

**EXPAND** *Knowledge*

**INTEGRATE** *Technology*

**DELIVER** *Results!*

*Increase your effectiveness today –  
Prepare for tomorrow*

**2010**

## **Technology Conference for Accountants**

Yesterday's practices are no longer adequate for success in today's rapidly evolving technology and business landscapes.

- **Do you have the knowledge** you need to move forward in this dynamic environment?
- **Are you as effective** as you can be in your organization or for your clients?
- **Can you remain competitive** where you are today?

This conference gives you the opportunity to participate in a series of sessions providing the knowledge and solutions that will enable you to:

- **Streamline** Operations
- **Reduce** IT costs
- **Improve** responsiveness
- **Minimize** risk
- **Make** better decisions
- **Enforce** governance
- **Increase** visibility

16 CPE Credits

**“Excellent summary  
of technology issues**

that apply to CPA's in  
public practice, industry and  
government.” – *A.H.*

**Monday | Tuesday  
May 10 and May 11, 2010**

**Hilton Jackson, 1001 East County Line Road  
Jackson, Mississippi**

8 to 9:45 a.m. *General Session*

**TECH UPDATE**

Where should you invest for the best technology ROI? Technology companies will roll out major upgrades, as well as new solutions, all year long. This session provides the most current recommendations for computers, servers, printers, and scanners. Learn about the latest technologies affecting the accounting profession, the organizations we work for, and the clients we serve.

7:30 to 8 a.m. *On-Site Registration*

*Refreshment Break*

9:55 to 11:30 a.m. *Morning Breakout Sessions*

○ **CHARTING IN MICROSOFT OFFICE:**

**WHAT THE USER MANUAL DOESN'T TELL YOU**

Basic charts in Excel are so easy "a cave man can do them." But how can you build advanced, interactive charts that allow users to "self-select" data? Or charts that change dynamically as the volume of data changes? Or PivotCharts? In this session, you will learn how to build amazing charts in Excel, Word, and PowerPoint that will enhance your communications.

○ **TECHNOLOGIES FOR THE TAX PRACTICE**

What technologies can make your tax practice more efficient and more profitable? How well do tools such as scan-and-populate, workflow, portals, document management systems, and web-based research really perform? How can you integrate popular accounting software applications such as QuickBooks with your tax software? Get answers to your questions – and enhance the value of your practice – in this session.

○ **ALL THINGS GOOGLE!**

Google is much more than just a search engine. Among other offerings, with an operating system, web browser, telecommunications services, collaboration tools, advertising services, web analytics, and online spreadsheets, word processing, calendars, and email, it is easy to see that Google is shaping and re-shaping the world of technology. Learn about "all things Google" in this fast-paced and very entertaining session.

11:30 to 12:30 p.m. *Lunch*

8 to 9:45 a.m. *General Session*

**SECURITY TOOLS – UP CLOSE AND PERSONAL**

Information security is no longer optional – it is the law! This session covers tools for securing emails, encrypting hard disks and flash drives, protecting data on mobile phones and other portable devices, securing documents, protecting desktops and servers, securing text messaging, and more. Attend this session if you want to understand how to protect confidential data and reduce your legal risks.

7:30 to 8 a.m. *On-Site Registration*

*Refreshment Break*

9:55 to 11:30 a.m. *Morning Breakout Sessions*

○ **REVIEWING AND EDITING PDF DOCUMENTS**

As accountants increasingly use PDF files, reviewing and editing these documents becomes even more important. In this session, you will learn best practices for reviewing and editing PDF documents. Examples of topics discussed include adding tick marks to PDFs, collaborating on PDFs, securing PDFs, and assembling "final copies" of PDFs. Become more efficient and productive working with PDFs by attending this session.

○ **TODAY'S VIRTUAL OFFICE - BEST PRACTICES FOR CUTTING THE CORD**

Today's virtual office looks much different from that envisioned just a few years ago. Remote access software tools are still viable, but so are tools such as virtual computers, virtual desktop infrastructures, virtual servers, portals, and "cloud computing." In this session, you will learn about these tools and others – along with security and privacy risks – so you can cut the cord and your office can reside virtually anywhere.

○ **iDIGITAL – EVERYTHING IN DIGITAL FORMAT**

Forget the paperless office; how about everything – old photographs, slides, documents, files, tapes, cassettes – in electronic form? As the world continues to march through technology, you might need to convert older data on the fly, so you have access to all of your data and documents. For example, can you really deal with a floppy disk now? This session will provide the best in ideas of how to keep everything available.

