

# Stump The Consultant

Customer Empowerment Webinar Series



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# Agenda

- Pre-Selected Questions & Demo
- Extended Question & Answer Session  
(time permitting)

# Pre-Selected Questions

- Our consultant imported all of the [personnel] data initially but we can't get that functionality to work
- How to set up a scheduled report binder that emails only on weekdays
- Workflow – setting up a department which contains specific accounts and allowing managers to prepare their budget directly in Prophix

# Enhanced Customer Support

- Designed for organizations who need ongoing advice and guidance from an experienced Prophix Professional Services resource who is familiar with your business and unique needs.

## Pricing Model:

Clients will be granted up to 8 hours of time per month with a member of the Enhanced Support team. The duration of the engagement will be three months from the contract date.

\$4,500/unit

(any hours required by the client above the 8 hours per month will be at the standard postpaid rates)

# Importing to DPM - Personnel

*Our consultant imported all of the [personnel] data initially but we can't ever seem to get that functionality to work.*

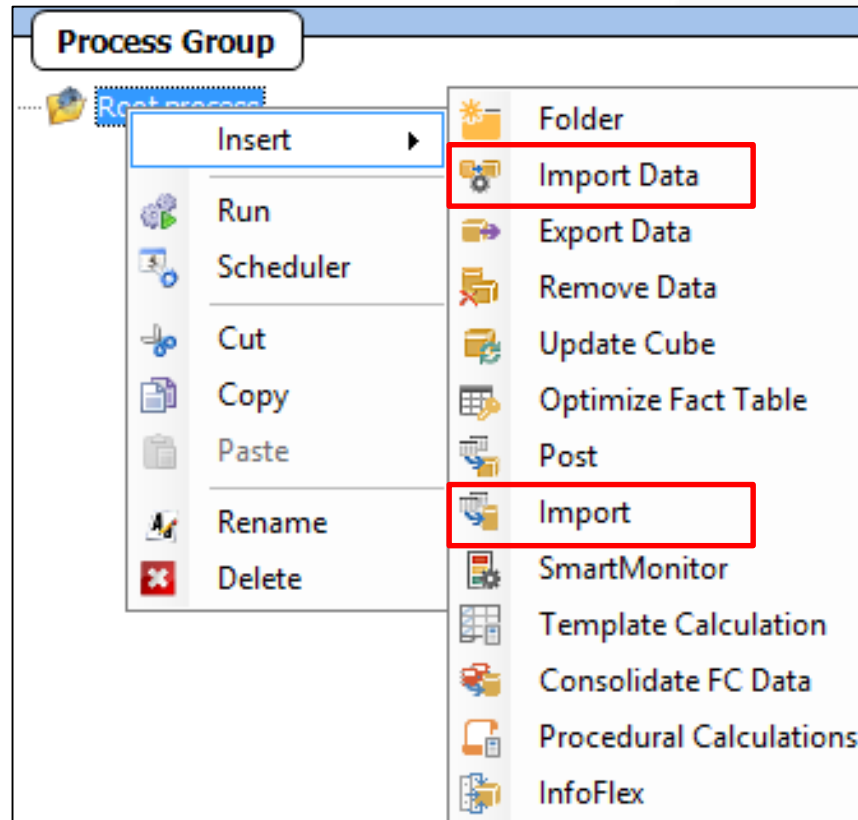
# Required:

- Advanced user (or higher) license to set up process
- Flat file (excel) export from payroll system
- Completed DPM model with all required attributes added

# Data Imports vs DPM Imports

- **Import data:** this is used to import data/dimensions into regular cubes (i.e. financial cube, sales cube)
- **Import:** this is used to import into the DPM application (such as employee or asset lists) with appropriate attributes filled out
  - It is also used for importing input calculations

# Data Imports vs DPM Imports



# Data Imports vs DPM Imports

Data Import

Import Data

Define the import type and the target connection

Enter the name and description of the Import process and select the connection and cube for this import.

Import Data  Import Dimension

Description:

Connection:

Cube:

Next >> Cancel

# Data Imports vs DPM Imports

DPM Import

Detailed Planning Import

Define the target model and scenario

Enter the name and description of the DP Import process and select the model and scenario for this import.

