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Autonomous Finance Realized

Welcome to the Delegation Era

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Work Smarter: In-App Secrets to Admin Efficiency

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Filters Manager: Structured and Consistent Template Maintenance

Benefits of using Filters

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One update, everywhere

A filter automatically updates across all dashboards, reports, and templates that reference it – for every user, instantly.

Consistent data, confident decisions

Every report draws from the same centrally governed filter definition, leadership is always looking at the same numbers.

Process run on right information

Removing the risk of a budget cycle or close process running against the wrong time period or incomplete member set.

Real time updates replace publishing

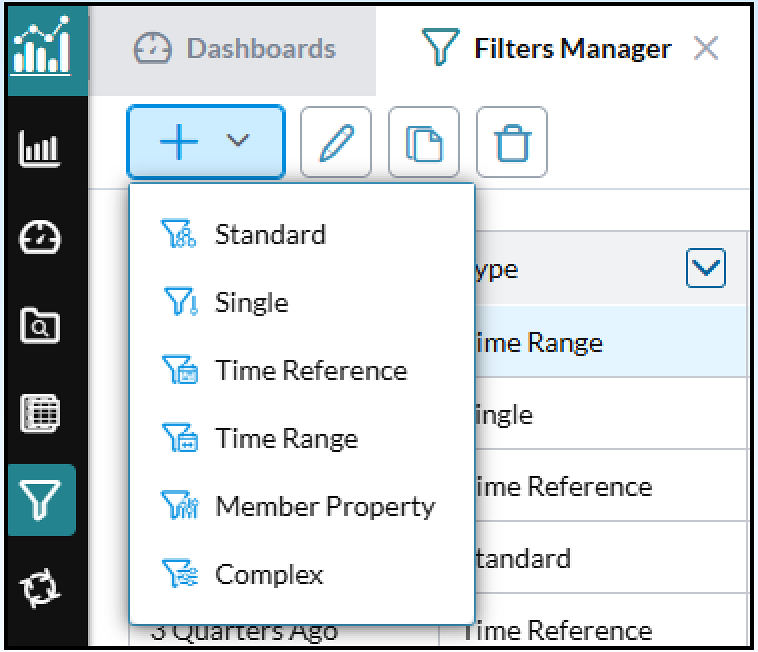
Centralized filter storage makes publishing obsolete by enabling real-time dimensional updates.

Cost of not using Filters Manager

Manual configuration, time spent on repetitive low-value tasks, reporting inconsistencies, revert to offline systems.

Filters Manager turns a recurring manual burden into a one-time configuration - freeing your team to focus on analysis, not administration.

Filters Manager



5 Filter Types

1. **Standard & Single -** Your everyday filters
2. **Time Reference -** Your highest-value filter for admin efficiency
3. **Time Range -** For rolling and horizon-based views
4. **Member Property -** For governed, attribute-driven scoping
5. **Complex -** For advanced, multi-condition scenarios