11:30 to 12:30 p.m. *Lunch*

12:30 to 2:05 p.m. *Afternoon Breakout Sessions*

○ **HOW TO CREATE A LEAN, CLEAN COMPUTING MACHINE**

Not going to Windows 7 in 2010? Then you likely need to clean up your Windows XP systems so they run optimally. This session reviews a number of utilities to help you manage hardware, even if you are not a “techie.” Learn how to undelete deleted files, wipe files forever, clean the registry, prepare your disks properly, and much more. Extend the life and enhance the performance of your Windows XP systems by learning about the tools and techniques covered in this session.

○ **TECHNOLOGIES FOR PRACTICE MANAGEMENT, AUDITS, AND WRITE-UPS**

More than ever, technology impacts traditional services such as audits, write-ups, compilations, and reviews. Engagement and trial balance software continue to evolve and offer significant efficiency gains, but so do other technologies such as workflow management, time and billing systems, document management, and research tools. Learn about the tools to make these segments of your practice more efficient and profitable.

○ **BECOMING MORE PRODUCTIVE WITH OFFICE 2010**

What’s new with Office 2010 and why should you consider using it? In this session, you will learn about productivity-enhancing features such as Outlook’s Conversation View and QuickSteps; Sparklines, Slicer, and PowerPivot in Excel; Conditional Formatting in Access; Video Editing in PowerPoint; Co-authoring in Word; and Office Web Apps – all tools to make you more productive with Microsoft Office 2010.

11:30 to 12:30 p.m. Lunch

Refreshment Break

2:15 to 4 p.m. *General Session*

**TEN THINGS YOU MAY HAVE MISSED IN EXCEL**

Unless you are using all of the following features, you may be missing out on some of Excel’s best tools: Custom Views, Report Manager, Solver, Scenario Manager, Defined Names, Templates, Form Controls, User Defined Functions, Page Layout View, and Working With Multiple Workbooks In The Same Instance Of Excel. With Excel being the “accountant’s tool of choice”, you really cannot afford to miss this opportunity to learn about some of Excel’s best features.

12:30 to 2:05 p.m. *Afternoon Breakout Sessions*

○ **EXCEL – THE BUSINESS ANALYTICS TOOL**

With over a million rows and sixteen thousand columns, Excel is a serious analytical tool. And with the introduction of PowerPivot in Excel 2010, the analytical capabilities of Excel continue to grow. Integrate an impressive array of newer features such as Tables with some old tried-and-true tools such as Data Tables, PivotTables, Solver, Goal Seek and you have a powerful analytics tool that can report results via dashboards. Learn how to perform business analytics in Excel!

○ **SOLVING THE TOP QUICKBOOKS ISSUES** | Some 4 million businesses use QuickBooks applications and almost every one of them faces certain issues when using the software. In this session, you will learn best practice solutions to the most common QuickBooks issues such as ensuring the integrity of prior period transactions, securing QuickBooks data files, finding and reconciling discrepancies in account balances, and financial and operational reporting. You will also learn about complementary products that can help you to solve some of QuickBooks’ most challenging issues. This session provides a terrific opportunity of how to make the most of QuickBooks.

○ **BETTER OPTIONS FOR BACKUP**

“As long as you have your data, we can recover everything else.” How many times have you or your organization gone to your backup only to find it bad or missing? Discover new alternatives for keeping your data safe, such as backup appliances with complete virtualization capability; internet-based backups; continuous data protection; and alternate backup media. Can you really afford to take chances with your most valuable asset – your organization’s data? Learn better ways to backup your data by participating in this session.

11:30 to 12:30 p.m. Lunch

Refreshment Break

2:15 to 4 p.m. *General Session*

**ALL ABOARD FOR WINDOWS 7**

Windows 7 is here and it is an immediate consideration for every PC user. Critical questions such as “Which version of Windows 7 is right for me”, “How can I become more productive with Windows 7”, and “What should I know before transitioning to Windows 7” are answered in this very timely, relevant, and practical session. Learn about accountant-centric issues such as new features in Windows 7 – including XP mode – and developing an effective transition plan in this “must-see” session.

