



K2E Webinars

These are recorded sessions broadcast at specific times to allow for verification of attendance. After attending during the broadcast time, participants then have a full year to replay the session.

TABLE OF CONTENTS

TABLE OF CONTENTS	2
K2'S ADVANCED EXCEL	5
K2'S BUDGETING AND FORECASTING TOOLS AND TECHNIQUES	6
K2'S BUSINESS CONTINUITY <i>BEST PRACTICES FOR MANAGING THE RISKS</i>	7
K2'S BUSINESS INTELLIGENCE, FEATURING MICROSOFT'S POWER BI TOOLS	8
K2'S CLOUD COMPUTING	9
K2'S EXCEL BEST PRACTICES	10
K2'S EXCEL DATA MAGIC, INCLUDING ADVANCED PIVOTTABLES & POWER PIVOT	11
K2'S EXCEL FINANCIAL REPORTING AND ANALYSIS	12
K2'S EXCEL PIVOTTABLES FOR ACCOUNTANTS	13
K2'S EXCEL TABLES AND DATA MODELS <i>EFFICIENTLY MANAGING, ANALYZING & REPORTING YOUR DATA</i>	14
K2'S EXCEL TIPS, TRICKS, AND TECHNIQUES FOR ACCOUNTANTS	15
K2'S PAPERLESS OFFICE	16
K2'S PLANNING AND MANAGING YOUR TEAM'S TECHNOLOGY	17
K2'S QUICKBOOKS FOR ACCOUNTANTS	18
K2'S QUICKBOOKS ONLINE AND OTHER TOP ACCOUNTING SOFTWARE FOR SMALL BUSINESSES	19
K2'S SMALL BUSINESS INTERNAL CONTROLS, SECURITY, AND FRAUD PREVENTION AND DETECTION	20

K2'S TECHNOLOGY FOR CPAS – DON'T GET LEFT BEHIND	21
K2'S ADVANCED EXCEL REPORTING	22
K2'S ADVANCED QUICKBOOKS TIPS AND TECHNIQUES	23
K2'S IMPLEMENTING INTERNAL CONTROLS IN QUICKBOOKS ENVIRONMENTS	24
K2'S INTRODUCTION TO EXCEL MACROS	25
K2'S SECURING YOUR DATA	26
K2'S TECHNOLOGY UPDATE	27
K2'S TOP PDF FEATURES YOU SHOULD KNOW	28
K2'S EXCEL TIPS AND TOOLS FOR BETTER BUDGETS	29
K2'S IMPLEMENTING PASSWORD MANAGEMENT AND DATA LOSS PREVENTION TOOLS FOR BETTER SECURITY	30
K2'S EXCEL DATA MODELS, COMBINATIONS, AND CONSOLIDATIONS	31
K2'S MICROSOFT WORD TIPS & TRICKS	32
K2'S EXTENDING THE POWER OF EXCEL WITH USEFUL ADD-INS	33
K2'S ADVANCED EXCEL FUNCTIONS AND FORMULAS	34
K2'S ACCESSING AND CLEANING DATA WITH EXCEL, POWER QUERY, AND POWER BI	35
K2'S EMERGING TECHNOLOGIES	36
K2'S EVALUATING TECHNOLOGY CONTROLS	37
K2'S FILTERING THE WORLD – SPAM, VIRUS, AND MALWARE PROTECTION	38
K2'S EXCEL FINANCIAL MODELING BEST PRACTICES	39

K2'S MASTERING THE EXCEL DATA MODEL	40
K2'S OFFICE 365 – NEW TOOLS, NEW TRICKS	41
K2'S MICROSOFT OUTLOOK – ORGANIZING THE INBOX	42
K2'S MICROSOFT POWER BI – POWER REPORTING FOR FREE!	43
K2'S DATA ANALYSIS WITH POWER PIVOT	44
K2'S PERSONAL TECHNOLOGIES	45
K2'S RANSOMWARE – REDUCING YOUR RISK	46
K2'S SECURITY – A PRACTICAL GUIDE	47
K2'S TECHNOLOGY CONCEPTS FOR DECISION MAKERS	48
K2'S TALES OF TRUE TECH CRIMES – RIPPED FROM THE HEADLINES!	49
K2'S THE BEST KEPT SECRETS OF WINDOWS 10	50
QUICKBOOKS ONLINE: CHANGING THE PARADIGM OF SMALL BUSINESS ACCOUNTING	51
FIVE COMMON SENSE STEPS TO SECURE YOUR PC	52
REMOTE ACCESS BEST PRACTICES	53
REVOLUTIONIZING SMALL BUSINESS ACCOUNTING	54

K2'S ADVANCED EXCEL

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/25/2018	10:00 AM	199.00	8	K2ADE
10/25/2018	1:00 PM	199.00	8	K2ADE
12/3/2018	10:00 AM	199.00	8	K2ADE
12/3/2018	1:00 PM	199.00	8	K2ADE

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 2010 through Excel 2016.

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- ◆ **CPE credit:** Recommended for 4 hours Accounting and 4 hours Computer Software and Applications
- ◆ **Prerequisites:** Experienced Excel user
- ◆ **Program level:** Advanced
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who work with Excel 2010 or newer and want to extend their knowledge with advanced features and functions. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

K2'S BUDGETING & FORECASTING TOOLS & TECHNIQUES

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/28/2018	10:00 AM	199.00	8	K2BFT
9/28/2018	1:00 PM	199.00	8	K2BFT
10/31/2018	10:00 AM	199.00	8	K2BFT
10/31/2018	1:00 PM	199.00	8	K2BFT
11/12/2018	10:00 AM	199.00	8	K2BFT
11/12/2018	1:00 PM	199.00	8	K2BFT
12/11/2018	10:00 AM	199.00	8	K2BFT
12/11/2018	1:00 PM	199.00	8	K2BFT

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.

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 Computer Software and Applications
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2010 or newer
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals involved in budgeting and forecasting activities.

K2'S BUSINESS CONTINUITY

BEST PRACTICES FOR MANAGING THE RISKS

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/13/2018	10:00 AM	199.00	8	K2BCO
9/13/2018	1:00 PM	199.00	8	K2BCO
11/14/2018	10:00 AM	199.00	8	K2BCO
11/14/2018	1:00 PM	199.00	8	K2BCO
12/12/2018	10:00 AM	199.00	8	K2BCO
12/12/2018	1:00 PM	199.00	8	K2BCO

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.