Description:

Model: DPM - Personnel Planning

Scenario: Default

Import Type: Detail Planning Import  
Detailed Planning Input Calculation Data

Next >> Cancel Help



Demo

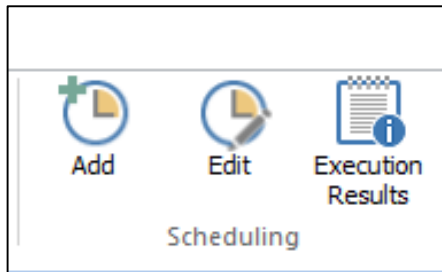
 **Prophix<sup>®</sup>**



# Scheduled Report Binders

*I recently created a Report Binder to email out a Daily Sales Report. Currently I have this emailing daily, but I would like to know how to set it up to email out only weekdays. Is there a way to do this?*

# Scheduled Report Binders



**New Scheduled Process** [X]

Select additional schedule options

Start Time: 4:55:03 PM [dropdown]

Start Date: Tuesday, May 30, 2017 [calendar]

End Date: Tuesday, May 30, 2017 [calendar]  Include End Date

Run Process:

Every 1 [dropdown] Week(s)

On Day(s)

<input type="checkbox"/> Sunday	<input checked="" type="checkbox"/> Thursday
<input checked="" type="checkbox"/> Monday	<input checked="" type="checkbox"/> Friday
<input checked="" type="checkbox"/> Tuesday	<input type="checkbox"/> Saturday
<input checked="" type="checkbox"/> Wednesday	

[Back] [Next] [Cancel]



Demo

 **Prophix<sup>®</sup>**

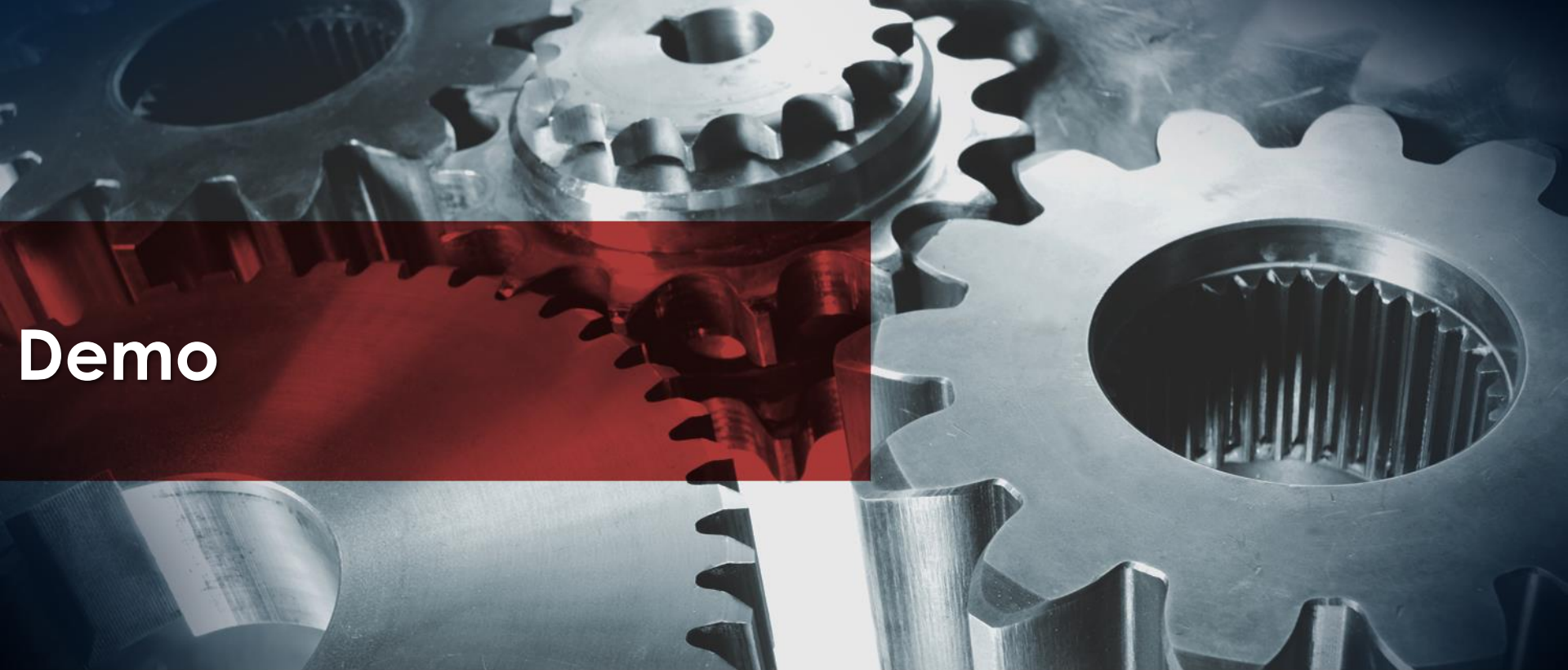


# Budgeting in Prophix

*We have been using Prophix for a few years now but never to have managers input their budgets directly in Prophix. Can you go over this specific workflow - setting up a department which contains specific accounts , and allowing managers to prepare their budgets directly in Prophix*

# Budgeting in Prophix

1. Security Manager tips for budgeting
2. Budgeting templates setup
3. Workflow manager – Online data entry



Demo

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Questions?



Thank You!