

## The Future with Infor ERP XA



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## ERP XA Content

- ERP Market Trends
- Disclaimer
- ERP XA Development Principles
- Project Timelines
- ERP XA: Phoenix Release (2009)
- ERP XA: Tucson Release
- ERP XA: Flagstaff Release
- ERP XA: Mesa Release
- Extend/Evolve Solutions
- Questions about ERP XA



# System i Market

# Hardware Market Trends

- Strong consolidation trend
  - Reduce cost, consolidate server and applications
  - 80's – Integration
  - 90's – dis-integration
  - Now – re-integration
- Back to Big Iron = System i
  - WHY? Low Total Cost of Ownership (often <1% of sales)
    - Low transaction cost
    - High security
    - Minimal administration
- Power Systems – Long Life
  - Market Leading Position
  - Ongoing Development (to 2015)

## ERP Software Market Trends

- SOA Architecture
- XML Messaging
- Platform Independent (Java)
- ERP Extension Toolsets
  
- WHY? Lower Total Cost of Ownership
  - Easy Modification
  - Easy Consolidation or Distribution
  - Easy Management

## ERP XA Architecture

### ■ ERP XA Architecture

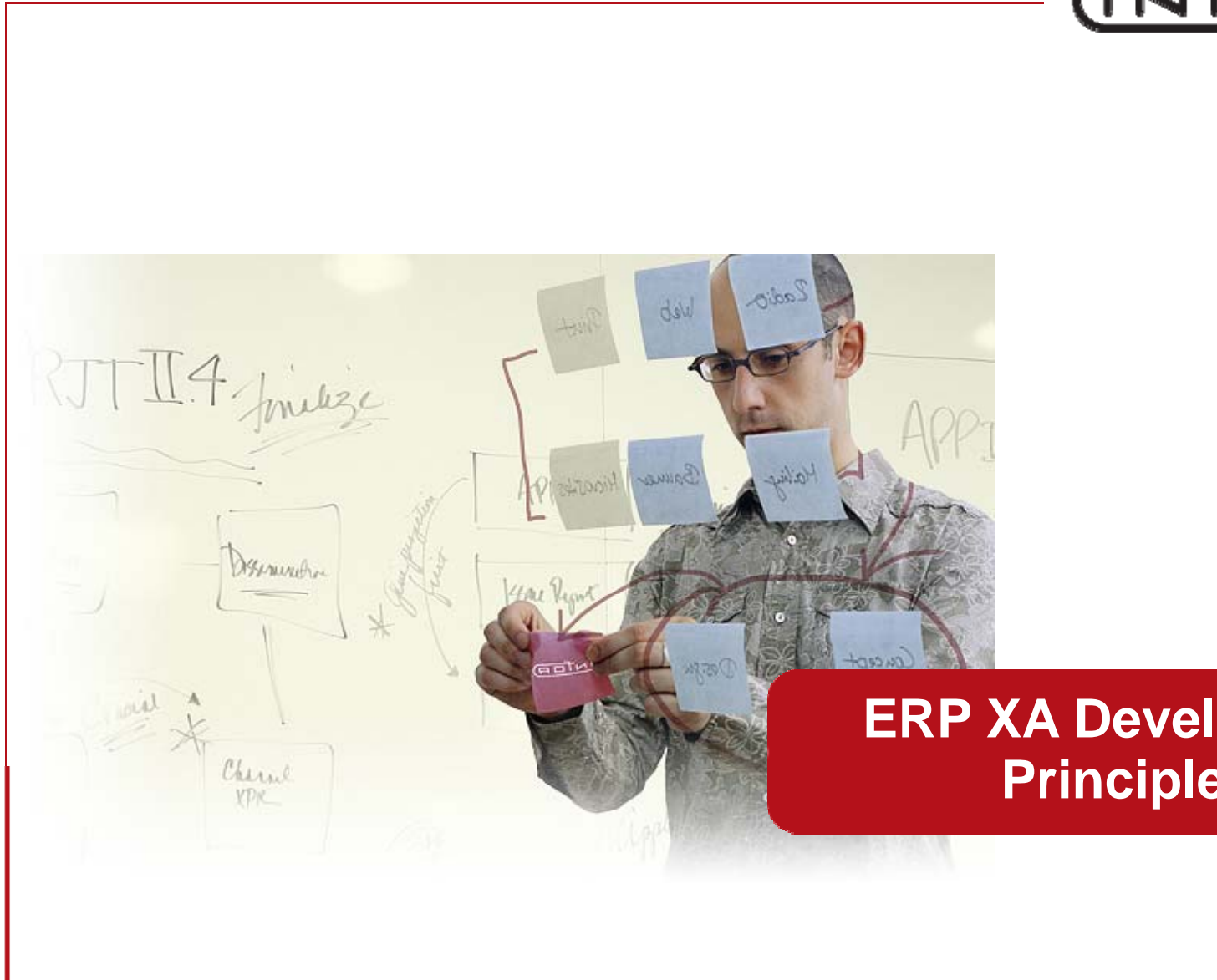
- SOA Messaging Architecture
- XML Messaging
- Object Oriented Design
- Java (Platform Independent)
- Extension Toolsets (Enterprise Integrator)
- Analyst view – “cleanest implementation of SOA/XML we have ever seen”
- Mainframe class database (DB2)

