Kanso Native Housing Summit

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**
  Technology and Innovations Manager
- **Sean DeCrescenzo**
  Data Operations Manager
- **Grant Walker**
  Data Operations Specialist
- **Jeffrey Olsson**
  Senior Software Engineer

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
- Other Resources for Site Maintenance
- Data Sensitivity and Site Security
- Kanso with Other Applications

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
- Incorrect data accounting errors and discrepancies
- Overcharging or undercharging tenants
- More...

Safe

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.

Keeping Kanso Up to Date

The Data that Should be Prioritized

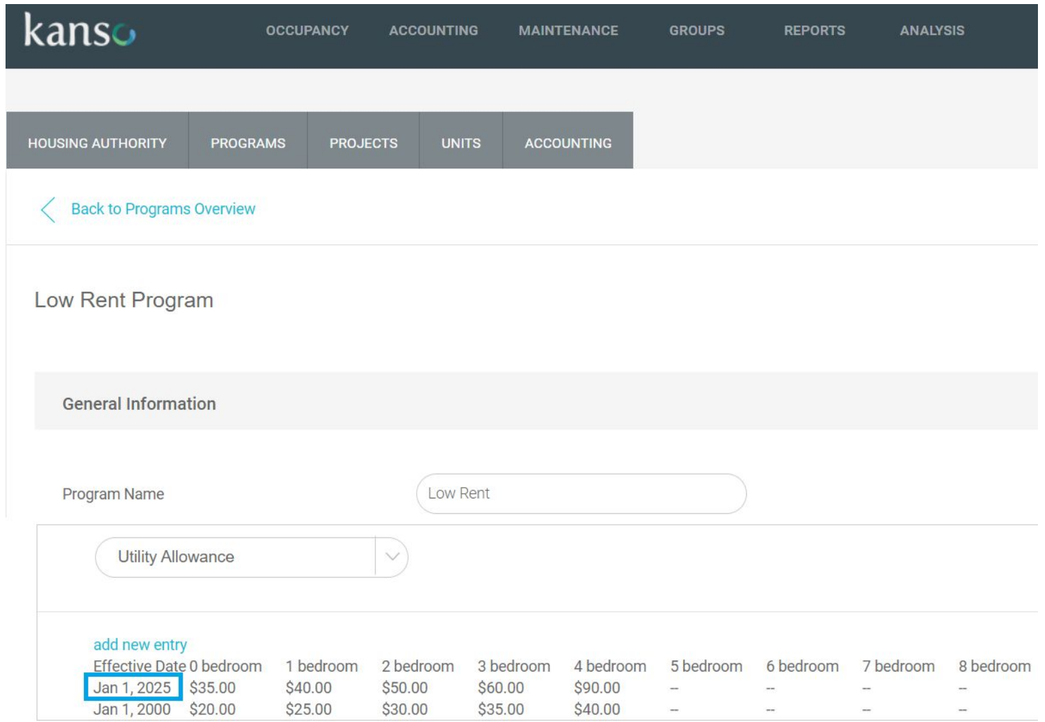
Where should you start?

- Rent calculation details
- Household actions, income, assets, expenses, and composition
- 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.



Kanso Tools to Stay Current

Automation in Kanso

“Let the System Work for You”

- Offsets and Allocation Priority
- Work Order Automatic Charge Configurations
- Recurring Transactions
- 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

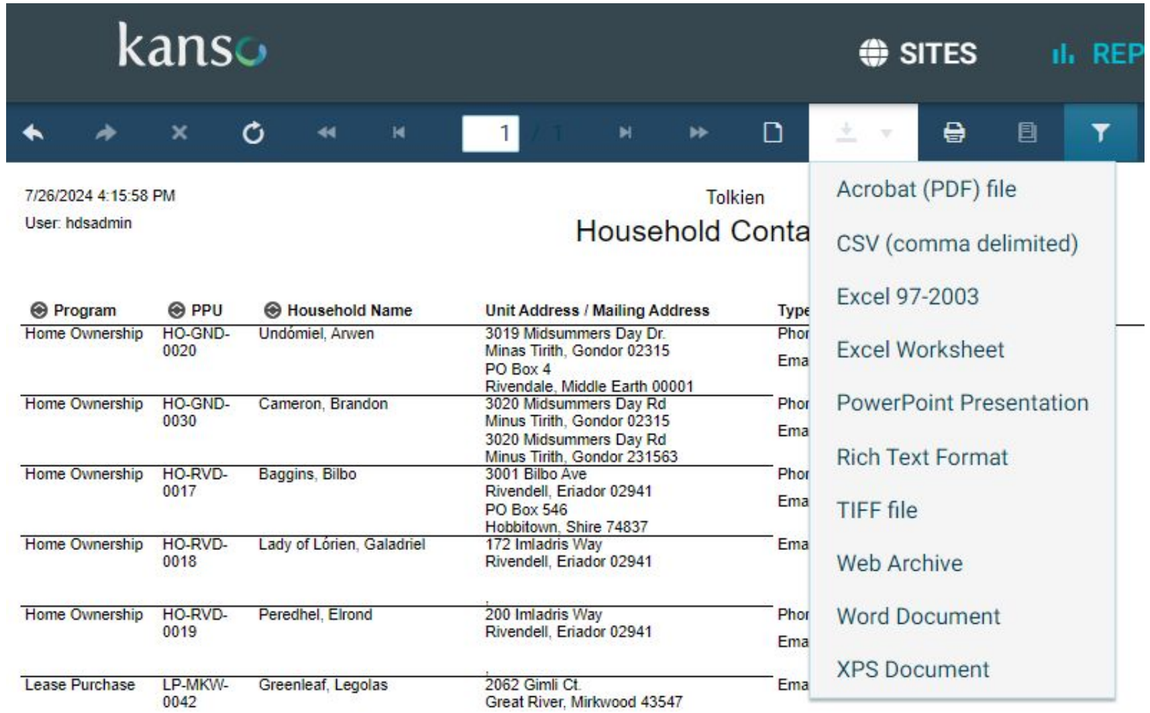
Kanso with Other Applications

How to Use Kanso with Your Software Ecosystem

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?

