



Infor Dynamic Enterprise Performance Management Release Notes

Release 11.2.0.3

Important Notices

The material contained in this publication (including any supplementary information) constitutes and contains confidential and proprietary information of Infor.

By gaining access to the attached, you acknowledge and agree that the material (including any modification, translation or adaptation of the material) and all copyright, trade secrets and all other right, title and interest therein, are the sole property of Infor and that you shall not gain right, title or interest in the material (including any modification, translation or adaptation of the material) by virtue of your review thereof other than the non-exclusive right to use the material solely in connection with and the furtherance of your license and use of software made available to your company from Infor pursuant to a separate agreement, the terms of which separate agreement shall govern your use of this material and all supplemental related materials ("Purpose").

In addition, by accessing the enclosed material, you acknowledge and agree that you are required to maintain such material in strict confidence and that your use of such material is limited to the Purpose described above. Although Infor has taken due care to ensure that the material included in this publication is accurate and complete, Infor cannot warrant that the information contained in this publication is complete, does not contain typographical or other errors, or will meet your specific requirements. As such, Infor does not assume and hereby disclaims all liability, consequential or otherwise, for any loss or damage to any person or entity which is caused by or relates to errors or omissions in this publication (including any supplementary information), whether such errors or omissions result from negligence, accident or any other cause.

Without limitation, U.S. export control laws and other applicable export and import laws govern your use of this material and you will neither export or re-export, directly or indirectly, this material nor any related materials or supplemental information in violation of such laws, or use such materials for any purpose prohibited by such laws.

Trademark Acknowledgements

The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All rights reserved. All other company, product, trade or service names referenced may be registered trademarks or trademarks of their respective owners.

Publication Information

Release: Infor Dynamic Enterprise Performance Management (d/EPM) 11.2.0.3

Publication Date: October 2, 2019

Document code: depm_11.2.0.3_depmrn__en-us

Contents

About this guide.....	5
Related documents.....	5
Navigating to the Infor d/EPM documentation.....	6
Contacting Infor.....	6
Chapter 1: Overview.....	7
Products and components.....	7
Chapter 2: New functionality.....	9
In 11.2.0.3.....	9
In 11.2.0.2.....	9
General.....	9
Workforce Budgeting.....	10
In 11.2.0.....	10
Infor Workforce Planning.....	10
Chapter 3: Known issues and limitations.....	12
General.....	12
Global configuration.....	13
Finance.....	14
Workforce Budgeting.....	15
Workflow.....	16
Capital Planning.....	16
Migration.....	17
Currency Exchange.....	17
Financial Consolidation.....	17
Workforce Planning.....	18
Chapter 4: Prerequisites.....	19
Federal Information Processing Standards (FIPS) Support.....	19

Required IIS features.....20

Chapter 5: Migration.....21

About this guide

This guide describes the new functionality, changed functionality, and known issues and limitations of the current and previous releases of Infor Dynamic Enterprise Performance Management™ (Infor d/EPM).

Intended audience

This guide is intended for all end users of the Infor d/EPM applications.

Related documents

You can find the documents in the documentation section on the Infor Xtreme Support portal.

Administrators

Refer to these guides:

- *Infor Dynamic Enterprise Performance Management Platform Support Guide*
- *Infor Dynamic Enterprise Performance Management Release Notes*
- *Infor Dynamic Enterprise Performance Management Installation Guide*
- *Infor Dynamic Enterprise Performance Management Administration Guide*
- *Infor Dynamic Enterprise Performance Management Configuration Guide for Infor ION*
- *Infor Dynamic Enterprise Performance Management (Single Tenant) Integration Guide for Infor CloudSuite Financials & Supply Management (Multi-tenant)*
- *Infor Dynamic Enterprise Performance Management Integration Guide for Infor CloudSuite Financials & Supply Management: Single Tenant or On-premises*
- *Infor Dynamic Enterprise Performance Management Integration Guide for PM Source Views*
- *Infor Dynamic Enterprise Performance Management Table-based Integration Guide*

See the *Infor BI Hardware Recommendations Guide* for hardware recommendations and sizing considerations.

See the *Infor BI Installation Guide* for details on installing Infor BI.

Users

Refer to these guides:

- *Infor Dynamic Enterprise Performance Management Budgeting & Planning User Guide*
- *Infor Dynamic Enterprise Performance Management Financial Consolidation User Guide*
- *Infor Dynamic Enterprise Performance Management Workforce Planning User Guide*

Navigating to the Infor d/EPM documentation

If the documentation is updated after the product release, new versions are posted on <https://www.inforxtreme.com>.

