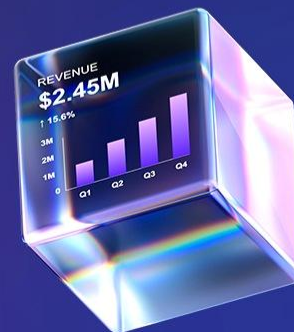




Autonomous Finance Realized

Welcome to the Delegation Era



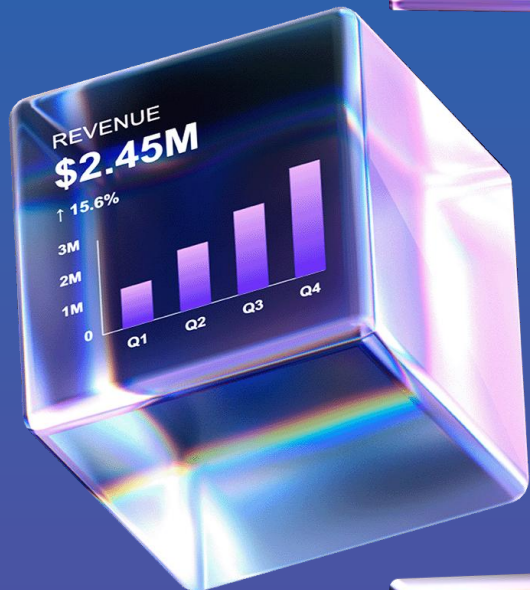
Mastering InfoFlex: Flexible Data Modelling for Complex Planning Environments

Configure controlled data movement, automate plan seeding, and execute structured reallocations – all within Prophix





Charlene Acuna
Solutions Architect



“Copy last year’s budget into a new tab and adjust from there.”



Infoflex

Automated data transformation



Copy & Move Data

Replicate values – including comments and line-item details, across versions, departments, or time periods with a single process



Seed Budgets & Forecasts

Copy last year's actuals into a plan version and apply a percentage uplift – your budget starting point is ready in seconds



Allocate Expenses

Spread shared costs – like HR or IT – from one department or account across many, automatically and proportionally



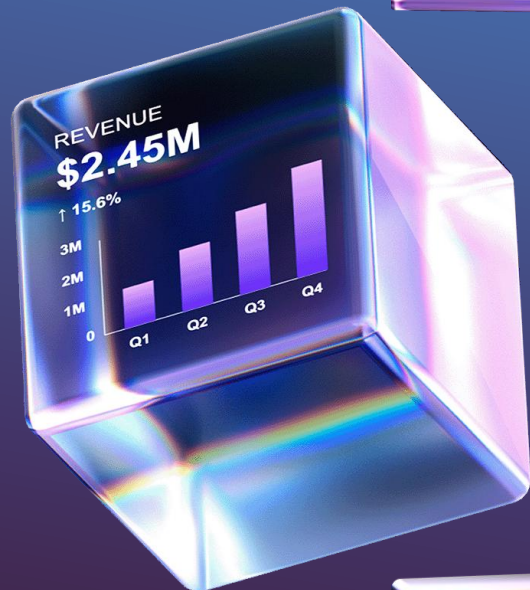
YTD Forecasting

Use year-to-date actuals as your baseline to project forward – a practical alternative to building forecasts from scratch



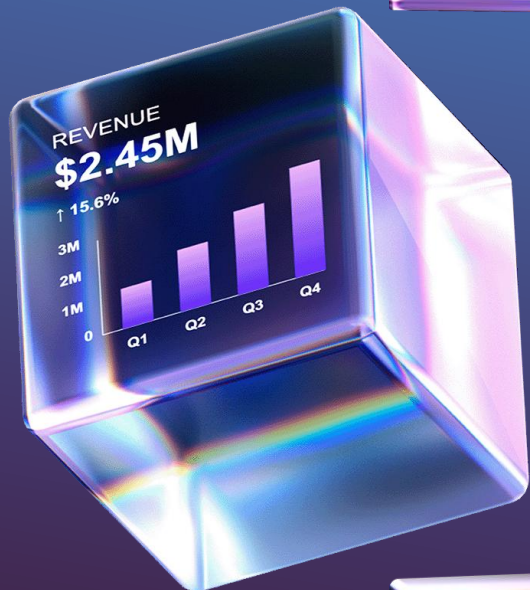
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- 4 Scenario 4: Scenario Planning



Demo





InfoFlex: The Toolkit



Processing Options

Store or allocate based on existing data

The value of the source member(s) is stored/allocated across target member(s) for each member combination

Store the following value

The value that you type is stored in each member combination

Allocate the following value

The value that you type is allocated across target members for each member combination

Processing Options

- Store or allocate based on existing data
- Store the following value:
- Allocate the following value:

Data Transformation Options

General Common Dimensions Source/Target Members **Data Transformation** Time Spread Processing Options

Data Calculation Options

Source data aggregation option: Aggregate

Delete data from source:

Apply the following transformation to the source data:

Target data write option:

- Aggregate
- Average including empty values
- Average excluding empty values
- Copy between time members

General Common Dimensions Source/Target Members **Data Transformation** Time Spread Processing Options

Data Calculation Options

Source data aggregation option: Aggregate

Delete data from source:

Apply the following transformation to the source data:

Target data write option:

- None
- Increase by percentage
- Decrease by percentage
- Increase by absolute amount
- Decrease by absolute amount
- Multiply by

Target Data Write Options

General Common Dimensions Source/Target Members **Data Transformation** Time Spread Processing Options

Data Calculation Options

Source data aggregation option:

Delete data from source:

Apply the following transformation to the source data:

Target data write option:

- Overwrite existing data
- Add to existing data
- Subtract from existing data

Time/Dimension Spread Options

Spread evenly

Spread the value evenly to all leaf members

Spread based on existing data

Spread to leaf members based on existing data pattern in the current member combination

Store

Store the value to all leaf members with no spread

General Common Dimensions Source/Target Members Data Transformation **Time Spread** Processing Options

Leaf Member Spreading Method

Spread evenly

Spread based on existing data

Store

Spread based on values in member property:

Spread based on data in:

Account

Version

Time periods starting with:

Business Class

Classification

Customer

Department

Item

Reason Code

Subsidiary

Time Perspective

Spread based on values in member property

Spread to leaf members based on the values in the selected member property (Time Spreading Only)

Spread based on data in

Spread to leaf members based on the existing data pattern in the selected member combination

Thank you!



Scan the QR code and complete
the course evaluation to earn
your CPE credit

Charlene Acuna
Solutions Architect
cacuna@prophix.com

www.Prophix.com

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Join the early access group

Give direct input on the roadmap, test new capabilities before general release, and ensure the product is built around how your team actually works.



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