



# Infor Dynamic Enterprise Performance Management Release Notes for 2022 (Cloud)

December 2022 Production Update

### **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 Enterprise Performance Management (EPM) 2022.12

Publication Date: December 6, 2022

Document code: depm\_2022.12\_release\_notes\_2022\_cloud\_en-us

# Contents

<b>About this document.....</b>	<b>6</b>
Contacting Infor.....	6
<b>Chapter 1: Customer action required.....</b>	<b>7</b>
<b>Chapter 2: December 2022 Production Update.....</b>	<b>8</b>
OLAP.....	8
Infor d/EPM Administration.....	9
Relational modeling.....	9
Business Modeling.....	9
Infor d/EPM business applications.....	10
Budgeting & Planning.....	10
<b>Chapter 3: November 2022 Production Update.....</b>	<b>11</b>
Application Studio.....	11
Application Engine.....	12
OLAP.....	13
Infor d/EPM business applications.....	13
Workforce Budgeting.....	14
Office Integration.....	14
Online documentation.....	15
<b>Chapter 4: October 2022 Production Information.....</b>	<b>16</b>
Application Studio.....	16
Application Engine.....	16
OLAP.....	17
Infor d/EPM Administration.....	18
Relational modeling.....	18
Infor d/EPM business applications.....	18
Financial Consolidation.....	18

---

<b>Chapter 5: September 2022 Production Update.....</b>	<b>19</b>
Application Studio.....	19
OLAP.....	19
Modeling.....	20
d/EPM Administration.....	20
Infor d/EPM business applications.....	20
Budgeting & Planning.....	20
Financial Consolidation.....	21
Workforce Budgeting.....	21
Office Integration.....	22
<b>Chapter 6: August 2022 Production Update.....</b>	<b>24</b>
Application Engine.....	24
OLAP.....	24
d/EPM Administration.....	25
Relational modeling.....	25
Infor d/EPM business applications.....	25
Business Modeling.....	25
Workforce Budgeting.....	26
<b>Chapter 7: July 2022 Production Update.....</b>	<b>27</b>
Infor d/EPM business applications.....	27
Financial Consolidation.....	27
Workforce Budgeting.....	28
Self-Service.....	28
<b>Chapter 8: June 2022 Production Update.....</b>	<b>30</b>
d/EPM Administration.....	30
Infor d/EPM business applications.....	30
Financial Consolidation.....	31
Workforce Budgeting.....	31
Online documentation.....	32
<b>Chapter 9: May 2022 Production Update.....</b>	<b>33</b>
Application Studio.....	33
Application Engine.....	33
Infor d/EPM business applications.....	34
Budgeting & Planning.....	35

---

Financial Consolidation.....	35
Workforce Budgeting.....	35
Excel Integration.....	36
Online documentation.....	36
<b>Chapter 10: April 2022 Production Update.....</b>	<b>37</b>
OLAP.....	37
Relational modeling.....	37
Application Studio.....	38
Infor d/EPM business applications.....	38
Budgeting & Planning.....	38
Third-party information.....	39
<b>Chapter 11: March 2022 Production Update.....</b>	<b>40</b>
Business Modeling.....	40
Infor d/EPM business applications.....	40
Budgeting & Planning.....	40
<b>Chapter 12: February 2022 Production Update.....</b>	<b>41</b>
Modeling.....	41
Infor d/EPM business applications.....	41
Financial Consolidation.....	41
Online documentation.....	42
<b>Chapter 13: January 2022 Production Update.....</b>	<b>43</b>
Application Studio.....	43
Modeling.....	43
Business Modeling.....	43
Infor d/EPM business applications.....	44
Budgeting & Planning.....	44
Financial Consolidation.....	45

## About this document

This document provides information about the enhancements and changes in Infor d/EPM.

See Knowledge Base Article 2066357 for known issues.

See Knowledge Base Article 2039523 for the list of resolved issues that are included in this update.

Details of previous updates for this year are also included in these documents.

## Contacting Infor

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

The latest documentation is available from [docs.infor.com](https://docs.infor.com) or from the Infor Support Portal. To access documentation on the Infor Support Portal, 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](mailto:documentation@infor.com).

## Chapter 1: Customer action required

This topic describes items where the customer must take action.

### **Infor d/EPM business applications**

This release requires your Infor d/EPM administrator to update applications using the Manage Applications widget as described in the "Updating commercial applications" topic. This step must be completed before users attempt to access Infor d/EPM. If this step is not finished, then errors are displayed and access is blocked.

### **Word Integration**

Customers who use Word Integration for the first time must enable Office Integration. See "Enabling Office Integration in Microsoft Excel and Microsoft Word".

### **Relational modeling permissions**

In a forthcoming version, security will be applied in relational modeling that will affect existing ION API calls and Application Engine processes. You must ensure that processes, ION API calls, and workflows that run load queries and SQL scripts in relational modeling are run under user accounts that have the View Relational Objects permission.

### **Hardware support**

Starting with the 2023.02 release, Infor d/EPM will not support client machines without AVX2 instruction support in the client computer's processors. This change will help with further performance improvements. We do not expect this will affect Infor d/EPM client machines as AVX2 was introduced in 2013 and generally supported on all modern environments. We recommend you check with your IT team to make sure the system is ready for the upcoming release.

More information about AVX2 instruction support can be found at [https://en.wikipedia.org/wiki/Advanced\\_Vector\\_Extensions](https://en.wikipedia.org/wiki/Advanced_Vector_Extensions)

## Chapter 2: December 2022 Production Update

This update introduces new features and product improvements.

