



# Infor Dynamic Enterprise Performance Management (d/EPM)

A fully integrated solution for planning, budgeting, forecasting, and financial consolidation

# Measure past performance and forecast activities

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Performance management is a crucial success factor for virtually any business. Research from IDC reinforces this concept and identifies **enterprise performance management (EPM) as one of eight primary use cases that enable enterprise intelligence in the digital economy**.<sup>1</sup> As a series of business processes through which an organization links strategy with operations, performance management acts as a key driver for strategic planning in today's uncertain business environment. Effective performance management offers valuable insight into how a company is performing against objectives, and then helps to produce the actionable insights necessary to generate the desired business results. Performance management can include everything from business strategy and goals to employees and their responsibilities, systems, and technology.

While the basic principles of performance management are well-established, individual companies take various approaches to manage their performance effectively. Many organizations still perform budgeting and planning in error-prone spreadsheet silos that consume a significant amount of time, money, and resources on highly manual processes. Modern EPM software, however, can help reduce errors and enable enterprise-wide collaboration with an integrated, closed-loop approach.

Infor Dynamic Enterprise Performance Management® (Infor d/EPM®) is such a solution. It delivers powerful features for complex business issues, while providing a simple and intuitive user experience. Infor® d/EPM is available on-premises and in a multi-tenant environment that tightly integrates with the Infor OS cloud operating platform. This cloud-based performance solution enables innovation without disruption, provides world-class security, and offers reliability without the need to divert IT resources away from supporting a business's strategic aims or burdening an organization with costly and never-ending upgrade cycles.

1. IDC, **Market Analysis Perspective: Worldwide Enterprise Performance Management Software, 2020**, Doc # US46845020, September 2020, p. 13.

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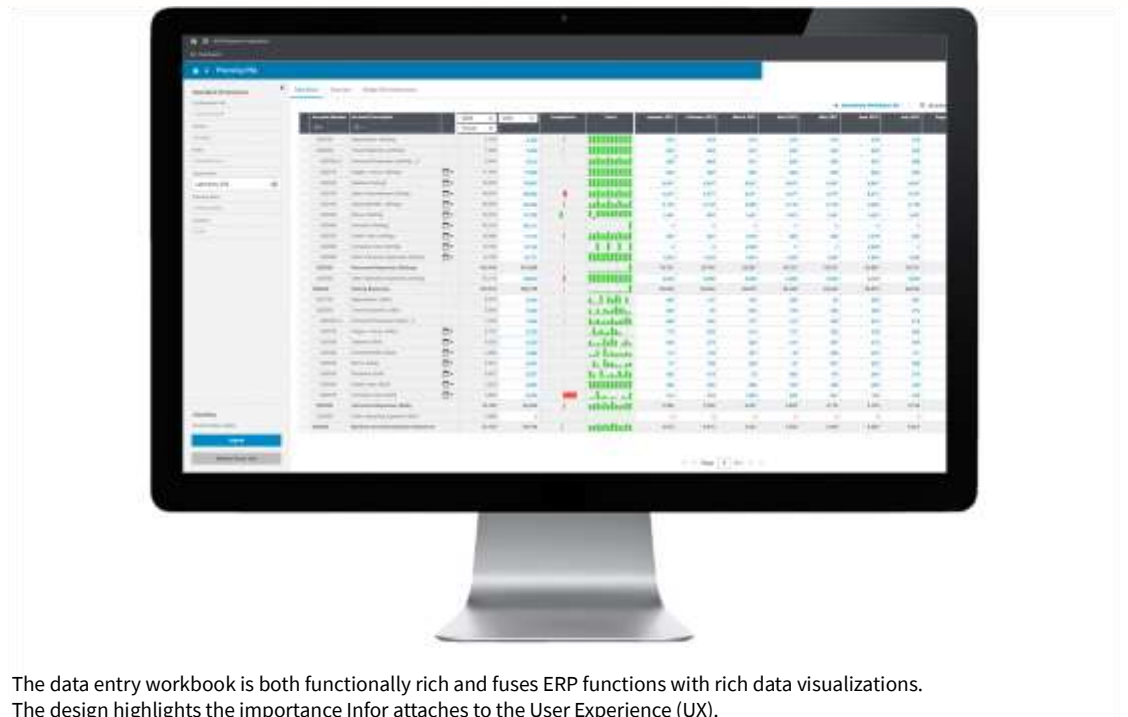
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# Improve visibility into financial processes

Infor d/EPM's Budgeting & Planning module connects to an organization's core ERP system (whether it's an Infor CloudSuite™ solution or third-party software) to bring financial budgets and actuals together. The pre-built functionality implements best practices with a modern, consumer-grade user interface.

