



Planning a Successful Transition

Infor CPM to Infor d/EPM



CFO Solutions

Logistics for Today

Planning a Successful Transition from Infor CPM to Infor d/EPM

- Presentation will run 35-40 minutes
- Ask questions in the chat throughout the presentation
- Q & A for 20 minutes at the end

Introductions

Purpose and Speakers

Your Presenters

Planning a Successful Transition from Infor CPM to Infor d/EPM



Jennifer Buchanan

Practice Director
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Infor Practice Director, Jennifer Buchanan has more than 15 years' experience providing professional services in management consulting and information system implementations. With prior roles at BearingPoint and Baker Tilly, she specializes in strategic planning, business process redesign, enterprise performance management, and project delivery.

Jennifer has implemented solutions for business intelligence, data warehousing, budgeting, planning and forecasting, ERP and application design. She has experience in multiple industries, including Public Sector, Healthcare, Manufacturing, Higher Education and Aerospace and Defense. Jennifer has worked with a broad suite of tools, including Infor CPM and d/EPM, Oracle Hyperion, Host Analytics (Planful), MicroStrategy, Information Builders, NetSuite and SAP.



Jason Edwards

Principal Solution Consultant
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215-370-0409
Philadelphia, PA

Jason Edwards is a Subject Matter Expert in planning and analytics, helping clients envision the possibilities with Infor d/EPM and Birst.

Jason joined Infor in March 2016. He has a dual background in finance and technology and has provided consulting services for many Fortune 500 companies. Jason has over 15 years' experience successfully implementing planning and reporting solutions using various budgeting and business intelligence technologies.

Specialties include presales, solution demonstrations, budgeting and forecasting, dashboards, reporting and analytics and financial modeling.

Agenda



Introductions



Why



How to Get Started



Q&A

Purpose

Help you get answers so you can plan your move.



Why should I transition to Infor d/EPM?



What are the benefits?



What are the risks?



How do I get started?



What should I do now to plan?



Who should I contact?

Founded in 2005, CFO Solutions is a professional services firm specializing in Enterprise Performance Management (EPM) and Business Intelligence (BI) products and solutions. We help clients define processes, determine the right technology solution, create a solution roadmap, and implement the vision.

CFO Solutions has been implementing Infor CPM and d/EPM since product inception and has worked alongside Infor throughout the evolution of the products

- Full suite of advisory and implementation services for Finance, focused on enterprise performance management solutions
- Team built from former Big 4 consultants, software experts, and CPAs
- Broad experience across multiple industries
- Uniquely staffed with both CPM and d/EPM expertise to aid in your transition



About Us

CFO Solutions helps companies find and implement the right solutions to thrive now and in the future



What We Do

Enterprise Performance Management and Reporting

- System Implementation
- Business Process Design
- Budgeting and Planning
- Corporate Consolidation
- Business Intelligence and Dashboard Reporting
- Data Warehousing
- Data Integration
- Installation, Training, and Support

Why

Risks
What to Expect from EPM
Why d/EPM

Risks of Waiting

Don't invest in avoiding the inevitable. Don't leave your organization exposed.

Knowns

- Infor CPM is dependent on the Microsoft Internet Explorer 11 browser for Silverlight
- Internet Explorer 11 is not compatible with Office 365 and is no longer supported for certain operating systems
- Office web components and Silverlight no longer available for download
- October 2021, Silverlight reaches end of support and will no longer receive quality or security updates
- Infor CPM will not be updated or patched for 3rd party component changes or issues
- EPM implementations can take 4-9 months

Unknowns

- After October 2021, what security issues could impact Internet Explorer or Silverlight that Microsoft will not fix?
- How long could you go without an application if something goes wrong?



What You Can Expect from d/EPM

Rich Functionality + Flexibility

Infor d/EPM offers preconfigured content based on common practices for collecting data, examining budgeting impact, and collaboration. Subplans offer business process solutions for common budgeting processes. Determine whether your business will adopt these processes or configure d/EPM to support your unique needs.



