

INFOR CloudSuite Key Benefits and Enhancements

FINANCIAL SERVICES MANAGEMENT

KEY OPPORTUNITY	VERSION 10 (CURRENT)	VERSION 11 (CLOUDSUITE UPGRADE)
Global Ledger	Existing accounting unit structure is rigid and static and does not meet all departmental reporting needs. Departments with multiple funds must run multiple reports to view all of their financial information. The one-size-fits-all structure does not allow departments such as HHSAs to capture program and claiming level detail, requiring manual spreadsheet tracking. Rigid fund-based structure not compatible with HHSAs's branch organizational structure.	Flexible and dynamic Global Ledger structure that will meet County and departmental accounting, reporting & budgetary control needs. Independent dimensions will allow flexible reporting by fund, department or other component. A mix of required and optional dimensions provide both standardization for financial reporting and flexibility to allow departments to track more granular data, such as program and claiming detail. Allows for development of branch structure in HHSAs.
Infor Document Management (IDM)	Documentation stored outside of system. The process for attaching documents to financial transactions such as journal entries is very cumbersome and time consuming, requiring users to save files on a dedicated County shared drive and then type in the URL address in Infor. Poses risk of documentation being duplicated, lost, or deleted. If URL is mistyped documents cannot be easily retrieved.	Backup documentation can be stored within the system making it readily available to users as-needed. Supporting documentation for financial transactions such as journal entries and invoice payments can be attached through drag-and-drop functionality. Documents are indexed and searchable for easy lookup.
Accounts Payable Workflow	Unable to use the system delivered workflow without customization because the standard functionality did not meet business requirements. The system allows transactions to post before approval is complete. Routing is also static in that every invoice must follow the same approval workflow. Users unable to see where it is in the approval process without contacting DFS or System Administrators.	Invoice routing rules can be created so that different invoice types (i.e. services, goods, or expense invoice) can have a different approval flow. Once in the approval process, the status is visible so the users can track it.
Journal Entry Workflow	Unable to use the system delivered workflow without customization because the standard functionality did not meet business requirements. The current system has two different set of ledgers; a general ledger vs a project ledger. The delivered flow does not stop transactions from posting to the project ledger until approval completes. This issue creates discrepancies between the two ledgers. Additionally the custom flow needs to be reworked in order to address audit risks.	System no longer has separate ledgers and has built-in control where the user who routed the transaction for approval is not allowed to approve it at department level. Status is visible so users can track progress.
Cash Ledger Workflow	Current system does not have a system delivered workflow. A custom workflow was created by a 3rd party consultant. Although this custom flow has addressed business requirements, users cannot easily track status of approval process.	System has a delivered flow that we can use. Status is visible so the users can track progress.
Birst/Analytic Tools	Not available. Reporting is largely limited to system delivered financial reports, which are limited and not user friendly. Customized reports require specialized expertise in 3rd party systems. Lack of analytic tools has resulted in attempts to use other systems such as OpenGov, which are not integrated and require additional effort to maintain.	Enhanced reporting and data analytics platform. Birst can combine multiple data sources and unify these disparate sources for all users. Combining data sets from multiple sources allows users to see the big picture and make data-driven decisions. Not isolated to the Infor system, Birst can be used across departments to analyze their business specific data and display dashboards and results. Infor has pre-built industry data models and analytics.

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HUMAN CAPITAL MANAGEMENT

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Increase access to department generalist	Currently, approximately 90-95% of all personnel actions are completed by County Human Resources staff. HNSA Human Resources and Probation generalists currently have limited access to Infor due to user security roles. Security needed to be reworked and redesign to secure data by department. Departments must request information related to their department and employees from County Human Resources. Currently, all personnel actions are processed manually via the paper PAF form.	Department HR generalists will complete action requests in the system, which will eliminate Personnel Action Form paper routing and duplication of efforts. Increased access will allow for departments to report in real time information related to their staff. This change will also address security concerns and eliminate of single points of failure.
Manager Space	Module not implemented. Was supposed to be a Phase 2 implementation. Currently, there is no access for supervisors or managers to view employee data. Reports are generated monthly by County HR to provide data on evaluation and merit dates for all departments.	Supervisors and Managers will be able to see information about their staff directly through Manager Space including merit and evaluation dates in real-time.
Employee Space	Employees can currently make minor changes in Employee Space but must do so while connected to the network. This significantly limits the capabilities of this module and employee utilization is minimal.	Employees can access system without connecting to County network and make changes such as benefits enrollment, personal data changes (address, phone, direct deposit, etc.) at their convenience and electronically.
Redesign of Position Structure/Position Budget Manager	Currently, a 1:1 ratio exists between positions and work assignments. As a result, most personnel transactions require two or more actions to process within the system to address both the position, employee, and work assignment. Additionally, because we did not implement the Position Budget Manager module, coupled with the 1:1 position ratio structure, new positions are required to be regularly added and maintained unnecessarily.	A consolidated position structure that will streamline the processing of personnel transactions including flexibly staffed positions, promotions, transfers, reclassifications, etc. This will typically result in narrowing down necessary actions from two or more, to one action requiring processing. Implementing the Position Budget Manager module will allow for ease of implementing position changes that go to the Board and provide real time data for departments related to vacant and filled positions.
Cross-training between HR/Payroll Staff	Currently, there are two systems that house data used within Human Resources. GHR (system of record) and Smart Office (used for benefits and payroll). The systems are unique which prevents cross-training and complicates reporting. Responding to requests that involve employee-related data requires data from both systems to be pulled and then consolidated outside the system.	Infor has consolidated these two systems into one. HR and payroll staff will be working in one system updating employee data. Data will be easier to analyze, report, and update. Additionally, HR and payroll staff will be better able to cross train as the system used will be the same across both groups.

