

### Keep your Kanso Site Current & Safe How to keep Kanso aligned with current operations and protect your communities data

July 31st 2024, at 2:15 P.M. Training Room

#### Zach Lenart Account Executive





## **Your Speakers**

- **Jeffrey Mastera** 
  - Sean DeCrescenzo Data Operations Manager
  - **Grant Walker** Data Operations Specialist
- **Jeffrey Olsson** Senior Software Engineer

## Technology and Innovations Manager

### **Session Overview**

How can we make sure that Kanso is adding value and not adding work?

Keeping Kanso Up to Date

Kanso Tools to Stay Current

Data Sensitivity and Site Security

Kanso with Other Applications

**Other Resources for Site Maintenance** 

## Keeping Kanso **Current and Safe**

### Current

### What does it mean?

Kanso reflects our operations as closely to real time as possible.

### Why does it matter?

Keeping Kanso current can prevent things like:

- Double work
- Missing data
- Overcharging or undercharging tenants
- More...

### <u>Safe</u>

### What does it mean?

Ensure that our data is accessible only to relevant staff while safeguarding it from malicious external threats.

### Why does it matter?

In data security, there are three major data types:

- Public
- Private
- Confidential

Much of the data we collect from our community falls into the Confidential category, requiring it to be handled with the utmost care and respect.

Incorrect data accounting errors and discrepancies

### Keeping Kanso Up to Date

### The Data that Should be Prioritized

### Where should you start?

- Rent calculation details
- Transactions and accounting operations

### **Get Ahead and Stay Ahead**

### Data can be entered into Kanso with a future effective date

Household actions, rent calculation changes, and many other things in Kanso can be entered into the site with a future effective date.

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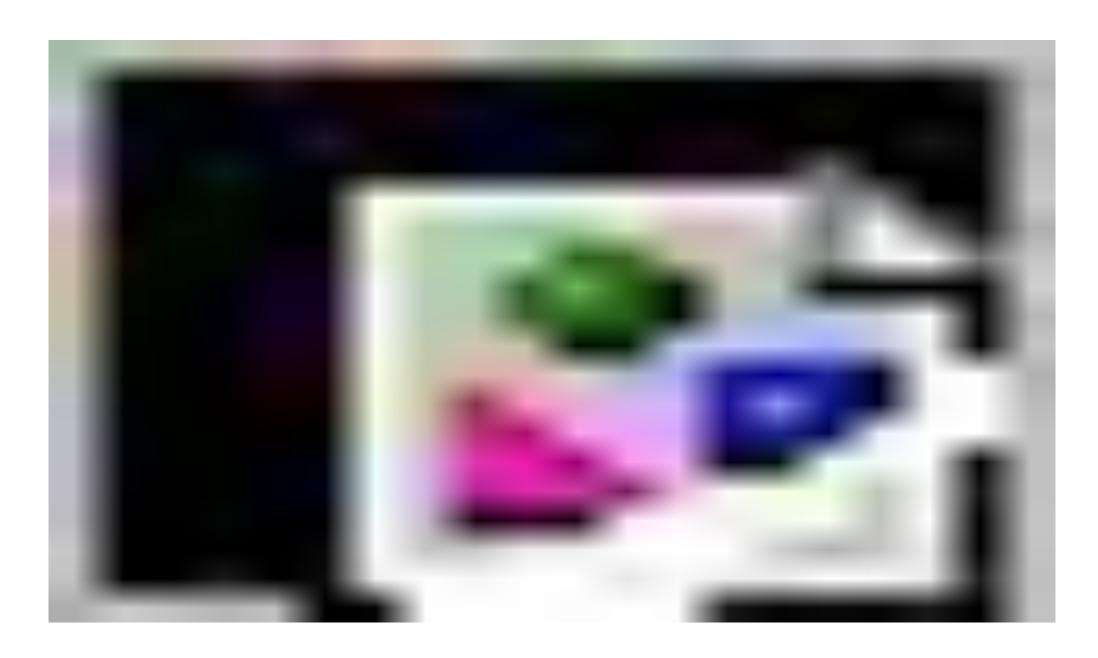
Household actions, income, assets, expenses, and composition

