Infor Enterprise Performance Management (EPM)

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

Gain a real-time view of your business

Performance management is a crucial success factor for virtually any business. 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 Enterprise Performance Management® (EPM®) is such a solution. It delivers powerful features for complex business issues, while providing a simple and intuitive user experience. Infor® EPM is available on-premises and in a multi- tenant environment that tightly integrates with the Infor OS (Operating Service) 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.

Contents
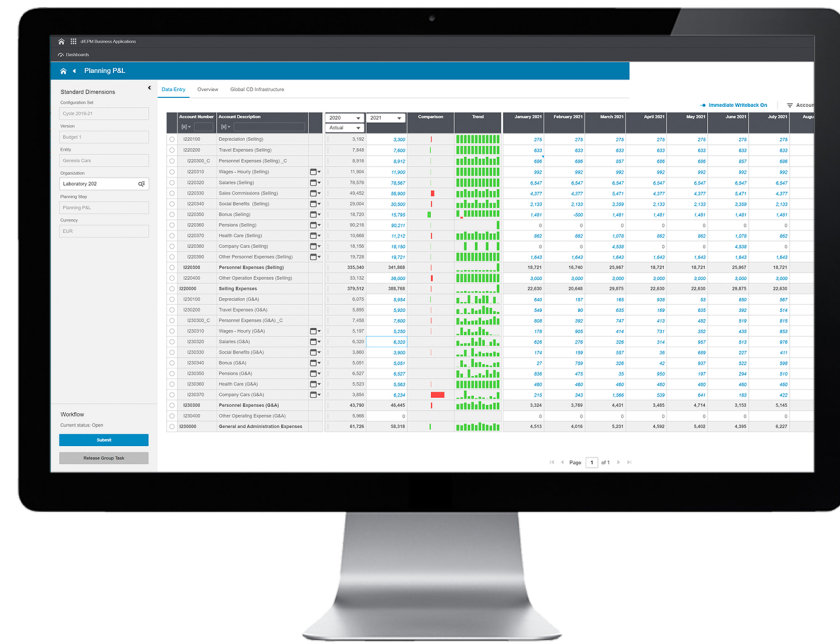
Improve visibility into financial processes

Infor EPM's Budgeting & Planning module connects to your 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 & Planning module supports 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.

Infor EPM's planning process is integrated with financial reporting and analysis and workforce-related costs, so your 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.
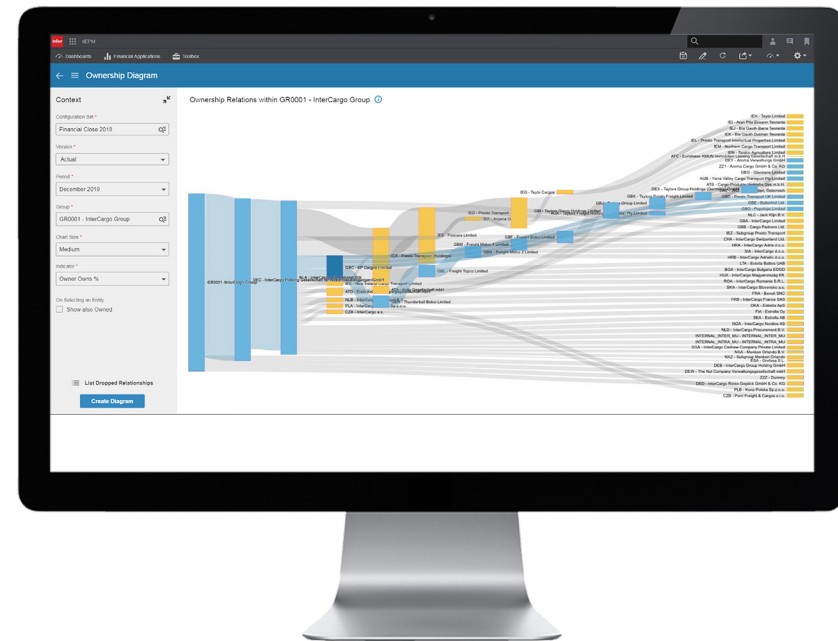

The data entry workbook is not only functionally rich, but also fuses ERP functions with rich data visualizations. Its design highlights the importance Infor attaches to the user experience.