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 Information Technology
- ◆ **Prerequisites:** Basic understanding of organizational business processes and technology terminology
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who desire to reduce the risk associated with business disruptions

K2'S BUSINESS INTELLIGENCE, FEATURING MICROSOFT'S POWER BI TOOLS

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/26/2018	10:00 AM	199.00	8	K2BIF
9/26/2018	1:00 PM	199.00	8	K2BIF
11/20/2018	10:00 AM	199.00	8	K2BIF
11/20/2018	1:00 PM	199.00	8	K2BIF
12/13/2018	10:00 AM	199.00	8	K2BIF
12/13/2018	1:00 PM	199.00	8	K2BIF

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

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

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Create Excel-based BI dashboards
- ◆ List the potential shortcomings of BI solutions based wholly on Excel
- ◆ Identify and implement various Excel add-ins that might be useful in BI applications
- ◆ Differentiate between the BI opportunities in Excel and Power BI
- ◆ Create and distribute dashboards using Power BI

Course Information

- ◆ **CPE credit:** Recommended for 8 hours Information Technology
- ◆ **Prerequisites:** Basic understanding of computer operations and terminology, including Microsoft Office Excel
- ◆ **Program level:** Advanced
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals seeking to develop and implement BI solutions

K2'S CLOUD COMPUTING

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/20/2018	10:00 AM	199.00	8	K2CLC
9/20/2018	1:00 PM	199.00	8	K2CLC
10/26/2018	10:00 AM	199.00	8	K2CLC
10/26/2018	1:00 PM	199.00	8	K2CLC
11/12/2018	10:00 AM	199.00	8	K2CLC
11/12/2018	1:00 PM	199.00	8	K2CLC

“Cloud Computing.” You’ve heard the term, but what does it really mean and how does it impact you both personally and professionally? In this seminar, you will learn the fundamentals of Cloud computing, including what Cloud computing really is and what it is not. More importantly, you will learn necessary skills to determine if Cloud computing might be right for your organization or for your clients. Additionally, during the seminar you will learn how to migrate to Cloud-based solutions and how to avoid the major pitfalls along the way.

Throughout this program, leading solutions from organizations such as Microsoft, Google, Zoho, Thomson Reuters, CCH, Intuit, Accumatica, Sage, Salesforce.com, Wave, XCM Solutions, Bill.com, Amazon, Canopy Tax, AccountantsWorld, Xero, and many others will be reviewed to help you understand the opportunities that exist today to move your organization forward and begin increasing the return on your investment in technology. A special focus of this seminar is the impact that Cloud computing has on the accounting profession, regardless of whether you work in public accounting, industry, or for governmental, educational, or not-for-profit institutions. Don’t miss this chance to learn about Cloud computing and the potential for you to improve information services within your organization while improving efficiency and driving down costs!

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Define “Cloud computing” and distinguish between various Cloud computing services
- ◆ Determine if Cloud computing is right for your organization
- ◆ Identify the major Cloud computing vendors and the key solutions provided by each
- ◆ Create a road map for selecting a Cloud-based solution and migrating to it
- ◆ Recognize the potential pitfalls associated with Cloud-based solutions – such as security and data availability – and identifying means of avoiding these hazards
- ◆ Establish an appropriate strategy for storing data in the Cloud

Course Information

- ◆ **CPE credit:** Recommended for 8 hours Information Technology
- ◆ **Prerequisites:** Fundamental knowledge of computer operations
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Accountants and other business professionals who want to learn more about the potential benefits and risks associated with Cloud computing

K2'S EXCEL BEST PRACTICES

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/7/2018	1:00 PM	199.00	8	K2EBP
11/7/2018	10:00 AM	199.00	8	K2EBP
11/7/2018	1:00 PM	199.00	8	K2EBP
12/21/2018	10:00 AM	199.00	8	K2EBP
12/21/2018	1:00 PM	199.00	8	K2EBP

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 2010 and newer.

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 Computer Software and Applications
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2010 or newer
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Excel users who want to learn best practices for working with spreadsheets. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

K2'S EXCEL DATA MAGIC, INCLUDING ADVANCED PIVOTTABLES & POWER PIVOT

Acquiring, Analyzing & Visualizing Your Data

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/19/2018	10:00 AM	199.00	8	K2EDM
10/19/2018	1:00 PM	199.00	8	K2EDM
11/8/2018	10:00 AM	199.00	8	K2EDM
11/8/2018	1:00 PM	199.00	8	K2EDM
12/20/2018	10:00 AM	199.00	8	K2EDM
12/20/2018	1:00 PM	199.00	8	K2EDM

Move into the new world of automatically linking data into Excel for analyzing, reporting, and preparing visualizations. Using tools such as Power Query and Power Pivot, leverage your existing knowledge of PivotTables to do even more when it comes to summarizing, analyzing, and reporting potentially very large volumes of data.

In this program, you will learn how to use automated data queries to link data from external databases into Excel and then transform this data into Data Models. From there, you will learn how to use Power Pivot and CUBE formulas to streamline the process of summarizing and reporting this data. You will also learn how to take advantage of advanced features such as Data Analysis Expressions, Key Performance Indicators, Hierarchies, and Dimensions to streamline your reporting processes. Further, you will learn how to create compelling visualizations of this summarized data to help your readers understand the true meaning behind the numbers. If you currently use PivotTables on a regular basis and want to take advantage of the powerful advanced reporting features available in Excel, then sign up today for this program.

Note: This program is taught at an advanced level; other, more fundamental coverage of PivotTables is offered in K2's Excel PivotTables for Accountants seminar. Many of the concepts taught in this course depend upon access to Power Pivot, Power Query, and Power View, available only in the Windows-based premium editions of Excel 2013 and Excel 2016.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Construct and manage links from external data sources into Excel for the automatic acquisition of data
- ◆ Define, build, and manage Data Models and build PivotTables from these objects
- ◆ Create PivotTables using Power Pivot, including PivotTables that summarize data from multiple data sources
- ◆ Utilize Data Analysis Expressions and other tools to add calculations to PivotTables
- ◆ Add features (Key Performance Indicators, Dimensions, and Hierarchies) to Power Pivot-based PivotTables
- ◆ Create visualizations of the data in your Power Pivot-based PivotTables using PivotCharts and Power View

Course Information

- ◆ **CPE credit:** Recommended for 8 hours Computer Software and Applications
- ◆ **Prerequisites:** Full understanding of intermediate to advanced PivotTables
- ◆ **Program level:** Advanced
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals using the Windows-based premium editions of Excel 2013 and Excel 2016 who are seeking to extend their knowledge of Excel as a reporting tool

