



K2 GoToTraining LIVE Webinars

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K2's Accessing and Cleaning Data with Excel, Power Query, and Power BI

Data Mining, Excel, Power BI | Data Mining, Excel, Power BI

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/12/2018	11:00 AM	89.00	2	WK2-ACD184
12/11/2018	11:00 AM	89.00	2	WK2-ACD185

9/12/2018	11:00 AM	89.00	2
12/11/2018	11:00 AM	89.00	2

Course Description

While there are a wide range of ways to analyze data, one must first retrieve, scrub, and organize data effectively before any of those techniques can be used. This session will help users understand and utilize end user data retrieval tools like Microsoft Power Query as well as content packs for Microsoft Power BI to connect, retrieve, reorganize, and create scripts to automatically reformat data of all kinds from a wide variety of sources. Attend this session and learn to use these powerful tools to solve and automate your data extraction and transformation processes.

Major Topics

- *Learn about Power Query and begin using it to automate your data importing and formatting to make your work more productive
- *See how content packs largely automate the retrieval of information from a wide range of applications
- *Review powerful techniques for rearranging your data quickly in Microsoft Excel

Learning Objectives

Upon completing this course, you should be able to:

- *Define the major components included in Microsoft Power Query and Power BI Content Packs
- *Explain how Power Query fits into the Microsoft self-service Business Intelligence ecosystem (Power Query, Power Map, Power Pivot, Power View, and Power BI)
- *List the types of data sources which can be accessed using Power Query, Power Pivot, and Power BI Content Packs
- *Describe how Power Query transformations can be used to reformat, combine, and rearrange data retrieved from a wide range of sources
- *Explain how Power BI and the Excel Data Model provide ways to use this data to create effective reports

Who Should Attend: Excel users who regularly use data exported or extracted from other software

Course Level: Intermediate

CPE Credits: 2 Hours Information Technology

Prerequisites: Basic knowledge of Excel

Advance Preparation: None

K2's Adobe Acrobat DC - Big Changes for PDF

PDF, Adobe Acrobat DC | PDF

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/11/2018	11:30 AM	89.00	2	WK2-ADC183
12/13/2018	11:30 AM	89.00	2	WK2-ADC184

Course Description

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. These features, 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.

Major Topics

- * Collect and send documents for e-signatures
- * Fill and sign forms on mobile devices
- * Collaborate with other users through the Cloud

Learning Objectives

Upon completing this course, you should be able to:

- * Distinguish between Acrobat DC and its predecessors and between the Standard, Pro, and subscription-based offerings within the Acrobat DC family
- * Utilize new features in Acrobat DC, including sending and tracking documents online and collecting e-signatures on PDFs
- * Edit and markup PDFs using Acrobat DC's re-designed user interface
- * Collaborate on PDFs with others using Acrobat DC's Cloud options
- * Manage and manipulate PDFs with Acrobat DC on mobile devices and tablets

Who Should Attend: Accounting and business professionals who want to become more efficient in using Adobe Acrobat DC

Course Level: Intermediate

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Good working knowledge of Adobe Acrobat and PDF documents

Advance Preparation: None

K2's Array Formulas - Exceptional Power at Your Finger Tips

Excel, Array Formulas | Excel

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
12/19/2018	11:00 AM	89.00	2	WK2-HPA184

Course Description

Array formulas, which work on arrays of data rather than individual cells or ranges, allow users to make calculations that would otherwise be impossible with ordinary formulas. They can perform multiple discrete calculations in a single cell or return results to multiple cells. For example, an array formula can be used to round off totals or subtotals, a feat that is impossible to accomplish with an ordinary formula. Don't miss this opportunity to harness the power of array formulas to improve your analytical abilities in Excel.

Major Topics

- *Basic syntax of array formulas and how to enter them from the keyboard
- *Creating array formulas useful to accountants and other financial professionals
- *Using SUMPRODUCT as an alternative to array formulas in some situations

Learning Objectives

Upon completing this course, you should be able to:

- *Explain array formulas and how they differ from ordinary formulas
- *Identify an array formula from the Formula Bar
- *Compose array formulas from the keyboard
- *Describe common accounting situations where array formulas would be useful

Who Should Attend: Accountants and business professionals who want to better understand array formulas and put their power to use in common accounting and business scenarios

Course Level: Intermediate

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Good working knowledge of Excel with a fundamental understanding of Excel formula building

Advance Preparation: None

K2's Blockchain and Other Emerging Technologies

Blockchain, Emerging Technologies | Blockchain, Emerging Technologies

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/13/2018	2:00 PM	89.00	2	WK2-BOE182

Course Description

The next big wave of disruptive technology is already pulling into the station. Each emerging technology - Blockchain, Artificial Intelligence, and Machine Learning - why it's important and how it works will be explained in this session. To learn more about these disruptive technologies - their capabilities, their risks, their potential impacts on business operations and processes, and their potential effects on the accounting profession - make plans to participate in this fast-paced and informative session.

Major Topics

- *Why emerging technologies should be considered for business
- *How each major emerging technology works
- *What solutions are available for implementation now

Learning Objectives

Upon completing this course, you should be able to:

- *List three major emerging technologies
- *Identify at least four possible uses for blockchain ledgers
- *Describe a business case for machine learning
- *Differentiate machine learning from artificial intelligence
- *Name a current use for artificial intelligence

Who Should Attend: Accountants and finance professionals who want to understand the power of emerging technologies and how they may be put to productive use

Course Level: Basic

CPE Credits: 2 Hours Information Technology

Prerequisites: None

Advance Preparation: None

K2's Create Stunning Dashboards with Power BI Desktop

Excel, Power BI | Excel

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/4/2018	11:00 AM	89.00	2	WK2-CSD183
12/21/2018	2:00 PM	89.00	2	WK2-CSD184

Course Description

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 Excel 2013/2016. If you have an older version of Office, are using a Mac, or have large data sets that require the additional memory space of a 64-bit application, Power BI Desktop is for you. It has more than twice the data visualizations in Power View and connects to more external data sources. 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.

Major Topics

- * Connecting to external data sources with Query
- * Transforming data to support reporting and analysis
- * Dragging and dropping fields on the Power BI report canvas
- * Applying data visualizations to tabular data
- * Adding slicers to filter Power BI reports
- * Publishing reports to PowerBI.com

Learning Objectives

Upon completing this course, you should be able to:

- * Describe the advantages of Power BI Desktop and list relevant limitations associated with using Power View to produce similar reports
- * Identify how to acquire Power BI Desktop and a PowerBI.com subscription
- * Explain how to work with data models in Power BI Desktop
- * List ways in which data can be displayed and presented on a Power BI report
- * Describe how Power BI reports present information better than tabular reports

Who Should Attend: Accountants and finance professionals responsible for analyzing and presenting information from large amounts of data

Course Level: Advanced

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Users of Microsoft Office that have a good working knowledge of Excel, charts, tables, and PivotTables

Advance Preparation: None

K2's Critical Tips for Avoiding Identity Theft

Identity Theft, Security | Identity Theft

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/26/2018	11:30 AM	89.00	2	WK2-CTI184
12/12/2018	11:30 AM	89.00	2	WK2-CTI185

Course Description

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.