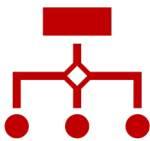
Financial planning, budgeting and forecasting

Create budgets and plans, forecasts, operational and strategic plans



Workforce planning and budgeting

Create position / employee-based budgets and plan employee count



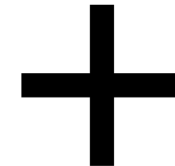
Financial consolidation (COMING SOON)

Complex ownership structures, multiple currencies & inter-company transactions



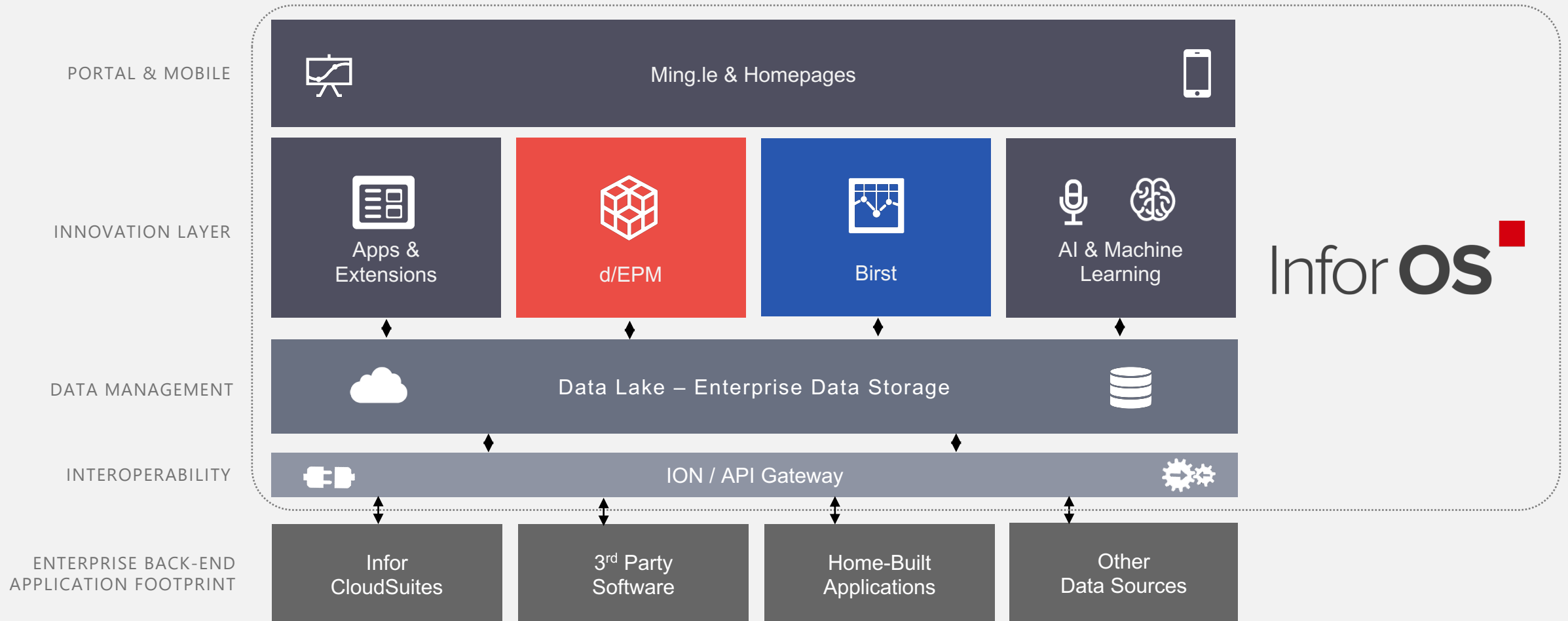
Financial reporting

Formatted standard reporting and flexible self-service reporting



- Sales models
- Revenue models
- Staffing models
- Capital planning
- ...

d/EPM and Infor OS



d/EPM and Birst

d/EPM

Enterprise Performance Management

Planning, Forecasting, Scenarios, Simulations,
Management and Statutory Consolidation

Birst

BI, Enterprise Reporting, Analytics

Collect, analyze and present data

- Strategy Management
- Financial Consolidation
- Business planning, budgeting and forecasting
- In-process reporting