K2'S EXCEL FINANCIAL REPORTING AND ANALYSIS

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
11/15/2018	10:00 AM	199.00	8	K2EFR
11/15/2018	1:00 PM	199.00	8	K2EFR
12/5/2018	10:00 AM	199.00	8	K2EFR
12/5/2018	1:00 PM	199.00	8	K2EFR

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

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

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- ◆ **CPE credit:** Recommended for 8 hours Accounting
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2010 or newer
- ◆ **Program level:** Advanced
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Accounting and financial professionals desiring more knowledge in using Excel for financial statement preparation and analysis. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

K2'S EXCEL PIVOTTABLES FOR ACCOUNTANTS

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/17/2018	10:00 AM	199.00	8	K2EPT
10/17/2018	1:00 PM	199.00	8	K2EPT
11/6/2018	10:00 AM	199.00	8	K2EPT
11/6/2018	1:00 PM	199.00	8	K2EPT

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.

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 Computer Software and Applications
- ◆ **Prerequisites:** Fundamental understanding of Microsoft Office Excel 2010 or newer
- ◆ **Program level:** Advanced
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Accounting and financial professionals who want to use the power of Excel PivotTables to analyze and summarize data. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

K2'S EXCEL TABLES AND DATA MODELS

EFFICIENTLY MANAGING, ANALYZING & REPORTING YOUR DATA

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/6/2018	10:00 AM	199.00	8	K2ETD
9/6/2018	1:00 PM	199.00	8	K2ETD
10/17/2018	10:00 AM	199.00	8	K2ETD
10/17/2018	1:00 PM	199.00	8	K2ETD
11/27/2018	10:00 AM	199.00	8	K2ETD
11/27/2018	1:00 PM	199.00	8	K2ETD

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!

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 Accounting and 6 hours Information Technology
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel
- ◆ **Program level:** Advanced
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Accounting and business professionals who use Windows-based versions of Excel 2013 and Excel 2016 and are seeking to manage, analyze, and report data more efficiently using Excel

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

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/19/2018	10:00 AM	199.00	8	K2EXL
9/19/2018	1:00 PM	199.00	8	K2EXL
11/29/2018	10:00 AM	199.00	8	K2EXL
11/29/2018	1:00 PM	199.00	8	K2EXL
12/11/2018	10:00 AM	199.00	8	K2EXL
12/11/2018	1:00 PM	199.00	8	K2EXL

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.

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 Computer Software and Applications
- ◆ **Prerequisites:** Fundamental knowledge of Microsoft Office Excel 2010 or newer
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Accounting and financial professionals who want to learn how to use Excel more efficiently and effectively. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

K2'S PAPERLESS OFFICE

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/18/2018	10:00 AM	199.00	8	K2PPO
9/18/2018	1:00 PM	199.00	8	K2PPO
11/13/2018	10:00 AM	199.00	8	K2PPO
11/13/2018	1:00 PM	199.00	8	K2PPO

Would you like to find important documents in 10 seconds or less? Would you like to ensure that all your digital information is safe and secure? Would you like to improve efficiency in workflow? Of course you would, and with a little planning and guidance, you will be on your way to realizing these and other benefits associated with a paperless office. No one expects a completely “paperless” office, but reducing the amount of paper we shuffle can lead to tremendous rewards and in this course, you will learn best practices and proven processes for effective document management.

By participating in this program, you will learn how you can implement simple, inexpensive document management systems at an individual, work group, or small business level. You will also learn how you can implement more sophisticated and comprehensive document management systems – complete with automated workflow processing – that would be appropriate for larger offices and organizations. Your instructor will guide you through issues such as digitizing hard copy files, exporting and importing data from specialized applications into a document management system, key hardware and software considerations, and the policies necessary to facilitate a successful office. Upon completing this course, you will have a comprehensive understanding of your options and a clear direction of how to implement your own version of the Paperless Office.

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- ◆ **CPE credit:** Recommended for 8 hours Information Technology
- ◆ **Prerequisites:** Fundamental knowledge of computer operations
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Accountants and other business professionals who are seeking to improve document management processes in their organizations

K2'S PLANNING AND MANAGING YOUR TEAM'S TECHNOLOGY

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/25/2018	10:00 AM	199.00	8	K2PMT
9/25/2018	1:00 PM	199.00	8	K2PMT
11/16/2018	10:00 AM	199.00	8	K2PMT
11/16/2018	1:00 PM	199.00	8	K2PMT

Isn't it time you took control of information technology (IT) within your organization? With IT being both a significant cost and a strategic expenditure, what can you do to manage ROI? What steps are available to maximize the impact of technology, controlling costs where possible, while still benefiting from leveraging that technology to improve profits? How can you set reasonable budgets and manage your team and vendors to ensure that your technology is functioning as intended and on budget? What can we do to stay current enough on the options and conversant enough to speak with computer people?

Join us in this seminar to learn the best ways to plan and manage your team's technology. The program is specifically designed for the manager who does not have a technology background, but who is now charged with leading and managing the technology investment in a small to mid-sized organization, including a CPA firm. If you are in that role, can you really afford to miss this program?

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Identify the major cost components associated with technology
- ◆ Plan budgets to acquire the necessary resources needed for success
- ◆ Differentiate between various opportunities for leveraging Cloud-based tools
- ◆ Identify optimal software licensing strategies in an organization
- ◆ Prepare and implement appropriate technology policies in a business

Course Information

- ◆ **CPE credit:** Recommended for 8 hours Information Technology
- ◆ **Prerequisites:** Basic understanding of computer operations and terminology
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who manage technology investments and applications in small to mid-sized organizations, including CPA firms

K2'S QUICKBOOKS FOR ACCOUNTANTS

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/17/2018	10:00 AM	199.00	8	K2QBP
9/17/2018	1:00 PM	199.00	8	K2QBP
11/28/2018	10:00 AM	199.00	8	K2QBP
11/28/2018	1:00 PM	199.00	8	K2QBP
12/6/2018	10:00 AM	199.00	8	K2QBP
12/6/2018	1:00 PM	199.00	8	K2QBP

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!