Major Topics

- * Examples of identity theft attacks
- * Identify when theft occurs
- * Information most at risk
- * Best practices for preventing identity theft

Learning Objectives

Upon completing this course, you should be able to:

- * List and classify potential threats in technology areas that leave organizations susceptible to privacy breaches, data theft, and distribution
- * Contrast the potential benefits and risks of allowing internal staff to use their personal technology devices for organizational projects
- * Build an action plan to safeguard personal and organizational data from potential threats
- * Identify the threat factors and areas of risk based on industry profile
- * Implement data security best practices for personal and organizational information

Who Should Attend: Accounting and business professionals responsible for information security

Course Level: Basic

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: None

Advance Preparation: None

K2's Data Consolidation and Combination in Excel

Excel, Data Consolidation | Excel

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
12/19/2018	2:00 PM	89.00	2	WK2-DCC183

Course Description

Combining data from multiple sheets or workbooks is daily fare for most accountants, yet many professionals do not fully appreciate the breadth of Excel options available for accomplishing this task. From simple sum-through formulas to auto-merging workbooks to consolidation PivotTables, this session comprehensively covers the full range of Excel data consolidation functionality. Simplify and streamline your data consolidation processes, improve your personal productivity, and reduce errors with the information contained in this feature-packed session.

Major Topics

- *Using Excel's SUM function to simplify the sum-through formula building process
- *Adding or removing worksheets from a sum-through total
- *Working with Excel's Data Consolidate function to consolidate data by position or category
- *Building sum-through formulas with wildcard characters
- *Using PivotTables to consolidate data in the same workbook or multiple workbooks

Learning Objectives

Upon completing this course, you should be able to:

- *Differentiate the advantages and disadvantages of using the SUM function to produce sum-through formulas as compared to simple arithmetic formulas
- *Implement dummy end-point worksheets or columns to simplify the data consolidation process and reduce errors
- *Identify situations where wild-card characters may be used effectively in combining data from multiple worksheets
- *Differentiate between using Data Consolidation by position and by category
- *Use consolidation PivotTables to combine data from multiple worksheets and/or multiple workbooks

Who Should Attend: Accounting and finance professionals who calculate summaries from consolidated or combined data

Course Level: Intermediate

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Basic working knowledge of Excel

Advance Preparation: None

K2's Detecting and Preventing Spreadsheet Errors

Excel | Excel

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/11/2018	11:00 AM	89.00	2	WK2-DPS183

Course Description

preadsheet error rates are at alarmingly high levels and have remained stuck there for years. In fact, many professionals who study this topic estimate that approximately 90% of spreadsheets contain errors. One organization - the European Spreadsheet Interest Group - identifies the top three reasons for spreadsheet errors as: 1) human error, 2) fraud, and 3) overconfidence. Regardless of the cause of spreadsheet errors, in an era in which business professionals rely increasingly on spreadsheets, the current error rate is not acceptable. In this session, you will learn techniques to help prevent and detect spreadsheet errors so that you will have confidence in the spreadsheets used by your organization.

Major Topics

- *Designing and building spreadsheet models using best practice techniques
- *Utilizing six specific techniques to reduce spreadsheet errors
- *Documenting workbooks using the Inquire add-in
- *Customizing and using error checking in Excel

Learning Objectives

Upon completing this course, you should be able to:

- *List the five principles of good spreadsheet design
- *Reduce the number of formulas used in analysis
- *Identify at-risk formulas in spreadsheets
- *Utilize Inquire feature to manage the process of documenting and auditing spreadsheets
- *List various add-ins for Excel that can help improve accuracy

Who Should Attend: Accountants and finance professionals who want to reduce errors in the spreadsheets used by their organization

Course Level: Intermediate

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Good working knowledge of Excel

Advance Preparation: None

K2's Do It Yourself Business Intelligence

Business Intelligence | Business Intelligence

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/11/2018	2:00 PM	154.00	4	WK2-DBI183

Course Description

Microsoft has created two parallel environments for delivering business intelligence reports and dashboards. One uses Excel and the four premium data-analysis add-ins (PowerPivot, Power View, 3D Maps, and Power Query) available in Office Professional Plus and the standalone version of Excel. The other environment uses the cloud-based tools of Power BI and the free Power BI Desktop application to create dashboards without Excel. Both environments allow business professionals to create user-interactive tabular reports and dashboards using quick and easy drag-and-drop processes. Don't miss this opportunity to see and evaluate these outstanding business intelligence solutions in action.

Major Topics

- *Understanding the applications and services required to use Power BI effectively
- *Using the Power BI tools to produce financial and operational analysis
- *Publishing completed analysis to Power BI
- *Overview of the devices and applications used for consuming BI content

Learning Objectives

Upon completing this course, you should be able to:

- *Identify the desktop applications, server components, and Office 365 subscriptions for producing and delivering analytics
- *Describe the process of accessing external data for analysis
- *Use PowerPivot, Power View, and Power Map to produce user-interactive analysis
- *Explain how to use Power Query to find, clean, transform, and merge data from multiple sources
- *Describe the advantages of using Power BI Desktop and identify the limitations of using Power View
- *Identify how to acquire Power BI Desktop and a PowerBI.com subscription
- *List several ways in which data can be displayed and presented on a Power BI report
- *Describe the process of publishing Power BI analysis for use by others

Who Should Attend: Accountants and business professionals who want to harness the power of business intelligence functionality using the premium Excel add-ins or the cloud-based tools of Microsoft Power BI.

Course Level: Advanced

CPE Credits: 4 Hours Information Technology

Prerequisites: Good working knowledge of Excel and PivotTables

Advance Preparation: None

K2's Emerging and Evolving Technology Standards for Accountants: Don't Get Left Behind

Emerging Technology | Emerging Technology

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/12/2018	4:30 PM	89.00	2	WK2-EET183
12/31/2018	4:30 PM	89.00	2	WK2-EET184

Course Description

Innovations like 5G cellular communications, TCP/IP v6, software defined networks, virtual machines, application containers, and new standards like Bluetooth 5, 802.11ah, 802.11ac, Thunderbolt 2, SIP and PCIe will have a significant impact on your technology decisions in 2018 and beyond. This session will help decisionmakers understand the impact of these changes and help them learn how they can adapt their personal and corporate technology strategies to take advantage of the new opportunities provided.

Major Topics

- *Emerging communication technologies like 5G and IPv6, and why they are important
- *Public cloud computing like Amazon, Azure, and Rackspace, and the basic terms underlying it
- *Emerging technology standards and how they will affect your IT environment

Learning Objectives

Upon completing this course, you should be able to:

- *Define 5G and list at least three ways it is different from existing cellular technologies (faster, more secure, based on IPv6, higher frequency, shorter range, etc.)
- *Define software defined networks, virtual machines, and application containers and explain how they make modern public data center services like Amazon Web Services, Google Compute Engine, and Microsoft Azure possible
- *Define SIP, VOIP, and unified communications, and explain how they work together to enable anytime, anywhere conversations on any device
- *List and define at least three new standards which will be implemented on new hardware devices in the coming years. (Bluetooth 5, 802.11ah, USB type C, Thunderbolt 2, M2 NVME over PCIe, etc.)

Who Should Attend: Accounting and business professionals who want to strengthen their understanding of key emerging tech standards

Course Level: Intermediate

CPE Credits: 2 Hours Information Technology

Prerequisites: Have some limited/basic knowledge of technology strategy and standards

Advance Preparation: None

K2's Excel 2013-2019 - Best New Features for Accountants

Excel 2013-2019 | Excel 2013-2019

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
12/19/2018	4:30 PM	89.00	2	WK2-EBF183

Course Description

Excel 2013 was a watershed release with many outstanding new features - automated analysis with recommended PivotTables and charts, pure power analysis with the Power View and PowerPivot add-ins, and advanced workbook auditing with Inquire. Excel 2016 and 2019 continues the trend with six new chart types, forecast sheets, and Power Query integration. But that's not all! The latest versions of Excel provide powerful and easy to use new features like Flash Fill, Timelines, Quick Explore drill down and around, Combo charts, and the ability to open workbooks in their own window without losing the ability to copy and paste between workbooks. Attend this webinar and learn how to put the power of Excel 2013-2019 to work immediately to improve your productivity.

