

# SAPinsider Finance & Automation 2021

## 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 in Event are offered as "Group Internet based."

**You may earn up to 4 CPE credits by attending sessions at SAPinsider Finance & Automation. Credits may be earned by attending the following: (Sessions must be attended live)**

- 1 credits – 50 minute session
- 0.5 credits- 25 minute session

Session Learning objectives, abstracts, field of study, and Recommended CPE credit can be seen below, starting on [page 5](#).

## Fields of Study offered:

- Information Technology
- Computer Software & Applications

To register for the event, please use the following [link](#). Please contact Katrina Irwin at [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 3 engagement checks per credit will be evaluated prior to issuing the credits. Session evaluation will be available following the conclusion of each session and must be completed and submitted to be eligible for credits. \*\* 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 after 60 days of the conclusion of the event. If you have any questions, please contact Katrina Irwin at [events@sapinsiderevents.com](mailto:events@sapinsiderevents.com).

# Program Learning Objectives

Please see session description for learning objects of the session. Also stated at the end of the session presentations (key points to take home).

## ***SAPinsider Finance & Automation Program Description:***

Automating financial processes is a strategic priority for most organizations. Our SAPinsider research shows that while most SAPinsiders (87%) have automated some finance or accounting process a majority (54%) are dissatisfied with their progress or project. Many businesses lack the skills and long-term vision of how automation can and should be applied for optimal gain. But the benefits are clear to those who get automation right. Improved efficiency, visibility into operations, and the ability to reallocate your resources to higher level tasks are among the rewards of successful automation projects.

This unique event shares strategies, best practices, and case studies to help finance and accounting teams understand how to get the most out of their investment in automation technologies, and where they need to apply them in the world of finance and accounting.

- Understand how to build a long-term automation strategy for finance
- How to balance the application of technologies like Robotic Process Automation and Artificial Intelligence in your automation portfolio
- What skills and roles are needed to support your automation projects
- How to better understand the automation solution landscape that includes SAP and third party solutions
- How to measure success and build the business case for automation projects
- Discover how to apply automation solutions to specific finance processes in the areas of order-to-cash, procure-to-pay, record-to-report, and more

## 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, 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 of 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 start date. Registrants must provide their registration confirmation number and submit a written cancellation request by e-mail to Katrina Irwin 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 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 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 Katrina Irwin at [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 complaint and refund, please contact Katrina Irwin at [events@sapinsiderevents.com](mailto:events@sapinsiderevents.com) or call our offices at (781) 751-8835.

## **Event Cancellation Policy**

### **Event cancellation or postponement**

In the event that an SAPinsider Conference is canceled or postponed, registrants will be notified by Katrina Irwin via email from [events@sapinsiderevents.com](mailto:events@sapinsiderevents.com) with all conference details regarding their registration. Registrations of the postponed conference will automatically transfer to the new event date once rescheduled. In the event that 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 canceled 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 complaint and refund, please contact Katrina Irwin at [events@sapinsiderevents.com](mailto:events@sapinsiderevents.com) or call our offices at (781) 751-8835.

## **Eligible Sessions:**

### **Opening Keynote | 10 Lessons to define and refine your finance automation strategy**

*Field of Study: Information Technology*

SAPinsider recent research shows that automation is a priority of technology and business investment. Automation is attracting growing amounts of corporate investment, and as technology continues to develop, the potential value is likely to increase. Almost 90% of SAPinsiders have begun automating some financial process, however over 50% are dissatisfied.

Why are many companies struggling with building an automation strategy that delivers long term value? How can they apply automation to finance processes in ways that will create insights and efficiencies?

This session will review some of the latest automation trends and areas in finance to help customers understand:

- Where and what processes they are applying automation first within finance.
- What are the early benefits?
- Why are companies building Automation centers of excellence?
- How are they selecting partners and building long-term automation strategies?
- How to assess your own automation strategy.

### **RPA, AI, oh my! What you need to know about the technologies that drive automation**

*Field of Study: Information Technology*

Automation technologies have always been present. In today's landscape there are more options for solutions and intelligent automation. This can create great value but only through careful design and implementation. Automation can enable businesses to reduce errors, improving quality and increase overall productivity. The technologies that deliver the best results in automation take the time to consider how they could redesign their processes, and the underlying technologies to pave the way for success.

This session will address the different types of automations solutions and how they can be applied to specific financial processes.

Attend to:

- Understand the basics of Robotic Process Automation (RPA), and Optical Character Recognition (OCR), and how automation solutions are applying these solutions.
- Get introduced to intelligent automation and how AI is being applied in areas such as advanced filtering, exception handling, and chat bots.
- Learn how both SAP and third-party vendors are utilizing these solutions.
- Know what skills and technological prerequisites you need to fulfill to get the most out of these solutions.

## Are We There Yet – or Not? Strategies for driving and supporting finance automation with SAP S/4HANA Finance

*Field of Study: Computer Software & Applications*

The move to SAP S/4HANA has motivated many organizations to reexamine their current portfolio of highly customized and inefficient processes. Many are considering a combination of standardization and automation to take their processes to the next level especially in the finance function which historically includes many repetitive tasks. This session will explore how SAP S/4HANA Finance can not be only a catalyst for change, but the business strategies and software capabilities built into SAP S/4HANA Finance to support your automation goals and objectives.

Key Takeaways:

- Understand the differences between different types of automation and artificial intelligence.
- Discover where there is specific machine learning and intelligent automation built into core areas of the finance and risk portfolio
- Learn how to automation and AI functionality within SAP S/4HANA Finance
- Prepare for change management to ensure the data and skill sets are in place for a successful implementation of automation and AI

## 3 Pillars for Long-Term Automation Success

*Field of Study: Information Technology*

Automation is not a short-term project, but a long term strategy. Ensuring consistent success and benefits requires that companies establish solid institutional foundations to drive automation governance, criteria for measuring success, and continuous improvement. To make the path ahead clear, 3 pillars for long-term automation success helps participants unlock their organization's potential and turn automation success into a driver of growth.

This session will:

- Delve into three distinguishing factors that will set you up for long-term success
- Help you understand how automation center of excellence can be of value throughout your organization
- Provide key steps to building a solid change management strategy and embracing the benefits of automation
- Discuss how you can document and leverage internal process knowledge to help train, lead, and provide guidance for your existing projects



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