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 Computer Software and Applications
- ◆ **Prerequisites:** Fundamental understanding of basic QuickBooks operations
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Accounting and financial professionals who use or support clients who use QuickBooks (This session is taught using the US Version)

K2'S QUICKBOOKS ONLINE AND OTHER TOP ACCOUNTING SOFTWARE FOR SMALL BUSINESSES

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/1/2018	10:00 AM	199.00	8	K2QOA
10/1/2018	1:00 PM	199.00	8	K2QOA
11/19/2018	10:00 AM	199.00	8	K2QOA
11/19/2018	1:00 PM	199.00	8	K2QOA
12/14/2018	10:00 AM	199.00	8	K2QOA
12/14/2018	1:00 PM	199.00	8	K2QOA

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

Join us in this seminar to learn which small business accounting application might be the best fit for your/your client's specific needs and you can maximize the return on investment for the solution you choose. You will learn about each solution's key features, target markets, approximate pricing, integration options, and other relevant factors to assist in make the right decision. This is the one "must-attend" seminar for anyone working in a small business or providing services to small businesses.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Identify relative strengths of competing small business accounting applications and optimal target markets
- ◆ Estimate the cost of acquiring and implementing various small business accounting solutions
- ◆ Identify and utilize various features to improve the accounting function in small businesses
- ◆ Differentiate among various add-on solutions for functions such as financial and operational reporting, sales tax, and workflow

Course Information

- ◆ **CPE credit:** Recommended for 8 hours Computer Software and Applications
- ◆ **Prerequisites:** Basic understanding of computer operations and accounting software
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals working in a small business or providing services to a small business (This session is taught using the US Version)

K2'S SMALL BUSINESS INTERNAL CONTROLS, SECURITY, AND FRAUD PREVENTION AND DETECTION

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/4/2018	10:00 AM	199.00	8	ICSBA
11/9/2018	10:00 AM	199.00	8	ICSBA
12/10/2018	10:00 AM	199.00	8	ICSBA

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.

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

Course Information

- ◆ **CPE credit:** Recommended 8 hours Auditing
- ◆ **Prerequisites:** Basic understanding of internal controls and accounting and administrative processes
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals responsible for internal control and fraud prevention and detection (This session is taught using the US Version)

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

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/27/2018	10:00 AM	199.00	8	K2TEC
9/27/2018	1:00 PM	199.00	8	K2TEC
11/5/2018	10:00 AM	199.00	8	K2TEC
11/5/2018	1:00 PM	199.00	8	K2TEC

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.

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 Computer Software and Applications
- ◆ **Prerequisites:** None
- ◆ **Program level:** Basic
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** 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

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
12/27/2018	8:00 PM	129.00	4	K2EXR

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

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

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

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- ◆ **CPE credit:** Recommended for 4 hours Accounting
- ◆ **Prerequisites:** Strong working knowledge of Excel 2010 or newer
- ◆ **Program level:** Advanced
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** 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. The program focuses on Excel for Windows, but some of the features can be found in Excel for Mac.

K2'S ADVANCED QUICKBOOKS TIPS & TECHNIQUES

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/26/2018	10:00 AM	129.00	4	K2AQB
10/26/2018	1:00 PM	129.00	4	K2AQB
12/4/2018	10:00 AM	129.00	4	K2AQB
12/4/2018	1:00 PM	129.00	4	K2AQB

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.

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 Computer Software and Applications
- ◆ **Prerequisites:** Fundamental knowledge of QuickBooks
- ◆ **Program level:** Advanced
- ◆ **Advanced preparation:** None
- ◆ **Who should participate:** Accounting and financial professionals who want to learn about advanced features and techniques associated with QuickBooks (This session is taught using the US Version)

K2'S IMPLEMENTING INTERNAL CONTROLS IN QUICKBOOKS ENVIRONMENTS

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/26/2018	8:00 PM	129.00	4	K2ICQ
12/4/2018	8:00 PM	129.00	4	K2ICQ

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

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

Learning Objectives

Upon completing this course, you should be able to:

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

Course Information

- ◆ **CPE Credit:** Recommended for 4 hours Auditing
- ◆ **Prerequisites:** Fundamental knowledge of internal controls and QuickBooks solutions
- ◆ **Program level:** Intermediate
- ◆ **Advanced preparation:** None
- ◆ **Who should participate:** Accountants and other business professionals who want to improve internal controls in QuickBooks and QuickBooks Online environments (This session is taught using the US Version)

K2'S INTRODUCTION TO EXCEL MACROS

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/16/2018	8:00 PM	129.00	4	K2EXM
12/3/2018	10:00 AM	129.00	4	K2EXM
12/3/2018	1:00 PM	129.00	4	K2EXM

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.

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 Computer Software and Applications
- ◆ **Prerequisites:** None
- ◆ **Program level:** Basic
- ◆ **Advanced preparation:** None
- ◆ **Who should participate:** Business professionals seeking to extend Excel’s functionality with simple, yet highly-effective, macros. The program focuses on Excel for Windows.

K2'S SECURING YOUR DATA

Practical Tools for Protecting Information

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/16/2018	10:00 AM	129.00	4	K2SEC
10/16/2018	1:00 PM	129.00	4	K2SEC
12/31/2018	10:00 AM	129.00	4	K2SEC
12/31/2018	1:00 PM	129.00	4	K2SEC

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.

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 Information Technology
- ◆ **Prerequisites:** Basic understanding of computer operations
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals seeking to secure sensitive data

K2'S TECHNOLOGY UPDATE

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/10/2018	8:00 PM	129.00	4	K2TUP
12/27/2018	10:00 AM	129.00	4	K2TUP
12/27/2018	1:00 PM	129.00	4	K2TUP

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.

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 Information Technology
- ◆ **Prerequisites:** Fundamental understanding of basic technology concepts
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** 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

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/20/2018	10:00 AM	129.00	4	K2TPF
9/20/2018	1:00 PM	129.00	4	K2TPF
12/28/2018	8:00 PM	129.00	4	K2TPF

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.

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 Computer Software and Applications
- ◆ **Prerequisites:** Fundamental knowledge of basic PDF operations
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to become more efficient and effective when working with PDF documents

K2'S EXCEL TIPS AND TOOLS FOR BETTER BUDGETS

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/21/2018	6:00 PM	79.00	2	K2ETB
11/14/2018	10:00 AM	79.00	2	K2ETB
11/14/2018	1:00 PM	79.00	2	K2ETB
11/30/2018	8:00 PM	79.00	2	K2ETB
12/3/2018	8:00 PM	79.00	2	K2ETB

Excel is the de facto budgeting and forecasting tool for most professionals, yet many who use Excel for these tasks do not take advantage of the numerous built-in tools available. Among other topics in this session, you will learn how to work with Excel features such as FORECAST, FORECAST.ETS, TREND, Forecast Sheets, XNPV, and XIRR. Additionally, you will learn better ways to manage what-if analysis using Scenario Manager, Solver, and the value of performing Monte Carlo simulations. In short, if you use Excel for budgeting and forecasting, you can't afford to miss this session!