### ■ Infor ERP Architecture

- SOA Messaging Architecture
- XML Messaging (Standard business documents)
- Java (Platform Independent)

## ERP Disclaimer

This document reflects the direction Infor may take with regard to the specific ERP product(s) described in this document, all of which is subject to change by Infor in its sole discretion, with or without notice to you of that ERP direction change. This document is not an ERP evolution commitment to you in any way and you should not rely on this document or any of its content in making any decision. Infor is not committing to develop ERP improvements or deliver anything described herein.



# ERP XA Development Principles

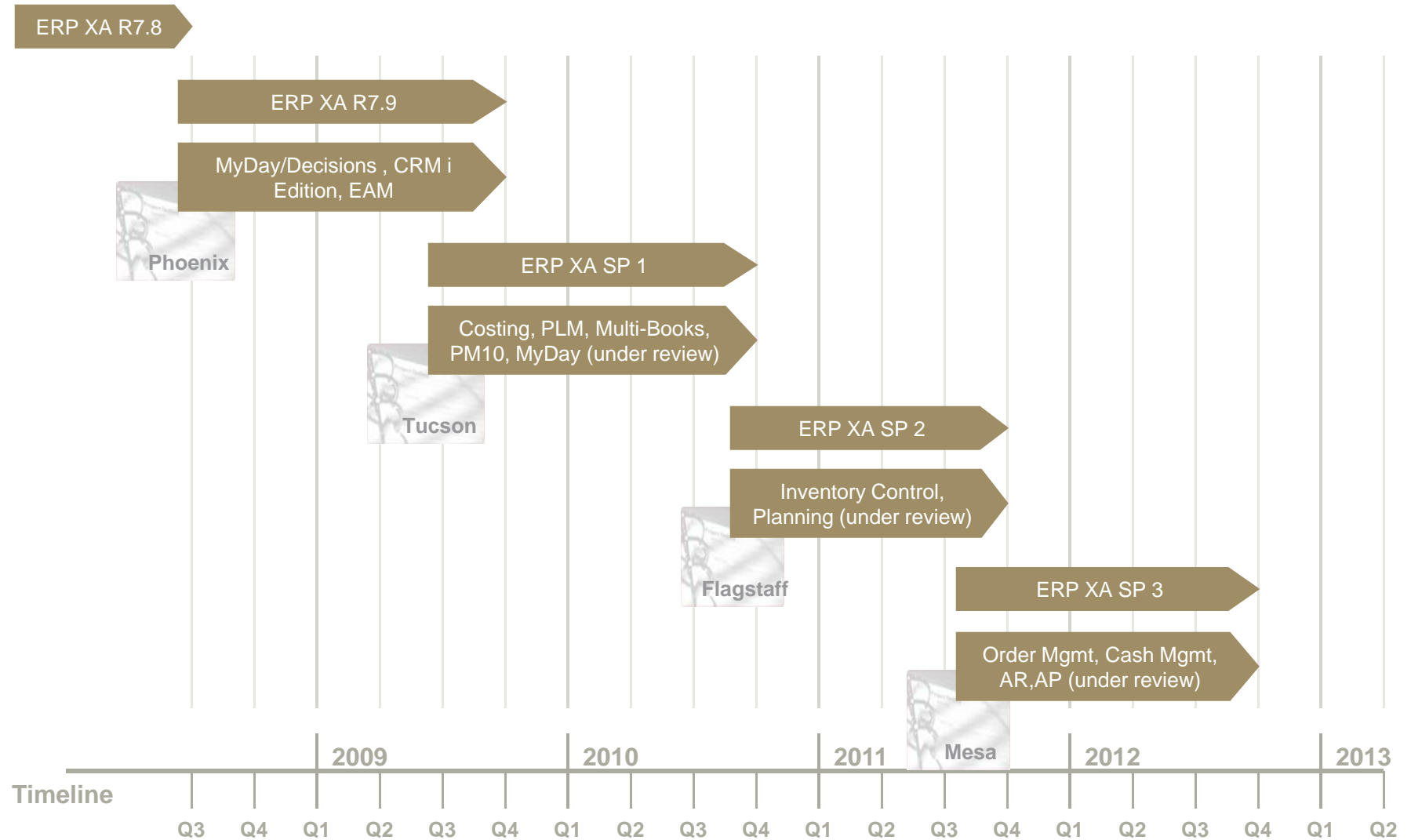
