Performance Management

Be enterprising.

The speed, complexity, and global nature of business today presents challenges for even the best-managed organizations. To adapt to this constantly changing environment, companies require broad, deep access to critical information in real time. They need cross-departmental, integrated views of operational and financial drivers and results to support company-wide collaboration, enabling them to harness the best thinking possible no matter where in the company or the world it originates. They must gain firm control over their financial reporting and disclosure processes to provide more information faster to satisfy the requirements of regulators, shareholders, and other stakeholders.

Delivering better information on demand to more—and more types of—business people than ever before presents serious challenges. Companies need the ability to leverage and extend existing technology investments. They must integrate data sources in a way that is transparent to system users and present data in a way that supports decision-making. They need to know that the technology they choose today won't be obsolete tomorrow.

For help with improving performance management and lowering their total cost of technology ownership, enterprising companies turn to Infor™.

be enterprising

Leverage experience.

Companies of all sizes around the globe rely on Infor PM to better monitor, measure, and manage their business. With Infor PM, organizations identify their true business success drivers, formulate effective strategies, align actions and resources with plans, proactively monitor and analyze business processes and results, control employee-initiated expenses, and collaborate across the enterprise.

Infor PM delivers these capabilities as three core components: Infor PM Business Process Applications (BPAs), Infor PM Business Specific Analytics (BSAs), and Infor Expense Management. BPAs help companies streamline and improve the effectiveness of their strategic management, planning, budgeting, forecasting, financial consolidation, and financial reporting processes. BSAs enable enterprising organizations to monitor key business-specific performance indicators in real time to support effective decision-making. Expense Management solutions help companies gain control of corporate-wide expense-related processes including travel planning, expense reporting and reimbursement, vendor payment requests, and time capture and billing.

These solutions are built on Infor's powerful Enterprise Information Foundation, an advanced infrastructure/integration layer that enables the management of financial and operational data, metadata, master data, and process integration. Combined with Infor Open SOA (Service-Oriented Architecture), this technology makes it possible for companies to leverage—rather than replace—existing technology systems and enterprise applications.

Infor's proven performance management applications have been shaped through the experience and input of customers, the expertise of industry associates and analysts, and the requirements of regulatory bodies. They are further strengthened by support specialists who put decades of experience to work for our customers, a knowledgeable and dedicated professional services organization, and the resources and commitment of one of the world's largest business software providers—Infor.

Get business specific.

Your business is unique, as are your information needs. Infor offers a variety of solutions to help people at all levels of your organization streamline processes, generate actionable business insights, and make knowledgeable decisions that help improve company-wide performance.

Infor PM BPAs—strategy to results

Using BPAs, enterprising companies move beyond performance measurement to true performance management. They direct the focus and actions of the organization through strategic management. They align resources with corporate objectives through financial and operational planning, flexible budgeting, and realistic forecasting. They monitor and control performance with meaningful reporting and analysis that leads to improved decision-making. Consider how the following solutions can help your enterprising company build a better business.

- *Strategic Management*—get a cause-and-effect framework for linking strategic plans to operational plans, performance measures, and people. You gain an intuitive, visual method of reporting on how the actions of operating units and individuals are contributing to the success of strategic goals. You understand not only the business events and the source of revenue in a given period, but also whether your strategic plan was implemented, to what degree, how well, and why some actions were successful while others were not.

- *Planning*—easily create and compare multiple "what if" scenarios, test assumptions, assess the impact of events, and model your business to meet targets and high-level objectives. You can model your business using key drivers and view it from multiple perspectives (e.g., organization, product, market, distribution channel, time) to support effective decision-making.

- *Budgeting*—design any number of zero-based, historical-based, and rolling budgets and plans. Use this application to improve the speed and accuracy of calculations, allocations, phasing, and currency translations. Because Infor PM's Microsoft® Excel® interface sits on top of a single database, you also retain the familiar look and feel of spreadsheets but eliminate the accuracy and version-control problems. When a business change occurs, Infor PM automatically updates the affected numbers and reports throughout the system.

- *Forecasting*—create statistically accurate forecasts that help you manage performance expectations, make tactical adjustments, and achieve performance goals. You can generate rolling forecasts, check the accuracy of submitted plans, and receive automatic alerts that allow you to easily spot issues as they arise and quickly take action. Combining the software's statistical benchmark engine and analytic capabilities with your own experience, you gain a more accurate picture of future performance.