### **Upcoming product name change**

Infor Dynamic Enterprise Performance Management (Infor d/EPM) will be renamed to Infor Enterprise Performance Management (Infor EPM) with the 2023.01 release because of a naming harmonization initiative.

This change will be done in several phases. The first phase is planned for the first release in 2023.

### **Microsoft Edge browser**

All full client applications are now delivered with the embedded Edge runtime WebView2. This ensures that the embedded Edge runtime is available in all Windows operating system installations. It also corrects an issue where MFA did not work for full clients.

See <https://docs.microsoft.com/en-us/microsoft-edge/webview2/> for information on WebView2.

## OLAP

### **Relations Access Control (RAC) cubes**

Relations Access Control cubes can now be used. RAC cubes work similar to Multidimensional Access Control (MDAC) cubes for the combination of several dimensions in an OLAP cube. RAC cubes do not include the data access roles dimension (#\_\_GRP\_\_).

Similar to MDAC cubes, RAC cubes provide security at the cell level with READ, WRITE, or NONE permissions. Permissions are not specific to a data role. RAC cubes must be assigned to user cubes in order to take effect.

Default permission can be set per RAC cube.



## d/EPM Administration

### Relational modeling

#### **New data type**

You can now use Integer as a data type. The Number data type has been renamed to Number (Float) to distinguish it from the additional numeric data type.

#### **Scanning for invalid characters**

To ensure that exported relational modeling bundles can be imported back, the bundle is scanned for invalid characters during the export process. If invalid characters are detected, the details and a corrective script can be downloaded and modified to remove or replace the invalid characters.

## Business Modeling

#### **Consolidation data management**

These data management pages have moved from the Module Management section to the financial Business Objects section:

- Versions
- Entity Levels Entry or Import
- Entity Level Journals
- Consolidation Levels
- Checks

The pages have been renamed:

- Versions is Consolidation Versions
- Entity Levels Entry or Import and Entity Level Journals is Adjustment Levels. There are options to select the type.
- Checks is Consolidation Checks

Existing records from a previous version are synchronized to the new business objects with the first publishing after the application update.

## Infor d/EPM business applications

Infor d/EPM business applications are not supported in Infor Government Solutions (IGS).

## Budgeting & Planning

### **Harmonization of financial schedule structures**

For reporting purposes, the financial schedule structure has been harmonized between Budgeting & Planning and Financial Consolidation. The Budgeting & Planning reports for data entry, entering opening balances, and cash flow account assignment have been adjusted to reflect changed opening balance calculation.

Business Modeling automatically migrates structure changes in BO Schedules including impacted data to new structure. Conflict cases require manual interaction.

## Chapter 3: November 2022 Production Update

This update introduces new features and product improvements.

### Upcoming product name change

Infor Dynamic Enterprise Performance Management (Infor d/EPM) will be renamed to Infor Enterprise Performance Management (Infor EPM) with the 2023.01 release because of a naming harmonization initiative.

This change will be done in several phases. The first phase is planned for the first release in 2023. For the first phase, the main screens of the product and the names of the client applications will be changed.

## Application Studio

### New spreadsheet function

You can use the new `ISEXPANDED` function to query the current expansion status of a referenced hyperblock cell. The function returns `TRUE` if the referenced cell of a hyperblock is expanded.

### Export profile using the Book Export Wizard

You can use the **Book Export Wizard** to download two different export profiles.

The full profile consists of the complete export definition of all reports to be exported. The file type is `.json`.

The modification profile contains only the modifications that should be made to the original definition of the book. The file type is `.json`.

The resulting `JSON` string can be used in the Application Engine `CreateBookExportProfile` function.

### ION API support for specifying a book export profile

The export function has a new parameter, `ExportSynchronous`. The `ExportSynchronous` operation is used to change the book content and parameters before export.

```
ExportSynchronous(string appName, string bookName, ExportOutputType outputFormat = ExportOutputType.Pdf, bool usePageLayout = true, ImageExportType imageFormat = ImageExportType.PNG, string exportProfile = "")
```

A JSON string, which can be generated manually or exported with the **Export Book Wizard**, is used in the export profile for the book.

## Application Engine

### Exporting report book enhancements

The function for exporting a report book has been enhanced to allow parameterization through a book export profile. For example:

```
BookExportResult ExportReportBook(string projectName, string bookName, BookExportOutputType outputFormat, bool usePageLayout, BookExportImageType imageFormat, string BookExportProfile)
```

A book export profile can be read from a report book with the Book Export Wizard in Application Studio or in Application Engine by calling the new `GetBookExportProfile` function.

A set of new book export-related functions has been implemented to create and manipulate book export profiles.

These functions are used to modify book export profiles:

- `CreateBookExportProfile(string bookExportProfile);`  
Creates a new book export profile from a JSON string.
- `CreateBookExportProfile(BookExportProfileType BookExportProfileType);`  
Creates a new book export profile when using `BookExportProfileType`.
- `GetBookExportProfile(string ApplicationUniqueName, string BookName);`  
Retrieves the book export profile from an Application Studio report book.

These functions are used to modify an existing book export profile:

- `BookExportProfileAddReport(BookExportProfile profile, string ReportUniqueName, int ReportPosition, string DocumentName);`  
Adds a report to a report book profile.
- `BookExportProfileSkipReport(BookExportProfile profile, string ReportUniqueName, int ReportPosition);`  
Skips a report while exporting the book.
- `BookExportProfileAddSelection(BookExportProfile profile, string ReportUniqueName, int ReportPosition, string ParameterName, BookExportSelectionType BookExportSelectionType, string elementUniqueNames);`  
Selects elements for a parameter through different selection types.
- `BookExportProfileClearSelections(BookExportProfile profile, string ReportUniqueName, int ReportPosition, string ParameterName);`  
Clears all selections of all types of a parameter.