Major Topics

- *Automated analysis with Quick Analysis, Recommended Charts, and Recommended PivotTables
- *Quick and easy data filtering with Timelines and Slicers for tables
- *Split, combine, or rearrange data quickly and easily with Flash Fill
- *Better charting, including standalone Pivot Charts
- *Drill down and around with Quick Explore
- *Powerful data analysis with PowerPivot and Inquire
- *Ease time series forecasting with Forecast Sheets
- *The Excel Data Model and table Relationships

Learning Objectives

Upon completing this course, you should be able to:

- *Identify three types of automated analysis in Excel 2013-2019
- *Describe the new Excel Data Model and explain its impact on PivotTable analysis
- *Use combo charts for presenting financial data
- *Distinguish between an ordinary PivotTable and one built using PowerPivot

Who Should Attend: Accounting and financial professionals who want to put the power of Excel 2013-2019 and its new features and functionality to use right away

Course Level: Intermediate

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Good working knowledge of Excel

Advance Preparation: None

K2's Excel Guru - Tips to Make Your Head Spin

Excel | Excel

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/13/2018	11:00 AM	89.00	2	WK2-EGU184

Course Description

How much do you know about Excel and the features and functionality it provides that could make a difference in your personal day-to-day productivity? Most accountants and other business professionals use less than 20% of the functionality of this product. Are you taking advantage of the features that are best for you? This session is sure to deliver many thought-provoking ideas and tips for getting better results with less effort and in less time.

Major Topics

- *Use the Data Model and cube formulas to improve analysis and reporting
- *Memorize complex formulas, constants, or array constants for future use
- *Utilize statistical procedures in the Data Analysis ToolPak to your advantage
- *Add slicers to individual or multiple Tables, Pivot Tables, or Pivot Charts
- *Use advanced functions such as AGGREGATE, RANDBETWEEN, EOMONTH, and WEEKDAY
- *Use SUMIFS to create analytical reports without using PivotTables
- *Use the Data Model effectively without PowerPivot

Learning Objectives

Upon completing this course, you should be able to:

- *Identify key productivity-enhancing Excel functionality and features
- *Differentiate between Excel functionality to select the best features for your objectives
- *List capabilities that have direct application to your practice or business
- *Apply the knowledge gained to improve your personal productivity

Who Should Attend: accountants and finance professionals who want to put the power of Excel to use in innovative ways to improve personal productivity

Course Level: Advanced

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Good working knowledge of Excel

Advance Preparation: None

K2's Excel Budgeting Techniques

Excel, Budgeting | Excel

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/5/2018	11:00 AM	89.00	2	WK2-EXB183

Course Description

Excel provides an outstanding variety of tools for accumulating, analyzing, and reporting budgetary data. This session focuses on the analytical features available in Excel for preparing budgets.

Major Topics

- *Performing regression analysis for forecasting
- *Using data tables for sensitivity analysis
- *Implementing linear programming with Goal Seek and Solver
- *Calculating moving averages automatically with built-in Excel functionality
- *Employing Scenario Manager for comparative budget reporting

Learning Objectives

Upon completing this course, you should be able to:

- *Differentiate between one-way and two-way data tables for forecasting revenues and expenses
- *Specify the four components of the regression equation
- *List some of the regression functions available in Excel
- *Describe the general procedure for using Solver in the budget process
- *Identify three automated methods of consolidating budget data

Who Should Attend: Accounting and financial professionals involved in the budget process who want to use Excel more effectively

Course Level: Intermediate

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Good working knowledge of Excel

Advance Preparation: None

K2's Excel PivotTables for Accountants - Part I

Excel, PivotTables | PivotTables

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
12/20/2018	2:00 PM	154.00	4	WK2-EPT185

Course Description

PivotTables are the most powerful feature of Excel, yet few accountants use them in their day-to-day activities. For some, PivotTables are too intimidating; for others, PivotTables are a foreign concept. With a little information, guidance, and demonstration from the instructor, you will be ready to begin using PivotTables to accomplish routine analysis and reporting. This webinar will begin with basic PivotTables and progress to advanced PivotTable topics.

Major Topics

- *Drag-and-drop pivoting, group and ungrouping, and drilling down to underlying details
- *Creating PivotTables from multiple ranges
- *Linking PivotTables to external database and financial accounting systems

Learning Objectives

Upon completing this course, you should be able to:

- *Identify and define the six main elements of a PivotTable report
- *Create PivotTables that summarize large volumes of data
- *Describe how to import the data from an accounting system and prepare the data to be used in the PivotTable
- *Create PivotTables from Multiple Consolidation Ranges

Who Should Attend: Accounting and financial professionals who want to use the power of Excel PivotTables to analyze and summarize data

Course Level: Intermediate

CPE Credits: 2 Hours Accounting 2 Computer Software and Applications

Prerequisites: Fundamental knowledge of Microsoft Excel

Advance Preparation: None

K2's Excel PivotTables for Accountants - Part II

Excel, PivotTables | PivotTables

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
11/15/2018	2:00 PM	154.00	4	WK2-EPA183

Course Description

This webinar is a continuation of Excel PivotTables for Accountants – Part I. It extends and builds upon the foundation of PivotTable topics covered in that course and includes in-depth coverage of using advanced data summary functions and creating calculated items and fields.

Major Topics

- *Making calculations in PivotTables using calculated fields, calculated items, and field settings
- *Enterprise-class PivotTables, including using PowerPivot to build complex PivotTables
- *Analyzing data with PivotTables using advanced techniques
- *PivotTable tips and tricks

Learning Objectives

Upon completing this course, you should be able to:

- *Create PivotTables and PivotCharts and add advanced elements to PivotTables, such as calculated fields and calculated items
- *Describe three methods for making calculations in PivotTables
- *Create enterprise-class PivotTables from large and complex data sets, using tools such as On Line Analytic Processing and PowerPivot
- *Utilize advanced sorting and filtering techniques, PivotCharts, and GETPIVOTDATA to analyze PivotTable data
- *Describe how to apply specific PivotTable techniques such as Show Report Filter Pages and VLOOKUPS to solve specific issues associated with PivotTables

Who Should Attend: Accounting and financial professionals who want to use the power of Excel PivotTables to analyze and summarize data

Course Level: Advanced

CPE Credits: 4 Hours Computer Software and Applications

Prerequisites: Excel PivotTables for Accountants – Part I or equivalent level of knowledge

Advance Preparation: None

K2's Integrating Excel with Word and PowerPoint

Excel, Word, PowerPoint | Excel

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
12/21/2018	4:30 PM	89.00	2	WK2-INE184

Course Description

Excel is the accountants' tool of choice for analyzing data, but 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. Tables and text in Word documents and PowerPoint presentations can be linked and updated as analyses in Excel is updated or changed. This session contains all of the tips, tricks, and techniques necessary to ease the process of integrating Excel with Word and PowerPoint.