Learning Objectives

Upon completing this course, you should be able to:

- ◆ List key budgeting and forecasting-centric features in Excel
- ◆ Differentiate between Excel's capital budgeting functions
- ◆ Utilize Scenario Manager to manage different sets of budget assumptions
- ◆ Solve complex, multi-variable equations with Excel's Solver add-in
- ◆ Create Monte Carlo simulations to model risk in budgets and forecasts

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Finance
- ◆ **Prerequisites:** Fundamental knowledge of budgeting and Microsoft Office Excel
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to become more efficient and effective in budgeting processes. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

K2'S IMPLEMENTING PASSWORD MANAGEMENT AND DATA LOSS PREVENTION TOOLS FOR BETTER SECURITY

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/12/2018	6:00 PM	79.00	2	K2EBB
12/7/2018	6:00 PM	79.00	2	K2EBB

Data Loss Prevention (DLP) is a means of creating and enforcing security policies in an organization. For example, with DLP, you can create rules that programmatically block all outbound email messages containing information such as Social Security or credit card numbers. Unfortunately, most business professionals have yet to discover DLP and how it improves security. Likewise, most business professionals have yet to discover and implement password management tools, which all but a necessity when attempting to enhance personal and organizational security.

In this session, you will learn the fundamentals of DLP and password management tools, and through demonstrations, see how you can use DLP and password management tools to enhance organizational security. Don't miss this chance to learn how to take advantage of one of the most innovative security options available to you!

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Define Data Loss Prevention and list examples of how it can enhance organizational security
- ◆ List examples of tools and services available that support DLP
- ◆ Identify the process for creating DLP rules in common tools, such as, Excel and Exchange Online
- ◆ List the key characteristics of "long-and-strong" passwords
- ◆ Differentiate between leading password management tools
- ◆ Identify alternatives to passwords to improve authentication controls

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Information Technology
- ◆ **Prerequisites:** Fundamental knowledge of computer operations
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to become enhance the security and privacy of sensitive data

K2'S EXCEL DATA MODELS, COMBINATIONS, AND CONSOLIDATIONS

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
11/14/2018	6:00 PM	79.00	2	K2WTT
12/19/2018	8:00 PM	79.00	2	K2WTT

Combining and linking data from multiple tables, sheets, and workbooks is a daily need for most accountants, yet many do not fully appreciate the breadth of Excel options available for accomplishing this task. In this session, you will learn about the full range of Excel data consolidation functionality, including simple sum-through formulas, auto-merging workbooks, consolidation PivotTables, and linking tables to create powerful Data Models. Simplify and streamline your data consolidation processes, improve your personal productivity, and reduce errors with the information contained in this feature-packed session.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Differentiate between various formula-based approaches to consolidating data
- ◆ Implement dummy end-point worksheets or columns to simplify the data consolidation process and reduce errors
- ◆ Differentiate between using Data Consolidation by position and by category
- ◆ Use consolidation PivotTables to combine data from multiple worksheets and/or multiple workbooks
- ◆ Create a Data Model by linking multiple tables of data and then build powerful PivotTable analyses from the Data Model

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Computer Software and Applications
- ◆ **Prerequisites:** Fundamental knowledge of computer operations and Microsoft Office Excel
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to harness the power of array formulas to perform calculations in Excel. The program focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

K2'S MICROSOFT WORD TIPS & TRICKS

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/21/2018	10:00 AM	79.00	2	K2EPQ
9/21/2018	1:00 PM	79.00	2	K2EPQ

Like most Microsoft Word users, you can get through the basics of creating a document and applying some formatting characteristics. 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.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Identify key features for entering, editing, and formatting data, including Styles
- ◆ Describe how to create and format Tables
- ◆ Use the Navigation Pane to navigate or rearrange a document quickly and easily
- ◆ Define Quick Parts and Building Blocks and how to use them effectively
- ◆ Describe how to communicate better with charts, SmartArt, and screen shots

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Computer Software and Applications
- ◆ **Prerequisites:** Fundamental knowledge of computer operations and Microsoft Word
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to utilize the Windows-based version of Microsoft Word more efficiently and effectively

K2'S EXTENDING THE POWER OF EXCEL WITH USEFUL ADD-INS

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/12/2018	6:00 PM	79.00	2	K2EPU
11/14/2018	8:00 PM	79.00	2	K2EPU
12/19/2018	6:00 PM	79.00	2	K2EPU

There are many free or low-cost add-ins available to overcome the limitations of Excel. For example, the free Fuzzy Lookup add-in from Microsoft allows users to match inexact data. Ever try that with VLOOKUP? RiskAMP allows users to perform Monte Carlo simulations for capital budgeting; ActiveData provides users with the means to do sophisticated Benford Analysis and other CAATS techniques; and the Analysis ToolPak provides a full range of statistical analyses useful in budgeting and forecasting. This session will identify and demonstrate useful add-ins to improve Excel functionality and your productivity.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Identify five useful add-ins to extend the power and functionality of Excel
- ◆ Use the Fuzzy Lookup add-in to match inexact data
- ◆ Explain Benford Analysis and why it is useful in fraud detection
- ◆ Perform linear regression using the Analysis ToolPak
- ◆ Describe the process of performing a Monte Carlo simulation on cash flow data

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Computer Software and Applications
- ◆ **Prerequisites:** Fundamental knowledge of computer operations and Microsoft Excel
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to maximize the functionality of Excel by using add-in tools. This program focuses on Excel for Windows.

K2'S ADVANCED EXCEL FUNCTIONS AND FORMULAS

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/11/2018	6:00 PM	79.00	2	K2AEF
10/18/2018	6:00 PM	79.00	2	K2AEF
11/30/2018	10:00 AM	79.00	2	K2AEF
11/30/2018	1:00 PM	79.00	2	K2AEF

Excel has more than 450 functions, many of which are unused by business professionals. This session will put you on a path to improved Excel productivity by introducing you to powerful but little used Excel functions, such as IFS (for nested IF statements), AGGREGATE (best described as SUBTOTAL on steroids), GETPIVOTDATA (for producing formal reports from data summarized in a pivot table), CUBEVALUE (for building reports directly from the Excel Data Model) or TEXTJOIN (for joining text or creating CSV files quickly and easily).

