

## 2015 Infinium User Conference, March 17–19, 2015 Session Descriptions

### General Session Day 1 Session 1

Jerry Daniel, TCI Director Infinium Practice, Stewart Applbaum, Infor SVP and General Manager, and Matthew Braun, Infor Product Manager for Infinium.

#### Keynote: Let's Move Forward Together

TCI invites you to attend the Keynote address presented by Infor's SVP, and General Manager, Stewart Applbaum. Stewart has global leadership responsibility for Infor's financial, reporting, hospitality, CRM, and Marketing management solutions. Stewart will share Infor's vision for empowering and equipping its' Infinium customer base with solutions designed to address and manage the daily challenges faced by ever changing business needs and requirements. Infor will discuss how they will partner with their Infinium customers to grow and move their enterprise forward together.

Topics include Infor's "expand" strategy for Infinium, which includes its "surround" solutions for areas such as Human Capital Management, Cloud, Enterprise Asset Management, and expanded reporting solutions with integrated business intelligence and analytics.

Matthew Braun, Infor's Product Manager for Infinium, will present Infor's Infinium roadmap which includes what is currently available; plus the Infinium roadmap going forward. Matt will also introduce Infor's new Financial product suite, XI. Infor has added several new offerings to its' portfolio since the last conference, so this is a MUST attend session.

### DDI –Turn AP into a Profit Center: Understanding Virtual Payments Session 2

This session will provide an in depth look into electronic payments (virtual payments) and how they can be integrated into your Infinium platform. Areas covered include: electronic payments landscape and how they are used; vendor payments; payroll; T&E expenses; small purchases; market offerings and differences; integration into Infinium; what does an implementation program look like; and financial overview examples. **Who Should Attend?** CFOs, Controllers, Treasurers, Accounting Managers, Accounts Payable, HR, and Strategic Planners.

### Infinium SHCM (Self Service) Hot Topics from Customer Support Session 3

Infinium Customer Support will discuss the most reported Infinium SHCM Customer Support issues and the solutions for them.

### Infinium Barcoding for PM Session 4

TCI will demo how to integrate barcoding with your Infinium PM system.

### **Infinium SHCM (Self Service) Demo/Questions Session 5**

Join this session to hear how Infinium SHCM helps reduce HR administrative workload, labor, and costs by providing on-demand, 24/7 electronic access to Human Resources, Benefits, and Payroll information for managers and employees. The benefits go beyond saved time and cost, as HR departments have been able to provide more face-to-face attention to issues that are more personal than personnel.

### **NEW! GL/PL/AR – Basic Functions You May Not Know Exist Session 6**

Yes, there is a button for that! Ever wish you could just punch a button and display or print what you wanted to? We will show you how in this session. TCI will review items such as: see only the last week's postings in the GL ITB, sort invoices/obligations another way, search for options, select multiple accounts, copy input pages, and create your own function key.

### **Back by Popular Demand! HR/PY Hot Topics from Customer Support Session 7**

Infinium Customer Support will discuss the most reported Infinium HR/PY Customer Support issues and the solutions for them.

### **NEW! AM Tech: Security, System Cleanup, Archiving, Performance, Install Strategy Session 8**

TCI will review numerous security and cleanup processes for Infinium, along with a discussion on best practices for installs.

### **Infor Q & A Demo Session 9**

This session highlights the ease of use and powerful analytical capabilities of Q&A for ad-hoc querying, irrespective of your underlying system. This session will have a focus on financial, Human Capital, and Materials Management data.

### **Back by Popular Demand! FM Hot Topics from Customer Support Session 10**

Infinium Customer Support will discuss the most reported Infinium FM Customer Support issues and the solutions for them.

### **Managing Positions Session 11**

Learn how to use the Authorized and Budgeted Headcount/FTE values to assist in keeping rampant headcount growth under control. Also, discover how to use the Infinium Multiple Position option to manage temporary work assignments or differing pay rates for working on assignments other than the employee's Primary Position.