## Kanso Tools to Stay Current

### **Automation in Kanso**

### "Let the System Work for You"

- Offsets and Allocation Priority
- **Recurring Transactions**



Work Order Automatic Charge Configurations

Professional Services: Custom Reports and GL Export

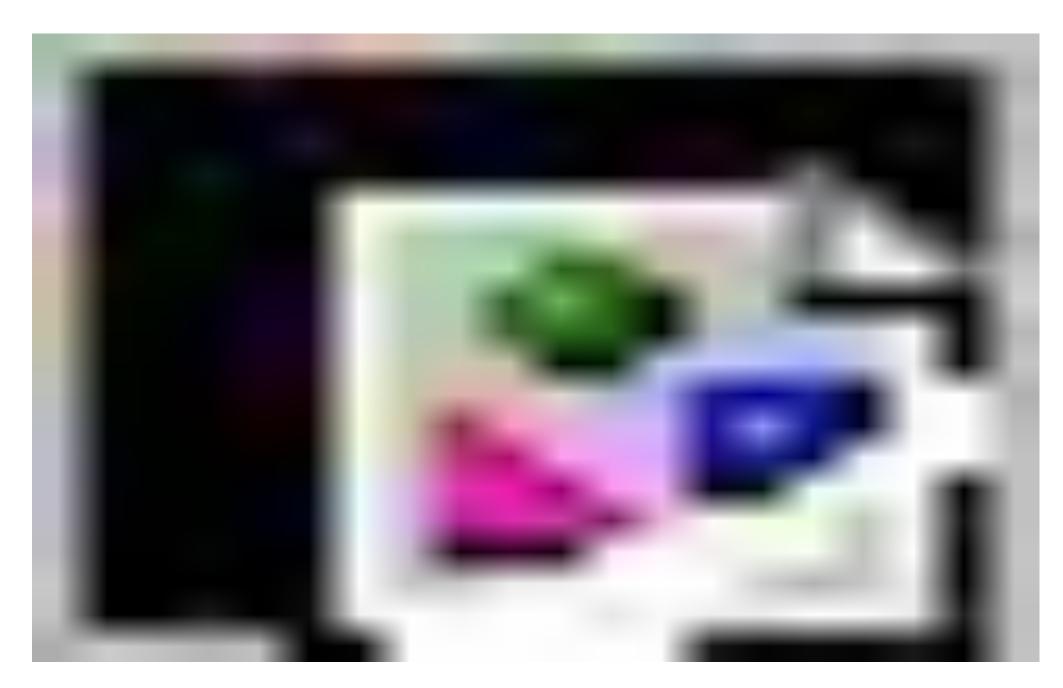
## Kanso Resources for Site Upkeep

### **Leveraging Reporting to Stay Ahead**

Kanso includes a comprehensive suite of reports designed to help you manage your workload effectively and proactively monitor data health.

#### Data Timeliness

- **Overdue Recertifications Report**
- Vacancy Reports
- **Rent Rolls**



#### **Data Health**

- **Duplicate Households**
- Monthly Auto Charges

## Kanso with Other Applications

### How to Use Kanso with Your Software Ecosystem

### What tools do we have at our disposal?

- Use similar reports to cross validate that the systems are in sync at regular intervals. Many modern applications include some form of "import" capabilities. Kanso includes this in our pro services offerings.
- Reports in Kanso are downloadable via the Telerik Reporting Portal. The default file types available for download are commonly accepted by other applications.
- Direct application integration via API with Sage Intacct.

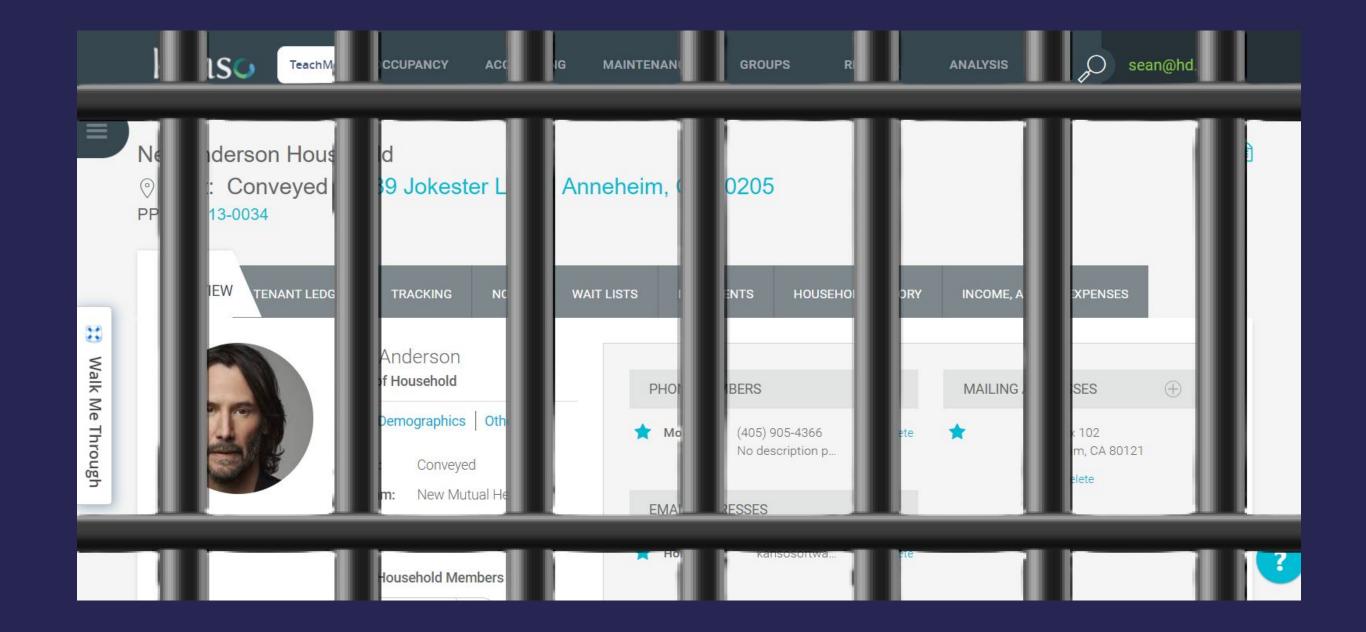
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- We understand that Kanso is one of many applications that your team may be
- using. How can we be sure that the data in all these applications is aligned?