Simplify and automate financial consolidation

Infor EPM's Financial Consolidation module enables your organization to consolidate multiple sets of books quickly and seamlessly from each of your 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 you to spend more time on financial reporting and analysis.

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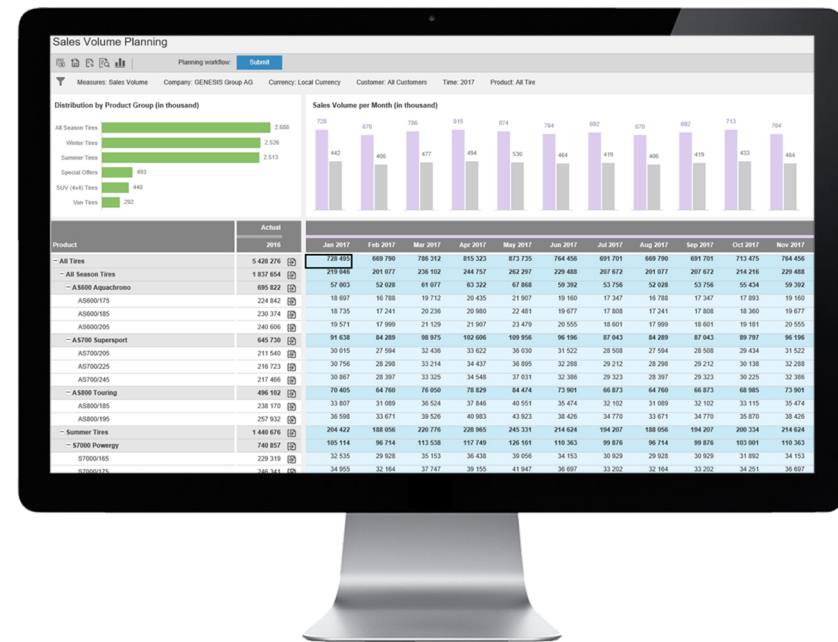

Infor EPM guides users through a close process with task sequences, dependencies, and statuses.

Elevate operational planning and forecasting

Infor EPM's integrated sales forecast and sales operational planning capabilities bring together your 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 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, you can enable or enhance demand sensing and generate more accurate predictions from existing trends.
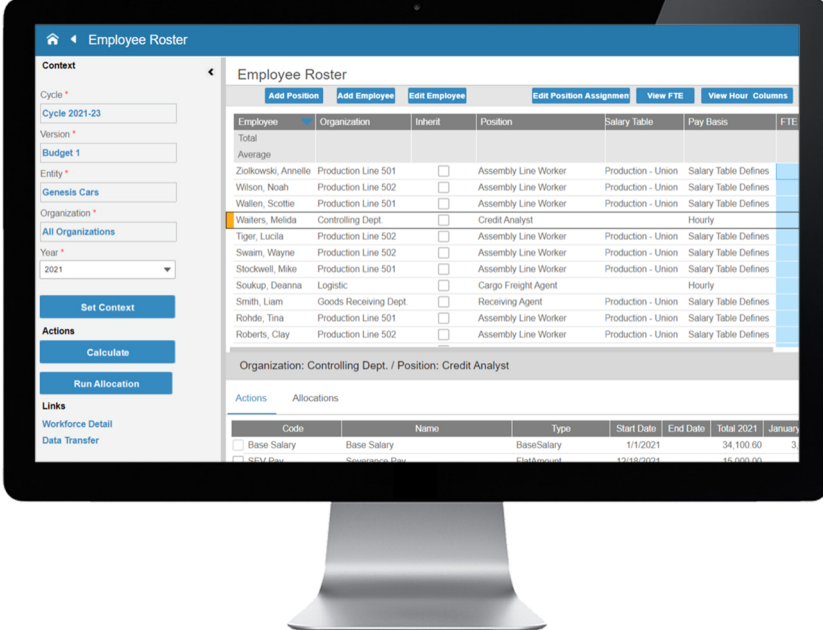

Infor EPM allows you to create sales plans with analysis of existing trends and what-if scenarios.

Enhance workforce budgeting and planning

Your people are one of your organization's most important resources. It's essential that the costs associated with human resources be fully integrated into EPM processes. Infor EPM enables the capture of detailed headcount requirements, models salary and benefits adjustments, can account for vacancies, and can assess needs for headcount optimization. You can perform detailed analyses of workforce-related costs, budget for positions, and employees linked to salary tables; as well as forecast future costs.

