

IN MEMORIAM

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Saltillo

Died Oct. 9, 2015

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June 23-26, 2016

Sandestin Golf & Beach Resort

2017 MSCPA Convention

June 22-25, 2017

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42nd Annual MISSISSIPPI TAX INSTITUTE

Thursday, Dec. 3, 2015

HILTON HOTEL

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Food Drive Raises 31,995 Meals

The MSCPA Young CPA Network teamed up with the Mississippi Food Network on Friday, Nov. 6 to collect food as their Annual Day of Service. Young CPA volunteers worked at four Kroger locations in the Jackson area raising 31,995 meals. With MSCPA President Karen Moody, left, is Kimberly Williams, Vice President/President Elect of the Young CPA Network and their Events Chairman.

In Natchez, members raised \$780 for the local Stewpot. The funds will be used to purchase new tables and food.



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Opinions expressed are not necessarily the official policy of the MSCPA. Advertising is accepted in good faith that the product/services are of value stated.

Welcome New Members

New members include: Patrick Hugh Cooper, Nell Edwards Jobe, Deena C. Keasler, Lauren Read Massey, Alison Lombardo McLendon, Shawn Mauldin, Allen Tyler Morgan and Kevin Edward Warren II,

Now completing the membership process are:

Jordan Taylor King was born in Mobile and received a Bachelor of Accountancy degree from Mississippi State University and an MBA from Mississippi College. He is a Staff Accountant with Haddox Reid Eubank Betts, PLLC in Jackson.

Walker Edward Manning was born in Hattiesburg and received Bachelor of Accountancy and Master of Accountancy degrees from the University of Mississippi. He is a Staff Accountant with Silas Simmons, LLP in Natchez.

Meghan Zito Ozburn was born in Baton Rouge and received Bachelor of Accountancy and Master of Professional Accountancy degrees from Mississippi State University. She is a Staff Accountant with Silas Simmons, LLP in Natchez.

Braden Allen Reeves was born in Independence, Missouri and received his BSBA and MBA degrees from Mississippi College. He is an Auditor with Harper Rains Knight & Company in Ridgeland.

Mischel P. Romero was born in Mobile and attended Spring Hill College receiving BS and MBA degrees with a concentration in accounting. She is a Manager with Nicholson & Company, PLLC in Gulfport.

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Which **BI Tool** is Right for You?

by Thomas G. Stephens, Jr., CPA, CITP, CGMA

Business Intelligence (BI) is one of the most important management trends to emerge in the past fifty years. As organizations of all sizes collect and store increasing volumes of data, the question of how to convert this data into a competitive advantage moves to the forefront. Increasingly, business professionals are turning to BI tools – including Excel and Tableau – to assist them in converting “big data” into actionable information. In this article, you will learn about both of these tools, including their relative strengths and when one option might be preferable to the other.

Focus on Outcomes First

When planning a BI initiative and selecting tools to support that initiative, the first step is to define your desired outcomes, for these outcomes will become critical drivers in your technology selection process. At a high level, the goals of your BI initiative will be to provide data to your teams to help drive productivity and enhance decision-making. At a more granular level, it is acutely important that the information you provide through your BI tools is 1) business critical, 2) goal oriented, 3) highly visible, 4) graphical and interactive, and 5) real-time. If your BI tools cannot help deliver information possessing these five characteristics, you will face monumental challenges to your BI initiatives delivering the results you expect.