- `BookExportProfileSetSelection(BookExportProfile profile, string ReportUniqueName, int ReportPosition, string ParameterName, BookExportSelectionType BookExportSelectionType, string elementUniqueNames);`

Replaces elements in an existing selection.

These functions are complemented by new book export-related enumerations for a better user experience when writing processes. This list shows the new export-related enumerations:

- `BookExportProfileType`
- `BookExportSelectionMode`
- `BookExportSelectionType`
- `BookExportDocumentType`

### **Copying values to a target cube with fewer dimensions**

The `OLapCopyDataArea` function now supports copy operations to a cube in which not all dimensions from the source cube are included. If a dimension does not exist in the target cube, the specified element from the source is used for reading values.

Together with previous improvements, this enhancement now enables you to copy data between cubes with the `DataareaCopy` function even if cubes have different dimensionality.

## OLAP

### **DataareaCopy function improvement**

The `DataareaCopy` function now supports copy operations to a cube in which not all dimensions from the source cube are included. If a dimension does not exist in the target cube, the specified element from the source is used for reading values.

Together with previous improvements, this enhancement now enables you to copy data between cubes with the `DataareaCopy` function even if cubes have different dimensionality.

## Infor d/EPM business applications

Infor d/EPM business applications are not supported in Infor Government Solutions (IGS).

## Workforce Budgeting

### User-defined dynamic attributes in details pages

You can review and adjust user-defined attributes that you create in the Job Attributes, Position Attributes, and Employee Attributes reports in these locations:

- **Job** page
- **Position** page
- **Employee details** page
- **Position Assignment Details** dialog box

These user-defined attributes are referred to as custom attributes in the integration tables.

### Load values for custom dynamic attributes

Optionally, you can use these new tables to upload values from the source systems into relational modeling:

- WFB\_JobCustomDynamicAttributes
- WFB\_PositionCustomDynamicAttributes
- WFB\_EmployeeCustomDynamicAttributes

The list of business objects in the **Load and Calculate Data** dialog box is updated to include the import for custom dynamic attributes into the OLAP database.

## Office Integration

### Converting ad-hoc reports to cell-based reports

Ad-hoc reports can be converted to formula reports with the release of the first phase of the Excel Integration conversion tool. With a single click, you can take advantage of both the speed of ad-hoc reports creation and the flexibility of cell-based reporting.

The current phase has a report size limit of 1.5 million cells. Larger reports cannot be converted at this time. In future releases, the focus will be on increasing or removing report size limits and better control of report overlaps occasions.

# Online documentation

## Translated documentation libraries

Translated documentation libraries are now available on [docs.infor.com](https://docs.infor.com). The features and user interface described in the translated documentation may differ from the latest version of the product.

The documentation libraries have been translated into these languages:

- Czech
- Danish
- German
- Spanish
- French
- French Canada
- Italian
- Japanese
- Korean
- Norwegian
- Dutch
- Polish
- Portuguese Brazil
- Swedish
- Thai
- Vietnamese
- Chinese

## Chapter 4: October 2022 Production Information

This update introduces new features and product improvements.

### Application Studio

#### **Application log for queries above size limit**

To enhance stability, the maximum size of query results will be limited in a future release. For relational and OLAP lists and for slices that exceed the size limit of 1 million cells, a warning message is written to the application log. You can use the application log to identify reports with lists and slices that exceed the limit. These reports should be adjusted so they do not exceed the limit.

### Application Engine

#### **Process Editor usability**

Referencing B# variables is now supported by the improved intelligent autocompletion of the Process Editor.

#### **New B# statement: `using`**

The B# language now includes the `using` statement. The `using` statement provides a way to ensure the correct disposal of unused data types without explicitly disconnecting them.

#### **New B# type: `ModelingOperationResult` to return additional information**

These modeling functions no longer return void but return additional information through the new B# type, `ModelingOperationResult`:

- `ModelingExecuteIntegrationStructureImport`
- `ModelingExecuteIntegrationDataImport`
- `ModelingPublishToOlap`
- `ModelingPublishCustomModelToOlap`



- `ModelingTriggerCsfIntegration`
- `ModelingExecuteHierarchyMapping`
- `ModelingExecuteFactMapping`
- `ModelingExecuteBusinessObjectDataLoadQuery`
- `ModelingExecuteFactDataDataLoadQuery`
- `ModelingExecuteIntegrationTableLoadQuery`
- `ModelingExecuteTableDataLoadQuery`
- `ModelingSetEntityActivityStatus`
- `ModelingSetGroupActivityStatus`
- `ModelingSetGlobalActivityStatus`
- `ModelingExecuteScript`

Existing processes will continue to work as before. The additional information is not returned automatically by the modeling functions. It must be requested using the `ModelingOperationResult B#` type.

The `ModelingOperationResult B#` type encapsulates the messages returned from the Modeling Service. These functions work with the `ModelingOperationResult BI#` type:

- `StringList ModelingOperationResultGetMessages(ModelingOperationResult result)`  
Gets the detailed result of a modeling function.
- `bool ModelingOperationResultIsSuccess(ModelingOperationResult result);`  
Checks whether `ModelingOperationResult` is a success.
- `bool ModelingOperationResultIsWarning(ModelingOperationResult result);`  
Checks whether `ModelingOperationResult` contains a warning.