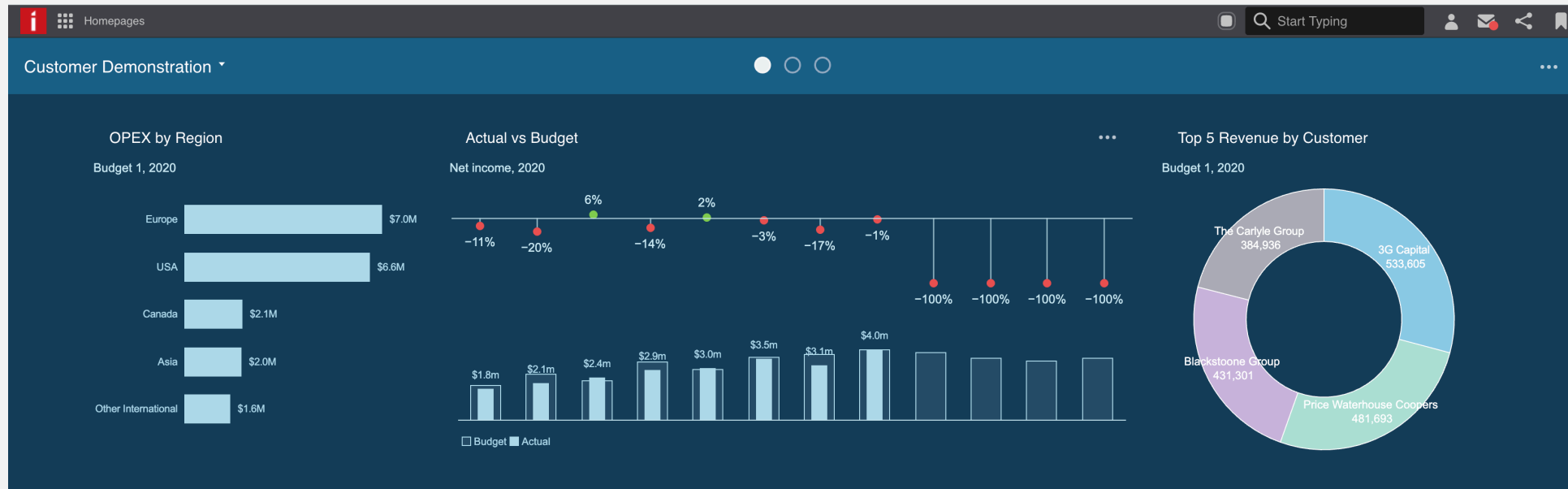
- Data Collection and Processing
- Reporting, Dashboarding, Data Discovery
- BI Self Service
- Operational Reporting

Read and Write

Read-only

Planning – Consolidation – FM – Operational Reporting – Dashboarding – Data Discovery – Advanced Analytics – IOT – Big Data

Ming.Le Homepages and d/EPM



Planning and Budgeting

- Infor Planning and Analytics
- Expense Planning
- Revenue and Expense Summary
- Salary Planning
- Capital Project Planning

Reporting and Analytics

- Infor Analytics
- Financial Reporting
- Ad Hoc Analytics
- Company Website
- Twitter

Posts

- Jason Edwards**
Travel expenses have been finalized for the US regional budget.
6/18/2020 2:34:02 PM
- Jason Edwards**
The marketing budget should be updated with the latest advertising costs for the quarter.
6/18/2020 2:32:36 PM
- Jason Edwards**
Team, can we finalize the sales budget this week.
6/18/2020 2:31:59 PM
- Jason Edwards**
Hi Gary,

Demonstration: Planning and Repo...

Agenda

1. Headcount and Salary Planning
 1. Headcount Requests and Approval
 2. Salary Planning
2. Planning for Expenses
3. Capital Project Planning
4. Financial Reporting
5. Self-Service Analytics
 1. Dashboards
 2. Excel Integration