Major Topics

- *Using the Camera to link or embed formatted Excel tables or reports into Word or PowerPoint
- *Linking individual data cells from Excel into Word text
- *Pasting and linking report text from Word into Excel
- *Embedding Excel analysis in Word documents or PowerPoint presentations
- *Using hyperlinks to link text in Word or PowerPoint to underlying analysis in Excel
- *Embedding PivotTables into PowerPoint presentations

Learning Objectives

Upon completing this course, you should be able to:

- *Use linked or embedded Excel analysis to automate the process of updating reports or presentations
- *List the five ways in which Excel data can be pasted into Word
- *Describe the process of linking or embedding multi-page Excel objects into Word
- *Explain how to modify the Quick Access Toolbar to facilitate working with hyperlinked documents

Who Should Attend: Accountants and business professionals that need to integrate Excel data and analysis with reports created in Word and presentations created in PowerPoint.

Course Level: Intermediate

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Good working knowledge of Excel, Word, and PowerPoint.

Advance Preparation: None

K2's Introduction to Power Query

Power Query, Data Mining | Power Query, Data Mining

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
12/20/2018	11:00 AM	89.00	2	WK2-IPQ182

Course Description

Power Query is an Excel data extraction and transformation tool integrated in all versions of Excel 2016, but is available as a free add-in for those using Excel 2013. Power Query allows users to combine data from multiple, disparate data sources, such as relational databases, OData feeds, web pages, Azure, SharePoint lists, Hadoop HDFS, and Excel, text, and XML files, etc. The Query Editor allows users to transform and cleanup data with the "M" query language using an intuitive query-by-example interface. The code created by the Editor can be fine tuned or modified to meet any need. Queries and data transformations can be saved, shared, and reused across an enterprise. Don't miss this opportunity to explore the power and time-saving functionality of Power Query.

Major Topics

- * Connecting to external data sources
- * Using the Query Editor to transform and cleanup data
- * Modifying and fine tuning query code
- * Saving queries for reuse by others in an organization

Learning Objectives

Upon completing this course, you should be able to:

- *Identify five common data sources that can accessed by Power Query
- *Describe the process of extracting data from an external data source
- * Use the Query Editor to transform and cleanup data
- * List three data transformations that can be accomplished with the Query Editor
- * Explain the process of saving queries for future use

Who Should Attend: Accountants and finance professionals who want to use Power Query to access, import, and transform external data for analysis and reporting

Course Level: Intermediate

CPE Credits: 2 Hours Information Technology

Prerequisites: Good working knowledge of Excel

Advance Preparation: None

K2's Introduction to the Excel Data Model

Excel, Excel Data Model | Excel Data Model

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
12/21/2018	11:00 AM	89.00	2	WK2-IED183

Course Description

The Excel Data Model is an in-memory multi-dimensional (OLAP) data engine available in all versions of Excel 2013 and 2016. The Data Model is the core foundation of PowerPivot, but all users can take advantage of the added power of the Data Model without this premium add-in available in Office Professional Plus and the standalone version of Excel. With the Data Model, users can 1) relate multiple Excel tables, build PivotTables on multiple Excel tables, and 3) analyze PivotTable reports using Quick Explore, which allows users to drill up, down, and around in reports. This webinar will provide the knowledge and skill necessary to take full advantage of the Excel Data Model.

Major Topics

- *Adding data to the Data Model
- *Building PivotTables from multiple related Tables
- *Using Quick Explore to drill up, down, and around in PivotTables built on the Excel Data Model
- *Calculating date fields in Tables to overcome Data Model limitations

Learning Objectives

Upon completing this course, you should be able to:

- *Describe the Excel Data Model
- *List the advantages of using the Data Model as a PivotTable data source
- *Create PivotTables from data stored in multiple related Tables
- *Describe the process of relating Tables in Excel 2013 and 2016

Who Should Attend: Accountants and finance professionals who want to put the power of the Excel Data Model to use right away.

Course Level: Intermediate

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Good working knowledge of Excel

Advance Preparation: None

K2's Mastering Advanced Excel Functions and Formulas

Excel | Excel

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
11/20/2018	2:00 PM	89.00	2	WK2-MAF182

Course Description

Excel has more than 300 functions, many of which are unused by most accounting and finance professionals. Some of these little used functions can be used to calculate depreciation, mortgage interest and principal reduction, cash flow analysis over unequal periods, and trap errors. It's time for you to break out of your Excel cocoon. This two-hour session will put you on the path to improved Excel productivity by introducing you to powerful and time saving but little used Excel functions. Among other topics, you will learn about logical and conditional formulas, including using Boolean operators; advanced financial formulas such as XNPV and XIRR; innovative uses for Excel's date functions, and SUMPRODUCT, GETPIVOTDATA, and INDIRECT.

Major Topics

- *Making advanced calculations with Excel's financial functions
- *Creating calculations that are dependent on a condition or conditions
- *Using array formulas to make calculations on a range of items
- *Building date and time calculations
- *Using GETPIVOTDATA to extract summarized data from a PivotTable
- *Employing INDIRECT to modify range references in formulas

Learning Objectives

Upon completing this course, you should be able to:

- *Use Excel's financial functions to compute depreciation, calculate mortgage interest and principal reduction, and perform conventional cash flow analysis
- *List three Excel functions for making conditional calculations that can evaluate multiple conditions
- *Explain the general process of entering an array formula in Excel
- *Describe the benefits of using GETPIVOTDATA for extracting summarized data from a PivotTable

Who Should Attend: Accountants and finance professionals who want to become more productive in using Excel

Course Level: Intermediate

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Good working knowledge of Excel

Advance Preparation: None

K2's Mastering Excel Charts

Excel, Excel Charts | Excel Charts

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/3/2018	11:00 AM	89.00	2	WK2-MEE182

Course Description

Most accounting professionals quit using charts to communicate financial and operational information years ago because charting was too time consuming and too cumbersome, but the new charting engine in Excel overcomes both of those issues. Now users can quickly and easily build advanced charts that allow users to filter data interactively, and create charts that change dynamically as the volume of data changes. Plus, users can easily produce combination charts on two axes, generate advanced Pivot Charts, and build charts commonly used in dashboards, such as gauge or thermometer charts. In this two-hour session, you will learn how to build amazing charts to communicate your information and analyses more effectively.

Major Topics

- * Selecting the right chart type for the reporting objective
- * Creating and customizing advanced charts in Excel quickly and easily
- * Linking or embedding charts from Excel into Word or PowerPoint
- * Constructing dynamic headings in charts that change as the underlying data changes
- * Producing specialized charts, such as gauge, thermometer, or combination charts
- * Using Pivot Charts to communicate data summarized in PivotTables

Learning Objectives

Upon completing this course, you should be able to:

- * List ten major types of charts produced by Microsoft Office
- * Use Excel, Word, or PowerPoint to create and modify advanced charts
- * Describe the process for creating dynamic headings in Office charts
- * Explain the general process for creating custom charts such as gauge or thermometer charts
- * Use chart templates to simplify and facilitate creation of similar charts in the future

Who Should Attend: Excel and Microsoft Office users seeking to use charts as effective communication tools to report or analyze data

Course Level: Intermediate

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Working knowledge of Excel and Microsoft Office

Advance Preparation: None

K2's Mastering PivotTable Calculations and Data Summaries

Excel, PivotTables | PivotTables

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/6/2018	11:00 AM	89.00	2	WK2-PTC183

Course Description

PivotTables have never been easier to build than they are in the latest versions of Excel. But, how do you handle calculated fields and calculated items, data grouping, simple data summaries, and special "show values as" data summaries? And how do you deal with non-calendar fiscal years, or 4-4-5 calendar periods? What problems does the Excel Data Model present to experienced PivotTable users, and how do you work around these problems? Get the answer to these questions and more in this session on mastering PivotTable calculations and data summaries.