## OLAP

### ION API function warnings

ION API functions for the Modeling Service now return warnings if they are not successful. This feature is implemented in version 2 of the functions.

These functions now return warnings:

- `ExecuteFactMapping`
- `ExecuteHierarchyMapping`
- `ValidateCustomOLAPModel`
- `PublishCustomModelToOlap`

## d/EPM Administration

### **Design and usability update**

These updates are available:

- The role selection is remembered after you change the access cubes on the Manage Permissions dashboard.
- Improved load time for the Edit Attributes and Levels dashboard.
- New icons and colors are used on both dashboards.

## Relational modeling

### **ION API function warnings**

ION API functions of the Modeling Service now return warnings if they are not successful. This feature is implemented in version 2 of the functions.

These functions now return warnings:

- `ExecuteIntegrationTableLoadQuery`
- `ExecuteLoadQuery`
- `ExecuteScript`

### **Improved behavior of failing non-SQL functions**

The behavior of failing non-SQL functions has been improved. When a function within a non-SQL script fails, the script does not continue to run.

## Infor d/EPM business applications

Infor d/EPM business applications are not supported in Infor Government Solutions (IGS).

## Financial Consolidation

### **Effective ownership calculation**

You can now run the group effective ownership calculation for multiple groups, periods, and versions. Optionally, subgroups for ownership calculation can be included.

## Chapter 5: September 2022 Production Update

This update introduces new features and product improvements.

### **Infor d/EPM version change**

The internal version numbering pattern has been updated to be more user friendly and connected to the public release version. Starting with the 2022.09 release, Infor d/EPM versions will be shown as YYYY.MM.## (12.YY.M.#).

## Application Studio

### **Tab Control web extension**

The Tab Control trusted web extension has been updated with additional features and new style.

## OLAP

### **OLAP modeling**

This release includes the first version of the OLAP modeling user interface. It works with the object definition tables and provides an overview of dimensions and cubes of an existing model. It can also be used to manage elements and their permissions.

### **Improved error handling for calculations**

Under certain circumstances OLAP was returning an empty cell when a rule calculation failed. OLAP now returns an error message which can be reviewed in log files.

# Modeling

## New functions

These functions have been added:

- `PublishCustomDimensionToOlap(string applicationName, string dimensionName)`  
Publishes a single dimension.
- `PublishCustomCubeToOlap(string applicationName, string cubeName, bool includeDimensions)`  
Publishes a single cube.

# d/EPM Administration

## Renaming an OLAP database

During the import of a custom application with an OLAP database, the database name is aligned with the custom application name. With this feature, you can now export an application with a new unique name and re-import in the same environment.

Existing OLAP databases are not renamed when you update an application.

# Infor d/EPM business applications

Infor d/EPM business applications are not supported in Infor Government Solutions (IGS).

# Budgeting & Planning

## Deleting planning data

You can now delete manually entered planning data when resetting the workflow. This feature is available when the **Reset to Planner** option on the **Reset Workflow** dialog box is selected. This option deletes all entered values, comments, cell notes, and attachments within the selected context.

## Copying segment configurations

You can copy segment configuration from the Configuration Set / Version / Entity source to the Configuration Set / Version / Entity target.

## Financial Consolidation

### Multiselection for the entity cash flow process

You can run the entity cash flow process for multiple versions, periods, and entities.

### Cash Flow Parametrization report

Selecting the account and schedule combination is simplified for assignment type schedule detail.

### Status filter for the Landing page

The **Landing** page includes a new filter for multiple selection. You can use the Status filter to filter tasks for Not Started, Open, Submitted, or Closed. This feature is useful if there is a large list of entities or groups.

### Enhanced display options for level dimensions

The **Selection** dialog box for the Level dimension presents the elements hierarchically with an option to display IDs together with the element names. The new **Selection** dialog box is available for the following reports:

- Account Reconciliation Intercompany
- Intercompany Matching detail overview
- Entity Assets
- Entity Liabilities
- Entity Income Statement
- Entity Schedules
- Group Schedules

## Workforce Budgeting

### Design update

These pages and reports were updated to the latest design standards:

- **Employee Details**
- **Employee Roster**
- Highest Step Report
- Action and Allocation sections in the **Job**, **Position**, and **Employee Details** pages

The **Job**, **Position**, and **Employee Details** pages now have one entry point for the export functionality. The exported spreadsheet or PDF file includes details on the context selection, selected business object details, their action tables, and allocation configuration.

The Action table in these details pages and the **Employee Roster** page displays information from which level the supplemental pay or benefit action is inherited from. Pay or benefit can be global, inherited from a job

or a position or added directly to the position assignment. You can select to display the ID, or the name or both for the action. You can also apply scaling and select the number of decimal points to display for their values.

On the **Employee Roster** page, the actions to recalculate and reallocate employee data and access to related Workforce Budgeting reports are moved to the toolbar. You can also apply scaling and select the number of decimal points to display for numeric values. These options are available also for the Action tables in the details pages.

Standard toolbars and contextual toolbars are available for the **Employee Roster** page and the Highest Step Report report. You can select to display the ID, or the name, or both for selected business objects. You can also hide extra columns using the toolbar. The applied filters are displayed directly in the table header and can be removed in a single step.