### **NEW! MM/PR/JP/Costing Open Session w/Kevin Williams (TCI) Session 12**

MM/PR/JP customers bring your questions with you to this open format class with Kevin. Feel free to contact TCI before the Conference to submit questions for discussion in this session. Send questions to [psears@tcipro.com](mailto:psears@tcipro.com).

### **NEW! Query & Analysis: Customer Stories Session 13**

Join Infor and Prairie Band Casino as they discuss how they use Q&A reporting to tackle their daily reporting challenges, including hours for the Affordable Care Act. Discussions will also include some clever ways to use the features of Excel to present Q&A content in an "across the page" style. If you are not an Excel expert, this session will give you some great information!

#### **NEW! BlackLine: Account Reconciliation Session 14**

This session will share insight on how Infinium clients have seamlessly integrated the BlackLine Financial Close Suite to minimize risk, reduce costs, and streamline their financial close cycles by automating traditionally manual, labor-intensive, spreadsheet-driven account reconciliation processes. By taking advantage of BlackLine's Financial Close Suite's enhanced controls, Infinium clients have increased visibility, reduced costs, and gained confidence in their numbers.

#### **NEW! ACA and Infinium Session 15**

Mike Miller, TCI, will discuss how to best utilize new Infinium reports and displays to assist in ACA reporting and compliance. Followed by an open group discussion on ACA and best practices with fellow customers.

#### **An Introduction to Infinium WebTop: Demo and Questions Session 16**

Would you like to see what Infinium under WebTop looks like? Attend this session to see an overview of WebTop, and the discussion will center on the benefits of WebTop. If you are also interested in learning about the steps to move to WebTop, be sure to attend the ***Technical Planning and Steps to Implement WebTop*** session (24).

#### **Infor F9 Demo Session 17**

If you know Excel, you know F9 Financial Reporting - F9 is a powerful, easy-to-use financial reporting solution that dynamically links the Infinium general ledger data to Microsoft Excel. Accountants already know how valuable spreadsheets are for financial reporting. F9 can quickly leverage that value by delivering your Infinium general ledger data directly to Excel through a link to the most current information, with no exports or manual entries required. Come hear how you can be implemented and trained on F9 in less than a week, so you can create fully formatted, dynamic reports in seconds.

#### **NEW! Infinium 14.1 FM Release Overview Session 18**

Infinium Customer Support will discuss enhancements delivered in Infinium FM 14.1.

#### **Child Support Orders, Garnishments Session 19**

This class will review how to define Infinium to handle (often automatically) government mandated child support payments and other garnishments.

#### **SQL Tips & Tech, Using SQL in Programs Session 20**

Only write queries in AS/400 or Infinium query? This session is a review of basic and intermediate SQL techniques for programmers and IT support staff, including an interactive demonstration. Included in the class will be a discussion of joins, sub-queries, indexes, query performance tuning, and more.

#### **NEW! Infinium Self Service (SHCM): A Customer Story Session 21**

Goodman Manufacturing, manufacturer of air conditioners and furnaces, headquartered in Houston, Texas, has over 5000 employees in four locations. Attend this session with Cuni Thompson and Tinh Nguyen, from Goodman Manufacturing, to learn how Goodman Manufacturing successfully implemented Infinium Self Service (SHCM). They will discuss their challenges, their plan, and their payoff.

#### **NEW! Talking with Payables Ledger Session 22**

Discussion and details around common interface points with Payables Ledger, including Positive Pay, ACH transmissions, Cleared Items, PCards, and Vendors. Topics will include some of the more advanced methods of exporting data, including ODBC connectivity, FTP, and XML.

#### **NEW! Preparing For and Managing Your Open Enrollment Session 23**

Join us in this session to review preparatory steps and expert guidance on gaining the highest ROI for your next Open Enrollment.

#### **Technical Planning & Steps to Implement WebTop Session 24**

Are you considering moving away from your old AS/400 green screens? Then this is the class for you. We will discuss the business planning and high-level technical steps included in this process, and the time frame you are looking at for implementation.