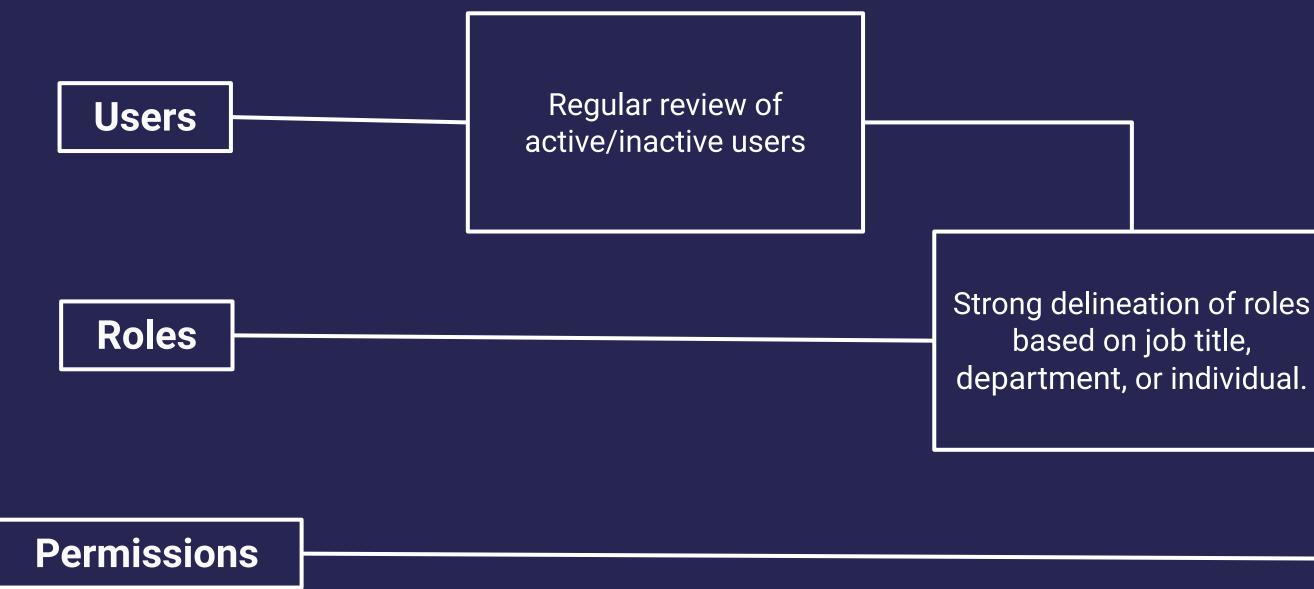
Safe: Data is accessible only to relevant staff to

mitigate potential threats.



#### **Users, Roles, and Permissions**

Your Site Administrator should take steps to improve your internal security through the available tools in Kanso.



Relevant permissions dependant on the role of the user and their workflows.





• Use strong and unique passwords



- Beware of phishing scams
- Log out of applications when finished
- Be cautious of what you share online
- Think before you share with others.



- Be aware of the SaaS provider's security practices
- Stay Protected with the Latest Updates

### What is Kanso Doing to Protect You?

### Security through design

- Secure Authentication
  - $\circ$  Passwords
  - MFA
- Secure Practices
  - Phishing
  - $\circ$  Sharing

- Stay Informed
  Security Updates
- Secure Networks
  - Secure Endpoints
  - Tunneled Traffic

#### **Security in Practice**

- Constantly analyzing & improving application security
- Data at rest encryption
- New robust encryption features for sensitive data (ACH account data, ssn, etc)

#### **Our Security Partners**





## Questions and Comments

What's important to to know?

### What's important to your team and what would you like

# Thank you to our Sponsors!



**Protecting Our People** 

### **RAYMOND JAMES**

#### AFFORDABLE HOUSING INVESTMENTS



Wagenlander & Heisterkamp, LLC Attorneys at Law



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100% INDIAN OWNED SMALL BUSINESS

Session: Homeownership in Time: 3:30 PM Location:

Session: Closing Remarks Time: 4:00 PM Location:

Event: ART Hotel ReceptionTime: 4:30 PMLocation: ART Hotel Rooftop Patio

Session: Homeownership in your Community: Kanso Loan Tracking & Home Conveyance