## Office Integration

### Enabling and disabling writeback mode

In Excel Integration, you can enable or disable writeback use globally, or for particular users, user groups, and application roles. Three options are available: **Enable Writeback with splashing**, **Enable Writeback without splashing**, and **Disable Writeback**. In the current release, configuration of writeback settings is done in the Custom Settings dashboard for the Excel Integration application by defining a new custom setting with the name WriteBackBehavior and entering the custom setting value in JSON format.

For example, to disable writeback globally, use this custom setting value:

```
{
  "D": "0"
}
```

If writeback configuration should be defined differently for certain users or application roles, use this format for the custom setting value definition:

```
{
  "D": "0",
  "Permissions": [
    {
      "ugo": [
        "UserName1",
        "UserName2",
        "ApplicationRole1",
        "ApplicationRole2"
      ],
      "v": "2"
    },
    {
      "ugo": [
        "UserName3",
        "UserName4",
        "ApplicationRole3"
      ],
      "v": "1"
    }
  ]
}
```

```
]
}
```

In the example above, users with the names UserName1, UserName2 or with the ApplicationRole1, ApplicationRole2 application roles can use writeback on base cells or on aggregated cells with splashing values. Users with the names UserName3, UserName4, or with the ApplicationRole3 application role, can use writeback but without the ability to splash values.

These are the values that can be used for the writeback definition:

- 0 – writeback disabled
- 1 – writeback enabled without splashing, writeback works on aggregated cells
- 2 – writeback enabled with splashing

See the "Excel Integration" section.

## Chapter 6: August 2022 Production Update

This update introduces new features and product improvements.

### Application Engine

#### Export report books

These Application Engine functions let you export report books:

- `BookExportResult ExportReportBook (string projectName, string bookName, ReportBookExportOutputType outputFormat, bool usePageLayout, ReportBookImageExportType imageFormat);`  
Exports a report book.
- `BinaryData BookExportResultGetBinaryData(BookExportResult bookExportResult);`  
Gets the result of the exported report book.
- `string BookExportResultGetFileName(BookExportResult bookExportResult);`  
Gets the name of the exported report book.

This example creates a PDF file and sends it as an attachment to an email:

```
BookExportResult result = ExportReportBook("AETESTruntime5", "Book1", BookExportOutputType.Pdf,
false, BookImageExportType.Png);
BinaryData bd = result.GetBinaryData(); // BookExportResultGetBinaryData(result);
string fileName = result.GetFileName(); // BookExportResultGetFileName(result);
WriteLocalFile("C:\\\" + fileName, bd);
```

### OLAP

#### Source filtering for cube mappings

You can filter the source table data while loading values into a cube. Use the new **Source Column Filter** column of the mapping definition to restrict the data to one or more elements of a dimension. To separate



multiple elements of a dimension, use the pipe symbol (|). The use of parameters and custom settings is also supported.

To load only the latest data of a source table, you can use the Process latest records filter. To use this filter, the source table must have a column with a timestamp or counter.

## d/EPM Administration

### Unique name format setting in data connections

You can define the format of unique names for OLAP elements in OLAP data connections. By default, the **Use database setting** option is used. You can overwrite the setting in the data connection to use **Long**, **Short**, or **Reduced** unique names for elements.

### Cancel log queries

You can cancel loading logs in the Log Viewer.

## Relational modeling

### Cancel load queries and scripts

You can cancel the running of load queries and scripts.

When navigating away from the **Schema** tab for a table, the query to load the table preview is canceled automatically.

## Infor d/EPM business applications

Infor d/EPM business applications are not supported in Infor Government Solutions (IGS).

## Business Modeling

### Publish model details

Before publishing a model, you can download an overview of the changed business objects. You can do a preliminary check of all business object related changes since the model was last published.

### **Additional Entity Accountant data roles**

You can start the creation of additional Entity Account data roles with read permissions for the entity/role combination. The **Read-only entity data roles for Financial Consolidation** option is available on the **Publish Model** page to users with the Business Modeling Administrator application role.

## Workforce Budgeting

### **Import changes to headcount, FTE, or working hours**

The import changes let you:

- Load headcount to positions. You cannot load headcount to position assignments.
- Load FTE to positions or position assignments. You can load FTE to all positions and position assignments types.
- Load Working Hours to hourly positions or hourly position assignments. You cannot load Working Hours to annual or monthly positions and position assignments.

Working Hours are converted into FTE or FTE is converted to Working Hours after you load Working Hours or FTE in hourly position or hourly position assignments. The convert function is used only by hourly position and hourly position assignment. The other types such as annual and monthly do not use this function as Working Hours cannot be loaded in those records.

The new HeadcountFTEChange integration table is used to load changes in Headcount and FTE. Using this table is optional.

## Chapter 7: July 2022 Production Update

This update introduces new features and product improvements.

### Infor d/EPM business applications

Infor d/EPM business applications are not supported in Infor Government Solutions (IGS).

#### Select Element improvements

For a single selection, the **Select Element** dialog box shows users the currently selected element. If multiple pages are available in the dialog box, then users are shown the page with the current selection.

### Financial Consolidation

#### Subgroup processing

All subgroups underneath the selected group are processed automatically when running consolidation processes. To use automatic processing, the check box in the **Use Subgroup Consolidation** column must be selected on the **Group Parameter** page for two or more groups.

#### Copying entity journals

You can copy posted entity journals and post them from one context to another.

#### Additional options for entity and group reports

The **Cell Information** and **Account Analysis** options have been added to additional entity and group reports. The **Account Analysis** option was named **Value Calculation** in the last release.