The budgeting and planning module delivers planning of profit and loss, balance sheet, and cash-flow functionality combined with a powerful and user-friendly modeling application as well as support for what-if scenario planning with unlimited iterations. For larger enterprises, workflow management, multiple currencies, conversions rates, and basic or complex allocations are all supported.

When the planning process is integrated with financial reporting and analysis and workforce-related costs, an organization's management team can gain improved visibility into all financial processes, more accurate forecasts, better auditability, and the power to handle whatever challenges come their way.

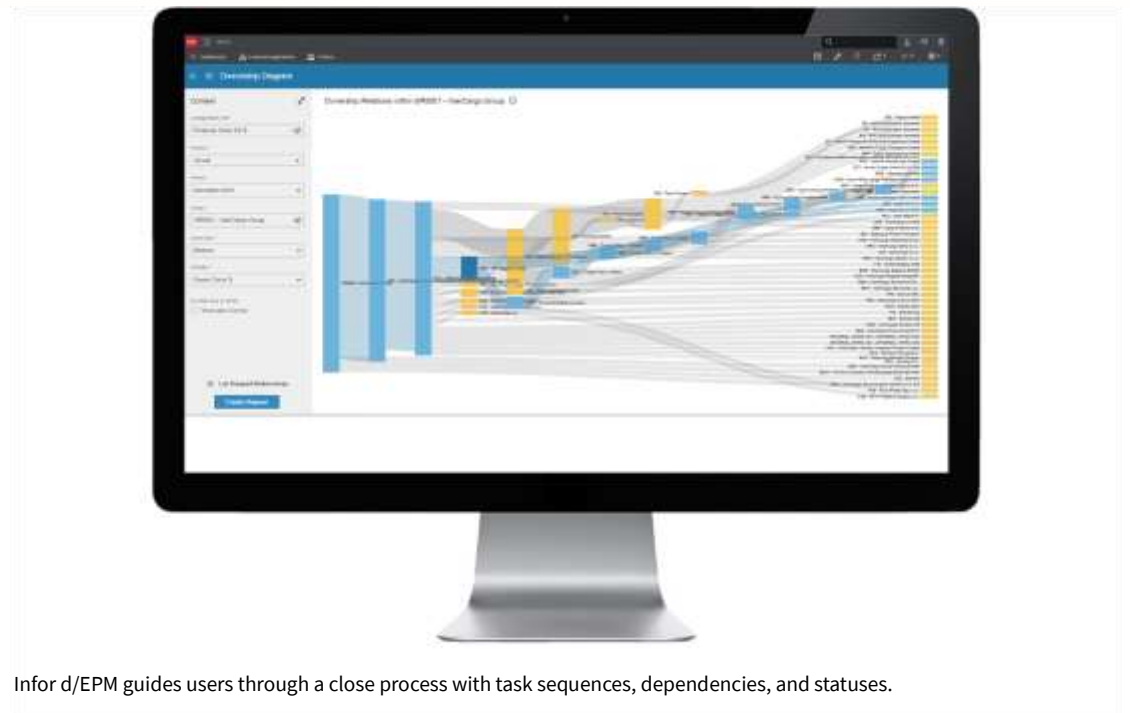


The data entry workbook is both functionally rich and fuses ERP functions with rich data visualizations. The design highlights the importance Infor attaches to the User Experience (UX).

# Simplify and automate financial consolidation

Infor d/EPM's Financial Consolidation module allows organizations to consolidate multiple sets of books quickly and seamlessly from each of its legal entities, process elimination entries, and generate a single set of financial statements. Financial Consolidation is fully integrated with Infor ERPs and can help simplify and automate the tasks associated with consolidation, allowing organizations to spend more time on financial reporting and analysis.

Powerful capabilities enable collecting, consolidating, and reporting accurate data from operating units worldwide, while quickly delivering financial results to senior management. Organizations can improve data accuracy, avoid closing delays, improve auditability, comply with regulations, and close books quickly and confidently.



Infor d/EPM guides users through a close process with task sequences, dependencies, and statuses.

