

# SAPinsider



Dallas 2024  
Finance Innovation  
Summit  
October 15-16, 2024

**CPE information**

## Program Details

**All sessions are intermediate level unless otherwise stated in the session description. All intermediate level sessions require basic SAP financial systems knowledge. No advanced preparation required, unless otherwise stated in the session description. Sessions at this event are offered as “Group Internet Based.”**

**You may earn up to 7.6 CPE credits by attending sessions at the SAPinsider Dallas 2024 Finance Innovation Summit.**

**Credits may be earned by attending the following: (Sessions must be attended live)**

.8 credit – Keynote Address

.8 credits – 45-minute Breakout Sessions

1 credit – 60-minute Breakout Sessions

Session learning objectives, abstracts, field of study, and recommended CPE credit can be seen below, starting on page 6.

### Field of Study Offered

- Finance

To register for the event, please use the following [link](#). Please contact [events@sapinsiderevents.com](mailto:events@sapinsiderevents.com) if you have any questions regarding registration.

### Evaluations

To receive CPE credit, you must participate during the entirety of the session and participate in all polls. Asking questions is highly encouraged. A minimum of three engagement checks per credit will be evaluated prior to issuing the credits. A session evaluation will be available following the conclusion of each session and must be completed and submitted to be eligible for credits. All questions on the evaluation form must be answered to earn credit.

**\* Evaluation results must be submitted within 60 days of the conclusion of the event to be eligible to receive your Certificate.**

### Certificate of Completion

You will receive your certificate of completion within 60 days of the conclusion of the event. If you have any questions, please contact [events@sapinsiderevents.com](mailto:events@sapinsiderevents.com).

## CPE Information

### **Program content and knowledge level equate to background of intended participants.**

SAPinsider assures the program content and program level is appropriate for the intended participants by focusing on a very specific audience of business professionals using SAP technology. The knowledge level of the course is specified in the curriculum description, from basic to intermediate to advanced, with some courses providing an overview of the topic for new professionals and other courses focusing on the updated information for the advanced professionals, so participants can determine the program that is most appropriate for their development needs. The SAPinsider materials indicate the prerequisite education and experience needed for the participants to attend the course, so participants can see if the material is best suited for them.

### **Content and delivery systems are current, effectively designed, and accurate.**

The SAPinsider courses are developed by global SAP Experts who are widely recognized as highly skilled professionals in the field of SAP technology. Their expertise is demonstrated in the presenters own professional experience and advanced business roles. The SAPinsider courses are frequently updated, reflecting the latest codes, technologies, and business processes related to SAP systems. The courses are also peer reviewed by other professionals to ensure the accuracy of the insights shared in the subjects, throughout the year.

### **Content is developed by a subject matter expert and reviewed by qualified persons outside of the development team,**

The SAPinsider program sessions are reviewed by qualified professionals, independent of the presenters who developed the materials, to ensure the accuracy and correctness of the topics and insights shared in the courses. The reviews are all completed before the first presentation of the materials and again before each new program delivery. The program material focusing on accounting, auditing, and taxes is accompanied by the participation of a licensed CPA in good standing with an active license.

**Content is based on relevant learning objectives and outcomes.**

All the SAPinsider program materials clearly communicate the learning objectives and outcomes from each course, and the skills that will be gained by attending the sessions.

## Refund Policy

*What is the event registration cancellation policy?*

### Event Registration Cancellation Policy

A service charge of \$250 applies to all conference registration cancellations submitted in writing and received on or before 31 days prior to the event's start date. Registrants must provide their registration confirmation number and submit a written cancellation request by e-mail at [events@sapinsiderevents.com](mailto:events@sapinsiderevents.com). Cancellation requests cannot be taken over the telephone. Refunds will not be issued on cancellations received less than 31 days prior to the event's start date. Cancellation requests received within 31 days may request to have their attendance applied to any other SAPinsider event within 1 year of the cancellation. An additional \$150 administrative fee will apply to any substitutions.