## Workforce Budgeting

### Design update

These items have been updated to the latest design standards:

- **Employee** page
- **Job Definition** page
- **Position Assignment Details** dialog box

On the **Employee** page, you can select to show the ID or the name, or both for entities. The applied filters are displayed in the table header and can be removed in a single step. You can also hide extra columns using the toolbar.

The **Job Definition** page and the **Position Assignment Details** dialog box show configuration fields in a new layout. The date picker has been improved.

## Self-Service

### Data configuration for business applications

By default, data cubes in DEPMAPPS are enabled for browsing. Technical and configuration cubes are hidden.

### Design update

These items have been updated to the latest design standards:

- The new **Title** widget adds a configurable title to dashboards. The **Title** widget includes a **Home** button to jump to the **Start** page.
- All widget types and the Data Configuration dashboard are available in one common navigation on the left of the **Start** page. The Data Configuration dashboard is only available to users with the `sbi_administrator` role.
- Date, name, and attribute filters are available in the table column headers.
- The number of paged records on each widget can be adjusted.

### `sbi_MultidimensionalWidgetCreator` role

The `sbi_MultidimensionalWidgetCreator` application role is no longer required to use Self-Service.

### Report definitions of favorites

You can edit report definitions of favorites using the text editor in the **Edit Favorites** dialog box. The editor offers XML validation to prevent creating invalid report definitions.

This functionality includes debugging, testing, and transferring a report definition. This functionality is available to users with the `sbi_administrator` role.

### Select Element improvements

For a single selection, the **Select Element** dialog box shows users the currently selected element. If multiple pages are available in the dialog box, then users are shown the page with the current selection.

## Chapter 8: June 2022 Production Update

This update introduces new features and product improvements.

### d/EPM Administration

#### Enhanced Applications widget

The **Applications** widget has been updated to enhance its usability. For example:

- When updating an application, taking the application offline is part of the update procedure.
- When deleting an application, taking the application offline is part of the delete procedure.
- When creating a new application, a data connection to the Staging database is automatically created if it exists.
- A new toolbar is available for application-related tasks.

See the d/EPM Administration section.

#### Adopting the latest Infor design

The latest Infor design has been adopted in d/EPM Administration. The changes include new icons, colors, and updated web extensions.

Some parts of the application have not been changed.

### Infor d/EPM business applications

Infor d/EPM business applications are not supported in Infor Government Solutions (IGS).

#### Adopting the latest Infor design

The latest Infor design has been adopted in Budgeting & Planning, Financial Consolidation, and Workforce Budgeting. The changes include new icons, colors, and updated web extensions across the applications.

Some parts of the application, such as the Ad-Hoc Designer in workbook configuration, have not been changed.

## Financial Consolidation

### Running consolidation processes for multiple selections

You can run processes in different context combinations simultaneously. A multiple selection option has been added for versions, periods, and groups.

### Copying entity data

Entity data can be copied from one context to another context.

### Entity and group statement reports

Two options for displayed values have been added to these reports:

- Entity statements
- Group statements
- Group Aggregate statements

The **Cell Information** option provides details about the source of a cell value. For example, cube name, coordinates, and whether the cell is rule-calculated, entered, or aggregated.

The **Value Calculation** option shows the appropriate Account Analysis report.

### Multiple inventory account support

You can select multiple inventory accounts when configuring the Intercompany Profit Elimination process.

## Workforce Budgeting

### Design update

These items were updated to the latest design standards:

- Workforce Budgeting configuration
- **Calculate Data** dialog box
- **Data Transfer, Job, Position,** and **Employee Attribute** configuration pages
- **Job** and **Position** overview pages

You can select to display the ID, the name, or both for selected business objects in the overview pages. The applied filters are displayed directly in the table header and can be removed in one step. These options are available in the toolbar area.

# Online documentation

## **Site Search on docs.infor.com**

Site-wide documentation search has been added to [docs.infor.com](https://docs.infor.com). This is in addition to, and separate from, the existing search within each product's documentation.

To access the site search, go to the docs.infor.com home page. To return to the docs.infor.com home page from a product's documentation, click the docs.infor.com link at the bottom of any topic.

To help you define your search terms and find the content you are looking for, the site-wide search provides search tips. See <https://docs.infor.com/searchtips/>.



## Chapter 9: May 2022 Production Update

This update introduces new features and product improvements.

### Application Studio

#### Expand and collapse on slices

Slices now support expand and collapse in hyperblocks. Use the **Expand and Collapse** option in the definition of a slice to enable it. You can use settings in hyperblocks to configure how the expand/collapse should behave, per hierarchy output cell, or for all hierarchies on an axis.

#### Export report books

Using the new ION API for report book export, you can now schedule report book export using Infor OS components such as Infor ION Workflow and schedules.

The new Infor ION API functions allow synchronous or asynchronous export of a report book. For asynchronous export jobs, additional functions are available to query the current status, retrieve the result or cancel the execution.

### Application Engine

#### Journals

The `ConsolidationGetCompanyJournals` and `ConsolidationGetGroupJournals` functions have been enhanced to let you build custom reports with journal management data.

#### SendMail

- `MailerSendMail(MailServer server, string sender, string receiverList, string subject, string body, string htmlBody);`

Sends an email (plain text and HTML format), no attachment

- `MailerSendMail(MailServer server, string sender, string receiverList, string subject, string body, VariantDictionary attachments);`  
Sends an email (plain text) with attachments.
- `MailerSendMail(MailServer server, string sender, string receiverList, string subject, string body, string htmlBody, VariantDictionary attachments);`  
Sends an email (plain text and HTML format) with attachments
- `VariantDictionary attachments` contains pairs of `<string KeyName, BinaryData KeyValue>`  
Creates a list of attachments.

