ELEVATE 2025 Conference Breakout Sessions

March 23-25 | Atlanta, Georgia

Topic Area	Presentation/Title	Session Description	CPE Available
Accounting Fundamentals	AFUDC Fundamentals and Any Query	Have you ever wondered just what goes into that seemingly black box of AFUDC Calculations? In this session, you'll get a better understanding of the AFUDC building blocks displayed in the new Work Order Any Query.	✓
Accounting Fundamentals	ARO Fundamentals and new ARO Reports from The Latest PowerPlan Releases	Let's take a look at those ARO Fundamental Concepts, as well as the new reporting functionality from PowerPlan version 2023.1!	✓
Accounting Fundamentals	CWIP and CCNC Backlog Analysis	What's a great "big picture" view of your company's Work Orders past their Estimated In Service and Completion Dates, their Auto 106 and Auto 101 Kick Outs, and Failed ARCs? The new CWIP and CCNC Backlog Analysis functionality! During this session, you'll see how to more effectively manage your time, searching for and analyzing these items. This functionality uses a top-down approach.	✓
Accounting Fundamentals	Depreciation: A Look Under the Hood	What drives Asset Depreciation calculations? In this session, we'll take a look "under the hood" of those calculations for a better understanding of the values produced.	✓
Accounting Fundamentals	New Accounting Functionality in versions 2023.2, 2024.1, and 2024.2	What's New for Fixed Assets, Work Orders, and Projects? During this time we will highlight major enhancements to the asset functionality from the latest PowerPlan release versions.	✓
Accounting Fundamentals	Project Calculations for Post In-Service Carrying Costs, Reg Assets or Contributions in Aid of Construction (CIAC)	What are the benefits of WIP Computations? WIP Comps allow you to create multiple assets with different accounts from a single Work Order, as well as compute regulatory and jurisdictional amounts based on AFUDC or WIP balances. In this session, we'll look at how WIP Comps help simplify complex financial calculations related to construction projects.	✓
Accounting Fundamentals	Work Order Unit Estimate Loader	How do you efficiently reduce your backlog errors due to missing or incorrect Property Unit Estimates? Use PowerPlan's new Work Order Unit Estimate Import tool! In this session, you'll review how to create the new Import Template and how to load the Unit Estimates into the system.	✓
Accounting Fundamentals	Work Order Validation	For selected Work Orders, how can you view Kick Outs, Failed ARCs, Alerts, Pending Transactions, and current Deleted Transactions from a single window? During this session, you'll see how to efficiently analyze these selected Work Orders, as well as how to drill down to their Actual Charges, Estimates, Details, Completion, and Charge Repository items. This functionality uses a bottom-up approach.	✓
Accounting Thought Leadership	Accounting Automation: Reducing Manual efforts with WIP Comps to meet your Regulatory Requirements	WIP Comps are an excellent tool to use in support of special regulatory requirements as well as specific jurisdictional requirements. Join us to learn how you can leverage WIP Comps to simplify many complex tasks.	✓
Accounting Thought Leadership	Accounting Products Roadmap	In this session, we will discuss the comprehensive roadmap for our accounting products, highlighting the latest enhancements and future developments. Attendees will gain valuable insights into the strategic direction and key priorities across our product suite, which are designed to meet the evolving needs of our customers.	
Accounting Thought Leadership	Best Practice - Leveraging SAP WBS Alongside PowerPlan to Optimize Capital Project Business Processes	This session will provide a deep dive into simplifying WBS structures by capturing FERC accounting to optimize capital business process.	✓
Accounting Thought Leadership	Case Study: Adopting FERC 898 - Lessons Learned from Dozens of Customers	Attend this session to hear how PowerPlan prepared and organized our customers' initiatives for compliance to be successful, including key challenges faced and lessons learned.	✓
Accounting Thought Leadership	Reducing Backlog and Time To Close for Capital Projects	This session outlines a plan to address the backlog of Construction Work in Progress (CWIP) and Completed Construction not Classified (CCNC) issues.	✓
Accounting Thought Leadership	Service Company Projects or Joint Owned Assets - Simplify Accounting with Work Order Allocations and Unitization	This session will cover anticipating key business functionality ahead of an ERP transformation. This will be of special importance to organizations considering a future transformational effort.	✓
Budgeting	Capital Budgeting Best Practices	This course provides an overview of the Capital Budgeting module's best practices. It introduces the flexible management tools found in the Project Cost Management and other Capital Budgeting modules that work to ensure accurate annual budgeting, forecasting, and project cost management as part of the overall capital budget modules.	✓
Budgeting	Leading Practices and Current Events in Forecasting	This course will be a panel conversation about industry trends and leading practices in the forecasting world.	