# ERP XA Development Principles

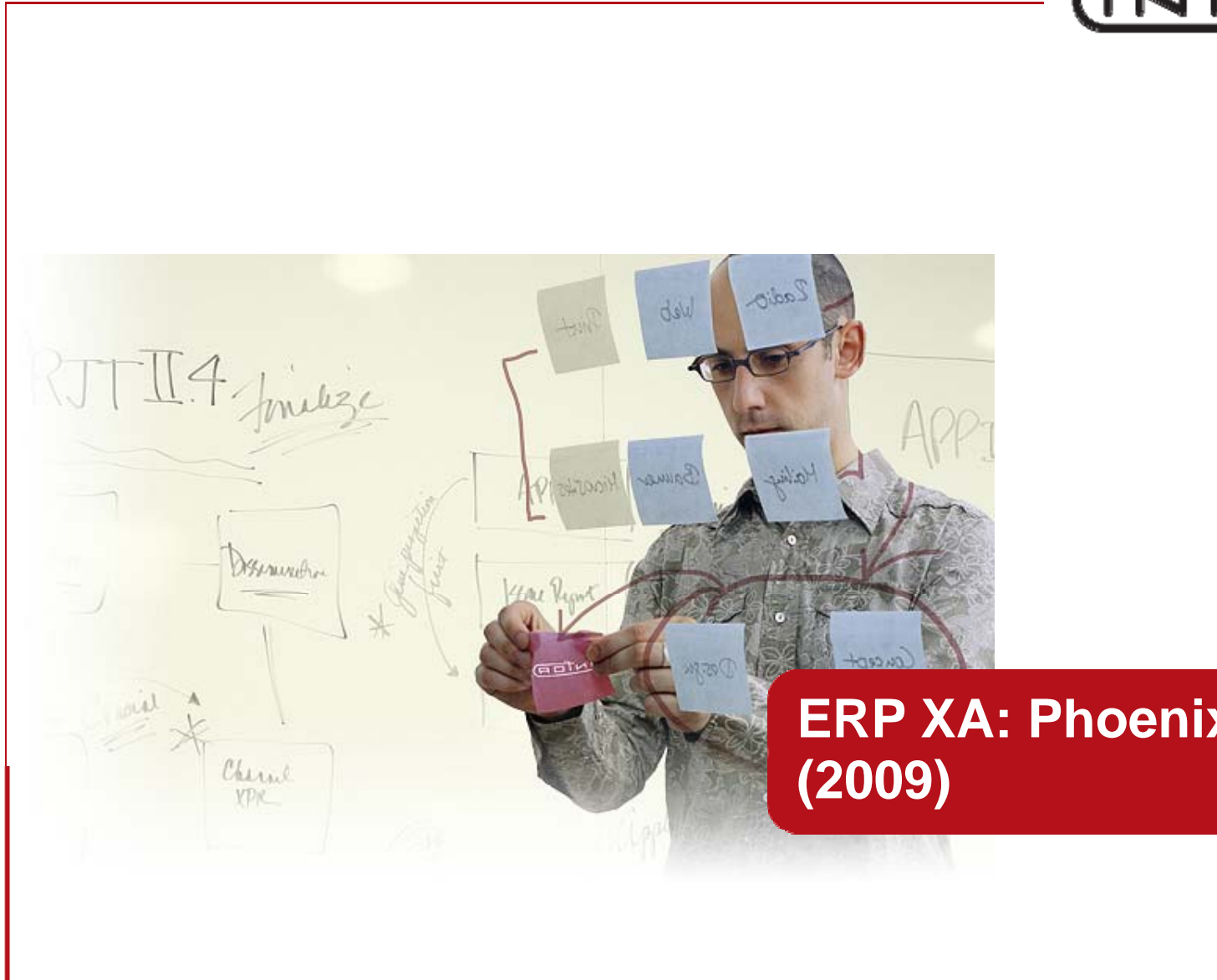
- Improve Productivity of Development of ERP XA
  - Rapid transition away from green screen = faster enhancement, better support, reduced cost
  - Eliminate 2x development/ support requirements (browser & green screen)
- Reduce IT Operating Costs with ERP XA
  - Reduce/ eliminate multiple environments
  - Reduce / eliminate RPG coding needs
  - IFM flow and terminology improvements
  - Process flow menu grouping
  - Eliminate duplications and complications
  - Consolidate functions into logical modules
- Increase Development Revenue Base with ERP
  - Improve ERP Software Selection Performance
  - Apply Magic Quadrant Criteria