Types of Filters

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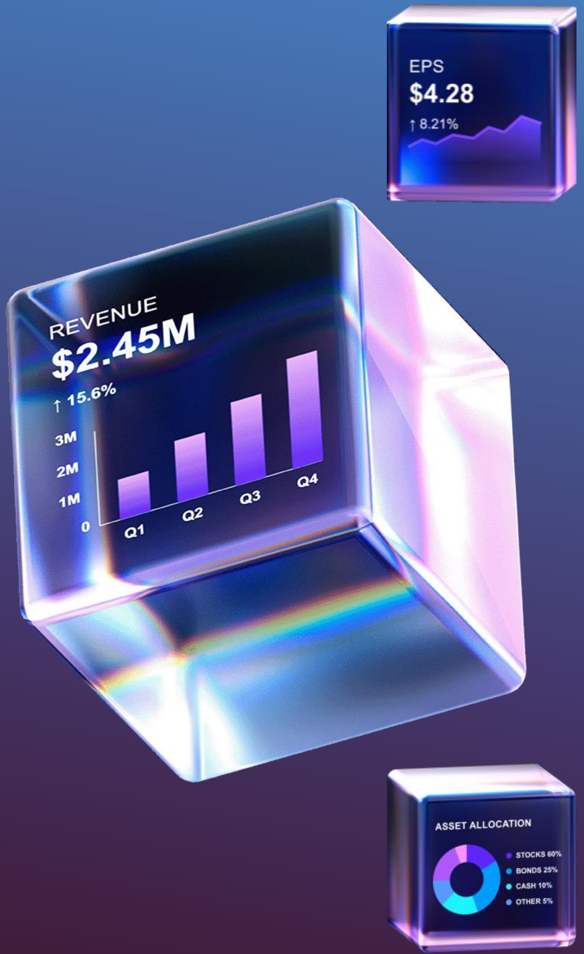
Type	Description	Example
Standard & Single Your everyday filters	Return single or multiple members from a dimension	Standard – Operating Expenses, Current Fiscal Months Single – Current Month
Time Reference Your highest-value filter for admin efficiency	Returns member dynamically relative to an anchor member in the time dimension	Current Month (anchor) >> Prior Month *[2026M05] May* *[2026M04] April* Current Month >> Last Year Month *[2026M05] May* *[2025M05] May*
Time Range For rolling and horizon-based views	Returns a defined span of time relative to the anchor member	Current Month >> Trailing 12 months *[2026M05] May* *[2025M06]….[2026M05]*

Types of Filters (Continued)

Type	Description	Example
Member Property **For governed, attribute-driven scoping**	Returns members based on a defined attribute or property on a dimension member	Filter Projects where Project Type = Active
Complex **For advanced, multi-condition scenarios**	Combines multiple conditions across dimensions for sophisticated data scoping	Filter Projects where Project Type = Active *AND* Project Region = North America *AND* Gross Margin > 0.00

Best practices

- Keep unique filters for each business cycle (Reporting, Planning, Forecasting)
- Use a numbering system and naming convention to keep it streamlined
- Connect & group filters using Time Range, Time Reference filter types
- Leverage same filters for all components - processes, dashboards, reports – of a business cycle
- Test and validate aggregated results



Leaf Formula: Best Practices & Model Management

Standard Formula

Formula	Description	Formula types	Best Suited for
Standard Formula Calculates at all levels	Calculates the account value at all levels of the hierarchy across all dimensions	Addition, Subtraction	Ratios, margin, variance calculations – anything where recalculating at a higher level produces meaningful results

Formula: Opex = Salaries + G&A

Addition

	Salaries	G&A	Opex
Entity A	800	250	1,050
Entity B	700	250	950
Total Entity	**1,500**	**500**	**2,000**

Formula: Gross Margin = Sales - COGS

Subtraction

	Sales	COGS	Gross Margin
Entity A	5,000	1,500	3,500
Entity B	6,000	2,200	3,800
Total Entity	**11,000**	**3,700**	**7,300**

Formula: Units = Revenue / Price Per Unit

Division

	Sales	Price Per Unit	Units
Entity A	1,000,000	5	200,000
Entity B	2,000,000	20	100,000
Total Entity	**3,000,000**	**25**	**120,000**

Expected result - sum of both Entities **300,000**

Formula: Revenue = Price X Unit

Multiplication

	Price	Unit	Revenue
Entity A	15	200	3,000
Entity B	20	300	6,000
Total Entity	**35**	**500**	**17,500**

Expected result - sum of both Entities **9,000**

Leaf Formula

Formula	Description	Formula types	Best Suited for
Leaf Formula Calculates at leaf levels	Calculates at leaf levels and aggregated to higher levels	Multiplication, Division	Any driver-based calculation where the inputs exist only at the leaf level and cannot be meaningfully aggregated before the formula is applied

Formula: Units = Revenue / Price Per Unit

Standard Formula

	Sales	Price Per Unit	Units
Entity A	1,000,000	5	200,000
Entity B	2,000,000	20	100,000
Total Entity	**3,000,000**	**25**	**120,000**