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Use Excel's financial functions to calculate mortgage interest and principal reduction, or perform conventional cash flow analysis
- ◆ List five Excel functions for making conditional calculations with multiple conditions
- ◆ Explain the general process of using INDIRECT to make report assembly easier
- ◆ Describe the benefits of using GETPIVOTDATA for extracting summarized data from a PivotTable

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Computer Software and Applications
- ◆ **Prerequisites:** Fundamental knowledge of computer operations and Microsoft Excel
- ◆ **Program level:** Advanced
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to maximize the functionality of Excel by using advanced functions and formulas. This program focuses on Excel for Windows.

K2'S ACCESSING AND CLEANING DATA WITH EXCEL, POWER QUERY, AND POWER BI

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
11/13/2018	8:00 PM	79.00	2	K2ACD

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.

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

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Information Technology
- ◆ **Prerequisites:** Fundamental knowledge of computer operations and Microsoft Excel
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to query data from external data sources into Excel and Power BI for analytical purposes. This program focuses on Excel for Windows.

K2'S EMERGING TECHNOLOGIES

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/11/2018	6:00 PM	79.00	2	K2PTG
10/18/2018	8:00 PM	79.00	2	K2PTG
11/30/2018	6:00 PM	79.00	2	K2PTG

Computer technologies have helped our businesses be more productive and get more done with fewer resources. The next major wave of technologies is arriving now and you'll want to choose from various technologies and solutions that fit your needs. Topics included in this session are: Artificial Intelligence, Blockchain, Big Data, Machine Learning. Each major technology will be explained including why it is important and it works. Products that have been delivered or will be delivered soon will be used as examples in each category to turn this discussion from a theoretical overview to a practical selection and how-to cookbook.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ List three major emerging technologies
- ◆ Estimate the volume capacity of Big Data
- ◆ Identify a business case for machine learning
- ◆ Specify a current use for artificial intelligence

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Computer Software and Applications
- ◆ **Prerequisites:** Fundamental knowledge of computer operations
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to stay ahead of the curve with respect to emerging technologies

K2'S EVALUATING TECHNOLOGY CONTROLS

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/16/2018	6:00 PM	79.00	2	K2ETC
11/13/2018	10:00 AM	79.00	2	K2ETC
11/13/2018	1:00 PM	79.00	2	K2ETC

Technology controls are more important than ever. In the absence of properly-functioning controls, entire systems and the data contained therein can quickly become infected, breached, or simply stop functioning. Auditors, business managers, and consultants all need to know how to evaluate critical technology controls and in this session, you will learn the best ways to evaluate critical information technology general controls and application controls.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Distinguish between information technology general controls and application controls;
- ◆ Identify key information technology control risks within an organization
- ◆ Design and perform tests of information technology controls
- ◆ Create recommendations for improving technology controls in an organization

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Auditing
- ◆ **Prerequisites:** Fundamental knowledge of computer operations
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to learn how to evaluate technology controls, either from an internal or external perspective.

K2'S FILTERING THE WORLD – SPAM, VIRUS, AND MALWARE PROTECTION

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/11/2018	10:00 AM	79.00	2	K2FWS
9/11/2018	1:00 PM	79.00	2	K2FWS
11/13/2018	6:00 PM	79.00	2	K2FWS

Bad actors want inside your systems and want to steal your data. They can attack your systems directly or they can use your email box. This session explains the protection options for spam, virus and malware. Top tools and techniques will be discussed with multiple solutions discussed in each area.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Identify threats that need protection
- ◆ Differentiate the most effective protection methods
- ◆ List the protection options that you can use
- ◆ Apply the knowledge to protect your systems

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Information Technology
- ◆ **Prerequisites:** Fundamental knowledge of computer operations and security needs
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to increase the security of sensitive and critical data

K2'S EXCEL FINANCIAL MODELING BEST PRACTICES

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/11/2018	8:00 PM	79.00	2	K2EFF
12/19/2018	10:00 AM	79.00	2	K2EFF
12/19/2018	1:00 PM	79.00	2	K2EFF

Excel remains the tool of choice for many accounting and financial professionals when building financial models, including forecasted financial statements and budgets. Yet, many of these same professionals have never received any formal training how the best practices associated with generating these types of spreadsheets. By participating in this session, you will learn many amazing techniques that will not only help you to save valuable time when building Excel-based models, but will also improve the quality of your results.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Identify ten best practices for creating financial models in Excel
- ◆ Utilize Excel features and add-in services for sensitivity, trend, and discounted cash-flow analyses
- ◆ Create optimization models using Excel's Solver tool
- ◆ Implement procedures for eliminating errors in Excel-based financial models
- ◆ Incorporate various formatting techniques to improve the usefulness of reports

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Finance
- ◆ **Prerequisites:** Fundamental knowledge of computer operations and Microsoft Excel
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to utilize the Windows-based version of Excel more efficiently and effectively when creating financial models, plans, and analyses

K2'S MASTERING THE EXCEL DATA MODEL

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/16/2018	10:00 AM	79.00	2	K2TDM
10/16/2018	1:00 PM	79.00	2	K2TDM
11/14/2018	6:00 PM	79.00	2	K2TDM

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 Power Pivot. With the Data Model, users can 1) relate multiple Excel tables, 2) build PivotTables on multiple data sources, 3) import data from external data sources, and 4) analyze PivotTable reports using Quick Explore, which allows users to drill up, down, and around in reports. This session will provide the knowledge and skill necessary to take full advantage of the Excel Data Model.

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
- ◆ Explain the process of connecting to external data sources

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Computer Software and Applications
- ◆ **Prerequisites:** Fundamental knowledge of computer operations and Microsoft Office Excel
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to take advantage of Excel's Data Model feature. This course focuses on features found in the Windows-based version of Excel.

K2'S OFFICE 365 – NEW TOOLS, NEW TRICKS

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/10/2018	6:00 PM	79.00	2	K2EAI
10/16/2018	8:00 PM	79.00	2	K2EAI
12/19/2018	6:00 PM	79.00	2	K2EAI

Microsoft's Office 365 offering continues to evolve and has likely forever changed how many organizations approach licensing familiar Microsoft Office applications. As part of the ever-changing nature of Office 365, Microsoft has added several new tools - including Flow and PowerApps - to the suite and has also added many new features to Excel, Word, and other existing applications. Join us for this productivity-enhancing session in which you will learn about the new tools in Office 365 and how to improve your productivity by taking advantage of them.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Differentiate Office 365 from traditional licenses of Microsoft Office and identify the license option that is best for you and your organization
- ◆ List the various update alternatives for Office 365 and determine which option is right for different team members and departments within your organization
- ◆ Identify new tools in Office 365 and how they might be useful to you or others in your organization
- ◆ Utilize new features in Office 365 applications to optimize productivity

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Computer Software and Applications
- ◆ **Prerequisites:** Fundamental knowledge of computer operations
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to take full advantage of the products and services offered under Office 365 subscriptions

K2'S MICROSOFT OUTLOOK – ORGANIZING THE INBOX

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/21/2018	8:00 PM	79.00	2	K2TTC

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.