# ERP XA Project Timelines

# ERP XA Project Timelines





**ERP XA: Phoenix Release (2009)**

# ERP XA: Phoenix Release - Summary

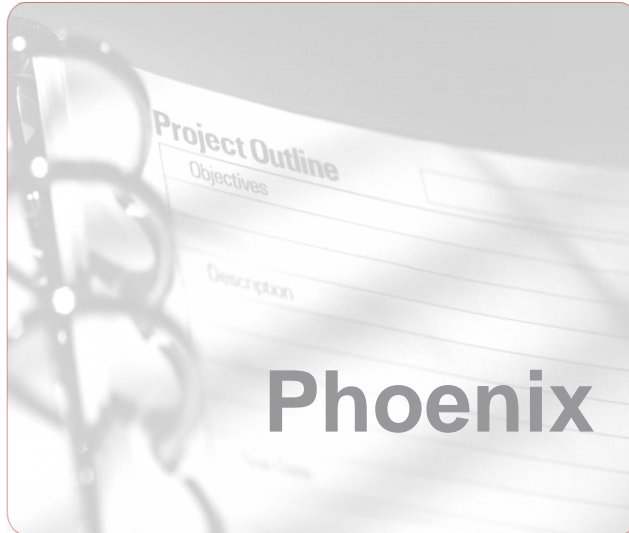
Summary

CRM i Edition

Infor MyDay

Phoenix Enrich

EAM



- Target LA: Q3-2009
- Key Business Objectives with ERP
  - *CRMi Edition*
  - *Enable SOA Strategy*
    - *MyDay/ Decisions*
  - *ERP Transition Away From Green Screen*
  - *IDF Level 2 Performance Enhancement*
  - *EPDM 100% Complete*
  - *Extend Solutions*
    - *EAM*

# ERP XA: Phoenix Release – CRM i Edition

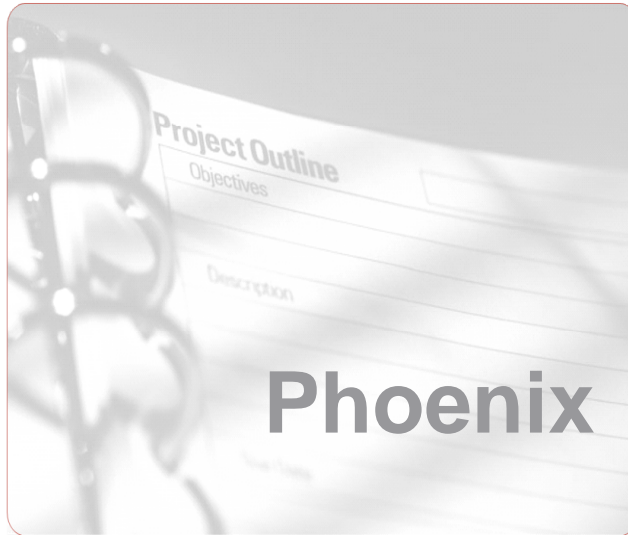
Summary

CRM i Edition

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Phoenix Enrich

EAM



- Opportunity Management
  - Define sales processes
  - Record a lead or opportunity
  - Track opportunity through sales process
  - Generate Sales forecast
- Target LA – Q1-09
- Key Features in ERP
  - Customer Base Information
    - Central Store for customer and prospect information
    - Includes tasks, attachments, email and links to the ERP inquiries
  - ERP Campaign Management
    - Focused customer/prospect communication
    - Define and execute a marketing campaign
    - Measure the success of a campaign
    - Manage events

# ERP XA: Phoenix Release – MyDay

Summary

CRM i Edition

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EAM



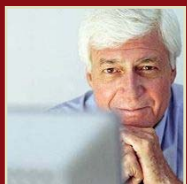
VP of Finance

1. Get me the information I need to manage the organization when I want it.
2. Make it easy to get information and easy to understand it.
3. Stop the silos of information that exist within the organization.



Purchasing  
Manager

1. We need real-time access to information.
2. We need to get answers to key business questions to support our decision making.
3. The information requested changes constantly. Answering one question leads to more questions.



Sys Admin  
IT

1. We need to support current and future user needs without disrupting the delivery of information.
2. As the business grows, we need to ensure there will still be integration with any new solutions we buy.
3. We don't want to create gatekeepers of information.

# ERP XA: Phoenix Release - MyDay

Summary

CRM i Edition

Infor MyDay

Phoenix Enrich

EAM



**Infor MyDay**  
Answers 1<sup>st</sup> set of business questions.

A screenshot of the Infor MyDay dashboard showing various charts and data points.

**Infor Decisions**  
Answers 2<sup>nd</sup>, 3<sup>rd</sup>, 4<sup>th</sup> set of business questions.

A screenshot of the Infor Decisions dashboard showing multiple analytical charts and data tables.