Budgeting	Understanding PP&E Forecasting from the Cradle to the Grave	This course will provide attendees with an overview of the PP&E process from start to finish.	✓

Draft Agenda Subject to Change

Updated 11/22/2024

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Budgeting	Using PowerPlan PP&E Forecasting	In this course, attendees will learn how Capital Budgeting interacts with PP&E Forecast to generate a PP&E, which assists with projected financial statements. Attendees will learn how to configure and maintain PowerPlan Forecast Depreciation features, including projected retirements, closings to plant assets, and multiple scenario analysis.	✓
Income Tax Fundamentals	Maximizing the Value of PowerPlan's Tax Provision	Advanced Functionality available in our Tax Provision solution can be used to address the ever-evolving regulatory landscape. We also will discuss more advanced concepts related to tax accounting and how they can be configured in the software.	✓
Income Tax Fundamentals	Migrating from PowerTax to Tax Fixed Assets: It's Faster and Easier Than You Think!	PowerPlan has streamlined the transition from PowerTax to Tax Fixed Assets (TFA), making it easier than you might think! Join us to learn about the data migration process and discover how TFA enhances usability and processing confidence. Find out what steps you can take today to streamline this future transition.	✓
Income Tax Fundamentals	NGSH - 481a Considerations and Pitfalls	Thoughtfulness is required when looking back at historical repair eligibility, especially if a previous adjustment has already been taken. Join us to learn about our experience with these deductions and how to best book costs and align those costs to what is in PowerTax and Tax Fixed Assets (TFA). We will address questions such as: How do we accurately adjust our tax basis and accumulated depreciation by tax book for this tax strategy? What is there to consider as it flows to the deferred tax calculation?	
Income Tax Fundamentals	Provision 101	A beginner's guide to the Tax Provision module for new users to develop basic skills to utilize during a close process. We also will discuss recommended steps to keep your Tax Provision module running optimally.	✓
Income Tax Fundamentals	Tax Deferred 101	A beginner's guide to the Tax Deferred module that develops skills to aid in understanding basic concepts, general configuration, and reports.	✓
Income Tax Fundamentals	Tax Depreciation 101	A beginner's guide to the Tax Depreciation module that develops skills to aid in understanding basic concepts, general configuration, and reports.	✓
Income Tax Fundamentals	Tax Fixed Assets: Hands On Session (Bring Your Own Device)	*Hands On Session: BYOD* Tax Fixed Assets (TFA) is PowerPlan's powerful, next-generation income tax solution. Bring your own device to get hands on experience with TFA and see why customers are raving about its benefits and ease of use!	✓
Income Tax Fundamentals	Tax Repairs 101	A beginner's guide to the Tax Repairs module that develops basic skills for configuring and testing work orders for tax repairs eligibility and calculation.	✓
Lease	Lease 101	Whether you are a new user of the lease accounting solutions or are a seasoned veteran, establishing a solid foundation on the core concepts and how they translate to the PowerPlan lease accounting solutions is imperative. Join us in this session for a refresher on key aspects of the lessee and lessor modules and how they help you manage your lease portfolio in a repeatable and compliant manner.	✓
Lease	Lessee Journal Entries Workshop	Throughout the lifecycle of a lease agreement, the application will book various journal entries to account for the agreement. Join us in this session as we deep dive into journal entry logic, lessee accounting journal entries, and the connection back to the schedule. This session will be a continuation of the schedule build workshop, but can be attended independently.	✓
Lease	Lessee Schedule Workshop	Are you trying to make sense of the ILR schedules generated by the application? Join this session to dive into the individual values, how it is related, and the journal entries associated.	✓
Lease	Understanding functionality to assist with ongoing Lease Compliance	Despite adoption of ASC 842 / IFRS 16 being in the rearview mirror, maintaining compliance is still top of mind. In this session, we will be breaking down recent improvements to the solution to aid in the continued maintenance and accounting of your leased asset portfolios.	✓
Panel/Roundtable	Accounting for Regulatory Needs Roundtable	Join us in a roundtable discussion with leaders about accounting for regulatory needs.	