Formula: Units = Revenue / Price Per Unit

Leaf Formula

	Sales	Price Per Unit	Units
Entity A	1,000,000	5	200,000
Entity B	2,000,000	20	100,000
Total Entity	**3,000,000**	**25**	**300,000**

When to use Leaf Formula

- Driver-based planning models
- Standard Formula produces incorrect or misleading results
- Calculations where the formula logic is dimension-dependent at the detail level

How to use Leaf formula

1. Select Formula >> Leaf Formula
2. Insert leaf formula in the account
3. Check the option 'Define using advanced formulas'
   Ensure the isnull function is inserted to allow it to calculate only for valid data
4. Test and validate aggregate results to ensure the formula is working as expected

Leaf formula – complex modeling

1. Create a parking account
2. Insert leaf formula in the parking account

Why a parking account? Leaf formula accounts calculate at the leaf level and should not be directly exposed in reports, templates, or processes — the parking account keeps that logic contained and clean

3. Test and validate aggregate results to ensure the formula is working as expected
4. Copy (i.e. Infoflex) results for specific member combinations to a target account (that is included in reports, templates, processes, etc.)

Best practices

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- Default approach should be Standard formula
- Use Leaf formula when the order of calculation and data aggregation is important
- Check the option 'Define using advanced formulas' to engage isnull function
- Be mindful of model size – use parking account if needed
- Test and validate aggregated results

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Template Formatting: Convenient & Time Saving trick

Template Settings: Map Row & Column Axis

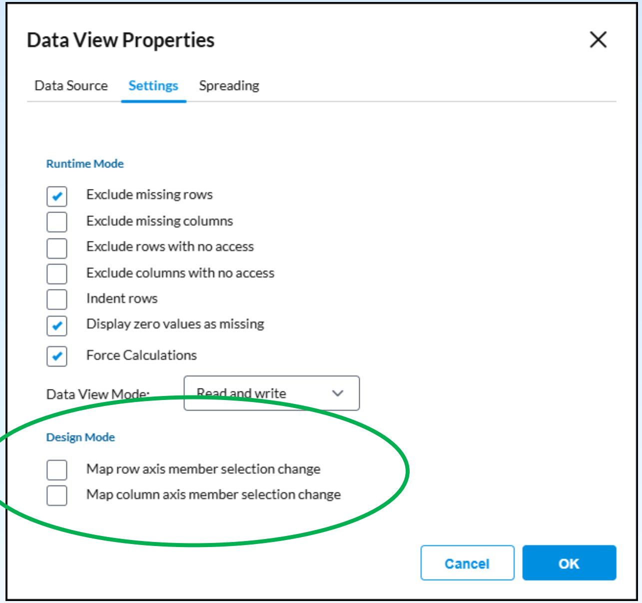
What are these settings?

Found under Data View Properties → Settings tab, these two checkboxes

- control whether cell formatting and formulas
- stay with their member combination when the template layout changes or
- stay fixed in their grid position.

Default setting

- Both settings are **enabled**
- existing formulas and formatting **move** to accommodate the new layout



Hidden cost of not knowing this exists

- Unknown settings = unnecessary rework
- Templates rebuilt from scratch — for the cost of one checkbox
- Real story: hours of rework. Real fix: one checkbox