ERP

Inventory Control

Infor Open SOA

Employee Initiated Expenses

Reports

Order Management

# ERP XA: Phoenix Release - MyDay

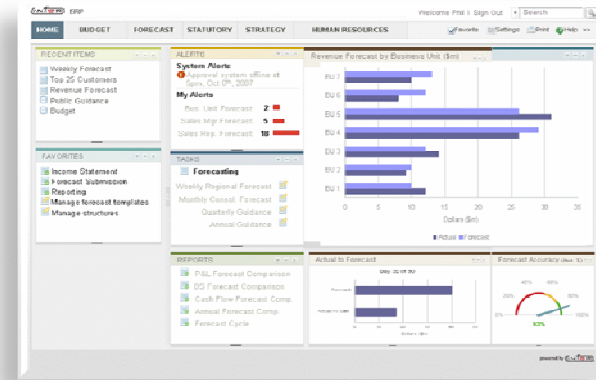
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EAM



ERP



Planning



# ERP XA: Phoenix Release – Enrich

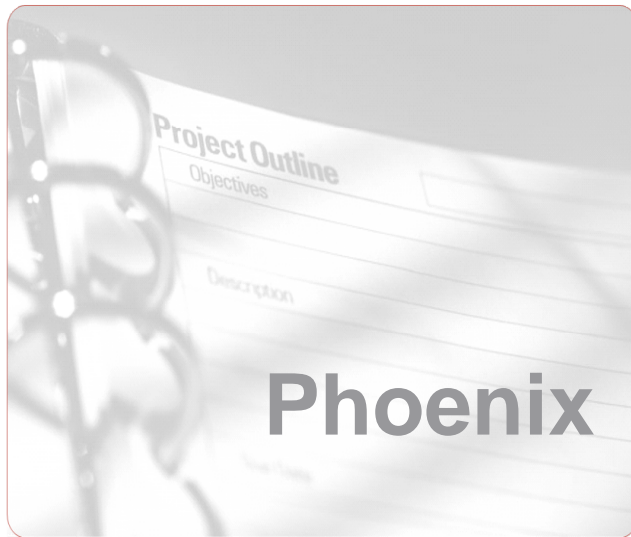
Summary

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EAM



- Target LA: Q3-2009
- ERP Release Objective
  - *Transition Away From Green Screen*
- *ERP Functional Components*
  - *100% IDF Level 1 Enablement*
  - *Green Screen Transition Toolset*

# ERP XA: Phoenix Release – Enrich

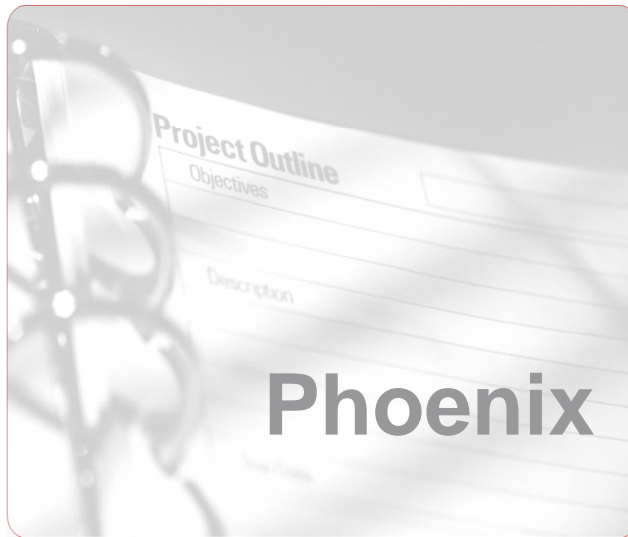
Summary

CRM i Edition

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EAM



- *IDF Level 1*
- *What You Get with ERP XA*
  - *Single Sign On*
  - *Single starting point from IDF environment*
  - *Unified Cosmetics on Menu and Screen Style*
  - *Business Process Organization On Condensed Menus*
  - *Single Security Maintenance*
  - *Single Entry Enable/Disable of Green Screen Menus*
  - *Clipboard Functionality*

# ERP XA: Phoenix Release – Enrich

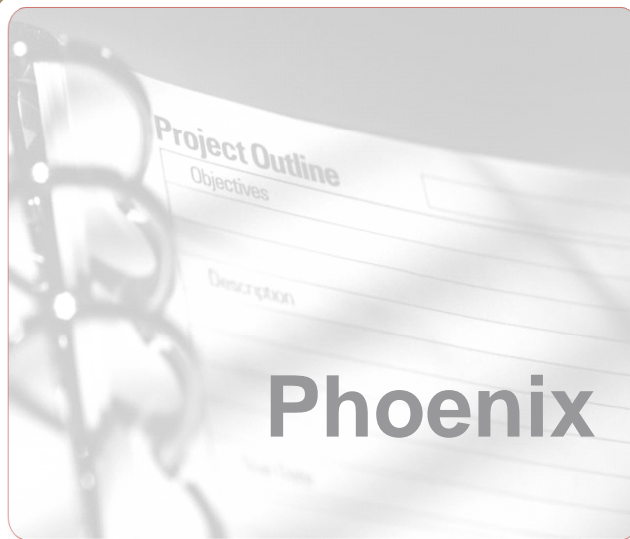
Summary

CRM i Edition

Infor MyDay

Phoenix Enrich

EAM



## ■ *All IDF Controlled*

- *First ERP XA release where green screen is never required*
- *Last ERP XA release where green screen transactions can be executed in parallel with IDF transactions*
- *Admin tools provided to easily turn off green screen menu options that are IDF Level 2 enabled*
- *Tool provided to identify green screen users that need to transition to IDF*
- *Organize green screen menus to support business process view*
- *Identify obsolete green screen menu items*