# Optimize operational planning and forecasting

Infor d/EPM's integrated sales forecast and sales operational planning capabilities bring together an organization's finance department and front-line operations teams. You can get detailed information from your sales organizations whenever you need it, significantly reduce the time it takes to prepare forecasts, and predict future performance more accurately.

Forecasting is tightly integrated with spreadsheets, budgeting, and ERP systems. It supports flexible rules for discounts and driver-based calculations, with what-if scenario planning, statistical forecasting, and artificial intelligence (AI) components that provide predictions and analysis of existing trends.

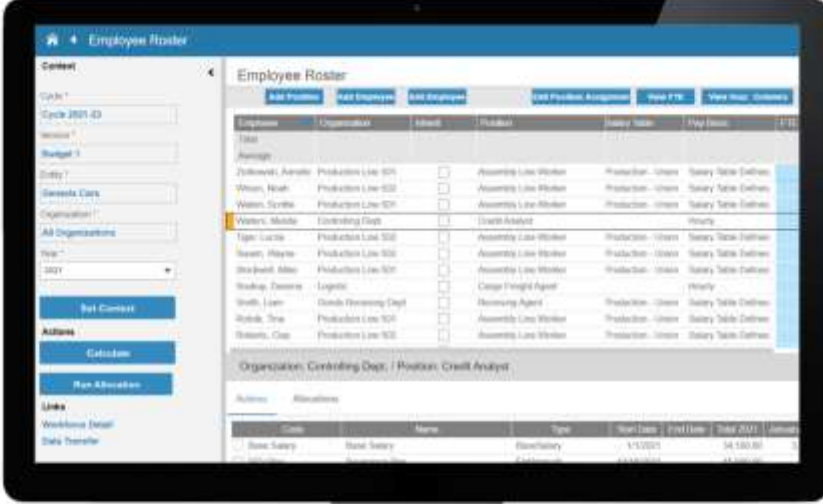
Infor Integrated Business Planning (IBP) is built on the same platform as d/EPM and provides organizations with advanced supply demand planning capabilities to provide an overview of demand and supply and connect the strategic plan with an organization's operational capabilities. It enables you to create a more agile business process, so you can master globalization of the supply chain—as well as improve cross-functional planning, collaboration, promotions management—and establish more flexible responsiveness to fluctuations in demand. By leveraging advanced statistical forecasting and machine learning, organizations can enable or enhance demand sensing and generate more accurate predictions from existing trends.



# Optimize workforce budgeting and planning

One of the most important assets of nearly every organization is its people. Therefore, it's essential that the costs associated with human resources be fully integrated into EPM processes. Infor d/EPM enables the capture of detailed headcount requirements, models salary and benefits adjustments can account for vacancies, and can assess needs for headcount optimization. Organizations can perform detailed analyses of workforce-related costs, budget for positions, and employees linked to salary tables; as well as forecast future costs.

Infor d/EPM's ability to integrate with existing human capital management (HCM) systems means that d/EPM can perform cost allocation across departments, projects, and funds. Intuitive reporting can be leveraged to create a detailed view of salary, pay, or benefit costs.



The screenshot displays the 'Employee Roster' interface in Infor d/EPM. The interface includes a left-hand navigation pane with sections for 'Context' (Cycle, Version, Budget, Salary, Benefits, Organization, Year, Run Context, Actions, Links), 'Employee Roster' (Add Position, Add Employees, Edit Employees, Add Position, Assignments, View FTE, View Max, Orders), and 'Organization: Contributing Dept. / Position: Credit Analyst'. The main area shows a table of employees with columns for Name, Organization, Job, Position, Salary Table, and Pay Basis. Below the table, there is a section for 'Organization: Contributing Dept. / Position: Credit Analyst' with a sub-table for 'Actions: Allocations'.