- *Financial Consolidation*—improve corporate accountability, increase financial transparency, and meet government-mandated reporting deadlines confidently. Even global companies with multiple general ledgers, charts of accounts, and ERP systems use this solution to automate data loading, consolidation, and validation. With Financial Consolidation, you can collect, process, report, and analyze data in multiple currencies, and report on the effects of currency fluctuations. Consolidate data according to local and international standards, and view it from many business perspectives (e.g., geographic region, product line) and structure versions (e.g., this year's results, last year's results).

Infor PM: Delivering Proven Value Worldwide

> Ranked 1st by Ventana Research (2005-2007)

> Used by more than 14,000 customers worldwide

> Implemented in more than 100 countries

> Available in multiple languages

> Developed with 30+ years' industry domain expertise

> Supported by a dedicated global support staff

> Based on open standards

> Supporting lower total cost of ownership

- *Financial Reporting*—automate the generation, formatting, and distribution of book-quality financial statements and management reports. Present data in the most useful format—dashboards, scorecards, spreadsheets, color-coded tables, bubble charts, pie charts, bar charts, and line graphs—and even receive early-warning alerts when results deviate from expected performance. Use this solution to compare actuals against budgets and forecasts, drill down into the details, evaluate trends, and see the results of currency fluctuations.

Infor PM BSAs—access and insight

BSAs offer pre-built integrations, reports, and analyses that make it easy for people at all levels within the company to unlock and use the valuable information captured in your existing ERP and other enterprise systems. Using dashboards, gauges, scorecards, and other types of at-a-glance reports, they gain the insight required to support daily and strategic decision-making.

Infor PM's BSAs allow companies to report in a timely manner, analyze all their data, monitor key thresholds, and notify decision makers, all on a single, proven architecture. These applications use Infor's Enterprise Information Foundation to report against all Infor and non-Infor operational systems and relational data sources. Organizations also can easily analyze all their data and provide at-a-glance snapshots of business performance, creating alerts for decision-makers when key thresholds are not met. The end result is decision-makers getting the critical information they need to improve top- and bottom-line performance.

With these applications, you can create and share self-service reports and analyses from your enterprise applications at will. At the same time, you can rely on the solution to enforce consistent metrics and definitions across your business for a single, accurate view of organizational performance.

- *Role-based Content*—use Infor's pre-built analytics to gain a better understanding of how your key operations are performing. System users save time because they can quickly focus on just the information they need, in the most useful context for their specific role. These BSAs include predefined reports and analyses for insight into sales, customer relationship management, inventory, production, procurement and supplier relationship management, asset management, accounting, and finance issues. For example, sales executives can quickly see performance by product, customer, and region; procurement gains insight into their material expenditure and demand; production better understands their time to delivery as well as quality and yield. Tools to help executives quickly understand enterprise-wide performance effectiveness are also offered.

- *Industry-focused Content*—get what you need. Infor understands that the reporting and analysis needs of a bank are not necessarily those of a retailer or a casino. Infor PM's BSAs combine innovative technology solutions and industry expertise to deliver the industry-specific performance views and analyses you require. BSAs deliver information the way that manufacturing, distribution, retail, telecommunications, hospitality/entertainment, financial services, education, government, utilities, energy, healthcare, life sciences, and organizations in other industries need to see it. For example, consumer packaged goods companies are able to determine which shipping points are experiencing the highest volume of delivery processing, financial services organizations can better monitor return on assets and return on equity, and healthcare organizations can analyze patient care.

Infor Expense Management—spend control

Expense Management solutions enable employees to plan, book, and expense business travel; request and approve payment requests; capture time that must be charged to projects and cost centers; and calculate paid time off and overtime.

With these applications, companies like yours improve their business results by automating expense-related administrative tasks, thereby reducing the associated costs. They are able to enforce spending policies and monitor activity, which decreases the opportunity for fraud. They also analyze spending patterns and use their findings to negotiate savings with vendors. Consider how your enterprising company can profit by using these licensed or hosted applications.

- *Travel Plans*—simplify the often cumbersome travel planning process and enforce policies to ensure optimum use of funds and resources. Whether travel is booked online or through a corporate travel agent, you can use the Infor solution to alert employees to out-of-policy items as itineraries are created and before money is committed or spent. By ensuring compliance at the beginning of the process, you shorten approval and reimbursement time at the end of the process.

- *Expense Reports*—dramatically reduce the hassle, time, and cost of creating, approving, and processing expense reports by replacing paper-based tasks with Infor's web-based, automated system. Data entry is simplified with pre-populated drop-down menus, saving time and eliminating potential errors. To further streamline the process, Infor's solution accepts credit card feeds and populates expense reports with detailed hotel, airline ticket, and car rental information. Reports can be created wherever travelers are—in the office, at the airport—and supervisors can approve them via email for reimbursement without delay because policy compliance is checked up front. Infor also offers an optional solution for digital receipt filing—the collection, scanning, and digital storage of expense report receipts for future retrieval. Combined with best business practices, digital receipt filing enables companies to reduce the time, effort, and cost associated with processing expense reports.