Panel/Roundtable	AI Roundtable	Join us in a roundtable discussion with leaders about how AI is impacting Accounting, Tax and IT departments.	
Panel/Roundtable	Cloud Adoption Roundtable	Join us in a roundtable discussion with leaders surrouding Cloud Adoption.	
Panel/Roundtable	ERP Transformation Roundtable	Join us in a roundtable discussion with leaders about ERP Transformation.	
Panel/Roundtable	Evolving Workforce Roundtable	Join us in a roundtable discussion about the evolving workforce.	
Panel/Roundtable	Income Tax Roundtable	Join us in a roundtable discussion with leaders surrouding Income Tax.	
Panel/Roundtable	Projects & Budgets Roundtable	Join us in a roundtable discussion with leaders about Projects and Budgets.	
Panel/Roundtable	Women in Energy Leaders Panel	PowerPlan will host a panel roundtable discussion with leaders working in the energy and utility space.	

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PowerPlan Connect	Accounting Controls and Automation with WPA - Hands on Experience (Bring Your Own Device)	*Hands On Session: BYOD* Participate in this session to experience for yourself the ease of adding system controls and automation to your PowerPlan processes. Several PowerPlan team members will be on hand to lend assistance.	✓
PowerPlan Connect	Getting the most out of WPA - Case Studies in Realizing Measurable Process Improvements	Learn how your industry peers are improving their practices with PowerPlan's Workflow Process Automation (WPA) tool. Hear how they are improving accounting process cycle times, increasing transparency, automating repetitive tasks, simplifying audits and more.	
PowerPlan Connect	Intelligent Insights Part 1 - Leveraging Data Hub to Drive Action	Part 1 of 2. The demands on people and systems for more data has been ever-increasing. In this session you'll see Data Hub accounting libraries put to work, and learn how they help you optimize data usage across your organization. There is value in attending this session even if you don't attend Part 2.	✓
PowerPlan Connect	Intelligent Insights Part 2 - Data Hub Hands on Experience (Bring Your Own Device)	Part 2 of 2. *Hands On Session: BYOD* The demands on people and systems for more data has been ever-increasing. Participate in this hands on experience to use Data Hub accounting libraries to build some of the high-value dashboards discussed in Part 1 of this Intelligent Insights topic. Several PowerPlan team members will be on hand to lend assistance. You will get the most value from this session if you attend Part 1 first.	✓
Property Tax	Asset Management for Property Tax Practioners	Join us to learn how your Property Tax team can better manage asset, depreciation, and project data throughout the year to prepare early for compliance season. Gain a better understanding of the upstream benefits and consequences of Fixed Asset accounting.	✓
Property Tax	Build Better Bills Processes	The PowerPlan Property Tax Bills Center is used for all statement processing. In this session, all the complex steps involved in processing bills are reviewed in a compact and user-friendly manner. After attending, Property Tax users will have the knowledge of navigation and configuration strategies to build a better bill paying process.	✓
Property Tax	Property Tax Collaboration Room (Bring Your Own Device)	*Hands On Session: BYOD* It's the Property Tax busy season, and you're in the trenches. Bring your device to the Collaboration Room where PowerPlan Professional Services and Support experts will offer one-on-one guidance for your most pressing questions!	