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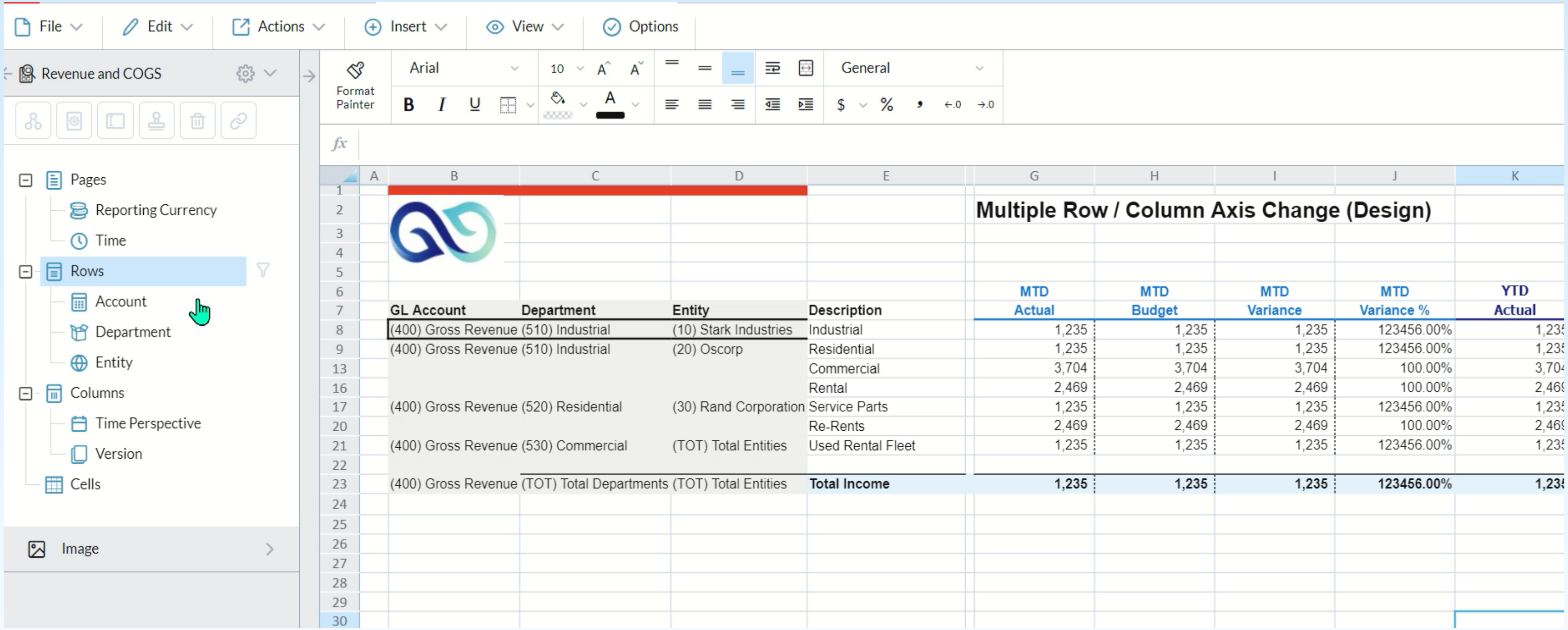
Template formatting: Save time when you edit a template



Admin Controls & User Permissions

The Security Manager Framework

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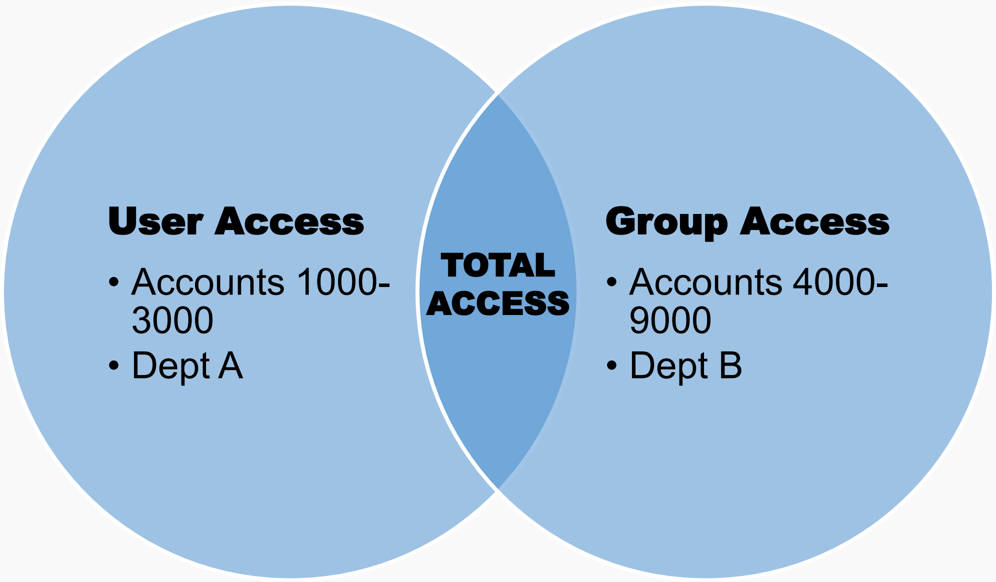
- **Poorly configured user permissions** are one of the most common causes of data integrity issues, audit failures, and accidental overwrites in financial planning platforms. They're also one of the most preventable errors
- **Security Manager controls two dimensions of access:** functional access (which areas of the platform a user can navigate to — Model Manager, Process Manager, Report Binder, Security Manager itself) and data access (which cubes, dimensions, and hierarchy members a user can read or write)
- **Functions** are assigned only to roles (never directly to users); users are assigned to roles and optionally to groups; groups reduce maintenance when many users share the same profile