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 messages
- ◆ Apply rules to automate email processes
- ◆ Describe how AutoArchive automates the process of cleaning the Inbox

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Computer Software and Applications
- ◆ **Prerequisites:** Fundamental knowledge of computer operations
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to take control over the ever-growing volume of data found in Microsoft Outlook

K2'S MICROSOFT POWER BI – POWER REPORTING FOR FREE!

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/12/2018	8:00 PM	79.00	2	K2OUT
10/18/2018	6:00 PM	79.00	2	K2OUT
12/7/2018	8:00 PM	79.00	2	K2OUT

Power BI is available as a free desktop solution and this tool can revolutionize your reporting processes. As a free solution, it is packed full of features found in pay for solutions costing thousands of dollars per year. This session will take you on a guided tour of importing data, organizing data, choosing visuals and building a simple report that will amaze you. You will also learn how you can leverage the desktop solution by publishing your reports to the paid Power BI Pro service. This is not rocket science - it is Power BI!

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Identify key differences between the cloud version and desktop version of Power BI
- ◆ Apply the knowledge gained to integrate Excel data into Power BI
- ◆ Use built-in query tools in Power BI to search for data
- ◆ Create compelling and interactive visualizations to build financial and operational dashboards

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Accounting
- ◆ **Prerequisites:** Fundamental knowledge of computer operations
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to improve financial reporting processes

K2'S DATA ANALYSIS WITH POWER PIVOT

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/20/2018	8:00 PM	79.00	2	K2SPG
12/28/2018	6:00 PM	79.00	2	K2SPG

With Power Pivot, your PivotTable reports become even more powerful. Power Pivot can connect directly to many common external data sources or can be used in conjunction with Power Query for superior data import and transformation capability. DAX functions allow users to create sophisticated calculations, both columns and measures, and the relational functionality of Power Pivot provides all the tools necessary for creating an intermediary database from multiple data sources. Put Power Pivot to use immediately by participating in this very practical session, which is sure to help you improve your analytical and reporting processes.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Differentiate between ordinary PivotTables and those created with Power Pivot
- ◆ Describe the advantages of working with Power Pivot
- ◆ Explain the procedure for building a PivotTable using Power Pivot
- ◆ Define Data Models, Data Analysis Expressions, and Key Performance Indicators

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Accounting
- ◆ **Prerequisites:** Fundamental knowledge of computer operations and Microsoft Excel, including creating PivotTables
- ◆ **Program level:** Advanced
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to improve financial analysis processes by taking advantage of the Power Pivot feature found in Windows-based versions of Excel

K2'S PERSONAL TECHNOLOGIES

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/20/2018	6:00 PM	79.00	2	K2FIL
11/13/2018	6:00 PM	79.00	2	K2FIL
12/31/2018	6:00 PM	79.00	2	K2FIL

Technology impacts us not only in our personal lives, but also in our business lives. Complicating matters, it sometimes can be difficult to distinguish between the two! In this session, you will learn about many of the technologies that can help you at home and at the office so that you can be more efficient and effective in getting things done. Examples of tools discussed in this session include personal hardware, apps, speech-to-text, notetaking tools, and audio-visual technologies. Make plans to participate in this session so that you can take full advantage of the technologies available to you.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Identify key hardware options for improved productivity
- ◆ List examples of how to securely synchronize data
- ◆ Identify how audio-visual technologies are an important consideration in today's business climate
- ◆ List example of apps that can have a positive impact at both a personal and a professional level

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Computer Software and Applications
- ◆ **Prerequisites:** Fundamental knowledge of basic technological concepts
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to identify new and emerging technologies to solve everyday issues

K2'S RANSOMWARE – REDUCING YOUR RISK

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/21/2018	6:00 PM	79.00	2	K2RYR
10/16/2018	6:00 PM	79.00	2	K2RYR

Ransomware continues to plague individuals and businesses of all sizes and in all industries and represents one of the biggest security threats we face today. Yet few are taking the steps necessary to reduce the risk associated with the potential loss of data associated with ransomware and the risk of a ransomware attack being considered a breach of confidential information. In this course, you will learn how you can implement an effective system of control to mitigate the risk that you will become yet another victim or ransomware.

Imagine turning on your computer one day to find that all your data files have been encrypted, but a criminal holds the key necessary for you to regain access to and use of these files. This is the classic definition of ransomware, an attack that affects hundreds of thousands of computers each year. Don't take the unnecessary chance that you will be impacted by ransomware. Learn the best practices for reducing the chances that your data is held hostage along with key recovery tactics in the event your preventive efforts fail.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Define “ransomware” and identify the risks it poses to you professionally and personally
- ◆ List the top methods by which ransomware infects an individual computer or a network
- ◆ Implement control methods to help reduce your risk of becoming another victim of ransomware

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Information Technology
- ◆ **Prerequisites:** Fundamental knowledge of basic technological and security concepts
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to reduce the risk of losing data in a ransomware attack

K2'S SECURITY – A PRACTICAL GUIDE

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/10/2018	10:00 AM	79.00	2	K2APG
9/10/2018	1:00 PM	79.00	2	K2APG
12/31/2018	8:00 PM	79.00	2	K2APG

It's not a matter of if you will have a security incident, but a matter of when. Learn the steps you can take to protect yourself. Everything from end to end will be covered including multi-factor authentication, password managers, encryption, mobile device management, anti-virus, firewalls, policies, tools and other techniques that you can apply immediately. Spending more does not make you more secure. Doing the right things can. Are you doing the right things to be secure?