### Event Registration Substitution Policy

Registration substitutions are permitted between employees from the same company. There is no fee for name-change substitutions if the payment information has not changed. A \$150 administrative fee will apply to any substitutions requiring updates to payment information. To initiate a substitution, e-mail [events@sapinsiderevents.com](mailto:events@sapinsiderevents.com). Substitution requests cannot be submitted over the telephone. If a substitution is requested on-site during the conference, a written request on company letterhead will be required.

For more information regarding administrative policies such as complaints and refunds, please contact [events@sapinsiderevents.com](mailto:events@sapinsiderevents.com) or call our offices at (781) 751-8835.

## Event Cancellation Policy Cancellation

### Event Cancellation or Postponement

In the event that an SAPinsider Conference is cancelled or postponed, registrants will be notified by email from [events@sapinsiderevents.com](mailto:events@sapinsiderevents.com) with all conference details regarding their registration. Registrations for the postponed conference will automatically transfer to

the new event date once rescheduled. If a registrant cannot attend the postponed conference once the new date is scheduled, they may transfer their registration to another conference of equal value within the calendar year. In the event of a cancelled conference, where the conference is not rescheduled, registrants may transfer their registration to another conference of equal value within the calendar year.

### **Policy of Retention of Records**

SAPinsider will retain its records for a minimum of 5 years. SAPinsider will retain all monitoring mechanism information, certificates, and any other related materials for a minimum of 5 years.

- Records of participation
- Date and location (online)
- Speaker (presenter/instructor)
- Content reviewer
- If review is required by a CPA, the reviewer's license number, state of license, and status of license
- Number of CPE credits earned by participants
- Results of program evaluations
- Program descriptive materials (course announcement information)

### **CPE Eligible Sessions**

#### **Complaint Resolution**

For more information regarding administrative policies such as complaints and refunds, please contact [events@sapinsiderevents.com](mailto:events@sapinsiderevents.com) or call our offices at (781) 751-8835.

## Eligible Sessions

**Session Name:** Opening Keynote | From Legacy to Future: How Merit Energy Successfully Navigated their Finance Transformation with SAP S/4HANA

**Field of Study:** Finance

**Description:** Every company that has a historic SAP footprint faces the question of not if, but when to upgrade to SAP S/4HANA and then the even bigger question: How are they going to do it? Just the first few questions of business case, timeline, Greenfield vs Brownfield, and cost can be enough to keep kicking the project can down the road! Come and hear about how Merit Energy Company faced these questions resulting in a successful SAP S/4HANA migration respecting the past but focusing on the future.

You will:

- Discover Merit's strategy to answering key questions around upgrading to SAP S4/HANA.
- Understand project timeline, key drivers, and success factors.
- Learn future initiatives with SAP S4/HANA as a foundation.

**Session Name:** Empower your finance users with SAP S/4HANA Embedded Analytics

**Field of Study:** Finance

**Description:** Embedded analytics is one of the value drivers for a move to SAP S/4HANA as well a benefit. It is also one of the noteworthy innovations in SAP S/4HANA that benefits your finance organizations well as others. Yet its potential and value are not understood very well. With the ability to do real-time operational analytics in the transaction system of record (SAP S/4HANA), users are able to make accurate and faster decisions on-the-fly utilizing an intuitive user experience with Fiori. Embedded analytics puts the power of reporting & analytics in the hands of the finance business user not only with it's ease of use but also with its flexibility & ability to meet custom business needs with little to no technical assistance.

You will:

- Explain the shortcomings of the traditional reporting & analytics model that embedded analytics addresses.
- Share how embedded analytics benefits the business user.
- Delve into the technology framework for embedded analytics.
- Share embedded analytics content that finance users can use out of the box.

**Session Name:** The Inside Track to Planning Excellence: An Exclusive Look at SAP's FP&A Vision and Technology Roadmap

**Field of Study:** Finance

**Description:** SAP provides cutting-edge solutions for all your financial planning and analysis needs. This can't-miss session offers an insider's look at these powerful solutions and how they enable transformational planning and profitability. In this session, you'll get exclusive access to SAP's FP&A vision and product direction.