At least four of the five characteristics defined above will depend on the capabilities of your BI tools. First, your BI tools must allow you to create reports and dashboards that are goal oriented, measuring actual results against specific, desired performance. Second, your BI tools must be capable of making information highly visible within your organization, “pushing” actionable information into the hands of information consumers, without requiring them to request it or search for it. Third, because “a picture is worth a thousand words,” your BI tools must

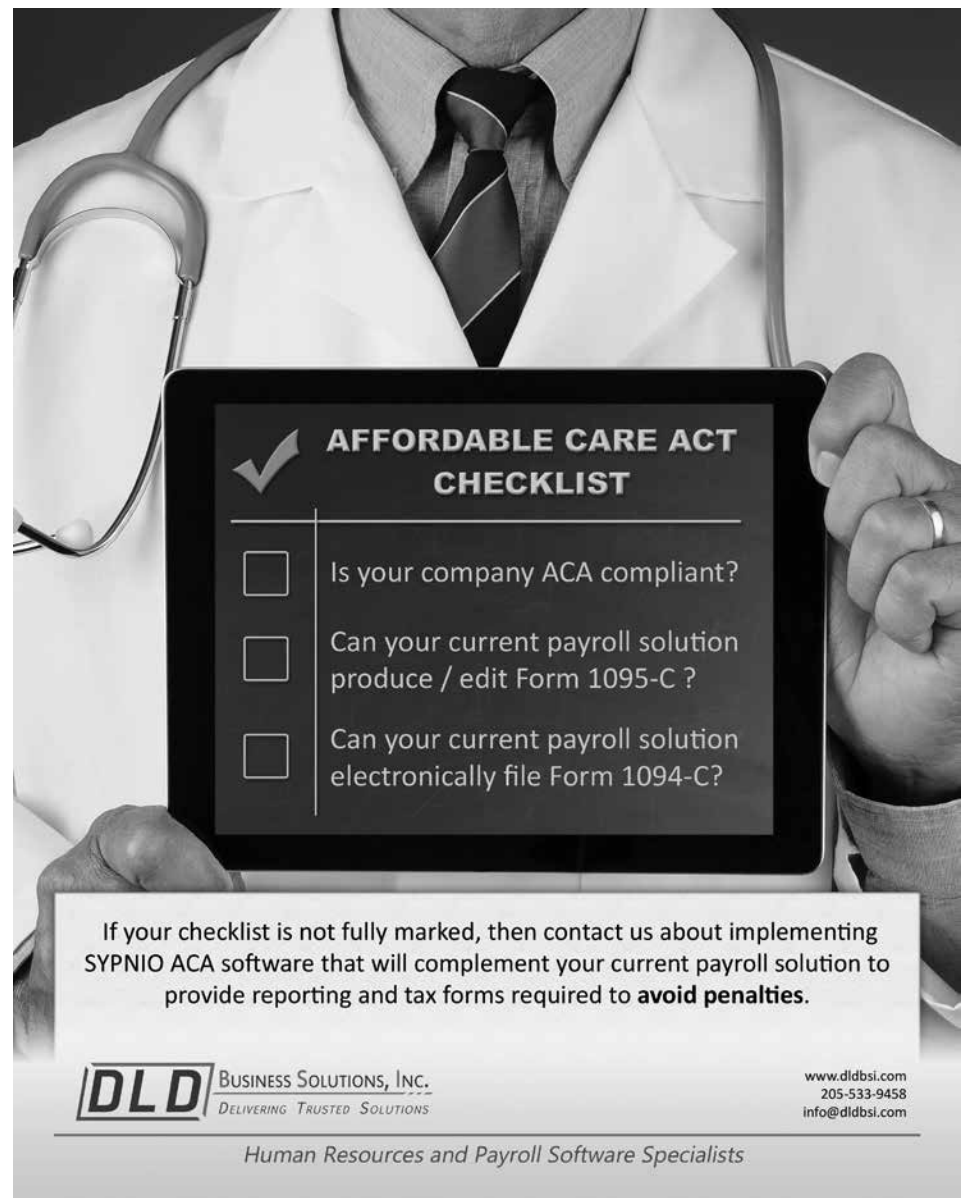
be graphical and interactive in nature, allowing team members to query and filter dashboards on-demand to access precisely the information that is important to them. Finally, presenting real-time or near real-time information is an absolute must in today’s ultra-competitive world; BI tools that cannot access information in real-time from underlying databases and other data sources will likely not help you realize the full measure of benefits provided by successful BI initiatives.

