategies, computer hardware and software applications, tax strategies and compliance, and financial accounting standards and applications. Over the past nineteen years, Mr. Stephens has presented in excess of 1,900 educational sessions to over 58,000 participants nationwide.

Presently, Mr. Stephens resides in Woodstock, Georgia where, in addition to his association with K2 Enterprises, he provides consulting services to small businesses and CPA firms. In addition to an active professional career, Mr. Stephens enjoys an active personal life as well. He and Michelle -- his wife of thirty years -- have two children. His hobbies include snow skiing, fishing, and running. Additionally, Mr. Stephens maintains professional memberships with the American Institute of Certified Public Accountants and the Georgia Society of Certified Public Accountants and is a past member of the Institute of Internal Auditors.

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JOHN K. KEEGAN, CPA.CITP

Associate, K2 Enterprises

Oakhurst, New Jersey

john@k2e.com

John Keegan has been in the accounting and computer fields for 30 years. He has worked in organizations ranging in size from a small, family-owned business to one of the largest departments of the U.S. government. In each position, John designed and implemented changes to improve processes. He received a commendation for outstanding performance for his work while at the Department of the Army. During his tenure at a nation-wide food distributor, John received *Employee of the Year* awards due in part to his use of spreadsheets in tracking and communicating information. Currently, John is the Chief Financial Officer of a large medical practice. In addition to the usual accounting and management requirements, he is responsible for improving all manner of information management and reporting. He is also an associate of K2 Enterprises where he lectures on technological solutions for business problems. Both roles give him the great opportunity to develop and apply solutions to real world challenges, and help others in similar situations.

John has earned several financial and technology certifications during his career. He is a Certified Public Accountant (CPA), Certified Treasury Professional (CTP), Financial Planning and Analysis (FP&A) Professional, and Chartered Global Management Accountant (CGMA). John is also a Certified Information Technology Professional (CITP), and Microsoft Certified Trainer and Office Master.

LAWRENCE A. (MAC) MCCLELLAND, MBA, JD

Associate, K2 Enterprises

Carriere, Mississippi
mac@k2e.com

Mac McClelland, an attorney and accounting professional, is an associate of K2 Enterprises of Hammond, Louisiana, and Network Management Group of Hutchinson, Kansas.

Mac was formerly the director of the Centre for Financial Studies at the University of Otago in Dunedin, New Zealand, where he lived and worked for seven years from 1990 to 1997. He was also a member of the faculty of the Advanced Business Programme, ranked in the top 100 MBA programs in the world by *The Economist*, specializing in business strategy and strategic management accounting.

He gained his practical experience in information systems with the National Aeronautics and Space Administration, and has an established practice in business and technology consulting. Mac has taught hundreds of continuing professional education seminars to accountants and business managers in the United States, New Zealand, Australia, Japan, and Southeast Asia. His presentations are highly rated, and he has won several awards for teaching excellence.

Mac has been published in leading business and practitioner journals, including *Tax Ideas*, *Computers in Accounting*, *Journal of Accounting Education*, *Chartered Accountants Journal of New Zealand*, and the top-rated *Journal of Accounting Research*.

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STEVEN M. PHELAN, CPA.CITP

Associate, K2 Enterprises

Oklahoma City, Oklahoma

steven@k2e.com

Steven M. Phelan, CPA.CITP manages an accounting practice based in Oklahoma City, Oklahoma. Areas of practice include taxation, accounting, business advisory and technology consulting services. He is both a Certified Public Accountant and Certified Information Technology Professional and received his Bachelor of Accountancy degree from the University of Oklahoma. He also holds several vendor specific software certifications.

Steven is a member of the Oklahoma Society of CPAs (OSCPA) and the American Institute of CPAs. Through the OSCP, he has served on the board of directors, was instrumental in creating the New CPA Committee, served as chair of the Technology Committee and has served on numerous other committees. In 2012, Steven was selected as a Trailblazer, an OSCP member under 40, recognizing innovation, professional dedication and community commitment. He also received the OSCP President's Award for his work with the New CPA Committee. Steven is active in the Mustang, Oklahoma community and most recently served as Treasurer for Friends of the Mustang Public Library, Inc.