You will:

- Discover the latest, greatest capabilities in FP&A and how SAP is delivering continuous innovation.
- Get the inside track on how SAP's product roadmap will take your solutions to the next level.
- Learn about groundbreaking new planning capabilities like predictive planning and scenario modeling.
- Hear real-world stories of customers using SAP to master complex planning in volatile times.



**Session Name:** 30 Things All SAP S/4HANA Finance End Users Need to Know

**Field of Study:** Finance

**Description:** This back-to-basics session identifies the most important areas to address when training all end users on SAP functionality, including analysis, display, environment, and reporting. Take home 30 tips that will accelerate the end-user learning curve and reduce calls to the help desk.

You will:

- Learn how to help users get the most from reporting tools to maximize their productivity.
- Learn how to teach end users to set key default values. Identify the most frequently used transaction codes to assist end users in quickly navigating SAP.
- Show users how to get the most from SAP GUI and SAP Fiori
- Walk away with a list of key parameter IDs for all users.

**Session Name:** SAP Finance Vision, Strategy, and Roadmap: Unlock the Future of Digital Finance

**Field of Study:** Finance

**Description:** For finance professionals, executives, and IT leaders ready to revolutionize their financial management, this session offers a cutting-edge look into SAP's transformative approach. Elevate your strategy and stay ahead in the digital finance era.

You will:

- Discover SAP's dynamic vision for the next era of finance and the groundbreaking developments poised to reshape the finance-tech nexus.
- Learn about the power of SAP's finance portfolio, including SAP S/4HANA Cloud for Finance and related solutions to unlock additional business benefits along the finance business processes, and see firsthand how they redefine financial processes and decision-making.
- Engage with the freshest updates and game-changing enhancements, including new ERP Cloud commercial offerings from SAP, ensuring you understand the full potential of planned features, like GenAI in Finance.

**Session Name:** Case Study: Achieve Success with SAC for Financial Planning

**Field of Study:** Finance

**Description:** In this session, Lyle Trenholme will share his experience integrating SAP Analytics Cloud (SAC) into financial planning processes at Topgolf Callaway Brands. Lyle recently led the development and implementation of new SAC planning models for expense planning using the New Model Type (a transition and departure from models built in 2019 on the Classic Account Model Type). The newly developed financial planning models are a significant advancement for Topgolf Callaway Brands financial planning function, delivering a significantly elevated user experience with advanced SAC-Excel integration. New functionalities further the speed and accuracy of forecast creation and aggregation. The planning models to be covered encompass Asset planning, People/Employee Costs planning, and other general expense planning.

You will:

- Learn how to leverage SAC for Asset Planning.
- Understand the integration of People/Employee and Cost planning.
- Gain insights into General Expense Planning.
- Leverage your Excel wisdom with SAC.

**Session Name:** Top-7 Finance Features you need to activate when you migrate from ECC to SAP S/4HANA

**Field of Study:** Finance

**Description:** You have been on ECC for all these years and now on the way to transitioning to SAP S/4HANA. Attend this session to learn about the Top-7 major enhancements you are about to collect when you move to S/4HANA Finance. Based on philosophy of delivering superior enhancements with simplifications, SAP S/4HANA Finance promises significant value. Gone are the olden days of G/L Account playing two separate roles in FI and CO – now, simply a unified G/L Account. Major enhancements in the areas of Ledgers and Document Splitting functions to support your multi-dimensional multi-valuation processes. Great improvements in Profitability Analysis (CO-PA), New Fixed Assets and Cost-of-Goods-Sold (COGS) make the transition to SAP S/4HANA super-rich with benefits. All these enhancements nicely packaged as a Universal Journal – the core of the core for finance processes.

You will:

- Learn about the major Finance enhancements offered in SAP S/4HANA.
- Evaluate the key considerations to get the most out of these enhancements.
- Learn how to plan for deploying these processes carefully in your organization.