Major Topics

- *Creating calculated fields and calculated items
- *Formulating calculated items with relative references
- *Applying special data summarization techniques
- *Dealing with fiscal periods and special accounting calendars, such as 4-4-5 and thirteen 28-day periods
- *Using the Excel Data Model for PivotTable reporting

Learning Objectives

Upon completing this course, you should be able to:

- *Create calculated fields and calculated items for better data analysis
- *Calculate between-period differences using special data summaries
- *Demonstrate how to calculate fiscal months, fiscal quarters, and fiscal years for use with non-calendar fiscal periods
- *Describe how to summarize data when working with 4-4-5 and thirteen 28-day calendars
- *Identify the advantages and disadvantages of using the Excel Data Model as a PivotTable data source
- *Explain how to relate multiple data sources using VLOOKUP or Data Relationships

Who Should Attend: Existing PivotTable users who need advanced knowledge and guidance in creating PivotTable calculations and data summaries

Course Level: Advanced

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Good working knowledge of Excel and PivotTables

Advance Preparation: None

K2's Mastering PowerPoint for Effective Presentations

PowerPoint | PowerPoint

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
11/14/2018	2:00 PM	154.00	4	WK2-MPE182

Course Description

More and more accountants and business professionals are using PowerPoint to deliver financial data to clients, customers, or co-workers. What seems at first to be an easy-to-use application consumes an extraordinary amount of time unless you know the tips and tricks to make the process less cumbersome. Did you know that you can generate a slide show from a properly formatted Word document with a few clicks? Or that you can create multiple custom slide shows within a single slide deck? Or that you can animate charts to better communicate financial information to your audience? Or that you can add your company logo to all slides in a slide show quickly and easily? All of these PowerPoint tips will be covered in this fast-paced session that will improve your productivity immediately.

Major Topics

- *Applying global changes to a slide show with slide masters
- *Creating compelling charts for effective communication
- *Linking and embedding Excel data into charts or presentations
- *Adding animations, transitions, and special effects to slides and charts
- *Building presentations automatically from Word documents
- *Creating multiple presentations within a single slide deck

Learning Objectives

Upon completing this course, you should be able to:

- *Describe the process of modifying a slide master
- *Demonstrate linking or embedding Excel data in a slide show
- *Use animated charts to communicate financial information more effectively
- *Differentiate between slide transitions and slide animations
- *Explain why it is more effective to create multiple custom slide shows in a single slide deck

Who Should Attend: Accountants and business professionals who want to become more effective and efficient in building and making presentations with PowerPoint

Course Level: Intermediate

CPE Credits: 4 Hours Computer Software and Applications

Prerequisites: Basic knowledge of PowerPoint

Advance Preparation: None

K2's Mastering the Excel Macro Recorder

Excel, Macros | Excel, Macros

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/5/2018	2:00 PM	89.00	2	WK2-MEM182

Course Description

Excel macros are a compilation of keystrokes and mouse clicks that are memorized and stored for later use, but you don't have to be a VBA programmer to make use of this outstanding functionality. Simply use the Macro Recorder to create and store macros that will save time and reduce errors in repetitive processes. This session provides the necessary knowledge to use the Macro Recorder effectively.

Major Topics

- *Creating your first macro in less than two minutes
- *Recording absolute and relative reference macros
- *Saving macros for future use
- *Modifying macros in the VBA Editor

Learning Objectives

Upon completing this course, you should be able to:

- *Use the Macro Recorder effectively and make minor modifications to recorded macros
- *List the three locations where recorded macros may be stored and the reasons for using each location
- *Differentiate the results when using absolute or relative references when recording macros
- *Describe how to attach macros to buttons on the ribbon or the Quick Access Toolbar

Who Should Attend: Accounting and financial professionals who want to improve their personal productivity by extending Excel's functionality with simple, easy to record macros.

Course Level: Intermediate

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Good working knowledge of Excel

Advance Preparation: None

K2's Microsoft Access Fundamentals - Tables and Queries

Access | Access, Tables, Queries

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/4/2018	2:00 PM	154.00	4	WK2-ACF182

Course Description

Microsoft Access is a bit of an enigma to many business professionals because they attempt to use Access in the same way as they use Excel. In this webinar, you will learn the fundamentals of working with Access using its two core components - tables and queries. Tables serve as data repositories, while Queries allow users to maintain, administer, and access stored data. Learn how to master tables and queries - and put yourself on the path to using Access effectively.

Major Topics

- *Introduction to Microsoft Access
- *Creating and working with tables in Access
- *Building queries in Access
- *Miscellaneous tools and techniques for working with Access

Learning Objectives

Upon completing this course, you should be able to:

- *Define the core components of Access
- *Create tables in Access and apply best practices to ensure continued integrity of data in multiple tables
- *Differentiate between the types of queries available in Access
- *Recognize opportunities to integrate Access with other applications in Microsoft Office, including linking Excel with Access

Who Should Attend: Accounting and financial professionals who want to learn the fundamentals of Access

Course Level: Basic

CPE Credits: 4 Hours Computer Software and Applications

Prerequisites: None

Advance Preparation: None

K2's Microsoft Office 2016 - Improving Productivity with New Features

Office 2016 | Office 2016

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/26/2018	2:30 PM	154.00	4	WK2-MOI182
12/12/2018	2:30 PM	154.00	4	WK2-MOI183

Course Description

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 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.

Major Topics

- *Key new features in Office 2016 for business professionals
- *How to collaborate more effectively in Office 2016
- *Choosing the right version of Office 2016
- *Optimizing your Office 2016 work environment

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

Who Should Attend: Business Professionals who work with Microsoft Office and are considering or have already upgraded to Office 2016

Course Level: Update

CPE Credits: 4 Hours Computer Software and Applications

Prerequisites: Basic understanding of Microsoft Office

Advance Preparation: None

K2's Microsoft Outlook - Contacts, Calendars, and Meetings

Outlook | Outlook

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
11/14/2018	11:00 AM	89.00	2	WK2-OCM182

Course Description

Microsoft Outlook is the most utilized business application in the world today, but for many users, dealing with Outlook is the most frustrating part of their day. This session is designed to help Outlook users better organize, manage, and use contacts, calendars, and meetings. It contains coverage on how to organize and share contacts, better utilize the address book, understand the People Pane, share calendars with others, display multiple calendars in overlay mode, schedule meetings, employ the out-of-office assistant, conduct simple email polls, and use template messages for routine communications. The information provided in this session will ease your frustration and improve your productivity in using Microsoft Outlook.

Major Topics

- * Working more effectively with contacts and the address book
- * Using, organizing, and sharing calendars among co-workers and others
- * Employing automated processes to schedule meetings and resources
- * Communicating more effectively using the out-of-office assistance, simple voting polls, and template messages

Learning Objectives

Upon completing this course, you should be able to:

- * Explain how to reorder the contact list in last name, first name order
- * Identify three methods of sharing your calendar with others
- * Describe the process of using the Scheduling Assistant to schedule a meeting
- * Explain the out-of-office assistant and its relevance to modern office communications
- * Conduct simple voting polls among staff members
- * Use message templates for routine communications

Who Should Attend: Accounting and business professionals who need to manage contacts, calendars, and meetings more effectively in Outlook

Course Level: Intermediate

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Working knowledge of Microsoft Outlook

Advance Preparation: None

K2's Microsoft Outlook - Inbox Organization and Optimization

Outlook | Outlook

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
11/20/2018	11:00 AM	89.00	2	WK2-MIC182

Course Description

Microsoft Outlook is the most utilized business application in the world today, but for many users, dealing with Outlook is the most frustrating part of their day. This session is designed to help Outlook users better organize and manage their email communications. It contains coverage on how to reduce e-mail interruptions, triage the Inbox rapidly, find related messages quickly and easily, organize the Inbox with folders, categories, and rules, and use drag-and-drop to create new tasks and appointments. The information provided in this session will ease your frustration and improve your productivity in using Microsoft Outlook.