d/EPM Budgeting and Planning

d/EPM Business Applications

Start Typing

Dashboards

G&A Expense Planning

Standard Dimensions

Configuration Set: 5 Year Plan

Version: Budget 1

Entity: Genesis Cars USA

Organization: Accounting

Planning Step: G&A Expense Planning

Currency: USD

Workflow: Current status: Open

Submit

Overview Data Entry

Immediate Writeback On

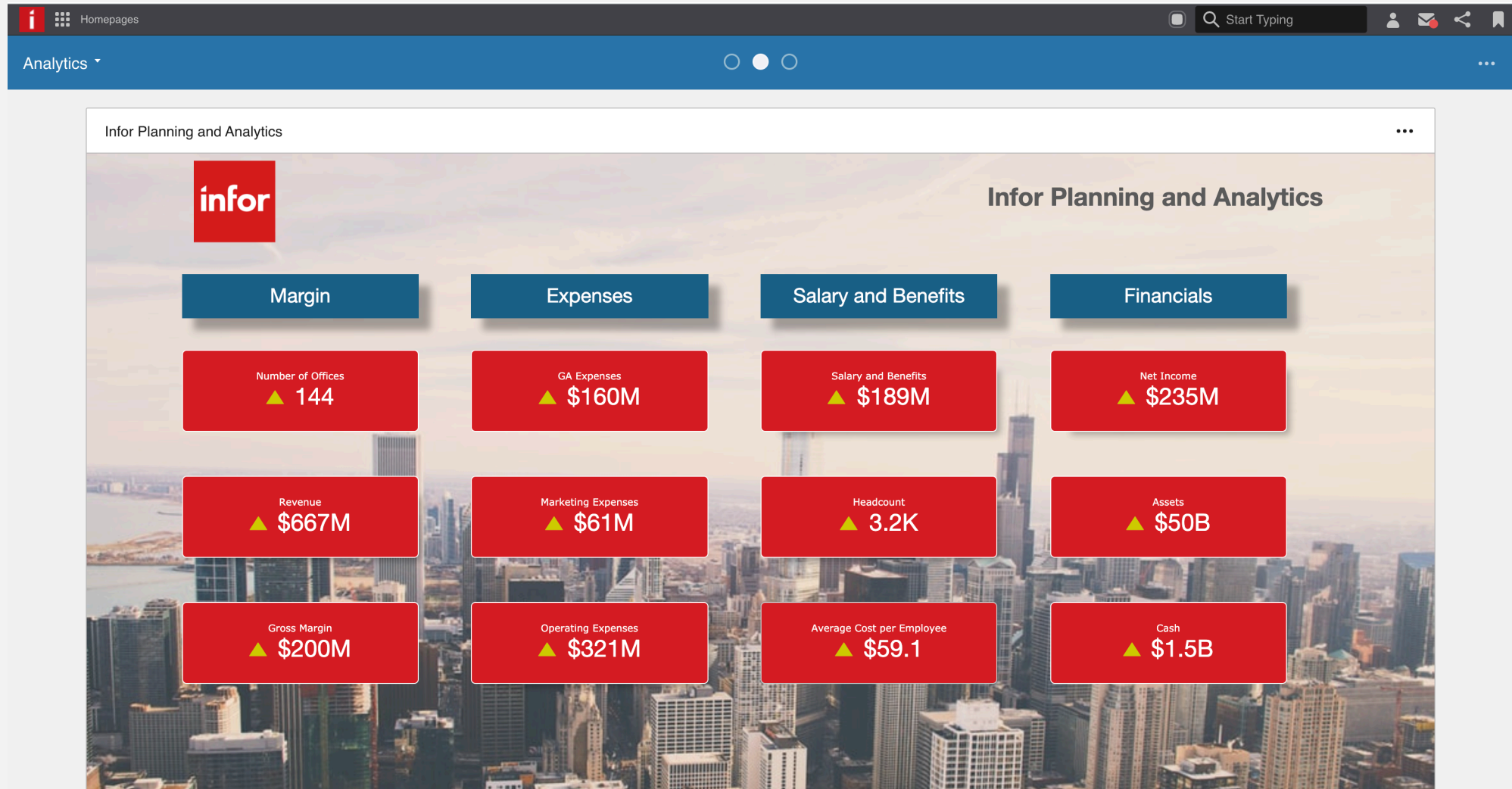
Account Details Analysis Columns

Account Description	2019	2019	2020	% Change	Comparison	Trend	January 2020	February 2020	March
	Actual	Actual							
Facilities (G&A)	2,446,575	2,446,575	2,700,000	10.36%			270,788	218,337	220,000
Entertainment (G&A)	822,273	822,273	858,080	4.35%			82,047	74,082	70,000
Rent (G&A)	3,224,534	3,224,534	3,097,182	-3.95%			265,069	268,953	260,000
Utilities (G&A)	552,978	552,978	560,500	1.36%			47,500	47,500	40,000
Office Supplies (G&A)	499,847	499,847	516,105	3.25%			44,237	43,602	40,000
Travel Expenses (G&A)	644,387	644,387	644,387	0.00%			61,746	62,877	60,000
Consulting Fees (G&A)	1,220,292	1,220,292	1,275,659	4.54%			108,205	106,501	110,000
Repairs (G&A)	1,781,872	1,781,872	1,859,482	4.36%			169,909	178,048	180,000
Maintenance(G&A)	1,333,736	1,333,736	1,486,473	11.45%			123,180	122,875	120,000
Warehouse (G&A)	2,985,765	2,985,765	3,432,052	14.95%			291,118	286,533	310,000
Depreciation (G&A)	3,446,455	3,446,455	3,572,780	3.67%			326,461	342,099	350,000
Other Operating Expense (G&A)	2,019,574	2,019,574	2,019,574	0.00%			167,358	166,943	160,000
General and Administration Expenses	20,978,288	20,978,288	22,022,273	4.98%			1,957,617	1,918,350	1,960,000

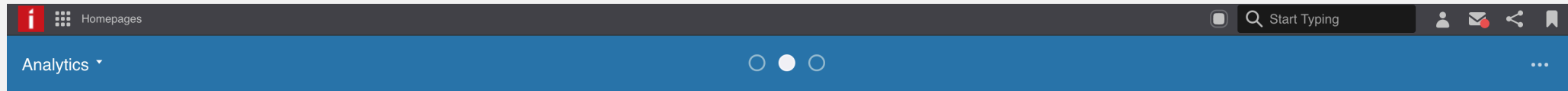
Page 1 of 1

100 Records per page






Ming.Le Homepages and Birst



Ming.Le Homepages and Birst



Why Customers Choose Infor d/EPM

Needs	Infor d/EPM	Other EPM Suites
 <p>Desire for unified platform, ERP Integration</p>	<ul style="list-style-type: none"> • Uses InforOS, Data Lake, SSO • Business modeling embedded integration tool • Load from tables, Infor ERP, or flat files 	<ul style="list-style-type: none"> • May require interim staging tools to integrate • Multiple tools to manage users across platforms • Some have strong integration options