You should check this website periodically for updated documentation.

- 1 Go to Infor Xtreme.
- 2 Click **Search > Browse Documentation**.
- 3 From the Product Line list, select PM and click **Browse**.
- 4 In the left pane, go to d/EPM.

The BI documentation is located under the PM > BI category.

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://concierge.infor.com/> and create a support incident.

If we update this document after the product release, we will post the new version on the Infor Support Portal. To access documentation, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1: Overview

Products and components

Infor Dynamic Enterprise Performance Management™ installs:

- Infor Budgeting & Planning 11.2
 - Workforce Budgeting
 - Infor d/EPM sample databases
- Infor Financial Consolidation 11.2

While the Financial Consolidation application is included in this release, it will not be included in the upcoming 12.0.2 release. The application will be reintroduced in a future release.

- Infor Strategy Management 11.2
- Infor Workforce Planning 11.2
 - By default, Workforce Planning is not activated.
- Infor BI 11.0 (Infor BI Application Studio, Infor BI Dashboards...)
- Infor BI Best Practices and Tutor sample databases

See the *Infor Dynamic Enterprise Performance Management Platform Support Guide* and the *Infor Dynamic Enterprise Performance Management Installation Guide*.

Infor d/EPM will be available in these languages:

- Brazilian Portuguese
- Czech
- Danish
- Dutch
- English
- Finnish
- French
- French Canadian
- German
- Italian
- Japanese
- Korean
- Malaysian
- Norwegian
- Polish
- Russian

- Simplified Chinese
- Spanish
- Swedish
- Thai
- Traditional Chinese
- Vietnamese

Note: Some language packs will be implemented after the initial release.

Chapter 2: New functionality

In 11.2.0.3

Infor d/EPM 11.2.0.3 is based on Infor BI 11.0 and incorporates the latest features of the Infor BI platform within the budgeting and planning component.

This is a resolved issues release. See the Resolved Issues document on Infor Xtreme for further information.

In 11.2.0.2

Infor d/EPM 11.2.0.2 includes all fixes provided in the previous patch. The release is based on Infor BI 11.0 and incorporates the latest features of the Infor BI platform within the budgeting and planning component.

General

Entity selection

The **Entity Selection** dialog box has been enhanced to support hierarchical selection. By default, the dialog box opens without paging. Once you select paging, it becomes the default.

The Entity dimension must have only one top level element.

Integration

The **Base Data Store Integration** page lets you import data from the Infor Business Vault Base Data Store to a staging table in the integration database.

Workforce Budgeting

Detail report

The **Detail** report now includes organization totals.

Highest step report

The **Highest Step** report displays the positions and position assignments that are at the highest grade and step of your salary table.

Progression rules

Previously, progression rules always used the value in the period column to determine when to apply the change to the position. For example, if the position was moving from grade 1 step 5 to grade 1 step 6, the change would take place 12 periods after the date. However, many times it makes sense for the first change of a planning cycle to happen on the date, not 12 periods after the date. Therefore, Workforce Budgeting now provides an option to apply the first progression rule change on the specific reference date rather than using the value in the period column. Continuing with the example above, the change from grade 1 step 5 to grade 1 step 6 would happen on the date rather than 12 periods later. You can override the salary table and use the salary value.

In 11.2.0

Infor d/EPM 11.2.0 is based on Infor BI 11.0 and incorporates the latest features of the Infor BI platform within the budgeting and planning component.

Infor Workforce Planning

Infor Workforce Planning is a new product in the Infor d/EPM suite. Workforce Planning is a separately licensed component of Infor d/EPM.

The focus of Workforce Planning is to determine the talent, headcount or full time equivalent (FTE), that is required to cover the workload or additional work requirements of a process. For example, in a manufacturing setting, this would be the headcount required to complete the tasks of the production line and produce a product; as well as the corresponding support that would be required to make it possible for the production line to operate. Workforce Planning is focused on the headcount or FTE required versus the cost of the headcount, which is considered in Workforce Budgeting.

Workforce Planning has two subject areas:

- Direct labor which is the headcount to complete the repetitive tasks. For example, associated with a production line.
- Indirect labor which includes the supporting functions such as administration, logistics, management, and all other things that make it possible to complete the repetitive tasks, or to help improve the process.

Workforce Planning in Infor d/EPM 11.2 addresses the indirect labor component. The direct labor component will be included in a subsequent version of Workforce Planning.