#### **NEW! Infor Talent Management Session 25**

An introduction to Infor Talent Science which utilizes Predictive Talent Analytics™ for making better hiring decisions based on *your* business objectives. Our new solution provides a powerful combination of talent science and big data to deliver measurable results including decreased turnover, improved performance, streamlined hiring processes, and reduced risk with a proven ROI.

#### **DDI Automating AP – A Case Study Session 26**

This session will provide an in depth look into the automation of accounts payable processes including detailed workflows and exceptions. Gray Television, one of the nation's top television stations with over 35 remote locations, will share their experiences and gains by automating their accounts payable processes. Areas covered include: a step by step look at what is involved in automating AP workflows; scanning invoices; storing & retrieving documents; routing & approvals; posting to Infinium; the real facts of what can be gained from automation; and a review of ROI. **Who Should Attend?** CFOs, Controllers, Accounting Managers, and Accounts Payable.

#### **FMLA, Multi-Tax, and Purging HR Data Session 27**

**FMLA** - This session will provide an interactive review of the steps involved in implementing the Infinium FMLA solution. TCI will review the process to determine if an employee is eligible for FMLA, calculating how much FMLA time an employee may be eligible to use, documenting the

numerous tasks involved in determining eligibility, communicating with the employee their FMLA benefits, and accurately recording the FMLA time used and time remaining.

**Multi-Tax** - The Infinium Multi-tax option provides you with an opportunity to implement a single integrated employee database, without any restrictions due to multiple Federal Tax Id numbers or multiple General Ledger companies. You will be able to easily provide consolidated HR reports, valid score card measurements, and accurate metrics for turnover, etc., without having to constantly manipulate subtotals from separate employers. This session will discuss some of the factors involved in making a decision to implement Multi-tax processing, and review some of the suggested "best practice" configuration options.

**Purging HR Data** – TCI will outline best practices for HR data cleanup including purges and archiving data.

### **Advanced WebTop Technical Training Session 28**

You have conquered the basics of WebTop; now learn more advanced operations and tips. TCI will discuss custom menus and displays, system/version navigation, printing and data exports, authorizing and restricting users, and also specifics regarding a new implementation of WebTop.

### **REPEAT FM Hot Topics from Customer Support 29**

Infinium Customer Support will discuss the most reported Infinium FM Customer Support issues and the solutions for them.

### **NEW! GL – Automating the Ins and Outs to Make Your Information More Valuable Session 30**

The basis of the General Ledger is the journals that are being entered and the results that need to be reported. We will discuss journal entry, storing the information you need, extracting needed information, and various features that can make your life easier. We will cover: features of mass journal entry, importing foreign journals, the use of recurring journals, the use of the allocations module, available user fields, and a shell conversion program which can make your life easier!

### **HR/PY Optimization Review Process Session 31**

TCI will review how an optimization review/audit helps enhance your productivity. TCI will summarize the steps of the Optimization Review along with particular outcomes, reports, and benefits.

### **Repeat: An Introduction to Infinium WebTop: Demo and Questions Session 32**

Would you like to see what Infinium under WebTop looks like? Attend this session to see an overview of WebTop, and the discussion will center on the benefits of WebTop. If you are also interested in learning about the steps to move to WebTop, be sure to attend the **Technical Planning and Steps to Implement WebTop** session (24).

### **Repeat: HR/PY Hot Topics from Customer Support Session 33**

Infinium Customer Support will discuss the most reported Infinium HR/PY Customer Support issues and the solutions for them.

#### **NEW! BlackLine: Financial Close Control Session 34**

The role of Accounting and Finance Professionals is ever evolving. Demands are increasing; regulations are even more stringent; and areas of focus are expanding. Management is also looking to obtain enhanced visibility into the financial close, monitoring progress towards strategic objectives and mitigate business, governance and compliance risks. All of these make it more critical for companies to efficiently close their books while ensuring they have balance sheet integrity. Join BlackLine to learn how Infinium clients have leveraged the BlackLine Financial Close Suite to help provide visibility into their controls surrounding the entire financial close process.