 <p>Flexibility</p>	<ul style="list-style-type: none"> • Use best practices content, build your own, or combine the two 	<ul style="list-style-type: none"> • Limited/no pre-built accelerators • Custom content not integrated with pre-built
 <p>Finance-owned application</p>	<ul style="list-style-type: none"> • Admin tools all on the web, Infor Support, No hardware to maintain with Cloud deployment 	<ul style="list-style-type: none"> • Other cloud vendors offer similar web- based admin tools. Some are more and less complex. • On prem solutions are still dependent on IT
 <p>Easy to Learn</p>	<ul style="list-style-type: none"> • Wizard driven admin tools, clean interfaces • Reporting tool has an excel-like interface • Intuitive ad hoc tools • The same tool used to write reports can be used to design user interfaces 	<ul style="list-style-type: none"> • “Powerful, but too complex” • “Steep learning curve” • Dependent on consultants • Many vendors struggle with the report-writer • Others are simple to use, but cannot scale to all use cases
 <p>Platform can scale as the business grows</p>	<ul style="list-style-type: none"> • Ability to extend the application • No constraints on developing content 	<ul style="list-style-type: none"> • Some limit the number of cubes • Some only feature a subset of business processes

How to Get Started

Phase 0
Start with Reporting
Begin Implementation

How to Get Started

Recommended Approach: Phase 0

Prepare with “Phase 0”

- Inventory assets and legacy content
- Gather improvement opportunities from stakeholders
- Evaluate processes
- Assess Readiness
- Chart your timeline

4-6 weeks

Start with Reporting

- Transfer reporting to d/EPM cubes while keeping core processes in CPM
- Set up data integrations
- Interact with your data in a new way
- Build reporting packages
- Get training on core skills
- Begin deploying reports to users

6-8 weeks

Jump Right In

- Align with a services provider
- Scope your project
- Meet with your sales executive to evaluate your use case and licenses
- Decide deployment method
- Kick-off your project