Excel as a Business Intelligence Tool

Largely because of its massive number

of users, Microsoft Office Excel is the leading BI tool in use today. Many Excel users have built BI dashboards using various components of Excel’s core functionality, including Open Database Connectivity queries, PivotTables and PivotCharts, tables, sorting and filtering, the extensive function library, macros, and charting and graphing options. However, in many cases, the BI dashboards and reports generated with Excel do not provide all of the functionality necessary for successful BI. For example, sharing Excel-based BI dashboards with other

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AFFORDABLE CARE ACT CHECKLIST

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- ☐ Can your current payroll solution electronically file Form 1094-C?

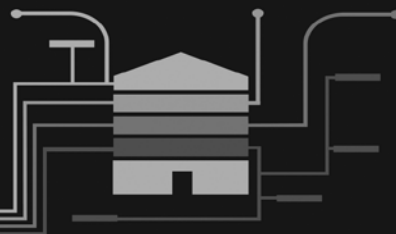
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WHICH BI TOOL

continued from page 5

team members is often a source of frustration, as is attempting to query, summarize, and analyze large volumes of data from multiple data sources. Consequently, though many business professionals attempt to use Excel as a BI tool, oftentimes the results are less than optimal.

Recognizing the desire of many Excel users to leverage their investment in Excel and their knowledge of the product, Microsoft has added specific BI features to selected versions of Excel 2013. Free tools such as **Power Query**, **Power Pivot**, **Power View**, and **Power Maps** can help you to overcome many of the limitations you might face when attempting to use Excel as a BI tool. You can use Power Query to access and query information from traditional data sources, such as your accounting software database, and non-traditional data sources, such as Facebook, Salesforce.com, and the Microsoft Azure Marketplace. Once you query the information, you can then use Power Pivot to “crunch” the data, even if you are dealing with extremely large data models. Further, you can use Power View and Power Maps to create and present visualizations of the data, including interactive dashboards that allow users to filter the dashboards on the fly. Clearly, those attempting to build BI models with Excel should take advantage of these tools to improve Excel as a BI tool.

Extending Excel with Power BI

In addition to the Excel tools mentioned above, Microsoft also makes available Power BI, a web-based suite of tools that interacts with Excel and the add-ins mentioned above to transform Excel into a BI tool that businesses of all sizes can use. With Power BI, you can work in the familiar environments of Excel, Power Query, Power Pivot, Power View, and Power Map to create your BI reports and dashboards and then publish them so that they are accessible on virtually anywhere on any device. Other key advantages associated with Power BI include the ability to explore your BI dashboards using natural language queries, free mobile apps to access your

BI dashboards on iOS and Windows mobile devices, scheduled data refreshes, and integration with Active Directory to manage sharing and access control. Further, Microsoft has priced Power BI very aggressively; a single-user edition is available at no charge, though most business professionals will likely need the functionality in the Power BI Pro option, priced at \$9.99 per month. In sum, Power BI – in concert with Power Query, Power Pivot, Power View, and Power Maps – does truly extend Excel to the point where it is a “true” BI tool and can help you to realize the results you desire of your BI initiative. Individuals and organizations seeking to capitalize on their existing investment in Excel and their knowledge of the ubiquitous spreadsheet tool should likely consider Power BI when planning a BI initiative. Likewise, Power BI is a compelling option for those attempting to implement BI without making substantial monetary commitments to a specific platform.

Tableau, another Powerful BI Option

Another well-respected provider of tools for generating business intelligence is Tableau. For three consecutive years, Tableau has been listed in the “Magic Quadrant” of Gartner’s annual report on Business Intelligence and Analytics, signifying the company as one of the leaders in this market.

Tableau offers a number of products to help professionals in organizations of all sizes generate and distribute BI reports and dashboards. Tableau Desktop allows users to connect to external data sources to query data and quickly convert the data into interactive dashboards that other team members can access. The Desktop solution is available in two editions – Professional (\$1,999 per user) and Personal (\$999). As an extension of Desktop, Tableau makes available the free Tableau Reader tool. With Reader, you can access dashboards created by other users in Desktop, including filtering and drilling in to the details, without having to invest in additional licenses.