Employee	Organization	Job	Position	Salary Table	Pay Basis
Average					
Zakewicz, Andrew	Production Line 520		Assembly Line Worker	Production - Union	Salary Table - Fulltime
Wilson, Noah	Production Line 520		Assembly Line Worker	Production - Union	Salary Table - Fulltime
Wilson, Cynthia	Production Line 520		Assembly Line Worker	Production - Union	Salary Table - Fulltime
Winters, Monte	Contributing Dept.		Credit Analyst		Hourly
Tyler, Lucie	Production Line 520		Assembly Line Worker	Production - Union	Salary Table - Fulltime
Reuter, Wayne	Production Line 520		Assembly Line Worker	Production - Union	Salary Table - Fulltime
Wardwell, Mike	Production Line 520		Assembly Line Worker	Production - Union	Salary Table - Fulltime
Workup, Thomas	Logistics		Order Freight Agent		Hourly
Worth, Liam	Goods Receiving Dept		Receiving Agent	Production - Union	Salary Table - Fulltime
Worick, Tim	Production Line 520		Assembly Line Worker	Production - Union	Salary Table - Fulltime
Waters, Greg	Production Line 520		Assembly Line Worker	Production - Union	Salary Table - Fulltime

Line	Class	Name	Type	Start Date	End Date	Total 2021	Amount
1	Base Salary	Base Salary	Base Salary	1/1/2021	12/31/2021	34,180.00	34,180.00
2	Commission	Commission	Commission	1/1/2021	12/31/2021	14,220.00	14,220.00

# Leverage an unrivaled breadth of applications

Infor d/EPM is a modern, mobile-enabled, financial performance management and business intelligence platform that provides a complete range of integrated enterprise performance management capabilities that allow organizations to report with confidence, measure past and current performance, and forecast future activities. Infor d/EPM can be tightly integrated into all of an organization's enterprise data sources via the Infor OS data fabric; and can leverage additional advanced industry analytics capabilities with Infor Birst®.

In addition to the use cases discussed, Infor d/EPM also offers:



## **Financial planning, budgeting, and forecasting**

Create budgets and plans, forecasts, and operational and strategic plans



## **Workforce budgeting and planning**

Build position/employee-based budgets and plan employee counts



## **Sales planning**

Form sales plans with analysis of existing trends and team collaboration



## **Capital expenses planning**

Manage capital with documentation packages, an overview of statuses, and approvals



## **Financial consolidation**

Manage complex ownership structures, multiple currencies, and intercompany transactions