**MONDAY | MAY 10 | 2010**

- 7:30 a.m. On Site Registration
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- 8 a.m. GENERAL SESSION | **TECH UPDATE**
- 
- 9:55 a.m. MORNING BREAKOUT SESSIONS
- 2. **CHARTING IN MICROSOFT OFFICE** | What The User Manual Doesn't Tell You
  - 3. **TECHNOLOGIES FOR THE TAX PRACTICE**
  - 4. **ALL THINGS GOOGLE!**
- 
- 11:30 a.m. Lunch
- 
- 12:30 p.m. AFTERNOON BREAKOUT SESSIONS
- 5. **HOW TO CREATE A LEAN, CLEAN COMPUTING MACHINE**
  - 6. **TECHNOLOGIES FOR PRACTICE MANAGEMENT, AUDITS, AND WRITE-UPS**
  - 7. **BECOMING MORE PRODUCTIVE WITH OFFICE 2010**
- 
- 2:15 p.m. GENERAL SESSION | **TEN THINGS YOU MAY HAVE MISSED IN EXCEL**
- 
- 4 p.m. End of Sessions for Monday, May 10

**TUESDAY | MAY 11 | 2010**

- 7:30 a.m. On Site Registration
- 
- 8 a.m. GENERAL SESSION | **SECURITY TOOLS - UP CLOSE AND PERSONAL**
- 
- 9:55 a.m. MORNING BREAKOUT SESSIONS
- 9. **REVIEWING AND EDITING PDF DOCUMENTS**
  - 10. **TODAY'S VIRTUAL OFFICE** | BEST PRACTICES FOR CUTTING THE CORD
  - 11. **iDIGITAL** | EVERYTHING IN DIGITAL FORMAT
- 
- 11:30 a.m. Lunch
- 
- 12:30 p.m. AFTERNOON BREAKOUT SESSIONS
- 12. **EXCEL** | THE BUSINESS ANALYTICS TOOL
  - 13. **SOLVING THE TOP QUICKBOOKS ISSUES**
  - 14. **BETTER OPTIONS FOR BACKUP**
- 
- 2:15 p.m. GENERAL SESSION | **ALL ABOARD FOR WINDOWS 7**
- 
- 4 p.m. End of Conference

**About this Conference:**

**CPE credit**..... 16 hours  
**Course developer**..... K2 Enterprises  
**Prerequisites**..... None  
**Conference Level** ..... All  
**Advance preparation** ..... None

**Instructional Method:**

Group-live demo using color projection – not hands on

**Designed for:**

Accountants who want to learn how to use technology more efficiently and effectively



# REGISTRATION FORM

CONFERENCE LOCATION | TIMES | FEES

## Hilton Jackson

1001 East County Line Road, Jackson MS 39211 • Phone: (601) 957-2800

On site check-in begins at 7:30 a.m., Conference starts at 8 a.m. and ends at 4 p.m.

Member Fee \$395 | Non-member Fee \$545

### Specific Needs:

Check here if you require special services. Attach a written description of your needs.

Please complete the following:

Name

Firm/Co.

Street Address

City/State/Zip

E-mail:

CPA Certificate #

Telephone #

Fax #

Are you a CPA?  Yes  No

Are you a member of the MSCPA?  Yes  No

Registration Fee: \$ \_\_\_\_\_

Reminder: Non-CPA staff may register at the "member" rate.

### Method of Payment:

Check  Visa  MasterCard

American Express  Discover

Credit Card #:

Exp. Date

Name on Credit Card

Signature

### BREAKOUT SESSIONS

(Select one from each time period)

#### Monday, May 10

Morning 9:55–11:30 a.m.

2  3  4

Afternoon 12:30–2:05 p.m.

5  6  7

#### Tuesday, May 11

Morning 9:55–11:30 a.m.

9  10  11

Afternoon 12:30–2:05 p.m.

12  13  14

**Credit card registrations will be accepted by mail, phone or fax. All other registrations must be mailed with payment.**

- **Fax** to (601) 856-8255; with credit card information
- **Mail** a check payable to Mississippi Society of CPAs  
306 Southampton Row  
Ridgeland, MS 39157
- **Call** (601) 856-4244 or (800) 772-1099  
In State Only

## DISCUSSION LEADERS

- **William C. Fleenor**, CPA.CITP, Ph.D
- **Randolph P. Johnston**, MCS, MCP
- **Val D. Steed**, CPA.CITP, MA
- **Thomas G. Stephens Jr.**, CPA.CITP
- **Ilene Eisen**, CPA.CITP, MBA
- **Lawrence A. McClelland**, MBA, JD
- **Robert H. Spencer**, Ph.D.
- **John K. Keegan**, CPA
- **Brian F. Tankersley**, CPA.CITP
- **Karl Egnatoff**, CPA.CITP



For almost 26 years, these nationally known speakers have teamed together to deliver 10,000+ technology courses and conferences through the AICPA and State CPA Societies. These instructors have consistently rated an average 4.5 to 5.0 (on a 5.0 scale) for instructor knowledge and presentation skills. Presentations are fast-paced to maximize time and enhance learning. Courses feature high quality, full-color computer projection systems for clear viewing.

For complete instructor biographies, visit:  
[www.k2e.com/team](http://www.k2e.com/team)