Tableau Server is a mobile and browser-based version of the company’s BI platform. Using Server, you can connect to the same data sources as you

can using a Desktop, but you access the platform from a web browser or a mobile app, instead of your desktop. Server facilitates functionality such as distributing dashboards throughout an organization and embedding dashboards in company portals. An alternative to Server is Tableau Online, which is simply a Software as a Service (SAAS) version of Server. Tableau prices the Online service at \$500 per user per year.

Tableau is probably best suited for organizations that might have more complex BI needs, including advanced visualization requirements. Additionally, Tableau Server and Tableau Online are attractive options for those who want IT staff to maintain a greater degree of control over BI deployments. However, if you are considering implementing Tableau, you should carefully plan and budget for the deployment as you might experience significant upfront software acquisition costs, along with annual maintenance expenses.

Summary

BI efforts are growing exponentially in most organizations and many outstanding tools are available today to facilitate your BI initiatives. Working with Excel and various Excel add-ins, Microsoft’s Power BI engine is a compelling option for those who want to remain Excel-centric and are looking for a low-cost option for deploying BI. The suite of tools available from Tableau provides outstanding visualization capabilities and numerous deployment options, though these tools will likely cost a bit more than a Power BI deployment. No matter which tool you might choose, you should find that you are able to generate and communicate BI efficiently and effectively helping your organization to convert big data into actionable information and gain competitive advantages along the way.

Mr. Stephens is a shareholder in K2 Enterprises, where he develops and presents continuing professional education programs to accounting, financial, and other business professionals across North America. You may contact him at tommy@k2e.com.

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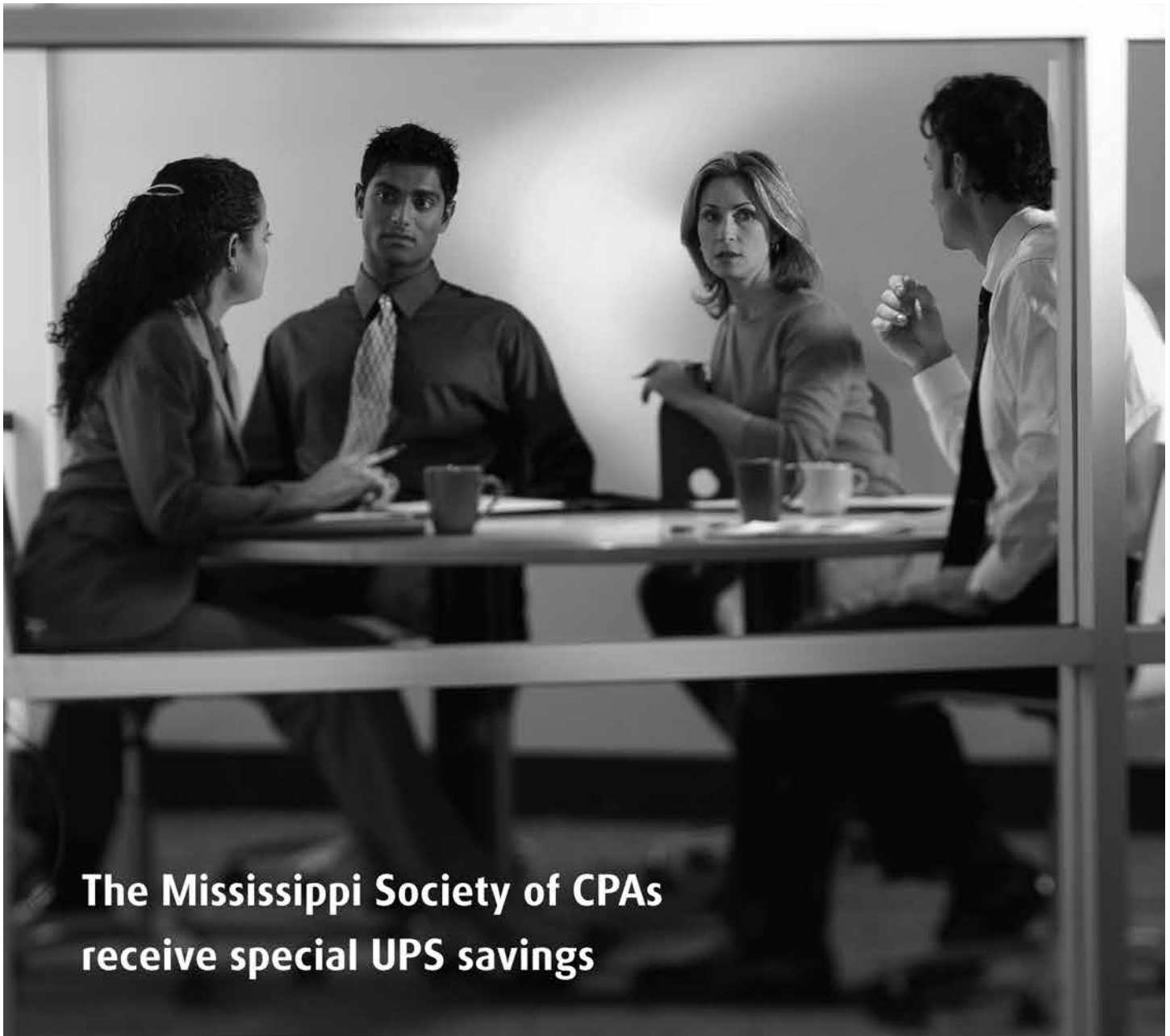
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Managing Outlook for Productivity