Learning Objectives

Upon completing this course, you should be able to:

- ◆ List three tools that enhance security
- ◆ Describe the security risk environment
- ◆ Specify a business case for security training
- ◆ Name a tool that enhances security and reduces risk

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Information Technology
- ◆ **Prerequisites:** Fundamental knowledge of basic technological and security concepts
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to enhance the security surrounding both personal and organizational data

K2'S TECHNOLOGY CONCEPTS FOR DECISION MAKERS

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/12/2018	10:00 AM	79.00	2	K2TCM
9/12/2018	1:00 PM	79.00	2	K2TCM

Many CPAs are called upon to help manage the technology budget in their organization, but the sheer number of concepts, terms, and acronyms associated with your company's technology function make it difficult for non-engineers to fully participate in the discussion. This session will cover major concepts and terms surrounding networking, security, and authentication, and will help you put them in context so you can make better technology decisions for your company. Attend this session and learn more about the technology concepts in every organization so you can be a better leader.

Learning Objectives

Upon completing this course, you should be able to:

Upon completing this session, you should be able to:

- ◆ Define and explain at a very high level the purpose of major technology terms and acronyms such as TCP/IP, DNS, DHCP, SMB, POP, IMAP, SMTP, SSL, VLANs, virtual machines, containers, and TLS
- ◆ List the three major categories of authentication and give an example of each
- ◆ Differentiate between servers, workstations, and thin clients, and between public clouds and private clouds
- ◆ Identify the difference between an IP address and a port and give an example of how each would be used to access a resource

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Information Technology
- ◆ **Prerequisites:** Fundamental knowledge of basic technological concepts
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to enhance the security surrounding both personal and organizational data

K2'S TALES OF TRUE TECH CRIMES – RIPPED FROM THE HEADLINES!

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/18/2018	10:00 AM	79.00	2	K2TRH
10/18/2018	1:00 PM	79.00	2	K2TRH
11/30/2018	6:00 PM	79.00	2	K2TRH

Security is a top concern for business professionals every year, and yet many hacks result from the failure of organizations to implement effective internal controls over information technology. This session will teach you about critical IT-related controls in a case study approach using examples from recent breaches and security failures to help you better understand how to protect your company and its data. Attend this fast-paced session and learn more about IT-related controls which can be used to prevent computer crimes such as unauthorized access, theft of information, identity theft, data exfiltration, tax refund fraud, and more.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ List at least three major security incidents reported in the headlines in the last two years, and explain at least one major control design or operation flaws which allowed the hack to occur
- ◆ Define the three factors used to authenticate someone to a system, and explain why two-factor authentication is preferable to one-factor authentication
- ◆ Explain why home-grade computer hardware and applications are inherently less secure than business and enterprise grade hardware and applications
- ◆ List at least three best practices learned as a result of reviewing the incidents cited in the case studies

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Information Technology
- ◆ **Prerequisites:** Fundamental knowledge of basic technological and security concepts
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to enhance the security surrounding both personal and organizational data

K2'S THE BEST KEPT SECRETS OF WINDOWS 10

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
9/20/2018	6:00 PM	79.00	2	K2BKW
12/28/2018	10:00 AM	79.00	2	K2BKW
12/28/2018	1:00 PM	79.00	2	K2BKW

Windows 10 has been available since 2015, yet most continue to use it as they did prior versions of Windows, ignoring many features that can be used to enhance productivity and security. In this session, you will learn the best kept secrets of Windows 10, including how you can use it to minimize the threat of ransomware, integrate with your iOS or Android-powered device, and how to utilize Timeline to track your activities for the most recent 30 days. Make plans to join us in this session so that you can experience all the best features of Windows 10.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Identify options for managing the update frequency of a Windows 10-based PC
- ◆ List at least five new features for improving productivity in Windows 10
- ◆ Differentiate between key new features in Windows 10 for improving security
- ◆ Identify the process for integrating a Windows 10-based PC with an iOS or Android-powered device

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Information Technology
- ◆ **Prerequisites:** Fundamental knowledge of Windows operating systems
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to improve their proficiency with the Windows 10 operating system

QUICKBOOKS ONLINE: CHANGING THE PARADIGM OF SMALL BUSINESS ACCOUNTING

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
11/13/2018	10:00 AM	129.00	4	K2QB4
11/13/2018	1:00 PM	129.00	4	K2QB4

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.

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 (This session is taught using the US Version)

FIVE COMMON SENSE STEPS TO SECURE YOUR PC

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/4/2018	6:00 PM	49.00	1	K2CSS

Security is paramount to success in today’s world, yet most computer 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.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ List the most common risks associated with PCs today
- ◆ Differentiate between various tools and techniques already available in Windows to reduce risk
- ◆ Implement five key features designed to minimize the risk associated with operating a PC

Course Information

- ◆ **CPE credit:** Recommended for 1 hour Information Technology
- ◆ **Prerequisites:** None
- ◆ **Program level:** Basic
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals who are seeking to improve the security associated with operating a Windows-based computer

REMOTE ACCESS BEST PRACTICES

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/11/2018	6:00 PM	79.00	2	K2RAB

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.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ List key considerations when configuring Citrix, VDI, or RDS
- ◆ Implement procedures to secure mobile devices
- ◆ Identify considerations for securing your network edge with firewalls, anti-virus, and mobile device management (MDM) tools based on each remote access method

Course Information

- ◆ **CPE credit:** Recommended for 2 hours Information Technology
- ◆ **Prerequisites:** None
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Business professionals seeking to learn more about the best way to remotely access data and systems

REVOLUTIONIZING SMALL BUSINESS ACCOUNTING

Course Date	Start Time (ATLANTIC)	Course Price	CPD Hours	Course Code
10/3/2018	6:00 PM	49.00	1	K2RSB

A revolution is taking place in small-business accounting. While traditional desktop products such as QuickBooks and Sage 50/Peachtree continue to hold the lion’s share of the market, newer solutions are gaining traction and changing how small businesses and their accountants record and report transactions. Many of these solutions are cloud-based, some focus on niche markets and a few provide functionality, such as workflow, that smaller organizations found difficult to obtain in the past.

Learning Objectives

Upon completing this course, you should be able to:

- ◆ Identify major enhancements to traditional desktop accounting software for small businesses
- ◆ Define “collaborative accounting,” how it changes accounting procedures and processes, and how it potentially improves efficiency and accuracy
- ◆ Recognize the differences between leading cloud-based solutions for small businesses, including QuickBooks Online, Wave Apps, Xero, FreshBooks, Kashoo, and Bill.com based on feature set and target markets

Course Information

- ◆ **CPE credit:** Recommended for 1 hour Computer Software & Applications
- ◆ **Prerequisites:** None
- ◆ **Program level:** Overview
- ◆ **Advance preparation:** None
- ◆ **Who should participate:** Accountants who own or advise small businesses and want to learn more about accounting applications (This session is taught using the US Version)