This new Infor d/EPM subplan is to accurately forecast number of FTE needed for a certain period of time to help support management in their labor related decisions. With Workforce Planning, you can perform driver based forecasting that is based on the key operating indicators, so called drivers. Driver based planning is ideal for workers who are not directly involved in the production of goods. It might be difficult to define their necessary numbers based solely on planned sales figures. To address that complexity, Workforce Planning creates the possibility to use drivers. It is important to find appropriate drivers, which are driving the workload of a certain organization or certain jobs. A company can define as many drivers that are connected to their workload as needed. Workforce Planning gives answers to questions such as how many operators are needed in a call center to fulfill the workload based on a certain number of calls received. If additional legal requirements need to be met and minimum number of FTE is required, Workforce Planning provides the opportunity to define that, too, and adjusts the final labor results accordingly.

Workforce Planning includes both bottom up and top down or benchmark drivers, and the ability to compare, including comparing actuals and forecasts for various combinations of drivers and organization structures.

Chapter 3: Known issues and limitations

General

Performance

Certain web pages within Infor d/EPM, such as the main dashboard page, take some time to render completely in the browser. This time varies, but can increase noticeably when the network delay or turnaround time is higher (as when the web server is far from the client browser on a slower Internet connection) or when the client PC itself is slower.

Permissions

Permissions for certain user roles are incorrect in the 11.2.0.2 patch (Patch 2). This results in some non-admin users having admin access to product configuration and data.

The permission settings for some roles must be corrected by updating the corresponding data stored in the OLAP database. See Knowledge Base 1985586 for step-by-step instructions on addressing this issue.

Sub plan integration

The configuration menus to integrate sub plans are not available in this release. Sub plans can be included in workbooks through custom reports and/or made available by modifying the navigation.

Data transfer

- It is not currently possible to transfer data between Budgeting & Planning and Financial Consolidation.
- You must access the **Data Transfer** page through the **Balance Sheet**, **Profit and Loss**, or **Cash Flow** pages. Accessing the **Data Transfer** page from the **Application Configuration** page opens a blank page.

Dashboards

Users can access reports using the folder structure for Dashboards. Users should use the **Home** page for all navigation. To prevent displaying the folder structure to users, assign the View Role for Dashboard Catalogue Roles.

PM source view integrations

Only import opening balance data for the first year with data within a planning cycle/version combination. Opening balance data for subsequent years is calculated by OLAP rules.

#NA and #REF errors after installing Self-Service or Analyzer

If you install the Self-Service or Analyzer application components then the language in the Repository changes from "English" to "en". The application ceases to work and #NA and #REF errors are displayed throughout.

To resolve this issue, change the language in Repository Administration to English.

Sample data

The options to install sample data for Public Sector and Health Care are reserved for a future release.

Favorite links

When you add favorites, they are not visible. You can hover over where the words should be and the arrow turns into a hand indicating you can select something. If you select it, you go to the expected page. This occurs with all topics added to favorites link. This affects the **Favorites Links** report.

Global configuration

Decision package transfers

A decision package must be submitted before it can be transferred. If there are no submitted decision packages, the **Select Decision Packages** dialog box is empty.

Financial Planning Steps

Currently the number of Financial Planning Steps is limited to 100 items within the application. This number can be raised manually in Designer.

- 1 Start Designer.
- 2 Go to the Configuration folder.
- 3 Click Flexible Elements.
- 4 Add the desired elements.

Finance

Copy actual data to budget version

If no exchange rates are specified in the actual version and the copy process to budget version (same or different cycle as source) is executed, no exchange rates are copied. As a result, no data is available.

Forecast data entry

If you change the selected intercompany on the **Intercompany** and **Segments** tab, the newly selected intercompany is displayed in the list but the values of the previous intercompany on the tab are not refreshed. Specifying new values for the data will result in writing back values to the wrong location. You must refresh the tab if you change the selected intercompany.

Time dimension

If you create a forecast beginning in a period where the closing balance does not exist, the forecast is not created and no warning message is displayed. A warning message will be included in a future patch release.

Refresh after splashing

If you click another tab before returning to the **Data Entry** tab and splashing on a consolidated account, then the value is not updated. To refresh, click a different tab and then return to the **Data Entry** tab.

Comments in group tasks

You cannot enter comments on the **Commentary** tab if you open a group task. Dates are not displayed correctly if you add a comment in the **Overview** tab.

Dimension Details check boxes

When configuring analysis dimensions of a workbook, the **Select Item** check box selects the **Dimension Details** check box of all selected analysis dimensions. The **Select Item** check box remains selected even if one or more analysis dimensions is then deselected.