by Randolph P. Johnston, MCSE, MCS, Executive VP, K2 Enterprises

My cluttered Outlook inbox used to make me feel guilty. I've always said in my conferences and seminars that leaving messages in one's inbox is by no means an effective way to manage tasks, so how could I be so hypocritical?

Well, it's easy to understand how inbox pileup occurs. Managing email takes a lot of time, mostly because of the following five tasks:

1. Setting up and managing folder structures in order to make emails easier to find
2. Keeping the inbox clean by moving saved mail to the appropriate folder (it's a never-ending task)
3. Setting up tasks for emails that require action
4. Putting very important tasks on the calendar and dedicating specific time to do them
5. Assigning categories to emails and tasks to make them easier to find

Each of these tasks alone requires some time to complete, and some people just can't find or make the time to do any of them. More and more participants in my seminars admit to giving up on their inboxes. They

delete the junk and move on. They don't move emails from the inbox into folders. They leave undeleted emails in the inbox forever. Yet they claim they have a better handle on their email now than ever before. How can this be?

It's all possible because of the new and improved search capabilities in Outlook 2010, 2013 and 2016. All versions offer much better management tools than did their predecessors, and give us the ability to completely rethink how we manage email.

Instant Search (Outlook 2010 and Later)

Outlook 2007 introduced Instant Search, and Outlook 2010 and later improve upon the original version by making it significantly easier and more intuitive for users to narrow their search results by adding search criteria. Whenever users click in the Search box at the top of the Message List, the Search Tools contextual tab is displayed. Users can search with a wide variety of criteria (From, Subject, Has Attachments, etc.) and through a list of locations (Current Folder, All Subfolders, All Mail Items, All Outlook Items).

Instant Search is available in all Outlook folders – Mail, Calendar, Contacts, Tasks, Notes, and the Journal. Look for the Search box at the top of the main application window

in folders other than Mail, or press CTRL + E to access Instant Search from any folder location. Note that field criteria are specific to the type of folder you search. If the Search Tools contextual tab doesn't display your desired criteria, click More for a complete list of fields.

One of the most significant improvements upon the original version of Instant Search is the ability to search all folders simultaneously, by clicking on All Outlook Items in the Scope section of the ribbon. In earlier versions of Outlook, you could search only one folder at a time. Even back then it was better not to separate email into an extensive collection of folders, because you had to search each folder one at a time.