Property Tax	Property Tax Potpourri	This session will allow Property Tax users to discover What's New in the Property Tax Center, best practices in usability, and tips and tricks to enhance the PowerPlan solution to fit their evolving business needs by using simple configuration changes.	✓
Property Tax	Property Tax T.B.D. (Types Bring Detail)	Property Tax Types Bring Detail, so take a closer look into the configuration and customizations. Customers will learn to review their tax types settings and other Admin data setup to extract more detail from the Fixed Assets and Projects modules. More detail leads to greater tax transparency, which can drive efficiency and potential tax savings through lower valuation.	✓
Property Tax	The Prop Tax Dash	Run, don't walk, to see how the Property Tax dashboards in the PowerPlan Data Hub can help scratch your analytics itch. The Property Tax data model is illustrated across the annual lifecycle including cost, valuation, and liability.	✓
Regulatory	Client Case Studies on Regulatory Reporting, Cost Studies and Rider Automation	Learn how organizations implemented the PowerPlan Regulatory Solution to automate key regulatory processes, including FERC page automation, Regulatory Cost Study, and monthly rider filings.	
Regulatory	Regulatory for Accounting Use Cases	Learn how PowerPlan clients have used our Regulatory Solution to automate key regulatory processes. The session will include high-level product demonstration for the use cases including Regulatory Reporting automation of trial balance, FERC pages, Cost Studies, Rider Automation, and Rate Case Schedules - along with value propositions for these cases.	
Supporting PowerPlan	Basic/Intermediate PowerPlan Troubleshooting	This session will be focused on common PowerPlan application questions and helping you resolve them in-house, reducing time spent with PowerPlan Customer Support.	✓
Supporting PowerPlan	Future-Proofing IT Support for Cloud-Based PowerPlan	As businesses increasingly adopt cloud-based solutions, the need for robust and adaptable IT support becomes paramount. This presentation will focus on strategies and best practices for ensuring seamless IT support in a cloud environment. We will explore the challenges and opportunities presented by transitioning PowerPlan to the cloud, and how IT departments can prepare for a successful migration.	✓
Supporting PowerPlan	I Didn't Know PowerPlan Could Do That!	In this session we will revisit key customizations and configurations that are often overlooked in the system, but when used provide enhanced usability and value.	✓

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Supporting PowerPlan	Maximizing PowerPlan in the Cloud: Evolution, Benefits, and Expert Management with PowerPlan	In the dynamic landscape of software and financial accounting, transitioning to cloud-based solutions is essential for maintaining agility and efficiency. This comprehensive session will explore the evolution of cloud services, the regulatory treatment of software services, and the extensive benefits of moving to the cloud. We also will discuss PowerPlan's Cloud Services Program, delivery mechanisms, and the critical role of expert management in optimizing cloud solutions.	✓
Supporting PowerPlan	Optimizing PowerPlan - Oracle Database for Performance	This session equips attendees with the skills to configure databases for maximum efficiency, identify and resolve long-running queries, and troubleshoot general performance issues. Participants also will learn common tips and tricks to enhance overall system performance.	✓
Supporting PowerPlan	PowerPlan System Administration for Business Users	Ever wonder the "What" and "Why" of Powerplan System Adminstration? In this session we will share best practices for system administration.	✓
System Integrations	ERP Transformation Demystified: Case Studies & Q&A Session	This session will highlight key questions customers should ask themselves before starting an ERP Transformation, and include best practice considerations for a successful project.	