4-9 months

Phase 0 Options

Choose a path that meets your needs

	d/EPM Readiness Evaluation "I want to implement what I am doing today"	Roadmap and Plan "I want to change things and try new features"	Prototyping and ERP Integration Readiness "We have ongoing organizational or systems changes"
Discovery Sessions	✓	✓	✓
High level architecture	✓	✓	✓
Requirements Gap Analysis	✓	✓	✓
Implementation Roadmap	✓	✓	✓
Risk Assessment	✓	✓	✓
d/EPM Deep Dive Demonstrations	✓	✓	✓
Requirements Document		✓	✓
Architecture & Data Flow Diagrams		✓	✓
Project Plan		✓	✓
ERP Structure Assessment			✓
Prototype			✓
Communication Plan			✓
Stakeholder Analysis			✓

Reporting

Start with reporting to focus on integrations and data structures

Goals

- Establish reporting dimensions
- Determine data integration strategy
- Load historical data
- Set up ERP data feeds
- Prepare core reports
- Learn Self Service and the Excel Add In
- Learn about d/EPM tools and how to administer
- Launch reports, dashboards, and ad hoc tools to your users

Results

- Monthly Financial Reporting
- Ad Hoc tools
- Change management for your team
- Stable baseline model for future phases
- Team is trained and ready for the future
- Ready for Phase 2

Proceed Directly to Implementation

Plan adequate lead time to implement, key decisions

Financial Consolidations

- Multiple ledger systems
- Intercompany eliminations
- Journal entries
- International operations
- Joint ventures or partial ownership



Financial Reporting

- Data sourced from ERP
- Data Aggregation
- Report Books
- Ad Hoc Reporting
- Excel Add In



Budgeting and Planning

- Plan revenue and expense
- Incorporate workflow approval processes
- Plan employees
- Report budget vs. actual



Complexity Drivers

Variables that impact the size of your project

- Chosen software
- Move from on prem to the cloud
- Cleanliness of data
- Shadow Processes
- Resource Availability
- Concurrent projects
- Complexity of business requirements
- Degree of change
- Consistency in current processes
- Desired volume of historical data conversion
- Number of data sources

Migration Accelerators

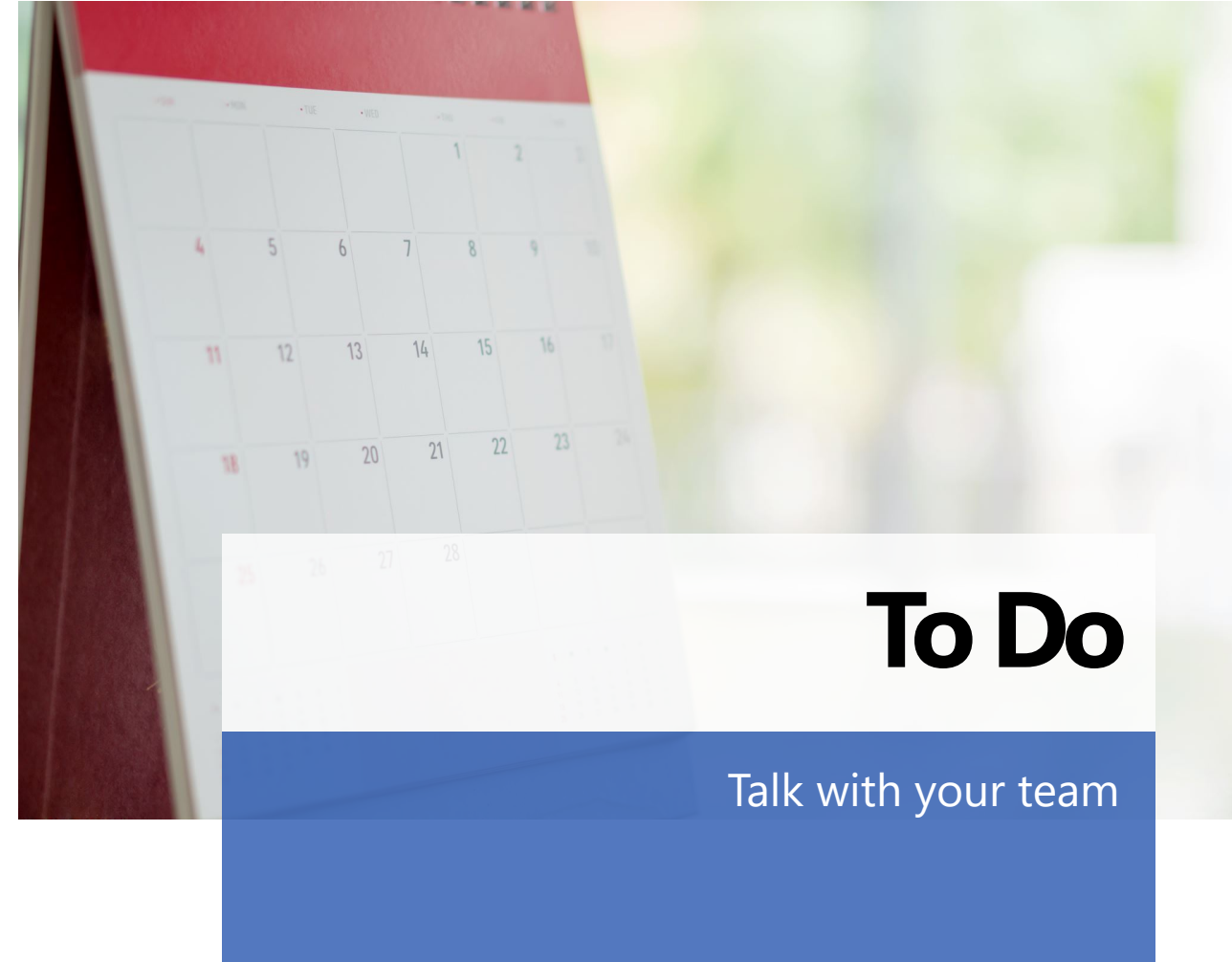
Action Item: Add this initiative to your budget for 2020/2021