Selecting the All Subfolders option (also in the Scope section on the left side of the ribbon), which searches all folders below the one you are currently in, generally will find what you are looking for, because most folders are below the inbox.

I generally can find the email I'm looking for in just a few seconds, thanks to Instant Search. It's so much quicker to use Instant Search than to pore through folders item by item. Plus, I save time by not putting stuff in

continued on page 15

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Not-For-Profit Conference ***DATE CHANGE*******

Discussion Leader: Panel

Cost: Members: \$100 Non-Members: \$100 AICPA Member Discount: \$0

Course Hours: 8:30-4:30

LEVEL: All **CPE Credit:** 8 General **VENDOR:** Self-Developed **ACRONYM:** NPC

COURSE OBJECTIVES AND DESCRIPTION: As the date for this event approaches, please access the MSCPA web site for details and registration information on this conference. www.ms-cpa.org

December 3, 2015

Thursday

Jackson

Hilton-Jackson

Mississippi Tax Institute

Discussion Leader: Panel

Cost: Members: \$175 Non-Members: \$175 AICPA Member Discount: \$0

Course Hours: 8:30-4:30

LEVEL: All **CPE Credit:** 8 Tax **VENDOR:** Self-Developed **ACRONYM:** MTI

COURSE OBJECTIVES AND DESCRIPTION: As the date for this event approaches, please access the MSCPA web site for details and registration information on this conference. www.ms-cpa.org

December 14, 2015

Monday

Ridgeland **NEW**

MSCPA Center

Revenue Recognition: Mastering the New FASB Requirements

Discussion Leader:

Cost: Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30 **NEW**

Course Hours: 8:30-4:30

LEVEL: Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** INRR-3

COURSE OBJECTIVES AND DESCRIPTION: The effective date of the new accounting standard for revenue recognition is fast approaching! With the issuance of FASB ASU No. 2014-09, Revenue from Contracts with Customers, FASB has completed a convergence project with the IASB to improve financial reporting by creating common revenue recognition guidance for U.S. GAAP and IFRS. For years, revenue recognition has been the cause of audit failures and the focus of corporate abuse and fraud allegations. This course will provide you with an in-depth understanding of the framework for revenue recognition built around the core principle that is applied in a five step process. In addition, understanding the changes and new requirements is critical for successful implementation of this new standard. Supported by practical examples, this course will assist you in avoiding revenue recognition traps and provide you with latest FASB guidance.

December 15, 2015

Tuesday

Ridgeland

MSCPA Center

AICPA's Annual Federal Tax Update

Discussion Leader: Jan Lewis, CPA

Cost: Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30

Course Hours: 8:30-4:30

LEVEL: Update **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** PTU-4

COURSE OBJECTIVES AND DESCRIPTION: Save time and keep current on the latest tax developments! This comprehensive course covers all legislative, judicial, and IRS developments of the past year with a focus on implementation and compliance. Discover how to effectively and confidently complete tax-planning and compliance engagements. Cover current developments affecting individuals (including those regarding income, deductions and losses, tax calculations, individual credits, filing matters), business entities (including those regarding S Corporations and their shareholders, C Corporations, partnerships), estates and trusts, retirement plans, and more.

December 16, 2015

Wednesday

Ridgeland

MSCPA Center

Ethics, Rules, and Regulations

Discussion Leader: William F. (Bill) Taylor, CPA

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

Course Hours: 8:30-12

LEVEL: All **CPE Credit:** 4 Ethics **VENDOR:** Self-Developed **ACRONYM:** ERR-11

COURSE OBJECTIVES AND DESCRIPTION: This seminar satisfies the State Board's requirement for three hours of general ethics and one hour of Mississippi Rules and Regulations.