**Session Name:** What You Need to Know About Material Ledger in SAP S/4HANA

**Field of Study:** Finance

**Description:** With Material Ledger a required part of SAP S/4HANA Finance, walk through the design considerations associated with a migration, learn to configure the Universal Journal for transfer pricing, and learn about the changes that have been made to actual costing with SAP S/4HANA Finance.

You will:

- Understand the Difference Between Material Ledger and Actual Costing, and which one is required for SAP S/4 HANA Finance.
- Learn what to consider from a design perspective before transitioning to Material Ledger with SAP S/4 HANA Finance.
- Discover the improvements that have been made to the Actual Costing closing cockpit.
- Analyze the significantly improved reporting that exists for Material ledger within SAP S/4 HANA Finance.
- Learn the functionality of Material Ledger with Universal Parallel Accounting.

**Session Name:** Shift your paradigm from operational finance to intelligent finance with SAP S/4HANA

**Field of Study:** Finance

**Description:** Finance organizations worldwide are looking to run in a more automated and intelligent manner so that they can become enablers of top, bottom, and green line growth. SAP S/4HANA finance provides many capabilities to do so, many of which are embedded in the core and others that can be subscribed to on-demand. Attend this session to discover how you can embark on a transformative journey towards an intelligent and innovative finance organization with SAP S/4HANA.

You will:

- Understand the key principles of & drivers for finance-driven enterprise transformations.
- Learn how SAP S/4HANA incorporates intelligence into its standard capabilities, empowering finance professionals to make data-driven decisions, automate routine tasks, and enhance operational efficiency.
- Discover additional capabilities and services that can help you pivot from an operational finance mindset to an intelligent one.

**Session Name:** Keynote: Finance Transformation in the Digital Age: Finance's Playbook

**Field of Study:** Finance

**Description:** Technology is revolutionizing the finance landscape, and finance professionals must adapt or risk falling behind. This keynote presentation will provide you with the tools and strategies you need to navigate this digital transformation. Learn how to identify and evaluate high-impact technologies, understand their financial implications, and overcome implementation challenges. Discover practical steps to leverage technology for maximum benefit, from optimizing efficiency to driving growth. Also, we will look into the crystal ball for technology for finance professionals!

You will:

- Learn how to assess and prioritize technology investments based on their potential impact on your financial function.
- Gain actionable insights to navigate common obstacles in technology adoption, such as budget constraints, resistance to change, and data integration issues.
- Explore how technology can empower finance teams to drive innovation, make data-driven decisions, and unlock new opportunities for growth and profitability.

**Session Name:** Tips and Tricks to Ease SAP S/4HANA Finance Migration Challenges

**Field of Study:** Finance

**Description:** Your SAP S/4HANA Finance budget is approved, but, are you ready to start your SAP S/4HANA Finance project? Is your existing data consistent for you to successfully migrate? Understand the key data objects (such as customers/vendors, consistent items and balances, consistent FICO setup and more) that you need for a clean and safe transition.

You will:

- See how extensive data clean-up efforts may be required for you to be ready for your SAP S/4HANA Finance migration.
- Learn about the pre-migration consistency checks and validations that you must perform to be ready for SAP S/4HANA Finance, as well as post-migration validations.
- Discover what options are available to you to fully exploit the power of SAP S/4HANA Finance parallel currencies.
- Explore some of the most common challenges faced while migrating from classic to new asset accounting.



**Session Name:** What's on your mind? Finance Transformation with SAP S/4HANA

**Field of Study:** Finance

**Description:** What's On Your Mind? is a dynamic discussion that aims to address the diverse and evolving concerns surrounding financial planning. In this interactive session, you will have the opportunity to directly engage with our Day 1 speakers who will provide insights and answer your questions. By allowing the conversation to be steered by the session attendees, the discussion will cater to the specific interests and needs of the participants, making it a highly personalized and informative experience.