Steven was added as a discussion leader for K2 Enterprises in 2013. Through K2 Enterprises, Steven speaks to CPAs throughout the nation covering a variety of computer software and technology related topics. Mr. Phelan is also a frequent speaker at seminars and conferences sponsored by a variety of state and local organizations.

Steven has written a number of technology related articles for state and national publications. He is a frequent contributor to *CPA Practice Advisor* where he reviews tax and accounting related software solutions.

BRIAN F. TANKERSLEY, CPA.CITP, CGMA

Director of Strategic Relationships, K2 Enterprises

Farragut, Tennessee
brian@k2e.com

Brian Tankersley is a consultant who *advises US firms and companies on accounting technology issues*. Mr. Tankersley is a frequent speaker at continuing education courses for K2 Enterprises, and publishes a nationally recognized blog on accounting and technology (www.cpatechblog.com). He has also served as the technology editor for a major accounting industry publication. Mr. Tankersley has over 20 years of professional experience, including accounting, auditing, technology, and education, and has been with K2 Enterprises since 2005.

Tankersley has been recognized annually as one of the “Top 25 Thought Leaders in Public Accounting Technology” for 2011-2014 by Cygnus Business Media. Tankersley is also one of the principal authors of the *Accounting Firm Operations and Technology Survey*, which has been published annually for the last three years. Brian has made presentations in 46 of the 50 US states and has *served as a guest speaker for many professional accounting organizations across Canada*. He received the Outstanding Discussion Leader Award from the Tennessee Society of CPAs in 2009 and 2013, and was recognized for writing the Article of the Year for the *Tennessee CPA Journal* in 2011. Brian has presented sessions at many national conferences, including AICPA TECH+/Practitioners Conference, The Sleeter Group’s Solutions Conference, Sage Insights, CCH Connections, and Thomson Reuters Synergy User Conference.

Brian is a certified public accountant (Tennessee), a certified information technology professional (CITP), and a Chartered Global Management Accountant (CGMA). He holds bachelor’s degrees in both Accounting and Finance, cum laude, from the [University of Tennessee](http://www.universityoftennessee.edu). He Tankersley also maintains numerous vendor software certifications, and is a member of the [Tennessee Society of CPAs](http://www.tennsocietyofcpas.org) and the [American Institute of CPAs](http://www.aicpa.org).

Brian and his family make their home in Farragut, Tennessee.

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STEPHEN M. (STEVE) YOSS, JR., CPA

Associate, K2 Enterprises

Claremont, California

steve.yoss@k2e.com

Stephen M. Yoss, Jr., CPA, is a senior technology strategist and principal of MantisPRO, a company that focuses on helping organizations develop a technology strategy to streamline their business operations. Stephen has consulted with several companies on how to lower overhead, personnel, and compliance costs by investing in technology and reengineering their business practices. He teaches his clients to embrace technology at every opportunity in order to increase efficiency and productivity. MantisPRO's specialty is designing and building cloud based workspaces for companies to conduct all their operations virtually.

Prior to starting MantisPRO, Stephen worked as an accountant in his family's accounting practice, Yoss & Allen. While working there he became a Certified Public Accountant and completely redesigned the firm's technology practices. Many of the technologies he consults on today were first designed, perfected and implemented in his family's practice and with their clients. Stephen has also spent time working abroad as a management accountant in New Zealand.

Stephen began working with technology at age ten, and started his first IT company at age 13, designing web applications for local businesses. He started writing original computer code at age 15 and has been working with technology ever since. Stephen is a graduate of Loyola Marymount University and holds degrees in Accountancy and International Business. He is currently pursuing a graduate degree in Information Systems and Technology at Claremont Graduate University. His research is focused in the areas of corporate technology and education technology strategy. He has been teaching professional continuing professional education since 2009 in self-study, webcast, in-house, and live formats. He has presented to thousands of practitioners nationwide on topics such as cloud computing, mobile technology, spreadsheet design and best practices, information security, identity theft prevention and many more. Apart from working in technology and accounting he is a professional licensed pyrotechnician and works on major firework displays around the country. He lives in Claremont, California.