Infor d/EPM migrations take time. Plan now and start with adequate lead time to execute, test, and train before CPM is no longer viable for your organization. Leave time for change and to add enhancements to your processes.

	Accelerated	Plan for More Time	Ask Questions to Confirm
Mature budgeting process, mostly in CPM	✓		
CPM Budget process supplemented with Excel models		✓	
Using Application Studio and/or Infor BI cubes today	✓		
Savvy end users using CPM full features	✓		
Unused views and old structures have been identified	✓		
Desire to move to the cloud			✓
Using full features of CPM Financial Consolidations			✓
Complex planning models and formulas, many data sources		✓	
Related projects ongoing, such as ERP change		✓	
Process change, improvement opportunities		✓	
Completed a Phase 0 or recent system health check	✓		

Schedule your free 2-hour scoping session with CFO Solutions:

- When is the right time for you?
- How does this impact related projects?
- What are your migration accelerators?
- How ready to move is your CPM content?
- How will you bring value to your users?
- What is the right way for you to get started?



Q&A

Planning a Successful Transition from Infor CPM to Infor d/EPM

Questions from You

Q&A from our emails today

Question	Response
Can I migrate my existing reporting model to d/EPM?	You can export your dimensions from Architect and modify them to be imported into d/EPM with the additional attributes needed to support the capabilities. If you are not changing dimensions substantially, you can also modify and load a data export from CPM.
What happens to my Views? Can they be imported?	View Manager views cannot be exported/imported. We recommend identifying your frequently used views, including private views, ahead of time. These will be future App Studio reports or Self-Service views.
Is my application going to just stop working in October 2021?	No. However, you are exposed to issues that may not be supported, leaving you vulnerable to unresolvable issues.
If I am happy with what I am doing today in CPM, is it easier or faster to switch to d/EPM vs. other platforms?	Being happy with your current model makes your d/EPM implementation faster. Implementing d/EPM is similar effort to implementing other solutions and is not faster if you are already using CPM. If you are already using Infor BI and Application Studio, then you have transferrable skills.
What skills do you need to administer d/EPM? How technical is it?	Most of the application is administered through the web with easy-to-use tools. Editing business rules or calculations sometimes required additional support. Power Users learn how to write reports. We typically see someone with a background in Finance and light IT skills take on this role.
Is there a migration tool to import CPM into d/EPM?	No, there is not a utility—rather it is a process we take you through to convert your model.




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Contacts


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Licensing Questions

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