You will:

- Discuss how you can prepare to help your organization embrace finance innovation.
- Explore strategies that will ensure financial success.
- Learn more about the latest planning tools that will take your processes to the next level.

**Session Name:** SAP Analytics Cloud – Optimize Consistency and Effectiveness in your Financial Planning Process

**Field of Study:** Finance

**Description:** Learn the basics of SAP Analytics Cloud Advanced Formulas used in Data Actions to enhance your planning and forecasting processes. Having a solid understanding of the fundamentals will allow you to perform data copies, seed one version with data from another, calculate results based on drivers, and other functions important to your planning and forecasting processes.

You will:

- Walk-through demonstration of Advanced Formulas.
- Stringing Data Actions together in Multi-Actions.

**Session Name:** What's On Your Mind? Financial Planning with New Technologies

**Field of Study:** Finance

**Description:** What's On Your Mind? is a dynamic discussion that aims to address the diverse and evolving concerns surrounding financial planning. In this interactive session, you will have the opportunity to directly engage with our Day 1 speakers who will provide insights and answer your questions. By allowing the conversation to be steered by the session attendees, the discussion will cater to the specific interests and needs of the participants, making it a highly personalized and informative experience.

You will:

- Discuss how you can prepare to help your organization embrace finance innovation.
- Explore strategies that will ensure financial success.
- Learn more about the latest planning tools that will take your processes to the next level.

**Session Name:** From Regional to Global – Customer Journey to Unified Planning, Forecasting, Reporting and Analytics

**Field of Study:** Finance

**Description:** Join this engaging session to uncover how customers harnessed the power of SAC Planning and the SAP HANA data warehouse to orchestrate a seamless transition from a legacy regional BPC platform.

You will:

- Explore the intricacies of this strategic migration by unpacking the critical stages of the BPC-to-SAC transition and its harmonious integration with the robust SAP HANA enterprise data warehouse.
- Delve into the innovative design that not only empowers a consolidated view of financial performance but also paves the way for comprehensive insights and informed decision-making across the organization.

**Session Name:** How SAP Gen AI Accelerates and Enhances the Financial Planning Process

**Field of Study:** Finance

**Description:** Learn how SAP Gen AI delivers big benefits to your financial planning process, enabling data driven decisions and offering practical insights and risk assessments based on real-time and historical data. This session dives into the details of AI advancements that enable you to turbo charge your financial planning process to identify market trends to deliver more precise recommendations.

You will:

- Gain a detailed understanding of SAP GenAI's impact on your financial planning process.
- Learn strategies for optimizing AI-driven processes and planning.
- Understand how AI enhances risk assessments to adapt to financial uncertainties.

**Session Name:** Case Study: How Spectrum Reach is Enhancing Customer Satisfaction Through SAP BRIM for Billing and Invoicing

**Field of Study:** Finance

**Description:** The existing IT landscape consisted of various unconnected systems, making integration complex. A thorough analysis was conducted to ensure seamless connection between SAP BRIM and these legacy systems. Custom data transformation rules were developed to facilitate smooth data flow and maintain functionality across all platforms. Moving a massive amount of critical data objects (product details, customer information, contracts, pricing, etc.) required meticulous planning. This process ensured accurate migration and minimal disruption. A robust and adaptable infrastructure was crucial to navigate industry changes and evolving business demands. This approach positioned the system to meet both immediate and long-term strategic goals. In essence, this project successfully overcame significant integration challenges to implement a new billing system, ensuring flexibility, scalability, and the ability to meet diverse customer needs of Spectrum Reach.

You will:

- Learn strategy to handle large volumetric data.
- Understand dealing with the complexity of the integration challenges.
- Discover customization and Flexibility in the Solution Architecture to diverse client needs.
- Uncover building Future-Ready Infrastructure.