Major Topics

- * Working more efficiently and effectively in Outlook through better organization
- * Finding specific messages, contacts, and appointments
- * Organizing the Inbox with folders, categories, and rules

Learning Objectives

Upon completing this course, you should be able to:

- * Identify related messages quickly and easily using Conversation View
- * Create Quick Steps to automate routine, recurring processes
- * Employ drag-and-drop to create new appointments, tasks, or contacts from email messages
- * Use folders and categories to organize the Inbox
- * Apply rules to automate the process of filing email messages
- * Describe how AutoArchive automates the process of cleaning the Inbox

Who Should Attend: Accounting and business professionals who need to manage email more effectively in Outlook

Course Level: Intermediate

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Working knowledge of Microsoft Outlook

Advance Preparation: None

K2's Microsoft Outlook Tips, Tricks and Advanced Techniques

Outlook | Outlook

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/6/2018	2:00 PM	154.00	4	WK2-OTT182

Course Description

Microsoft Outlook is the most utilized e-mail, contacts, and calendar management application in the world today and with the latest release of Outlook, Microsoft ups the ante with more powerful and time saving features. The familiar folders, categories, and rules are still there, but have you tried Quick Steps or used the People Pane? What about Conversation View, the Out-of-Office Assistant, in line replies or forwarding, or the confusing People Cards? Did you know that you can share your calendar with just a few clicks, or use the Scheduling Assistant to find the next free meeting time for all expected participants? These and other new features will be covered in this session, along with many tried-and-true tips and tricks to help you better organize and manage your communications, calendar, and contacts.

Major Topics

- *Minimizing interruptions caused by Outlook's default settings
- *Organizing the Inbox for improved productivity
- *Finding specific messages, contacts, or appointments more effectively
- *Sharing your calendar
- *Understanding the People Card
- *Taking advantage of Outlook's newest features

Learning Objectives

Upon completing this course, you should be able to:

- *Use folders, categories, and rules to organize the Inbox
- *Employ drag-and-drop to create new appointments, tasks, or contacts from e-mail messages
- *Describe Quick Steps and how they can be used to triage your Inbox quickly and easily
- *Explain why some of the information in the People Card cannot be edited
- *List three methods of sharing your calendar
- *Describe the process of using the Scheduling Assistant to schedule a meeting
- *Explain how to reorder the contact list in last name/first name order

Who Should Attend: Accounting and business professionals who want to handle their e-mail, contacts, and calendar more effectively in Outlook

Course Level: Intermediate

CPE Credits: 4 Hours Computer Software and Applications

Prerequisites: Good working knowledge of Outlook

Advance Preparation: None

K2's Powerful Reporting with Cube Formulas

Excel | Excel

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
11/15/2018	11:00 AM	89.00	2	WK2-PRC183

Course Description

The Excel Data Model (an OLAP cube) can be viewed as a multi-dimensional PivotTable. The intersections of the rows, columns, and other dimensions are summarized in the cube and can be extracted into a report using cube functions that specify the desired intersections. Hence, a PivotTable is not required to summarize and report data stored in the Excel Data Model. Excel has seven built-in cube functions for creating reports without using a PivotTable, while maintaining the ability to refresh a report as the underlying data changes. Don't miss this opportunity to learn how to use cube formulas to produce dynamic formal reports from the Excel Data Model.

Major Topics

- *Overview of the cube functions available in Excel
- *Understanding the Data Model and how to specify an intersection
- *Building cube formulas that can be copied down and across Creating reports using implicit and explicit measures

Learning Objectives

Upon completing this course, you should be able to:

- *List the seven cube functions available in Excel
- *Use a PivotTable to create an implicit measure
- *Create explicit measures using PowerPivot or from the PivotTable Field List in Excel 2016
- *Describe the process of creating formal reports with cube functions
- *Employ mixed cell references in formulas to build complex reports quickly and easily

Who Should Attend: Accountants and finance professionals who want to streamline and improve their data analysis and reporting processes

Course Level: Advanced

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Good working knowledge of PivotTables and the Excel Data Model

Advance Preparation: None

K2's QuickBooks Power Reporting with Excel

Excel, QuickBooks | Excel

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
11/20/2018	4:30 PM	89.00	2	WK2-QPR183

Course Description

If you want to improve QuickBooks financial or operational reporting, this session is for you. Learn innovative ways to export data to existing Excel report templates; connect Excel Tables, PivotTables, and Pivot Charts directly to QuickBooks; update previously exported reports from within Excel; enhance reports using Excel's auto-filter and auto-outline features; take advantage of Flash Fill to split account numbers and descriptions into separate columns quickly and easily; and use QuickBooks ES to produce multi-company financial statements even when the charts of accounts are different.

Major Topics

- *Exporting and linking QuickBooks based reports to Microsoft Excel spreadsheets
- *Creating PivotTable reports that are directly linked to a QuickBooks company file
- *Automating sophisticated analysis with pre-built formulas
- *Using Excel's auto-filter and auto-outline functionality to build specialized reports
- *Prepare multi-company reports with QuickBooks ES

Learning Objectives

Upon completing this course, you should be able to:

- *Explain the process of creating workbooks that use formulas to automate the analysis and reporting of exported data
- *Describe how to connect Excel Tables, PivotTables, and Pivot Charts directly to QuickBooks using ODBC
- *Identify two features in Excel that can be used to enhance reports exported from QuickBooks
- *Use the built-in functionality of QuickBooks ES to automate the process of producing multi-company reports

Who Should Attend: Accounting and financial professionals seeking more thorough knowledge of QuickBooks financial reporting and analysis using Excel

Course Level: Intermediate

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Good working knowledge of QuickBooks and Excel

Advance Preparation: None

K2's Six Emerging Technologies for Accounting, Auditing, and Bookkeeping

Accounting Technology, Auditing Technology, Bookkeeping Technology | Technology

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/17/2018	4:30 PM	89.00	2	WK2-SET184
12/11/2018	4:30 PM	89.00	2	WK2-SET185

Course Description

The world is abuzz about dozens of emerging technologies like artificial general intelligence, machine learning, and blockchain-based ledgers, but many of these technologies won't have a meaningful impact your work for ten or more years, and some, like Google Glass, have fallen off the radar entirely. On the other hand, technologies like automated statement/document retrieval, automated data import and reporting, and electronic signatures are often not utilized. This session will mix a discussion of emerging technologies and will provide some insight into the kinds of work automation technologies available now and in the future in accounting and bookkeeping.

Major Topics

- *A high level overview of emerging technologies
- *Automation for accounting, auditing, and bookkeeping, including statement retrieval, testing with wizards, and receipt recognition
- *High level discussion of blockchain

Learning Objectives

Upon completing this course, you should be able to:

- *Explain what is revolutionary about blockchain– and also why it is of limited use to accounting professionals in its current form
- *List at least three technologies for accounting, bookkeeping, and auditing which are available and are often overlooked by accountants
- *Define the terms blockchain, cryptocurrencies, artificial intelligence and machine learning

Who Should Attend: Accounting and business professionals who would like to understand some emerging technologies which will impact accounting in the future

Course Level: Basic

CPE Credits: 2 Hours Information Technology

Prerequisites: None

Advance Preparation: None

K2's Tech Tools and Gadgets for a More Efficient You!