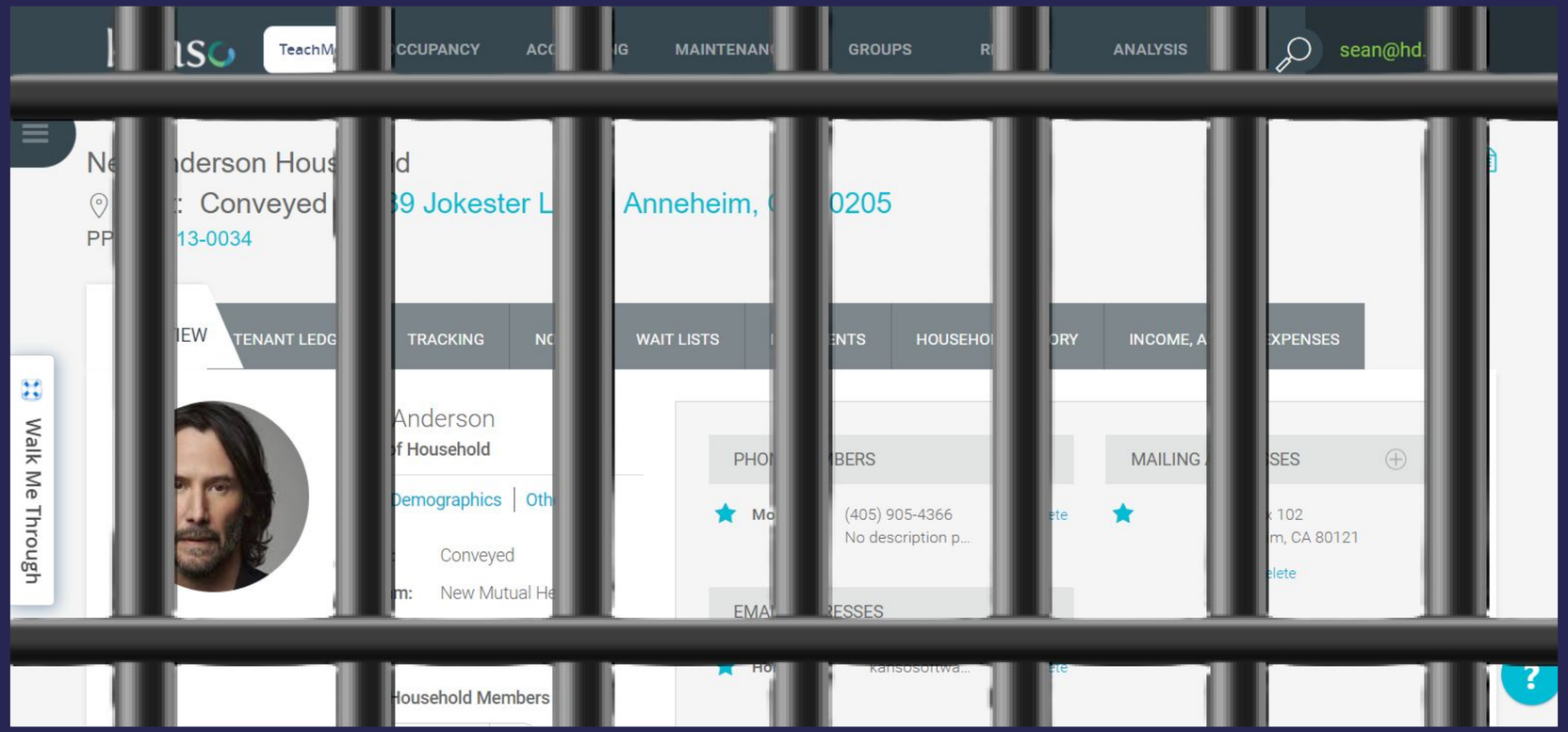
What tools do we have at our disposal?

- 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.



Keeping Kanso Safe

Safe: Data is accessible only to relevant staff to mitigate potential threats.



Keeping Kanso Safe

Users, Roles, and Permissions

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

Users — Regular review of active/inactive users

Roles — Strong delineation of roles based on job title, department, or individual.

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

Keeping Kanso Safe

Strong Authentication

- Use strong and unique passwords

Secure Practices

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

Stay Informed

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

Keeping Kanso Safe

What is Kanso Doing to Protect You?

Security through design

- Secure Authentication
  - Passwords
  - MFA
- Secure Practices
  - Phishing
  - 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

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Questions and Comments

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

Thank you to our Sponsors!

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Wagenlander & Heisterkamp, LLC
Attorneys at Law

Uflex
Your Money Your Terms

- **Session**: Homeownership in your Community: Kanso Loan Tracking & Home Conveyance
  Time: 3:30 PM
  Location:
- **Session**: Closing Remarks
  Time: 4:00 PM
  Location:
- **Event**: ART Hotel Reception
  Time: 4:30 PM
  Location: ART Hotel Rooftop Patio