Ad-hoc tab

- When specifying text for a dynamic attribute on the **Ad-hoc** tab, the column expands to the length of the text. The text does not wrap.
- Currently all ad-hoc reports are limited by a column length of 2 unless the default column length is changed to a higher value. This is done on the **Ad-Hoc Configuration** page under Paging Limit Configuration.

Splashing

For the forecast version, splashing of values is done even if the accounts are not activated.

Reports

Some reports may display internal unique names for accounts such as [BPDACCOUNT].[I220310].[1] instead of the descriptions, even though the Account Description Shown option is selected. You can correct this by editing the reports and making the change described in Knowledge Base 1922874. The reports are:

- Profit and Loss Time Analysis
- Balance Sheet Time Analysis
- Profit and Loss Entity Analysis
- Balance Sheet Entity Analysis

Workforce Budgeting

Calculate Imported Data

Calculate Imported Data may take longer with larger volumes of data. Improvements will be made in a patch.

Employee Roster

- Changing the annual salary by editing a position from the employee roster may not update the employee roster or mark the position as requiring calculation. This is caused by the report not refreshing properly. Refreshing the report updates the position and marks it as requiring recalculation.
- Editing approved decision package positions on the employee roster is currently allowed. This will be corrected in a future release.

Decision packages

- If an organization is not selected when creating a decision package, the **Edit Allocations** page displays #REF!. In addition, it causes the position to be corrupt and the allocations to fail for the entire organization. To avoid this issue, always select an Organization. This requirement will be corrected in a future release.
- Allocations cannot be added to Decision Package Position from the decision package.

Allocation report

The Allocation report does not refresh automatically with the **Perform New Allocation** button. To display the updated data on the report, refresh the browser. This will be corrected in a future release.

Workforce Detail report

When the Workforce Detail report is set to show positions (not employees) in the configuration area, positions without vacancy values will not display on the report. This will be corrected in a future release.

Employee Details

When assigning positions to employees, approved decision package positions are missing from the select position dialog box. This will be corrected in a future release.

Workflow

Task status

When **Reject All** is selected for a parent organization, the rejected tasks return to the responsible users of the child organizations. However, the task status for those users' organizations incorrectly indicates that the tasks are in progress.

Linked workflow

When a workbook is deleted, not all related information is unlinked or set to inactive. If a new decision package workbook is created, the related workflow setup takes the information from the previous workbook that was deleted.

Reject button

When opening a finance workbook as the approver user, the **Reject** button is not displayed. To see the **Reject** button, collapse and expand the Workflow section within the Configuration section.

Capital Planning

If you change an account assignment on the **Asset Categories** page after data entry has started, the change is only for future data entries. Any data already specified is not changed. For example, if you add a depreciation account named A4020 and assign it to asset category, XY. The previous depreciation account is named A4010. Any specified values remain under A4010. All future depreciation is written to A4020. Only the new assignment is shown on the tabs in the workbook. If you change the assignment for an asset category, you should also reassign the account on the **Custom Detail Maintenance** page.

If no asset category is configured for the selected cycle, the **Asset Category** tab in a workbook displays #REF. To work around this, define one asset category after creating a cycle.

Migration

Forecast versions

During installation, you are prompted to select the forecast versions to migrate. The migration process supports up to 12 forecast versions.

Designer database

Migration of a Designer 10.6 database fails with errors that values for the cubes BPCMAIN and BPCCONFIG_ENTITY_SEGMENT cannot be written to the OLAP database. See Knowledge Base 1928285 for further information.

Planning database

During the migration from 11.0 to 11.2 several warnings are reported. See Knowledge Base 1931158 for further information.

Currency Exchange

No Forecast Version is Activated for Currency Analysis

If you are using the Demo 2018-20 cycle, the message `No Forecast Version is Activated for Currency Analysis` is displayed when you run the **Weighted Average and Closing Forecast Rates** report.

To work around this issue:

- 1 Go to Currency Configuration and select a forecast version on the **Activate Currency Rate Set** tab.
- 2 On the home page, click **Settings** and reselect the global context of cycle, version, and entity.
- 3 Re-run the **Weighted Average and Closing Forecast Rates** report.

Financial Consolidation

Dimension synchronization

The **Synchronized with OLAP** option in Designer is not supported.

Workforce Planning

- Once input, the Min, Max, Fixed FTE configuration cannot be deleted from the **Assignment** report. It can only be changed to zero, but the value never gets deleted, even if the user enters an empty string to the **Input** dialog box. See Knowledge Base 1931247 for further information.
- The **Employee** dialog box may not show many rows, especially with lower screen resolutions. See Knowledge Base 1931503 for further information.
- Selecting elements may be slow for the **Version Comparison** or **Driver Value** reports when selecting from very large dimensions. In some cases, the report may fail to display. See Knowledge Base 1931512 for further information.