Tech Tools | Technology Tools

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/11/2018	2:30 PM	154.00	4	WK2-TTG182
12/13/2018	2:30 PM	154.00	4	WK2-TTG183

Course Description

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

Major Topics

- *Identifying and utilizing little-known features in Windows and Office
- *Taking advantage of free and inexpensive apps and services
- *Deploying and utilizing various gadgets and gizmos for increased convenience and productivity
- *Recognizing the profound impact of “The Internet of Things”

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

Who Should Attend: Business professionals seeking to leverage technology for improved personal and team productivity

Course Level: Intermediate

CPE Credits: 4 Hours Computer Software and Applications

Prerequisites: Fundamental knowledge of computer operations

Advance Preparation: None

K2's The Right Stuff: Best Practices for Purchasing Technology

Technology Best Practices | Technology

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/12/2018	2:00 PM	89.00	2	WK2-TRS183
12/31/2018	11:00 AM	89.00	2	WK2-TRS184

Course Description

With technology becoming more strategic to every organization, it is more important than ever to buy the right business grade hardware, software, and services for your team. This session will cover some of the basics of buying the right technology for your business, including evaluating hardware quality, tips for getting the best deals on hardware, hints for evaluating contracts and end user license agreements (EULAs), and a review of software and cloud application licensing options. Attend this session and learn more about how to save time and money in the long run by doing technology right the first time.

Major Topics

- *Software licensing
- *Hardware fundamentals and the differences in home and business grade technology
- *Tips for effectively buying your team's technology

Learning Objectives

Upon completing this course, you should be able to:

- *List three major channels used to sell software by publishers and list at least one benefit and one drawback related to the license restrictions/risks typically included with each
- *Explain why it is generally a bad idea to use consumer grade computers and consumer grade routers and other networking gear in a business network
- *List at least three kinds of costs associated with on-premises and public cloud deployments of applications, and give an example of each
- *Name the open source tool which was used to evaluate complex terms in license agreements

Who Should Attend: Practitioners and senior executives in industry who are responsible for managing, purchasing, or auditing the IT and purchasing functions

Course Level: Basic

CPE Credits: 2 Hours Information Technology

Prerequisites: None

Advance Preparation: None

K2's Understanding Key Internal Controls Over Technology

Technology Internal Controls | Internal Controls

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/17/2018	2:00 PM	89.00	2	WK2-UKC184
12/31/2018	2:00 PM	89.00	2	WK2-UKC185

Course Description

Internal controls over technology are essential to the effective operation of any business, and yet many financial professionals do not adequately consider the impact of IT controls on the effectiveness of the organization's control environment. This session reviews IT terminology and key IT controls, provides an overview of the types of policies and procedures needed in any organization, and discusses the scope and nature of major key third party control evaluations (SOC 1, SOC 2, SOC 3, SOC for Cybersecurity, and ISO 27001). Attend this session and become more effective at understanding, documenting, identifying, and mitigating risks in your IT environment.

Major Topics

- *Understand common terminology used in information technology
- *Learn more about your organization's IT controls at a high level, including common third party evaluations like SOC reports
- *Review common IT policies needed in most organizations

Learning Objectives

Upon completing this course, you should be able to:

- *Define key terms associated with major technology areas, including those associated with hardware, software, cloud apps, and authentication
- *Explain how the COSO and COBIT frameworks evaluate technology differently and give an example of when you might prefer the use of one over the other
- *Explain the goal of the CIS Controls and contrast its tactical approach to controls with the strategic view of internal control embraced by COSO and COBIT
- *Name at least five technology policies needed in an organization and provide a short definition of what the policy is designed to accomplish
- *List and define the major types of SOC reports and third party evaluations (SOC 1, SOC 2, SOC 3, and SOC for Cybersecurity), and for SOC 1 and SOC 2, explain the difference in a Type I report and a Type II report

Who Should Attend: Accounting and business professionals responsible for managing, maintaining, documenting, understanding, or auditing internal controls

Course Level: Intermediate

CPE Credits: 2 Hours Auditing

Prerequisites: Basic knowledge of internal controls

Advance Preparation: None

K2's What to Ask Your Technology Provider

Technology | Technology

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/17/2018	11:00 AM	89.00	2	WK2-WAT183
12/11/2018	2:00 PM	89.00	2	WK2-WAT184

Course Description

Managing Information Technology (IT) is difficult when team members, contractors, and others all sound alike. If you manage IT, wouldn't it be nice to know the questions that you should be asking? Join us in this session to learn the questions to ask your technology providers and to identify warning flags for suspicious responses. All aspects of IT are included, and the session materials can serve as a checklist for your discussions with your providers.

Major Topics

- *Questions to be posed in each area of IT
- *Licensing, contracting, and other recurring tasks and documentation
- *Common errors to avoid

Learning Objectives

Upon completing this course, you should be able to:

- *Identify questions to ask of your IT team
- *Differentiate IT approaches and responsibilities
- *List the options that you can use for IT

Who Should Attend: Accountants who are responsible for selecting and vetting technology providers

Course Level: Intermediate

CPE Credits: 2 Hours Information Technology

Prerequisites: Knowledge of basic IT Technology

Advance Preparation: None

K2's What's New with Microsoft Office 365, Zoho Docs, & G Suite by Google Cloud

Office, Zoho, G Suite | Productivity Software

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/10/2018	11:30 AM	89.00	2	WK2-WNM183

Course Description

Business productivity software is a cornerstone of an organization's software investment. This session looks at three major business productivity platforms, Office 365, Zoho Docs, and G Suite. We examine these platforms and their popular applications, services, mobile apps, and backend functionalities.

Major Topics

- *How Microsoft Office 365, Zoho Docs, and G Suite work inside an organization
- *Cloud versus desktop solutions
- *Conclude which solution is right for your organization

Learning Objectives

Upon completing this course, you should be able to:

- *Identify the popular applications, services, mobile apps, and backend functionalities
- *Identify the back-office functionalities provided, their merits, necessities, and compelling features
- *Analyze the differences, opportunities, and drawbacks of a user experience delivered via the Cloud versus software installed on the computer
- *Create an action plan to move your organization to one of the solutions
- *Outline and list the financial costs and organizational requirements

Who Should Attend: Business professionals who want to be able to make informed decisions about available business productivity software

Course Level: Overview

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Basic understanding of computer operations

Advance Preparation: None

K2's Windows 10 Productivity Tips and Tricks

Windows 10 | Windows 10

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/13/2018	4:30 PM	89.00	2	WK2-WPT182

Course Description

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 webinar will help you setup and customize Windows 10 and improve its performance, security, and privacy. From navigation to configuring default applications to setting up backup, this webinar provides the needed guidance. Plus, we will introduce you to virtual desktops and the unified notifications area, as well as provide numerous tips and tricks for elimination common frustrations and improving productivity. Don't miss this opportunity to learn how to use Windows 10 more effectively.