> Infor PM is designed for companies in all industries that seek to better monitor, measure, and manage their business performance in real time.

- *Payment Requests*—keep pace with business needs without losing visibility into purchases. In today's fast-paced business environment, employees sometimes must purchase goods and services immediately, bypassing the company's lengthy purchase requisition and order process. Use Infor's solution to track these requests and gain a complete view of employee spend. With Payment Requests, system users can track the status of submitted requests in real time, and reviewers can approve requests and route them to accounts payable (AP) via email in only minutes. This solution also lessens the workload for AP by eliminating the need for duplicate data entry and by automating validation.

- *Timesheets*—ensure timely, accurate customer billing and payroll calculation by using Infor's application to accurately record project hours as well as general work and absence hours. The solution's intuitive, interactive interface guides the system user through timecard creation and submission. Personalized project menus help them choose the right code quickly from potentially thousands of options. By accelerating processing time and reducing disputes from errors, Timesheets from Infor enables a company to significantly increase the efficiency of customer billing cycles and reduce "days sales outstanding," contributing directly to the bottom line.

See results now.

Infor PM is designed for companies in all industries that seek to better monitor, measure, and manage their business performance in real time for improved competitive advantage. With Infor, you can harness your data, wherever it resides, so that you can better understand your business environment, streamline and improve the effectiveness of your financial processes, and prepare options for competing successfully.

With Infor's proven, best-practice methodology guiding the process, rest assured that your implementation will be smooth, fast, and accurate, reducing the time necessary to see a return on your investment. Infor delivers business-specific solutions with experience built in. You get the most out-of-the-box functionality available from any enterprise software vendor, reducing the need for time-consuming customizations. Our solutions are implemented by domain experts whose skills and knowledge are unmatched in the industries we serve, further reducing implementation time.

With Infor PM BPAs, you gain fast ROI through:

- Aligned goals and resources
- Improved data integrity and quality
- Shortened process cycle times
- Increased time for analysis
- Enhanced operational insight
- Increased financial transparency
- Improved business agility and responsiveness
- Strengthened process and compliance controls

With Infor PM BSAs, you profit from:

- Rapid deployment through pre-built integrations
- Reduced report creation time through predefined content
- Improved data integrity and accuracy through pre-built integration
- Business-specific data views and pre-built dashboards and reports
- Automated alerts that warn of business events or changes
- Self-service reporting and analysis that reduces dependency on IT

With Infor Expense Management, you benefit from:

- Improved employee compliance with spending policies
- Increased savings through effective vendor negotiation and rebate usage
- Reduced unnecessary travel and purchases
- Fewer people needed to process documents
- Reduced manager time spent on approvals
- Increased accuracy of time billed to clients and paid time off due employees
- Higher amounts of foreign taxes reclaimed
- Increased efficiency through effective domestic and non-domestic VAT identification
- Reduced employee time spent on travel planning, expense reporting, time capture, and purchasing of goods and services
- Lower administrative costs

Business happens whether you are ready or not. With Infor PM, enterprising companies like yours remain on guard and ready for action.

Be open to an enterprising future.

When competitive, organizational, or regulatory changes impact your business, you must be able to adapt with speed and precision. That takes a technology infrastructure that allows you to add, change, upgrade, or modify your solutions as painlessly as possible.

Infor Open SOA is Infor's commitment to solution interoperability, innovation, and evolution across all product lines so you can quickly align your systems to changing business requirements. It enables you to enrich your existing solutions with open SOA industry standards now, extend them to create end-to-end processes across different functional areas, and evolve to meet the future in a way that introduces new functionality and technology incrementally to preserve your investment and reduce risk and cost.

You gain business agility and IT flexibility without the high costs and disruption of a major re-implementation project or the need to adopt the proprietary technology of another software vendor. Infor gives you choice and control over the technologies you deploy, as well as the time frame you deploy them in, so you can eliminate redundancies and build the best long-term cost model for your business.

This is how we satisfy your need for industry-specific solutions that deliver value today while incorporating deployment flexibility that lets you quickly add, subtract, and replace critical capabilities … and be more enterprising … tomorrow.

About Infor

Infor delivers business-specific software to enterprising organizations. With experience built in, Infor's solutions enable businesses of all sizes to be more enterprising and adapt to the rapid changes of a global marketplace. With more than 70,000 customers, Infor is changing what businesses expect from an enterprise software provider. For additional information, visit www.infor.com.

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