**Session Name:** Excel Meets SAC: A Practical Workshop to Smarter Planning - When, Why, and How to Leverage Both

**Field of Study:** Finance

**Description:** Effective and efficient planning requires an Extended Planning and Analytics (xP&A) solution like SAP Analytics Cloud (SAC), but companies struggle due to the entrenched use of Excel. Excel will likely remain an indispensable tool due to its flexibility and familiarity. However, the misuse of Excel is a well-documented risk, leading to errors and inefficiencies that can have significant repercussions. Striking the right balance is key to achieving desired outcomes. This practical, and highly engaging, session will delve into the synergies between Excel and SAC.

You will:

- Learn actionable insights on when, why, and how to use Excel with SAC.

**Session Name:** Proven Techniques to Optimize the Accounts Receivables Process

**Field of Study:** Finance

**Description:** This session walks through four essential practices to increase the efficiency of accounts receivables management, including insight into: What's new with SAP S/4HANA, AI-powered cash application, including the advanced rules engine, with SAP Cash Application software, lessons to streamline various accounts receivables processes, from tracing open items to processing customer underpayments.

You will:

- Learn the differences between partial payments and residual items, including criteria to determine the option that best reflects your business situation.
- Understand whether and how to use Special G/L Indicators Take home a list of SAP correction reports and their uses, useful SAP Notes, and supplementary articles.



**Session Name:** Primetals Supercharges Supplier Payments with AI-powered Automation

**Field of Study:** Finance

**Description:** Primetals Technologies which provides metals producers with cutting-edge, tailor-made technologies, solutions, and services wanted to bring the same spirit of innovation into their finance team. The company recently supercharged their supplier payments with an end-to-end accounts payable automation solution that includes AI-powered invoice capture and flexible AI-driven processes. Since implementing the solution, the company has been able to eliminate manual work, increase process efficiency, and improve visibility with real-time information on their supplier invoices and payments within SAP.

You will:

- Discover how Primetals Technologies implemented AI-driven automation to revolutionize their supplier payments process.
- Learn how integrating end-to-end accounts payable solutions can eliminate manual work and enhance efficiency.
- Explore the benefits of real-time information and improved visibility on supplier invoices and payments within SAP.

**Session Name:** 3 Ways to Future Proof Your Compliance Strategy

**Field of Study:** Finance

**Description:** Do you operate internationally or dream of expanding in the future? Design a strategy now to navigate compliance on a global scale. It's an essential part to mitigate your financial risk. Don't miss the chance to hear real-world use cases. Sovos experts will take you well beyond the traditional compliance narrative and focus on the unique challenges and opportunities you face, operating on a global scale. Gain essential strategies to enhance compliance processes, reduce costs, and improve your overall efficiency.

You will:

- Identify where your organization falls on the compliance maturity curve and determine the next steps for enhancing your organization's approach.
- Learn how to adapt to evolving regulatory landscapes without causing disruptions to your financial operations.
- Understand the challenges of disparate point solutions and how your organization can minimize risk with a consolidated approach.

**Session Name:** Waters' Formula for Financial Transformation with SAP & BlackLine

**Field of Study:** Finance

**Description:** Join Waters Corporation, a global leader in analytical instruments and software which help ensure the safety of our medicines, the purity of the food we eat and the water we drink, as they share their journey to future-ready financial operations. By leveraging SAP Financial Close Solutions by BlackLine, Waters has transformed their finance and accounting functions.

You will:

- Discover how Waters initiated their transformation, tackling key challenges along the way.
- Learn how BlackLine's automation replaced traditional manual accounting processes and what's on the horizon for Waters.
- Unlock valuable insights on achieving future-ready financial operations through the combined power of SAP and BlackLine.

**Session Name:** Case Study: Group Reporting at Hexion: Leveling Up Financial Consolidation

**Field of Study:** Finance

**Description:** Hexion, a global chemical company, transitioned its financial consolidation solution to Group Reporting as the initial phase of adopting SAP S/4HANA. Explore the reasons behind choosing Group Reporting, their implementation approach, and how they extended its use beyond standard consolidation processes.

You will:

- Gain insights into internal and external reporting.
- Learn optimization of cash flow reporting.
- Understand management of discontinued operations and carve-out scenarios.



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