# ERP XA: Phoenix Release – Enrich

Summary

CRM i Edition

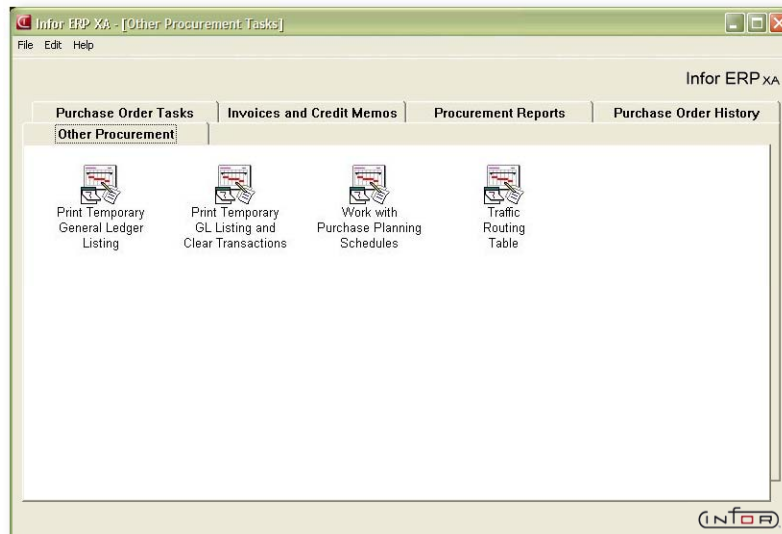
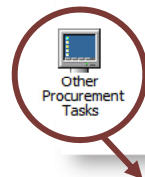
Infor MyDay

Phoenix Enrich

EAM



- Unify IDF Level 1 and Level 2 Navigation
  - Use a single sign-on
  - Level 1 functions are displayed on new menus
  - Corresponding menus available for green screen with identical security
  - IDF settings enable/disable access to Level 1 icons and menus
  - Level 1 menu functions separate from Level 2 menu functions



# ERP XA: Phoenix Release – Enrich

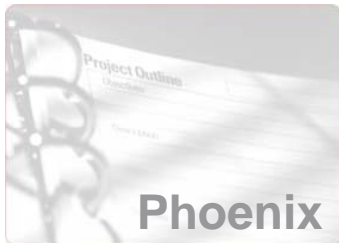
Summary

CRM i Edition

Infor MyDay

Phoenix Enrich

EAM



(9F) Change Buyer - MPR1 MPA RAW MATERIAL 1

File Display Maintain Customize Navigation Help

Default

MPR1 MPA RAW MATERIAL 1

**General** Buyer Performance

Name: MPA RAW MATERIAL 1

User ID:

Department: 3456

Telephone: 4049876543

Fax:

E-mail address:

Average orders: 999

IFM approver:

Last maintained date: 05/21/1996

Update Cancel Help

Level 2

Infor ERP XA eWorkPlace - [Buyer Master]

File Edit Functions View Help

File Maintenance

Buyer number: MPR1

Buyer userid:

Buyer name: MPA RAW MATERIAL 1

Department code: 3456

Telephone number: 4049876543

Average orders: 999

IFM approver:

Date last maintained: 05/21/96

Continue Status Return Help

Java Applet Window

Level 1

# ERP XA: Phoenix Release – Enrich

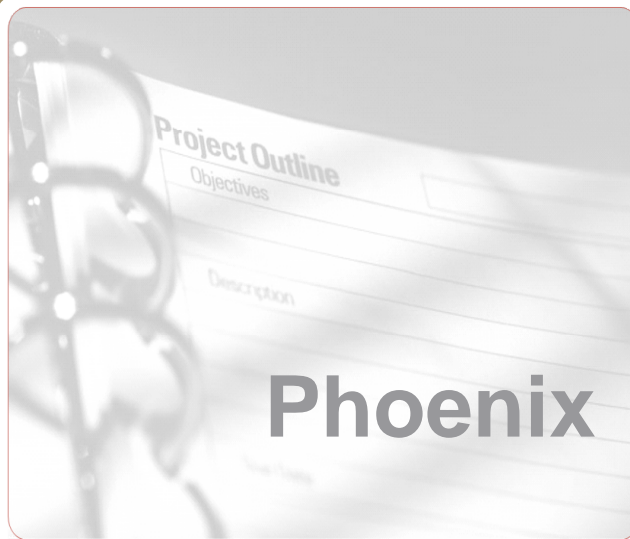
Summary

CRM i Edition

Infor MyDay

Phoenix Enrich

EAM



- *Browser Migration - Support Tools*
  - *Usage Analyzer*
    - *Report on usage of green screen vs. browser applications by user*
    - *Assess readiness to go to browser applications*
    - *Allows targeted training to people who need to move from green screen*
- *One Click disable of Level 2 menus (green and browser)*
  - *Security is remembered, in case menus are re-enabled*
- *Level 1 Menus and Access Control*
  - *New menus contain only Level 1 selections*
  - *Level 2 selections eliminated from menus now organized by business function*