Infor EPM's ability to integrate with existing human capital management (HCM) systems means the solution 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.

Infor EPM delivers functionality that enables you to easily design employee-based budgets and plans.

Leverage an unrivaled breadth of applications

Infor 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 lets you report with confidence, measure past and current performance, and forecast future activities. Infor 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 EPM also offers the following capabilities:

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
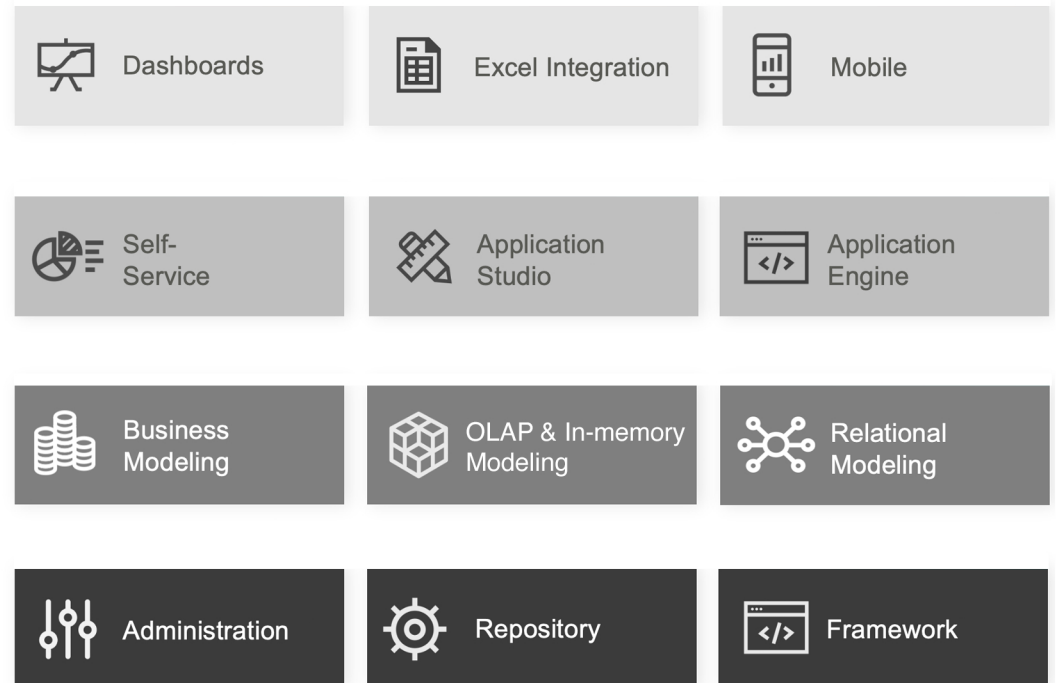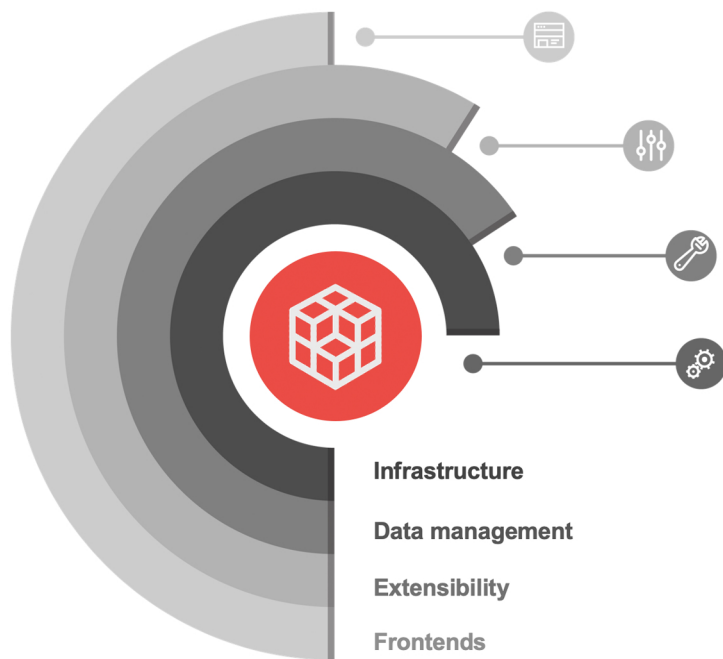
Strategy management

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

Build on a modern technology architecture

Infor 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 applications. This modernization also benefits those organizations that choose to run Infor 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—where users can import Infor EPM data to their spreadsheets and use Excel to change the model and create powerful applications in an Excel-like designer. Infor EPM's in-memory analytical and planning model ensures that the model is immediately recalculated as soon as changes are made.