System Integrations	Groundplexes: Enabling Integration Hub Access to On-Prem Data Sources	While cloud hosting removes the need for on-premises installations of PowerPlan itself, integrations often require on-premises agents known as groundplexes to enable access to source systems. This session will discuss what groundplexes are, the installation requirements for groundplexes, and the required security configurations for their operation.	✓
System Integrations	Mastering PowerPlan: Integration Management and Leveraging API Calls (including new Security APIs)	This presentation will provide a comprehensive overview of data flow within PowerPlan, focusing on the challenges of integration and error messages. We will discuss the causes of error messages, strategies for their management, and the interpretation and resolution of error messages to support integrations effectively. Attendees also will see a live demonstration of the new API calls available in version 2023.2 of PowerPlan. We will explore their functionalities, usage, and implementation during projects. Attendees will gain practical insights into leveraging these APIs to modernize and improve the PowerPlan solution.	✓
System Integrations	Planning Systems and Maximo Integration Best Practices	The high-volume integrations between PowerPlan and external systems like UI Planner and Maximo require careful planning and consideration, especially in the context of cloud infrastructure. This session will discuss the latest best practices and cover case studies for successful UI Planner and Maximo integrations.	✓
System Integrations	PowerPlan Cloud Integrations	In this basic-level session, we'll explore the intricacies of PowerPlan's cloud integrations. Our discussion will encompass both standard base-delivered integrations and custom non-base integrations. We also will discuss the differences between PowerPlan Base On-premise API's and PowerPlan Base Cloud API's for your transition to the cloud.	✓
System Integrations	PowerPlan System Architecture Options	PowerPlan continues to grow and evolve with enhancements to existing solutions and the addition of new offerings in the solution footprint. This session will discuss which PowerPlan offerings operate on-premise, in the cloud, or in a hybrid architecture.	✓
System Integrations	Preparing for SAP S4 transformation and an overview of the PowerPlan S4 Hana adapter.	Organizations are transitioning to SAP S4 and there are many considerations for success. We will share best practices to prepare for a transformation based on our experience with many successful transitions. In addition, we will provide an overview of deploying the PowerPlan S4 Hana adapter (Adapter 101).	✓
Tax Thought Leadership	Case Study - Tax Fixed Assets Migration Ahead of an ERP Transformation	Transitioning to Tax Fixed Assets (TFA) can seem daunting amidst competing organizational priorities. The reality is that the migration is much easier than it sounds! Join us to hear about one of the country's largest utilities and their successful migration to TFA on an accelerated timeline, all while preparing for an ERP Transformation.	
Tax Thought Leadership	Artificial Intelligence vs. Actual Intelligence	AI is the future, or is it? In this session, we explore the contrast between Artificial Intelligence (AI) and Human Intelligence (HI). The interplay between these two forms of intelligence shapes our technological landscape. Join us to discuss and explore how AI algorithms can complement the HI embodied by tax professionals. (Note: this abstract was written with an AI CoPilot...or was it?)	
Tax Thought Leadership	ITC & PTC	The IRA Act of 2022 provided Investment and Production Tax Credits for renewable energy projects, and proposed regulations in 2024 helped business better understand how to they can effectively use these credits in their tax strategy. In this session, we'll discuss what PowerPlan is seeing in the industry and how our software can effectively assist in the tracking and calculation of these credits in Provision, Tax Fixed Assets, and PowerTax.	✓

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Tax Thought Leadership	Modernizing and Supporting the Tax Department in the Face of Organizational Change	Looking for ways to modernize your tax department? Join us to hear a Tax Fixed Assets (TFA) customer discuss how using TFA enables them to support organizational goals and stay ahead of change.	
Tax Thought Leadership	Next Generation Provision Preview	Join us to preview PowerPlan's next-generation Provision solution, which, like Tax Fixed Assets, builds on the strengths of our classic product while creating a modernized user experience, streamlined workflows, time-saving data validations, and curated insights to surface vital information quickly.	✓
Tax Thought Leadership	Tax Fixed Assets - Peer Experiences Panel	A panel of peers at regulated utilities who have migrated to Tax Fixed Assets (TFA) will discuss what they are accomplishing with TFA that they could only dream about with PowerTax. Learn more about their migration to TFA and subsequent adoption of its functionality to help their team succeed.	
Tax Thought Leadership	Tax Fixed Assets Product Roadmap and Q&A	Join us for a session where you'll have the opportunity to submit questions ahead of time for our Q&A segment. Discover the latest updates within Tax Fixed Assets (TFA), including new functionalities and innovative uses for the TFA Data Hub. We'll address both pre-submitted questions and engage in an open Q&A session. Don't miss this chance to get all your questions answered!	✓