# ERP XA: Phoenix Release – EAM

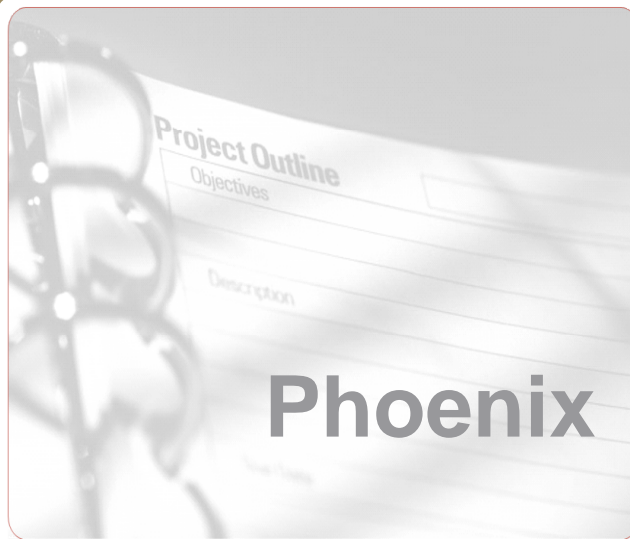
Summary

CRM i Edition

Infor MyDay

Phoenix Enrich

EAM



## ■ *EAM Integration*

### ■ Visibility

- MRO visible in ERP XA
- MRO valuation in the new ERP XA

### ■ Control

- Requisition and purchasing to single system

### ■ Financial

- Automatic material transaction posting
- Expensed or inventory valuation
- Costing options in ERP XA



**ERP XA: Tucson Release**

# ERP XA: Tucson Release - Summary

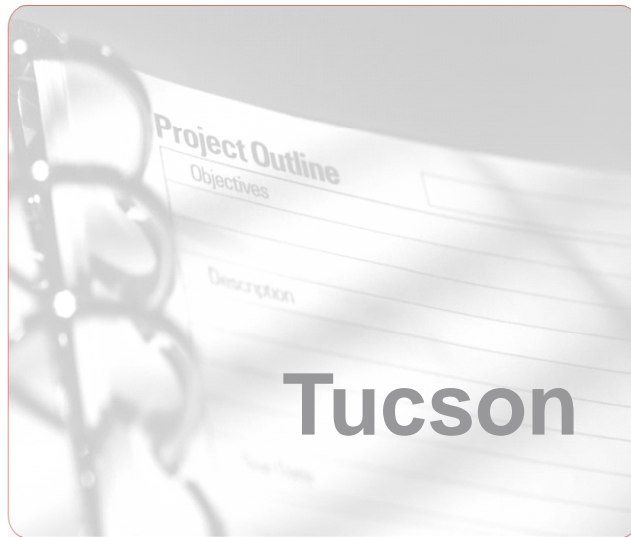
Summary

Service Pack 1

MyDay

Extend

Evolve



- **Evolve Solutions**
  - *Costing (under review)*
  - *Multi-Books (under review)*
- **Strategic Scope To Be Completed June 2009**
- **Target LA: Q3-2010**
- **Key ERP Business Objectives**
  - *Break Link to Green Screen*
    - *Green / eWP Not Available*
  - *IDF Finalization Phase I Objects*
  - *ERP MyDay/ Decisions*
    - *Deliver phase II personas*
  - **Extend Solutions**
    - *Financial Reporting and Analysis (PM10) (under review)*
    - *Product Lifecycle Management (PLM 8) (under review)*



**ERP XA: Flagstaff Release**

# ERP XA: Flagstaff Release - Summary

Summary

Service Pack 2

MyDay

Extend

Evolve



- Target LA: Q3-2011
- Key ERP Business Objectives
  - *IDF Finalization Phase II Objects*
  - *MyDay/ Decisions*
    - *Deliver phase III personas*
  - *Extend Solutions*
    - *SCM Planning (under review)*
  - *Evolve Solutions*
    - *Inventory Control (under review)*
- **Strategic Scope To Be Set June 2010**



**ERP XA: Mesa Release**

# ERP XA: Mesa Release – Summary

Summary

Service Pack 3

Extend

Evolve



- Target LA: Q3-2012
- Key ERP Business Objectives
  - *IDF Finalization Phase III Objects*
    - *Level 2 priority objects completed*
  - *Extend Solutions*
    - *TBD*
  - *Evolve Solutions*
    - *Order Management (under review)*
    - *Cash Management (under review)*
    - *AP/AR (under review)*
- *Strategic Scope To Be Set June 2011*