## **Financial reporting**

Utilize formatted standard reporting and flexible self-service reporting





### **Sales and operational planning**

Fill the gap between operational planning and yearly/strategic planning



### **Supply-demand planning**

Use the power of AI and machine learning to plan supply and demand



### **Projects forecasting**

Produce various scenarios for project forecasts and analyze the execution



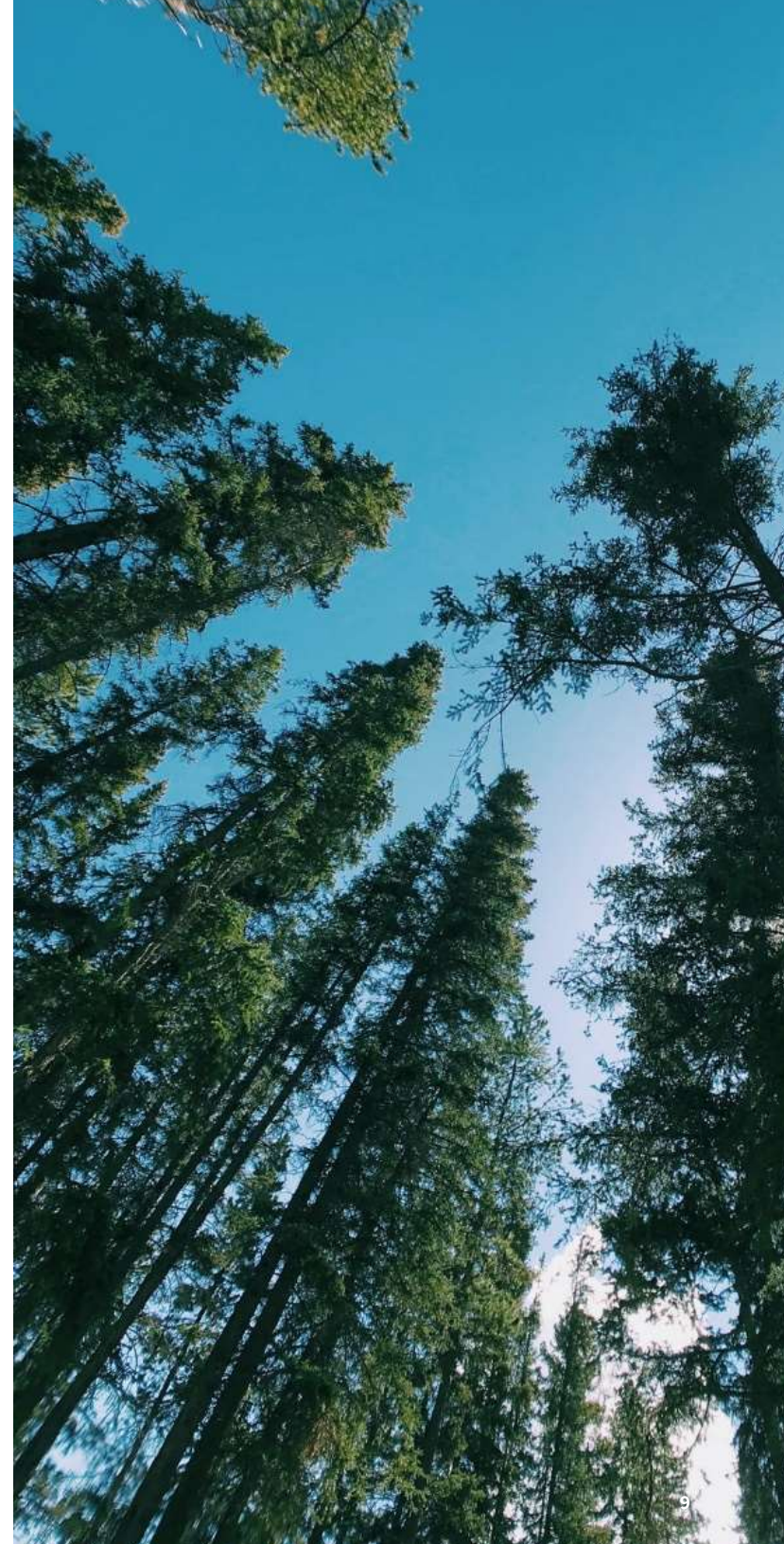
### **Risk management**

Conduct project, campaigns, or business risk-management with reaction plans, action workflows, and analysis of different versions and scenarios



### **Strategy management**

Evolve your company strategy by connecting strategy with activities, measures, and metrics



# Join a thriving community

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Many Infor d/EPM customers are part of a thriving user community of thousands of organizations worldwide that run a modern and mature platform that delivers innovation without disruption, in the cloud and on-premises.

4,500+

active customers across all versions

30+

years in the market

80

countries

2,000+

community members

100+

major features every year

20

supported languages

# Built on a modern technology architecture

Infor d/EPM benefits from more than 30 years of development and innovation. The platform has recently been completely reengineered to use a modern services-based architecture that meets the needs of today's modern cloud-based applications. This modernization also benefits those organizations that choose to run Infor d/EPM on-premises.

With browser-based dashboards and mobile devices, users can access reports and perform planning wherever they are. Native integration with Excel allows you to use Excel's latest features, such as dynamic array—users can import Infor d/EPM data to their spreadsheets and use Excel to change the model and create powerful applications in an Excel-like designer. Infor d/EPM's in-memory analytical and planning model ensures that the model is immediately recalculated as soon as changes are made.