#### **REPEAT ACA and Infinium Session 35**

Mike Miller, TCI, will discuss how to best utilize new Infinium reports and displays to assist in ACA reporting and compliance. Followed by an open group discussion on ACA and best practices with fellow customers.

#### **Saving and Displaying Documents via WebTop Session 36**

One of the many solutions provided by WebTop is the ability to link and retrieve documents to specific records in an Infinium database. This could be linking an employee's picture to their employee record, a product description to an inventory item, a copy of an invoice to an order, or any number of other examples. This session will provide an overview of the process, showcase some specific examples, and provide suggestions on storing and retrieving documents.

#### **Infor Session 37**

**No Session.**

### **Extended Training Track - HR Controls and Processing Session 38, Benefits Administration Session 39 (2.5 days)**

After the first day's general session, this class is a continuous training class for HR Controls and Processing, and then Benefits Administration. After the first day's General Session, it is highly recommend that you stay in this class for the remainder of the conference as this is a continuous information building class. You will have similar breaks and the same lunch as the other sessions.

This is a lecture style class with a handbook. You will go through the complete normal 5 day training class in a focused, accelerated style to be completed within the conference's 2.5 days. You will review HR Controls, Settings, and how to complete basic HR functions within Infinium, such as Adding and Editing New Hires, Working with Salary Ranges, and How to Handle Transfers, Promotions, and Demotions. The last part of this class will focus on Benefits Administration and how to define and manipulate those settings.

**Note:** If you plan on attending Benefits Administration, we strongly advise attending the complete 2.5 training (Session 38 and 39) because HR Controls and Processing covers setup information for Benefits Administration.

### **NEW! Extended Training Track – Infinium SHCM (Self Service) Accelerated Full Training (1 day, 1<sup>st</sup> day ONLY of the conference) Session 40**

The full day Infinium SHCM class will review setup and processing of Infinium SHCM (Self Service) on both the managerial and employee side.

### **NEW! Extended Training Track - Infor Q&A Mini Training (1 day, 2<sup>nd</sup> day ONLY of the conference) Session 41**

This session will be a review of the basics of writing a report in Q&A, but will also contain tips and tricks for more advanced report writing such as using *User Defined Output* fields, formatting reports with subtotals and breaks, placing multiple reports on a single page, and putting your input parameters in the Excel spreadsheet for easy end user report requests.

### **NEW! Extended Training Track - Infor DataLink Studio Training (.5 day, 3<sup>rd</sup> day ONLY of the conference) Session 42**

This session will cover how to build a datalink over non-Infinium data to be used for reporting by Infor Q&A. Topics will include defining the files and fields to the datalink, custom prompts, adding fields, and complex joins. We will also cover a brief review of a datalink extension.

### **Extended Training Track - PY Training Track – Payroll Controls & Processing (2.5 days) Session 43**

After the first day's general session, this class is a continuous training class for PY Controls and Processing. After the first day's General Session, it is highly recommend that you stay in this class for the remainder of the conference as this is a continuous information building class. You will have similar breaks and the same lunch as the other sessions. This is a lecture style class with a handbook. You will go through the complete normal 5 day training class in a focused, accelerated style to be completed within the conference's 2.5 days.

You will review General Ledger Controls, Employer Controls, Level Controls, Cycle Controls, Summarization Codes, Income Controls, Deduction Controls, Payroll Authorization Groups, Payroll Benefits Groups, Auto Pay Groups, Basics of New Employee Hiring, Understanding and Updating Employee Data, Cycle Operations, Timesheets, Time Entry Methods, On-Demand Checks, Reclassification of Employee Incomes and Deductions, Voiding Checks, Updating Tax Data, Employee User Defined Data, Closing PY to GL and PL, Mass Change Employee Payroll Data, and Bonus Processing.