**Extend/Evolve Solutions of ERP  
XA**

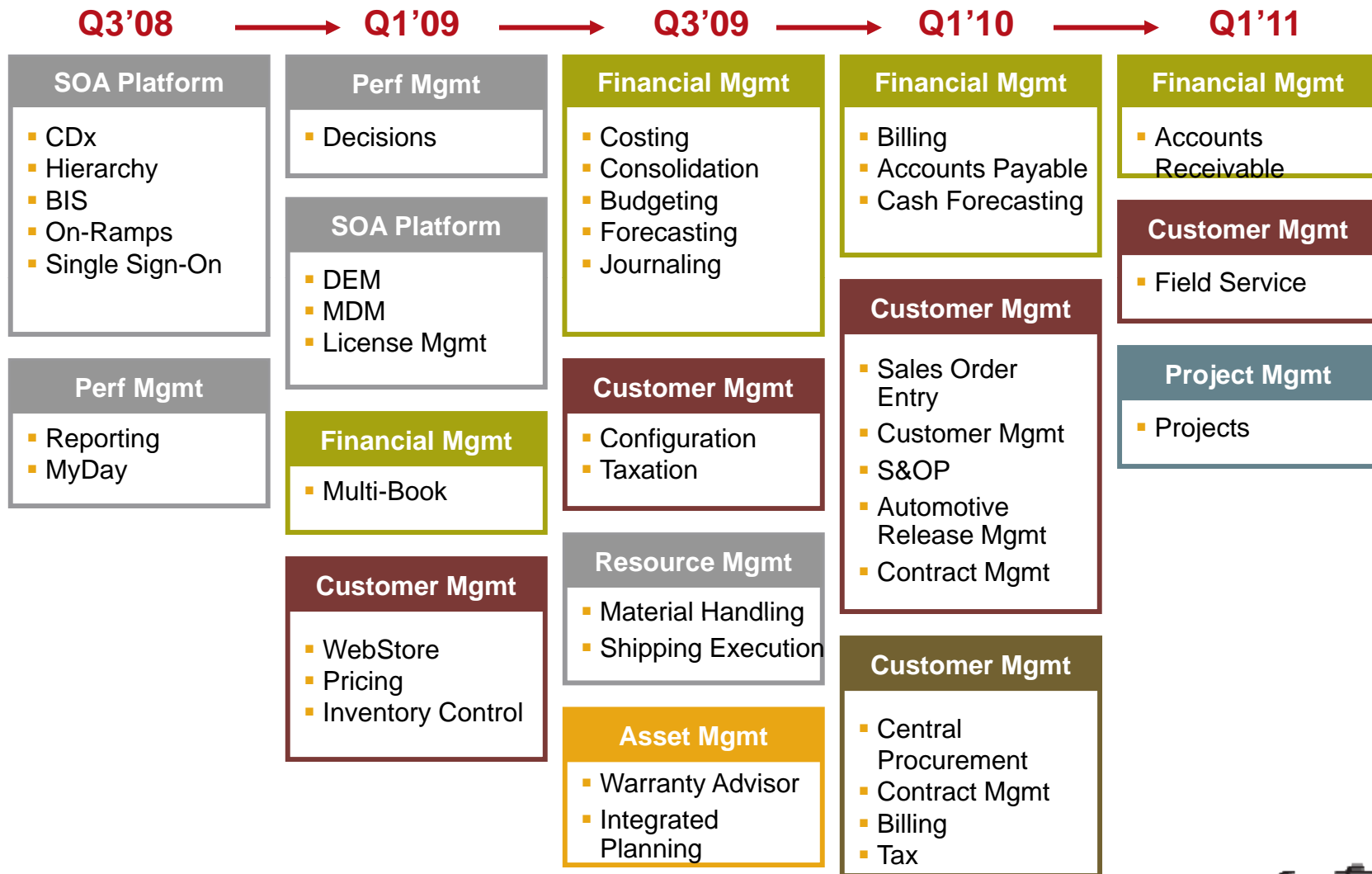
## Extend Components of ERP XA

- Performance Management and Analysis
  - PM 10
- ERP Supply Chain Planning
  - S&OP, Forecasting, Supply Chain Design
- ERP Supply Chain Execution
  - Warehouse Management, Transportation Management
- ERP Asset management – Maintenance
  - EAM
- Product Lifecycle Management
  - PLM 8

## Evolve Components of ERP XA

- Multi-Site Management and Execution
  - Master Data
  - Inventory
  - Sales Orders
- ERP Advanced Financial Management
  - Multi-Books
  - Advanced Costing
  - Budgeting, Consolidation, etc.

# ERP XA: Timeline – Evolve Components





Questions about ERP XA?

## Contact Information

- Infor 365 – ERP XA Community
  - Post to Discussions
  - Product Management Announcements