### BinaryData

- `ToString(BinaryData binaryData)`  
Converts binary data into a string (UTF8 encoding).
- `ToString(BinaryData binaryData, string encoding);`  
Converts binary data into a string (set encoding method).
- `BinaryDataCreateFromString(string text);`  
Converts a string into binary data (UTF8 encoding).
- `BinaryDataCreateFromString(string text, string encoding);`  
Converts a string to binary data (set encoding method).
- `BinaryDataCompress(BinaryData binaryData, string method, bool compress);`  
Compresses binary data.

### ION

- `IONGetResponseBinaryContent(IONResponse response);`  
Retrieves binary data from an ION API request.
- `IONAddRequestParameter(RequestParameterType type, IONRequestMessage request, string name, BinaryData value, string fileName);`  
Passes binary data to an ION API request.

## Infor d/EPM business applications

Infor d/EPM business applications are not supported in Infor Government Solutions (IGS).

## Budgeting & Planning

### Manual adjustments in forecast versions

You can now delete manual adjustments from the total level. This feature deletes values on related periods and excludes actual periods. The **Delete Manual Adjustment** option is valid only for those values entered by currently logged in user.

## Financial Consolidation

### Journal management

Entity and intercompany can be identical in journal management. This addresses rare use cases such as intra-legal entity booking in journals.

### Data entry

These features are now available on the **Data Entry** page:

- You can add columns to the **Data Entry** page including the total rollover and total journal data.
- You can adjust number of decimals.

### Audit reports

Drill through from the audit reports to journals is now possible where the net movement is zero.

## Workforce Budgeting

### Adjust workforce costs for multiple records

The **Action Generator** page lets you change multiple selected positions and position assignments in a single action. For example, new salary, supplemental pay or benefit actions can be added. Existing actions can be modified by changing their values, effective start, or end dates. You can also delete values for multiple records.

Budgeters can review their changes before they are applied. The action generator expands the configuration options that were available in scenarios. Different cost adjustments for different departments or different positions can be defined for the same budget version. Access to this dashboard for mass changes is controlled by a new application role: WB Action Generator.

# Excel Integration

## Dynamic selection functions

Reports can be created dynamically using selection functions for column and row hierarchies. In the Element Selection pane, users can use selections such as:

- Children of a specific element
- All elements of a level
- Siblings of an element
- Descendants of an element on certain levels

It is no longer required to select each element manually.

The dynamic functions always run on the latest version of a hierarchy so the report dynamically reacts to hierarchy changes.

The Element Selection pane displays a list of all selections.

# Online documentation

## List of available PDFs

The behavior of the **PDF** button in content on [docs.infor.com](https://docs.infor.com) has changed. The effects of the change are different in documentation libraries than in single help systems.

In a single help system, click the **PDF** button to display a single PDF that contains all the content of the system.

In a documentation library, the behavior of the **PDF** button is also affected by your current position within the library.

If no topic is selected, click the **PDF** button to display links to all available PDFs within the library.

If a topic is selected, click the **PDF** button to display a PDF of the topic's parent document.

To return to the list of links to available PDFs, click the **Home** button and then click **PDF**.

## Chapter 10: April 2022 Production Update

This update introduces new features and product improvements.

### OLAP

#### Performance enhancements

The performance of OLAP tasks that require a relational connection has been enhanced. OLAP hierarchy mappings, fact mappings, and exporting OLAP data to relational tables using the `OLAPExportDataArea` and `OLAPExportHierarchy` Application Engine functions are now faster.

#### Duplicate mapping definitions

The new **Duplicate** option on the **Mapping Definition** page allows the reuse of existing mapping definitions.

#### Views support in OLAP models

You can use views in OLAP models, that are defined, in Staging, in these places:

- Elements table for hierarchies
- Relations table for hierarchies
- Facts table for cubes, MDAC cubes, and TABACC cubes

### Relational modeling

#### Grid view for tables and views

You can now switch between the tile view and grid view when looking at tables and views. In grid view, you can filter and sort by name, description, and other properties of tables and views. You can delete multiple tables or views at once using multi-selection.

### Views can be exported and imported in Staging

The Export Bundle Wizard lets you select which views to export. The Import Bundle Wizard offers conflict handling for single views when importing.

## Application Studio

### Session timeout

Application Studio disconnects idle users after 30 minutes. Report designers can reconnect without losing unsaved changes.

### Connection recovery

If Application Studio loses its connection to the service, it tries to reconnect automatically 20 times.

### Enhanced drillback action

When defining a drillback action, you can now add any parameter that the target system supports. Alternatively, you can pass the parameters as XML to create an action that dynamically supports drillback to any system with any number of parameters.

## Infor d/EPM business applications

Infor d/EPM business applications are not supported in Infor Government Solutions (IGS).

## Budgeting & Planning

### Workflow status

The **BOD Publishing** report now shows the status of tasks, which users can review before publishing data back to the ERP.

### Custom Details and Global Custom Details tabs

The **Custom Details** and **Global Custom Detail** tabs are now expanded by default. All the configured details, units and asset categories are visible at first glance.

### **Time and Entity Analysis report captions**

The **Time** and **Entity Analysis** reports have been renamed to include the Balance Sheet, Profit and Loss, and Cash Flow classifications.

## Third-party information

### **Windows 11**

Windows 11 is now supported for these thick clients: Application Studio and Process Editor.

## Chapter 11: March 2022 Production Update

This update introduces new features and product improvements.