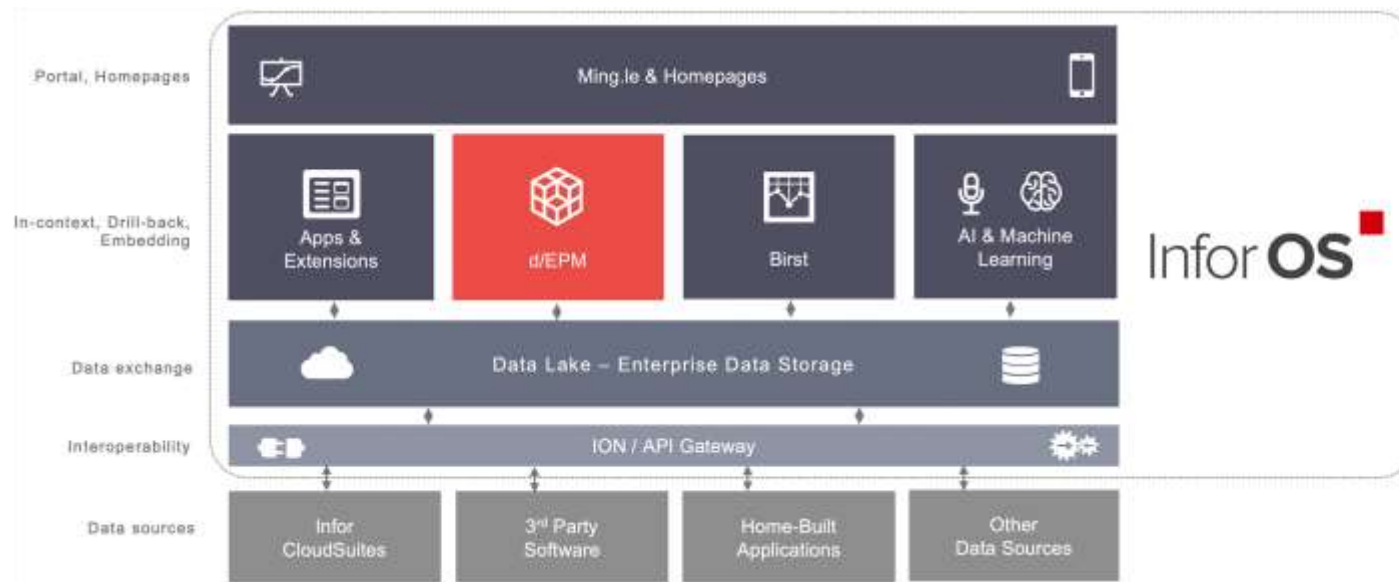
# Implement a foundation for innovation

Infor OS is a cloud operating platform that seamlessly connects services to provide a robust technology framework that serves as the foundation of innovation for the entire business ecosystem—and is provided to all cloud and on-premises customers of Infor d/EPM. Using Infor OS means that Infor customers can implement faster and benefit from all the technology stack innovations.

With Infor OS integration, Infor d/EPM customers experience a seamlessly integrated user experience with the rest of the Infor ERP solutions and applications—including the ability to create personalized Homepages.

Infor ION® and the Infor ION API gateways serve as a data hub for Infor d/EPM. They are an essential part of Infor’s cloud strategy—making data easy to integrate with on-premises, hybrid, and cloud data sources with Infor d/EPM.

For multi-tenant, cloud-based, Infor d/EPM customers, the Infor OS data fabric provides a single source of trusted data for the enterprise through data lake integration with Infor and third-party data sources, as well as utilizing the Infor Coleman® Digital Assistant for AI-powered interactions.



# Drive informed decisions with better insight

Gain unprecedented insight into your business with an integrated suite of applications for planning, consolidation, and analysis—combined with compliance tools—all connected to your underlying systems.



## Decisions in context

Make decisions in the context of business plans collaboratively across teams, rather than manually referencing reports in silos



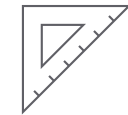
## Predictive analytics

Use predictive analytics and powerful forecasting capabilities to drive strategic, tactical, and operational decisions



## Insights on the go

Give users insight into the business, wherever they are—whether they're visiting customers or working on the manufacturing floor



## Extensible prepackaged content

Implement planning tools with prepackaged, industry-specific content that can be extended to meet your unique business requirements



## Better investment decisions

Drive better investment decisions across the business by better understanding the impact of plans before developing budgets



## Proactive monitoring

Pair with Infor GRC to automatically monitor systems for security breaches, segregation of duties violations, or fraud

# Improve business performance

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Dealing with disruption, change, and complexity is a reality of doing business today. Yesterday's strategies and practices won't always provide a clear path to solving today's challenges. If your organization is like most, you want to improve productivity. Innovative enterprise performance management software, like Infor Dynamic Enterprise Performance Management (d/EPM), can help. Infor d/EPM delivers greater insight, so that you can make more informed financial decisions across your enterprise. When combined with Infor Birst for advanced analytics and the Infor OS data fabric for governed and trusted data management and API integration, Infor d/EPM provides a genuinely unique business management platform.

When you have the agile business and financial performance management software systems you need, your organization is ready to thrive.

[LEARN MORE →](#)





Infor builds business software for specific industries in the cloud. With 17,000 employees and over 67,000 customers in more than 170 countries, Infor software is designed for progress. To learn more, please visit [www.infor.com](http://www.infor.com).



TRG is a market-leading global professional services firm focused on delivering technical excellence. TRG adds value in a challenging and dynamic market by delivering the right IT solutions that work quietly and brilliantly in the background, freeing our customers up to focus on their core.

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