- **There are four main areas to Security Manager:**
  - Users
  - Groups
  - Roles
  - Functions
- **The three default admin roles** that cannot be deleted or renamed:
  - **Global Administrator** (full access to all functions and models)
  - **Security Administrator** (security operations and monitoring only)
  - **Model Administrator** (model-specific data management, typically for technically proficient business users)

Important Note: Users have the union access of individual, role, and group permissions meaning they have additive access

The Security Manager Framework

Important Note: Users have the union access of individual, role, and group permissions meaning they have additive access



Practical Configuration Tips: Admin Best Practices

- **Design roles before adding users:** the recommended setup sequence is to setup roles first with the correct functions, then groups as needed, and finally individual users
  - Skipping ahead to assigning users before roles are structured leads to inconsistent access that is difficult to audit later
- **Use groups to reduce long-term maintenance:** when a position is frequently occupied by a rotating individual (e.g., a department budget owner), assign the group to the individual — personnel changes require only updating group membership, not rebuilding individual user permissions
- **Understand the "Not defined" distinction:** for a default hierarchy, "Not defined" means no access; for alternate hierarchies, "Not defined" means full access
  - This distinction is a frequent source of unintended over-permission in alternate hierarchy configurations
- **Copy permissions between users:** when onboarding a new user with a profile identical to an existing user, use the copy data access function in Security Manager rather than manually replicating each dimension setting
  - Select the source user, copy to the target, and save
- **Workflow and security are integrated:** data visible within a workflow task is scoped to the task owner's permissions, not the approver: ensuring budget contributors only see their own data even when a more senior user is reviewing their submission
  - Important note: This applies to Alternate Owners as well