Infrastructure

Data management

Extensibility

Frontends

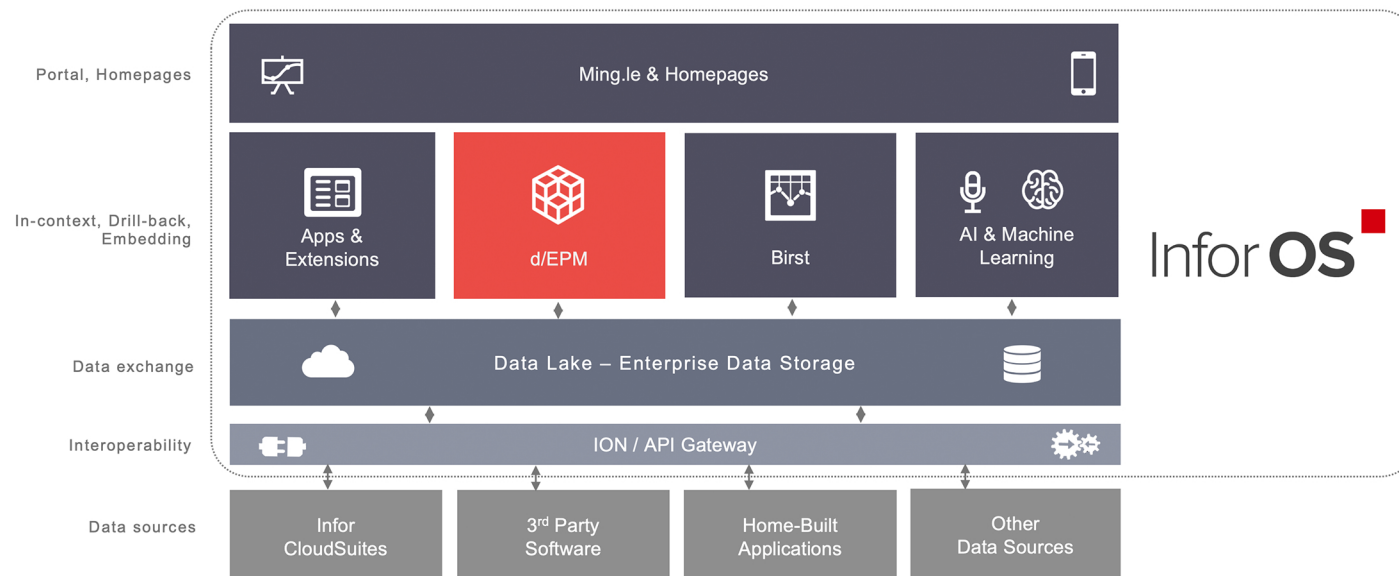| Dashboards	Excel Integration	Mobile
Self-Service	Application Studio	Application Engine
Business Modeling	OLAP & In-memory Modeling	Relational Modeling
Administration	Repository	Framework

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 EPM. Using Infor OS means you can implement faster and benefit from all the technology stack innovations.

Infor OS integration provides a seamless user experience across all Infor applications and ERP solutions—including the ability to create personalized Homepages.

Infor ION® and the Infor ION API gateways serve as a data hub for Infor 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 EPM.

For multi-tenant, cloud Infor 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.
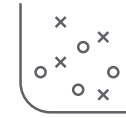
Drive informed decisions with better insight

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
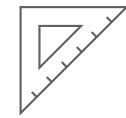
Predictive analytics

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

Yesterday's strategies and practices won't always provide a clear path to solving today's disruptive and complex challenges. If your organization is like most, you want to improve productivity. Infor Enterprise Performance Management (EPM) is innovative enterprise performance management software that can help you. Infor 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 EPM provides a genuinely unique business management platform.

Infor EPM provides your organization with the agile business and financial performance management capabilities you need to thrive in today's challenging market conditions

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