### Business Modeling

Business Modeling is not supported in Infor Government Solutions (IGS).

#### Loading data from a file

In the **Load Data** dialog box, you can load local currency data to Financial Consolidation from a file. The supported file formats are .xls, .xlsx, .csv, and .txt. The .txt and .csv files must be comma delimited.

### Infor d/EPM business applications

Infor d/EPM business applications are not supported in Infor Government Solutions (IGS).

### Budgeting & Planning

#### Phasing of values option in Line Details

You can use the **Phasing of values** option on the **Line Details** tab to phase values from the Year level, on both the Line Details level and the Not Assigned level.

#### Delete Manual Adjustments option in Line Details

You can now delete entered values for the Not Assigned level and for the Line Details level directly on the **Line Details** tab. The **Delete Manual Adjustments** option deletes the entered data on the Year level, which sets to zero all values on related month periods within the year.



## Chapter 12: February 2022 Production Update

This update introduces new features and product improvements.

### Modeling

#### **Relational modeling permissions**

In a forthcoming version, security will be applied in relational modeling that will affect existing ION API calls and Application Engine processes. You must ensure that processes, ION API calls, and workflows that run load queries and SQL scripts in relational modeling are run under user accounts that have the View Relational Objects permission.

### Infor d/EPM business applications

Infor d/EPM business applications are not supported in Infor Government Solutions (IGS).

### Financial Consolidation

#### **Simplified rule for capital consolidation**

To match the functionality of Financial Consolidation version 11, a simplified rule for capital consolidation was added. It eliminates the investments of the owning entity against the owned entity's portion of shares. This simplified rule applies for a limited set of use cases and can be extended by customers, if required.

#### **Custom Group Accountant application role**

The new Custom Group Accountant role has similar permissions to the Group Accountant role. However, it can be limited to single groups, subgroups, entities or segments.

### Create journal drafts

The **Copy and Edit** option in journal management has been added to create journal copies as drafts.

### Customizing the Landing Page

You can customize the **Landing Page** by adding and reordering lanes, cards, jumps, and check points.

## Online documentation

### Toolbar enhancements in online documentation

The toolbar for online documentation has been enhanced. We have added descriptive text next to each icon to improve usability. The **Print PDF** option, which was under the **Print** icon, is now represented by a **PDF** icon. Click the icon to open a PDF of the current document. You can print or download the PDF, or view it in the browser. To print a single topic, click the **Print** icon.

### Translated documentation libraries

Translated documentation libraries are now available on [docs.infor.com](https://docs.infor.com). The English language documentation is published before it is translated to other languages. Therefore, the features and user interface described in translated documentation may differ from the latest version of the product.

The documentation libraries have been translated into these languages:

- Czech
- Danish
- German
- Spanish
- French
- French Canada
- Italian
- Japanese
- Korean
- Norwegian
- Dutch
- Polish
- Portuguese Brazil
- Swedish
- Thai
- Vietnamese
- Chinese

## Chapter 13: January 2022 Production Update

This update introduces new features and product improvements.

### Application Studio

#### **GlobalText property for custom settings**

You can now use the GlobalText property for custom settings. After you change the value of a custom setting, all users can view the updated value without having to sign out and sign in again.

### Modeling

#### **Parameters with multiple values**

You can use parameters with multiple values in mappings, scripts, and load queries. To reference a parameter that has multiple values, use @@<parameter name>. Separate multiple parameter values with the pipe symbol (|).

### Business Modeling

Business Modeling is not supported in Infor Government Solutions (IGS).

#### **Role-dependent availability of functions**

Only users of the Business Modeling Administrator application role can use these Business Modeling functions that may cause data loss:

- Reducing the calendar definition
- Deactivating a published currency

- Module configuration:
  - Deactivating the consolidation core setting for segmentation
  - Deactivating the consolidation core setting for schedules
- Business Objects editor:
  - Using replace when importing or uploading
  - Deleting a published record
  - Converting a published record to a parent
- Custom extensions:
  - Deleting a published sub plan
  - Deleting a published data storage element
  - Deleting a published parameter element
- Deleting a published custom business object
- Importing the business model, which is permitted only if no publishing was done previously
- Resetting the business model, which is permitted only if no publishing was done previously

### **Loading data with schedule details**

You can load financial data, including schedule details, into Budgeting & Planning.

### **Improved handling of group currencies**

All currencies that are defined as group currencies are also set as entity currencies. This applies only if you have activated the Financial Consolidation module.

### **Adding multiple parent relationships**

In the Business Objects editor, you can add multiple parent relationships to a business object record. Previously, this was possible only through importing or uploading.

## **Infor d/EPM business applications**

Infor d/EPM business applications are not supported in Infor Government Solutions (IGS).

## **Budgeting & Planning**

### **Improved publish action in the workflow**

You can edit and save workflow configurations without publishing. The publish action is moved from the **Close** button in the dialog box to the **Publish** button in the toolbar. The workflow is started when you click **Publish**.

### **Search in the workflow hierarchical configuration**

You can search for specific organizations and users in the workflow hierarchical configuration.

### **Take Over setting of a group task**

Workflow administrators can enable the Take Over feature in a group task regardless of whether the workflow has already been published. Disabling the Take Over feature in a published workflow is not possible.

### **Cash flow transfer**

You can transfer cash flow values to multiple entities and versions. You can select multiple periods for the actual versions.

## Financial Consolidation

### **Loading data to periods 13 to 16**

You can load financial data to periods 13 to 16. The data is aggregated and added to the YTD calculation of period 12.