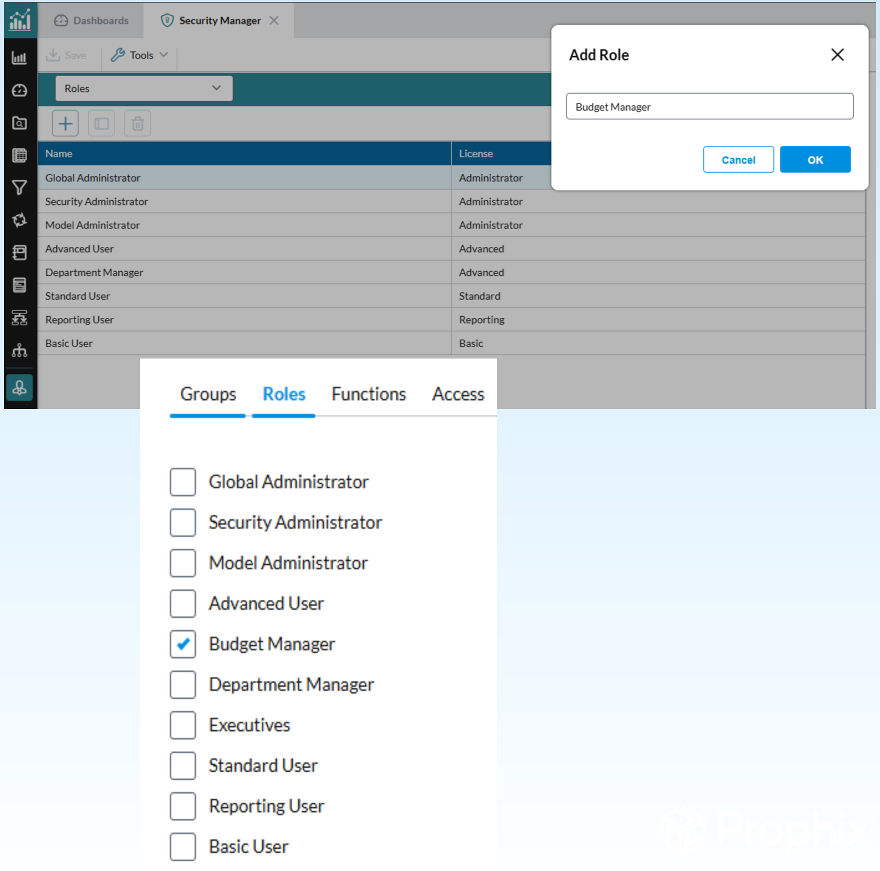
The Security Audit Report: Your Governance Tool

- Global Administrators can export a full Security Audit Report at any time
    - Go to Tools → Export Report
    - This generates an Excel file listing every user, group, and their complete permission details. It's the starting point for any access review, onboarding audit, or compliance check
- Additionally, Portal administrators can generate CSV-based audit reports covering user creation dates, application assignments, login events (including failed attempts and IP addresses), and deletion history, providing a complete access governance record

Practical Configuration Tips: What Admins Can Do Now

Demo: Security Manager

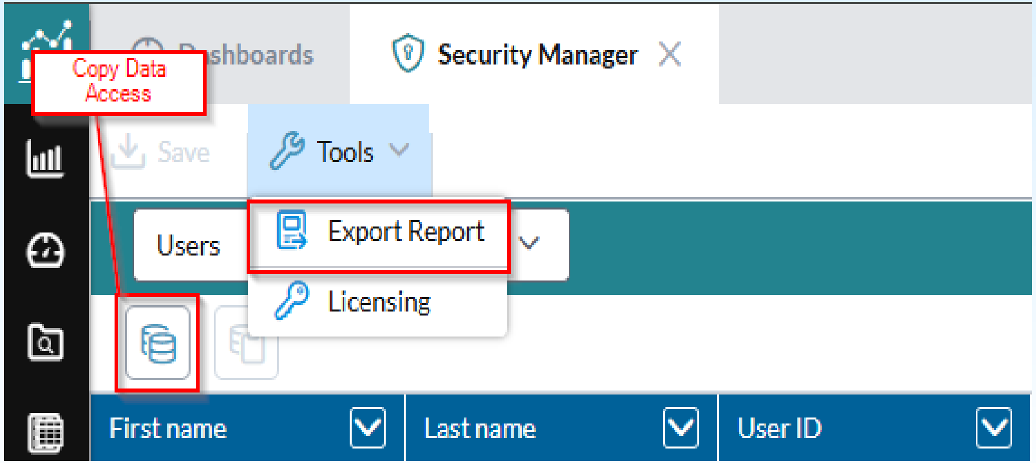
- **Role Creation:** set up roles for common access requirements for users. Having functions assigned to roles, never directly to individual users, which is what makes the architecture scalable
- **Easily add new users:** configure roles to easily copy access from existing users to new users - configure once, apply to multiple, and override only where needed
- **Audit Security:** export the security manager audit report to generate a full Excel file listing every user, group, and their complete permission details for your single source of truth for any access review, onboarding audit, or compliance check



Demo: Security Manager

Copy the data access permissions of one user or group to another

1. Select the user or group whose data access you want to copy.
2. In the lip, click .
3. Select the target user or group.
4. Click and confirm your decision.
5. Click Save .