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SUPPLY CHAIN MANAGEMENT

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Contract Management	Module not implemented. County did review this module and at the time there were still functionality issues with the system. A fragmented approval process exists and rests on multiples of emails to approve a contract. There is no workflow to document approvals. There is no way currently to record vendor performance. Financial tracking of payments is convoluted resulting in over and under reporting of contract obligations.	Implement Contract Management with DocuSign integrated into the solution to have all contracts signed digitally. The module will improve the contract management process by facilitating more accurate financial/payment information, enable vendor performance tracking, improve process workflows, and improve vendor relations.
Infor Document Management (IDM)	Documentation stored outside of system. Documents are haphazardly maintained by departments over multiple locations on County shared drives. Identifying and reviewing key procurement documents is difficult to due to a lack of a central repository and one that can track document versions	Backup documentation can be stored within the system making it readily available to users as-needed. This will improve record keeping and compliance with public records act requests.
Purchase Card	Module not implemented. The P-Card process in the system was deemed inefficient and low on priority during the original implementation project. The result of that is a manual reconciliation process outside the system. The current P-Card process inhibits proper oversight as all charges are commingled into summaries and there is no way to know if a purchase card user has submitted their supporting documents.	This module will improve transparency, accountability, and oversight of the purchase card program.
Requisition Process / Workflow	There is no requisition workflow currently. The current process relies on emails to notify the next person in approval chain that a requisition is ready. Without a workflow, it is unclear when / if a requisition is approved, where it is in the approval process, and to append comments.	Requisitions are approved and managed within a nimble workflow process, reducing emails, and providing more information to all users about requisition status.

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TECHNICAL MANAGEMENT

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Software-as-a-Service Model	Current system is a hosted single tenant solution. System is only accessible from the county network. Lifecycle management including patch testing and server refresh cycles take significant effort to test and deploy.	Software Enhancements: Continuous deployment of new features & functionality; system always kept up to date. Accessibility: Ability to run via an internet browser 24/7 from any device Operational Management: No installation, equipment updates or traditional licensing management Scalability: Easily scale solution to accommodate changing needs Data Storage: Data is routinely saved in the cloud Analytics: Access to data reporting and intelligence tools Increase Security: SaaS providers invest heavily in security technology and expertise
Data Level Control & Security	In Fiscal Year 2017, the County restructured the General Ledger structure to add a department level in hopes of being able to secure system data at that level. The GL restructure was completed with the assistance of a 3rd party consultant but improvement work on securing system was placed on hold. Unsure if this could have been achieved. County would have needed professional services to assist with this effort.	Transactional data level processing can be secured at dimension level per user. Financial users are tied to employee record in HR which makes security more effective. We can open system to Special Districts to process their own financial transactions.
Improved audit log	Current system does not track changes to a transaction consistently throughout the system.	System has improved audit log throughout the system.
User Setup & Maintenance	User setup and maintenance is decentralized between multiple tools that Infor has.	The management of users is more centralized and in one area. No longer need to log into separate systems to complete the addition/inactivation of a user.
Technical Management	Management of workflow setup and transactions in the workflow process is cumbersome and requires going back between different environments (Landmark vs S3) to find the state of various things and update accordingly.	The management of users is more centralized and in one area. No longer need to log into separate systems to complete the addition/inactivation of a user.
Infor Process Automation (IPA)	All workflow processes run in one environment (Landmark) with ties to another environment (S3). Both processes uses the same resources but different methodology to access resources.	Environments are consolidated and centralized. All resources within one environment so system is no longer pulling the same resources from different areas.
Infor Document Management (IDM)	Creator content does not exist although there may be limited capabilities through use of LBI (crystal report).	Creator content. Can produce various templates (example check templates, PO templates, invoice templates, etc.)
ION	Exist but unknown what it's used for or capabilities are. Not sure if licensed to use.	Ability to import data from outside of Infor to be reported on and/or use in the Infor environment.
Configuration Console - Tailoring the system to meet reporting needs	The configuration console tool allows us to tailor the system to improve user experience. However, this tool is not available in the environment where the finance system lives and therefore its use has been limited.	Infor has consolidated their different environments and this configuration tool can be used across the one system. Personalizations and configuration changes made using Configuration Console tools are saved to separate files, stored separately in the database, and are not affected by upgrades. However, it is possible that these items can be affected by a new delivery of the business class (data table) but Infor has a comparison tool that would help to identify and troubleshoot these types of issues.