Major Topics

- *Using the Start Menu and other GUI innovations
- * Configuring Task View (virtual desktops) and Cortana (your personal digital assistant) to meet your needs
- * Modifying default settings that impact security, privacy, and performance
- *Customizing the desktop, the Start Menu, and the Taskbar
- *Setting up backup (File History) and enabling encryption (BitLocker)

Learning Objectives

Upon completing this course, you should be able to:

- *identify ten new features that will improve your productivity and user experience
- * Use the new interface effectively in performing day-to-day tasks
- *Describe how File History differs from conventional backup methods
- * Explain how BitLocker whole disk encryption reduces the risk of compromising client or customer data

Who Should Attend: Accountants and finance professionals who want to work with Windows 10 more effectively to improve their productivity

Course Level: Intermediate

CPE Credits: 2 Hours Information Technology

Prerequisites: Good working knowledge of Windows 7 or 8.1

Advance Preparation: None

K2's Word Advanced Tips, Tricks, and Techniques

Word | Word

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/3/2018	2:00 PM	154.00	4	WK2-WES182

Course Description

Like most Microsoft Word users, you know the basics of creating a document: entering text, adding formatting, and saving and printing a file. But, do you use Word Styles or Quick Parts? Do you know how to generate a Table of Contents automatically from a document? Can you insert Excel-like formulas into Word Tables? If your answer to any one of these questions is "no," then don't miss this opportunity to improve your knowledge, skill, and productivity in using Microsoft Word. In this session, we will examine some of Word's most powerful tools and functionality for producing more polished, professional documents in a fraction of the time.

Major Topics

- *Exploiting the advantages of Styles
- *Creating Tables of Contents, PDF bookmarks, and PowerPoint slide shows automatically from documents
- *Using Building Blocks and Quick Parts to automate the entry of frequently used text
- *Managing AutoCorrect as a personal shorthand gallery
- *Integrating Excel content with Word documents
- *Creating and formatting Tables and using formulas for making calculations

Learning Objectives

Upon completing this course, you should be able to:

- *Identify key features for entering, editing, and formatting data, including Styles
- *Use the Navigation Pane to navigate or rearrange a document quickly and easily
- *Describe various methods for selecting text in a Word document
- *Define Quick Parts and Building Blocks and how to use them effectively
- *Integrate Excel content with Word documents
- *Use charts, SmartArt, and screen shots to communicate more effectively
- *Describe how to create and format Tables

Who Should Attend: Accountants and finance professionals who want to use Microsoft Word to create documents more efficiently and effectively

Course Level: Intermediate

CPE Credits: 4 Hours Computer Software and Applications

Prerequisites: Good working knowledge of Word and Microsoft Office

Advance Preparation: None

K2's Working Effectively from Anywhere

Working remotely | Working remotely

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/10/2018	2:30 PM	89.00	2	WK2-WEA183

Course Description

The Internet and mobile technologies have revolutionized the way businesses operate. We're no longer constrained by having to operate in a specific location or during specific business hours. Organizations can, now, effectively communicate and do business with customers and staff based anywhere in the world.

Major Topics

- *Implement virtual office technology
- *Solutions to simplify and streamline communications
- *Benefit and risks of Implementing a virtual workplace

Learning Objectives

Upon completing this course, you should be able to:

- *Identify the characteristics of the virtual office
- *Determine what technology should be implemented into your organization to build your own virtual office
- *Compare various virtual collaboration tools
- *Identify and utilize new apps, websites, and services to gain efficiency
- *Contrast the benefits and drawbacks of the virtual office and telecommuting
- *Identify how to implement a unified communications platform

Who Should Attend: Business professionals considering or already working remotely

Course Level: Basic

CPE Credits: 2 Hours Computer Software and Applications

Prerequisites: Basic understanding of computer operations

Advance Preparation: None

FREQUENTLY ASKED QUESTIONS

HOW DO I CONNECT TO MY ONLINE TRAINING SESSION?

After you register for an event, you will receive a course confirmation email. To connect to your online training session, simply click on the designated link in that email message. You will find it in the “**How To Join The Training**” section of the email message.

HOW DO I HEAR THE AUDIO PORTION OF MY ONLINE TRAINING?

You have two options for listening to the audio portion of your online training. Both of these options are described in detail in the “**How To Join The Training**” section of the confirmation email you received for the course.

The first option is to listen through your computer’s audio system. To utilize this option, select “Use Mic & Speakers” after you join the training session.

The second option is to dial-in to the online training event using your phone. Your confirmation email will include the phone number to dial and the access code to use for your event. *Please note that this is not a toll-free call.*

HOW EARLY MAY I LOGIN TO MY ONLINE TRAINING SESSION?

You may login to your online training session up to thirty minutes in advance of the designated start time.

WILL I RECEIVE A HANDOUT OR A BOOK FOR MY TRAINING EVENT?

Yes, we provide you with an electronic copy of the course materials prior to the event. To access these materials, click the link in the “**Before The Training**” section of the confirmation email you received for the course.

WHAT TRAINING PLATFORM DO YOU USE TO DELIVER YOUR WEB-BASED TRAINING?

K2 Enterprises is proud to use the **GoToTraining** solution from Citrix as the training platform for our online training events. This solution works with virtually all computers and provides an exceptional learning environment for online training participants.

CAN I PARTICIPATE IN AN ONLINE TRAINING SESSION USING MY IPAD?

If you would like to participate in our webinars using an iPad, you can do so by first downloading the GoToMeeting app from the App Store. Then, use the app to connect to the webinar. **Please note: Do not use an Android device for attending K2 webinars if CPE credit is desired.**

HOW CAN I DETERMINE IF MY COMPUTER WILL WORK WITH YOUR TRAINING PLATFORM?

Prior to participating in an online training event, you can test your computer to ensure that you will not have any difficulties connecting to the session. To do so, [click this link](#) or visit <https://www3.gotomeeting.com/join/406552062> to join a test session. Upon doing so, if you see a “Successfully Connected” message, you should be able to join your K2 Enterprises training session without any issues. **WE STRONGLY RECOMMEND YOU TEST YOUR SYSTEM BEFORE LOGGING IN TO YOUR ONLINE TRAINING SESSION.**

Note that if you are connecting from a Windows-based computer, GoToTraining will automatically launch into session if you have Java enabled. We recommend [installing or upgrading Java](#) to connect quickly to sessions.

If you are using a Mac and have never joined a GoToTraining/GoToMeeting session before, you will first need to [download the Citrix Online Launcher file](#).

For solutions to common issues associated with joining a GoToTraining/GoToMeeting session, please [click here](#) or visit <http://support.citrixonline.com> and choose the GoToTraining option.

CAN I ASK QUESTIONS DURING ONE OF YOUR ON-LINE TRAINING EVENTS?

Yes, you can ask questions of your instructor during a K2 Enterprises online training event. While participating in an event, you will see a “Q & A” pane on your screen. Simply type your question into the Q & A pane and your instructor will answer it during the session. Only the instructor will be able to see your question.

In addition to the Q & A pane, you will notice a “Chat” pane on your screen. You can use this Chat pane to submit administrative or technical questions to the course administrator that are not related directly to the course content.

WILL I RECEIVE A COMPLETION CERTIFICATE UPON COMPLETING AN ONLINE TRAINING COURSE?

Within twenty four hours after you complete the online event, you will receive an email message containing your course completion certificate. You should retain that message as it serves as your course completion certificate.

DO I HAVE TO PASS A TEST TO COMPLETE ONE OF YOUR ONLINE TRAINING COURSES AND EARN CPE CREDIT?

No testing is required to complete a K2 Enterprises online training course and earn CPE credit. However, at intervals during the presentation, you will need to respond to polling questions to confirm your attendance and active participation in the event. A minimum of four polling questions will be presented for each recommended CPE credit hour. You must answer at least 75% of these questions in order to receive full CPE credit for the program. Note that your answers to these polling questions need not be correct; rather, we only measure whether you attempted to answer the question and, if you do, our GoToTraining platform logs your response and you will receive credit for attempting to answer.