Security as a Planning Enabler

A well-structured Security Manager configuration reduces ad-hoc access requests, prevents accidental data changes, and makes every audit straightforward

Practical takeaway: run the Security Audit Report today and verify that no users hold access who do not require it. This single check addresses the most common over-permission risk. Global and Security Admins should be completing this check on a regular basis

Streamlining Workflows & Intelligent Process Design

The Cost of Manual Processes and How Workflow Manager Could Work For You

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McKinsey research shows finance professionals spend 20–30% of their time on manual tasks that automation can eliminate and at companies where tools have been deployed robustly, an estimated 30 percent of finance professionals' hours have been recovered

Workflow Manager

assign tasks to owners, routes approvals, sets deadlines, and sends automated reminders and notifications to participants

Security Manager integration

a user's data access within a workflow is automatically governed by their Security Manager permissions

Pro tip: Set up workflow tasks based on their roles, not their names, which means the workflow survives personnel changes without rebuilding

Process Manager

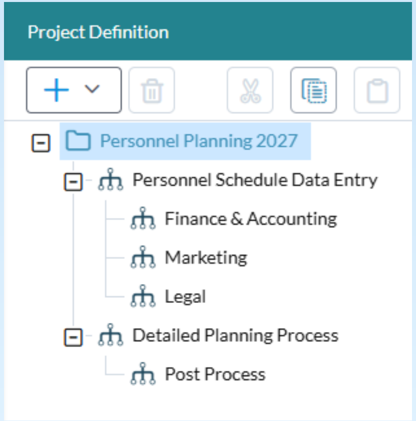
administrators build process groups to automate processes such as data imports, template calculations, and cube updates to run on demand or on a schedule with no manual intervention required

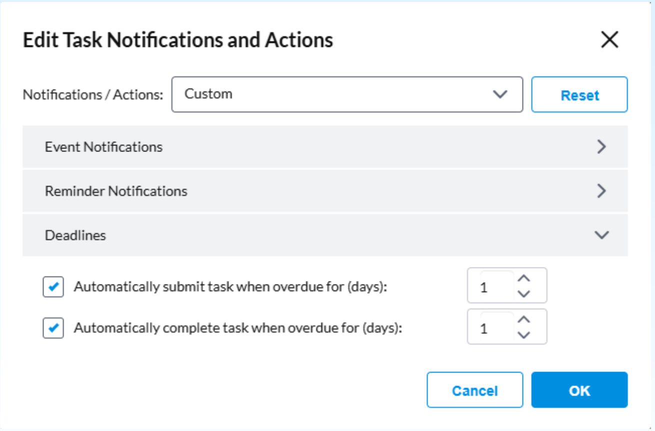
The two layers are complementary: Workflow Manager handles human coordination; Process Manager handles data automation; together they form a complete planning cycle all while respecting Security Manager permissions