Chapter 4: Prerequisites

These prerequisites are not installed by any Infor d/EPM product. If these prerequisites are not yet installed, download and install them on each machine that you plan to use.

Infor d/EPM	64bit and 32bit
Microsoft® .NET Framework 4.5	<p>Microsoft® .NET Framework 4.5</p> <p>Download and install on all client and server machines used to install any Infor BI product.</p>
Visual Studio 2010 Tools for Office (VSTO)	<p>Before you install Infor BI Q&A Excel add-in or Infor BI Office Plus for Microsoft Office Word and Microsoft Office PowerPoint, download and install Microsoft Visual Studio 2010 Tools for Office Runtime on each client machine. The bit version of the tools you need must match the bit version of the operating system.</p>
Visual Basic for Applications (VBA)	<p>The presence of VBA, a shared Microsoft component that is referenced by Microsoft Office Excel, is required for Infor BI Office Plus for Microsoft Office Excel.</p> <div style="background-color: #ffff00; padding: 5px;"> <p>Caution: Installation or removal of Microsoft products, including Microsoft Office, Microsoft Project, and Microsoft Visio, can disrupt the link between Microsoft Office Excel and VBA. If so, Office Plus will install but will not run. Repair Microsoft Office Excel and ensure that VBA is selected.</p> </div>

Federal Information Processing Standards (FIPS) Support

Infor BI does not support Federal Information Processing Standards (FIPS). Installation of Infor d/EPM on a system that has the **System Cryptography: Use of FIPS compliant algorithms for encryption, hashing, and signing** option enabled in Microsoft Windows is not supported. This option must be disabled either through the Windows Registry or the Local Security Policy. To disable the option through the registry, ensure that this key has a value of 0:

```
HKEY_LOCAL_MACHINE\System\CurrentControlSet\Control\Lsa\FIPSAAlgorithmPolicy\Enabled
```

To disable the option through the Local Security Policy:

- 1 Select Local Security Policy in Administrative Tools.
- 2 Expand **Security Settings > Local Policies > Security Options**.
- 3 Right-click **System Cryptography: Use FIPS compliant algorithms for encryption, hashing, and signing** and select **Properties**.
- 4 Select **Disabled**.

Required IIS features

Application Studio WebServices and Dashboards run in Internet Information Services (IIS).

Several features or role services must be installed or enabled. Whether they are referred to as features or role services, and how they are enabled, depends on your operating system. For example, in Windows Server, IIS is referred to as a web server (IIS) role.

Enable the role services in Server Manager. On Windows PCs, enable the features by selecting **Programs and Features > Turn Windows features on or off** in Control Panel.

These are the required features/role services:

- Web Server\Common HTTP Features\Static Content
- Web Server\Common HTTP Features\Default Document
- Web Server\Common HTTP Features\Directory Browsing
- Web Server\Common HTTP Features\HTTP Errors
- Web Server\Application Development\ASP.NET - select all listed versions
- Web Server\Application Development\ .NET Extensibility - select all listed versions
- Web Server\Application Development\ISAPI Extensions
- Web Server\Application Development\ISAPI Filters
- Web Server\Health and Diagnostics\HTTP Logging
- Web Server\Health and Diagnostics\Logging Tools
- Web Server\Security\Basic Authentication
- Web Server\Security\Windows Authentication
- Web Server\Security\Request Filtering
- Web Server\Performance\Static Content Compression
- Web Server\Performance\Dynamic Content Compression
- Web Server\Management Tools\IIS Management Console
- Web Server\Management Tools\Management Service

You can install further roles without affecting Application Studio WebServices.

Chapter 5: Migration

The options for migrating from a previous version of Infor d/EPM depend on these factors:

- Currently installed Infor d/EPM products
- Currently installed version of Infor d/EPM
- Database management system

Oracle is supported only for standalone installations of Infor Financial Consolidation. Oracle is not supported for Financial Consolidation in Infor d/EPM 11.x. You cannot migrate to Infor d/EPM 11.x at this time.

For standalone installations of Financial Consolidation on SQL Server, you can migrate from any previous version to Infor d/EPM 11.x.

If other Infor d/EPM products are installed, you can migrate to Infor d/EPM 11.x only from Infor d/EPM 10.6.

Workforce Budgeting was not part of the 11.0.0 release was included in the 11.1 release. You cannot migrate data from any previous version of Workforce Budgeting to 11.1 or 11.2.