December 16, 2015

Wednesday

Ridgeland

MSCPA Center

Hot Tax Planning Developments Under the Current Tax Law

Discussion Leader: William F. (Bill) Taylor, CPA

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

Course Hours: 1:00-4:30

LEVEL: Intermediate **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4HOT-2

COURSE OBJECTIVES AND DESCRIPTION: Are you up-to-date on the latest tax planning developments for 2015? This course explores the hottest tax planning topics which will impact you and your clients. Discover how these topics may impact tax planning strategies and be in a position to help minimize your client's tax bill.



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* CPAs who are members of the AICPA may deduct \$30 per day from 8- or 16-hour AICPA seminars ONLY. (These are identified in the CPE Catalog). This discount must be taken when registering. **Non-CPA staff are NOT eligible for the AICPA discount. Seminars from other vendors are not eligible for this discount.**

DESIRED CPE EVENTS

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MANAGING OUTLOOK

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folders. My email server allows me to keep 25 GB of email history, which means I can keep years of email in my inbox and search it all in a matter of seconds.

If you adopt this approach and leave everything (except junk mail) in your inbox, you'll have to quit using your inbox as a repository for unanswered email and undone tasks. You'll have to respond to email as soon as you read it, as long as you take no more than three minutes to do so, or make reading the email itself or completing the action requested in the email a task or a calendar item. This approach is similar to one promoted by Gmail and other efficiency experts such as Sally McGhee and John Wittry in [Take Back Your Life!](#)

K2 teaches in-house, conference sessions and all day Microsoft Outlook courses. A few more ideas that may help you include the following:

Universal Drag-and-Drop in Outlook

Outlook supports drag-and-drop universally throughout the application. Thus, if you receive an email message and need to create an appointment on your calendar containing the details of the message, simply drag the message from the message list, and drop it onto your calendar in Outlook. Similarly, if you need to add an attachment to a message, you can drag it from your desktop into the message; conversely, you

can drag attachments from a message to your desktop. Universal drag-and-drop eliminates unnecessary typing and other keystrokes otherwise required to perform many functions in Outlook.

Assign Outlook Tasks to Others

Are you trying to manage multiple projects and tasks that involve other team members? If so, try assigning these tasks to others in Outlook. To do so, first add a task to Outlook. Then right-click on the task and choose Assign Task from the pop-up menu. Enter any desired details and click Send to assign the task to another team member. Once the team member accepts the task, he will be able to send updates and notes to you by updating the task in his instance of Outlook, helping you to minimize the amount of time you spend managing tasks.

Save Time with Outlook's Quick Steps Feature

Do you often perform multiple actions – such as adding a category to a message and moving that message to another folder – on items in Outlook? If so, create a Quick Step to automate these tasks for you. From the Home tab of the Ribbon in Outlook, you can customize the “canned” Quick Steps provided in Outlook and create new ones to meet your specific needs. Once you do so, select an item and then click the Quick Step you wish to apply and Outlook will perform all of the actions designated in the Quick Step on the selected item.

Clutter

In Outlook 2016, a new feature called Clutter helps filter your low-priority email—saving time for your most important messages. Clutter looks at what you've done in the past to determine the messages you're most likely to ignore. It then moves those messages to a folder called Clutter. If you keep using email as usual, Clutter will learn which messages aren't important to you. From time to time, Clutter might get it wrong. You can move the messages incorrectly identified as clutter to your inbox, and Clutter will take notice and change behavior in the future.

Conclusion

Items 3, 4, and 5 in Figure 1 are still good ideas, but they take discipline. Why bother making something a task if you're just going to ignore it every time you open Outlook? If you absolutely must do a task, block time on your calendar to do it. Categories are optional, but Outlook rules make it easy to assign categories to inbox items automatically.

Sometimes I still feel guilty about having hundreds of items in my inbox. But then I remember how much time I save by leaving everything in my inbox and letting Instant Search do the hard work for me in just a few seconds. I think it's a pretty good trade-off.

Mr. Johnston is a member in K2 Enterprises, where he develops and presents continuing professional education programs to accounting, financial, and other business professionals across North America. You may contact him at randy@k2e.com.

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