Practical Configuration Tips: What Admins Can Do Now

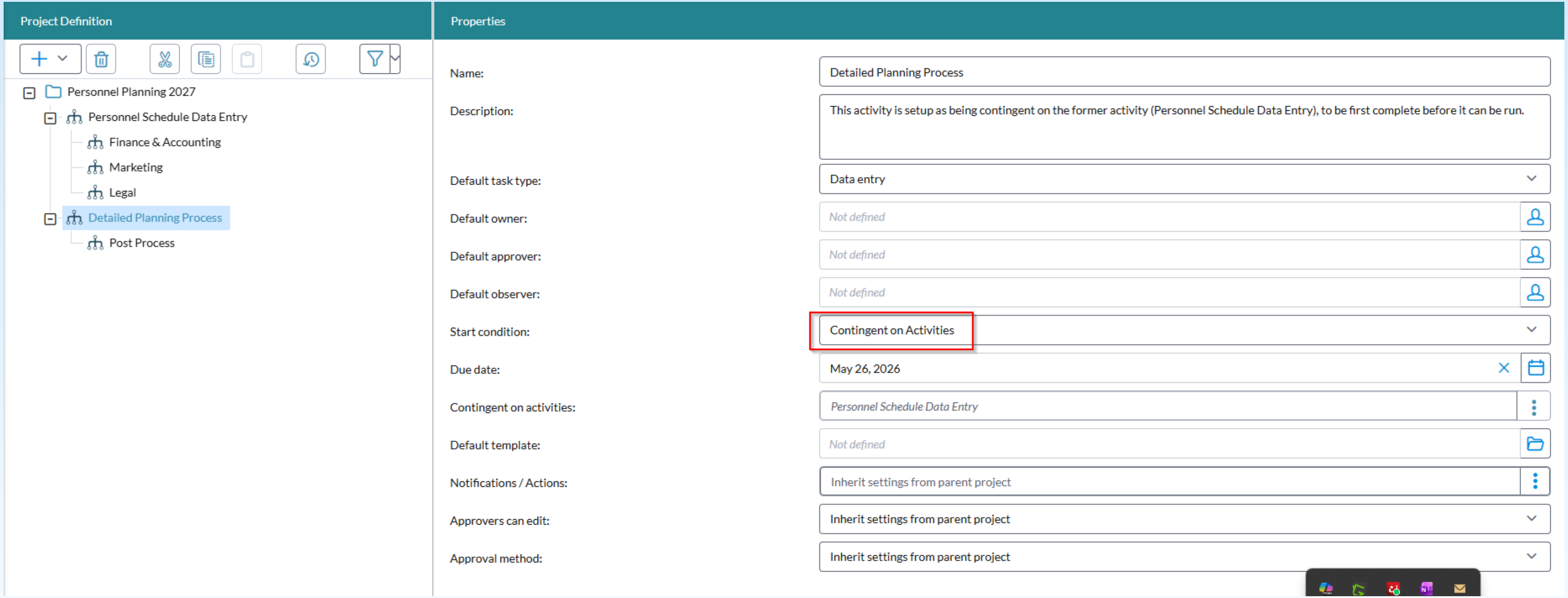
Demo: Workflow Manager

- **Deadline automation:** set auto-submission rules so that overdue tasks are automatically completed after a defined number of days, keeping the cycle moving even when individual contributors miss deadlines
- **Dependency-based task chaining:** configure activities so each step launches automatically once its predecessor completes — the next task owner receives an immediate notification without any manual trigger from the admin
- **Inheritance for bulk configuration:** properties set at the project or activity level (due dates, notification rules, reminder cadences) automatically cascade to all tasks below — configure once, apply everywhere, and override only where needed





Activity Contingency



Workflow Manager as a Project Manager

A well-structured workflow with Workflow Manager automation eliminates the need for a finance manager to act as a manual project coordinator - the platform becomes the project manager

Practical takeaway: Review your current budgeting or forecasting cycle and identify the one step that most frequently causes delay - what is one step you can automate using workflow? Is this a:

- Dependency-based task?
- Deadline automation?

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Q&A

Thank you

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This is coming.
And you can help shape it.

What you saw today isn't available yet — but your voice determines what it becomes.

We're inviting customers to be part of what comes next — not as observers, but as contributors. The experiences you have, the friction you feel, and the outcomes you need are exactly what this product should be built around.

Your experience shapes the product. We're here to listen.

At the conference

Visit the product & design team

Come talk to us directly. Tell us what you need, what's missing, and what would make this indispensable for your team.

Early access group

Influence what gets built next

Join our early access group to give direct input on the roadmap, test new capabilities before general release, and ensure the product is built around how your team actually works.

What you can do next

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Each of these steps will move you closer to the experience you saw today.

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Unlock advanced driver-based modelling, expanded scenario planning, and deeper workflow automation — built directly on top of what you use today. **Same data. Same team. Significantly more capability.**

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Prophix connects planning, consolidation, and reporting into a single environment. Each application you add reduces the number of systems your team has to manage.

Book a call with your account manager

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