

Infor Product Strategy

Enriching, extending, and evolving the Infor solution portfolio to meet customers' requirements

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Overview

Infor™ is passionate about enterprise software and we are committed to delivering, through innovation, the best business-specific solutions to meet our customers' diverse business challenges and ever-changing needs. This commitment is at the core of our product strategy, our comprehensive approach to delivering business value to our customers based on three key objectives:

- **Enrich.** We will enrich our customers' existing solutions and clearly communicate the enhancements they can expect for their specific products. Enhancements, which are both functional and technical in nature, are based on our understanding of the requirements that are specific to a given industry or business area, our ability to increase solution interoperability through Infor Open Service-Oriented Architecture (SOA), and—most importantly—customer feedback on enhancement priorities.
- **Extend.** We will extend our existing portfolio of solutions in response to customer demand by acquiring or building best-in-class complementary solutions that deliver extended business value to our customers. As with enhancements, we give careful consideration to customer feedback when deciding how best to extend our portfolio.
- **Evolve.** We will evolve our solutions by building next-generation components to deliver the breakthrough capabilities that will help our customers keep pace with business change. Our focus will be on long-term business and technology innovation that allows customers to leverage their investment without disrupting or abandoning the solutions they already have in place.

The bottom line: An ongoing investment in the products you already own, complementary solutions that provide you with new business value, and a commitment to your future success as an enterprising company.

A more detailed explanation of our commitment to enrich, extend, and evolve your solutions is presented in the next section, followed by a discussion of Infor Open SOA and the role it plays in our product strategy.

Enrich, extend, and evolve: The core of Infor's product strategy

In every industry—from manufacturing to services to the public sector—and in every geography, there are multiple forces driving companies to reduce costs, increase business velocity, and better respond to customer demand. Infor experts leverage product and industry knowledge gained from years of on-the-job experience and collaborate with customers to understand how their business is changing and find new ways we can help them achieve improved business results. These requirements are what drive our product strategy and help us determine how we enrich, extend, and evolve our solution portfolio.

Enrich

Infor is committed to increasing the value of the investment our customers have made in our solutions. As part of our pledge to protect and advance your interests, we will maintain, support, and advance all product lines by aligning our resources to demand. Products with strong market demand and a broad customer base will be a major focus and receive company-wide attention. Products for which there is a smaller customer base or less robust market demand will be managed by self-contained business units comprised of product experts with multiple responsibilities who serve the overall needs of that product and its customers. Specific examples of what we are doing to enrich your products include:

- “Feature Packs” that deliver usability improvements and keep your solutions current with regulatory requirements and changing business conditions—without the need to re-implement software or disrupt your business.
- SOA enablement to improve interoperability and enhance usability of our solutions.
- “Infor365 Online Support” with technical and non-technical product resources, incident tracking, and a host of other support tools including rich new customer-to-customer networking capabilities.
- “Voice to Infor” programs that facilitate a global enhancement voting process via user groups and help us openly and fairly manage product lifecycles with customers.
- “Center of Excellence” programs that focus expertise on and enhance development and modernization of Infor solutions based on business processes, platforms, or technology.
- “Fast Start” programs for many Infor solutions that streamline and expedite—at a much lower cost to you—the way in which you implement our products and services.
- Significant expansion of our domain experts within Infor Professional Services.

Extend

Infor is committed to serving our customers with a full portfolio of solutions to meet their most challenging business requirements. To honor this commitment, we are continuously looking at ways we can extend our portfolio with new innovative and complementary solutions. Since 2002, when Infor was founded, we have acquired and built a strong portfolio of business-specific solutions with industry experience built in. These solutions are grouped in the following solution categories:

- **Infor CRM (Customer Relationship Management)** enables you to make the most of every customer interaction by integrating marketing, sales, and service and creating a multi-channel, closed-loop dialogue with your customers that nurtures the customer experience.
- **Infor EAM (Enterprise Asset Management)** helps organizations better manage, maintain, and track their assets, as well as drive better decision-making in maintenance, inventory/warranty, uptime, risk management, and strategic planning.
- **Infor ERP (Enterprise Resource Planning)** gives you the flexibility and control necessary to automate, plan, collaborate, and execute according to your unique business requirements with a breadth of functionality that never locks you in to one mode of operating.
- **Infor FMS (Financial Management System)** takes today's CFO beyond the procedures, controls, and data necessary to carry out core financial management functions and extends financial systems into new areas—automating more processes, boosting productivity, and providing opportunities for greater strategic leadership.
- **Infor HCM (Human Capital Management)** helps you automate and optimize the entire “recruit-to-retire” process, as well as improve competitiveness by ensuring that your staff is always aligned with demand.
- **Infor PLM (Product Lifecycle Management)** helps you maximize profit, ensure product compliance, improve quality, and reduce time to market by optimizing every stage of the product lifecycle from portfolio management to product development to obsolescence, so you can innovate faster.
- **Infor PM (Performance Management)** enables you to improve overall business performance by developing effective strategies, aligning resources and actions to plans and strategies, and proactively monitoring business processes and results.
- **Infor SCM (Supply Chain Management)** helps you manage the most complex supply chains with a full suite of planning, warehouse management, and transportation and logistics solutions that deliver the visibility and event management you need to operate a chaos-tolerant supply chain and support profitability, competitiveness, and growth from concept to customer.
- **Infor SRM (Supplier Relationship Management)** is an electronic data interchange (EDI) and web-enabled supplier collaboration solution that facilitates lean supplier replenishment by creating a real-time interactive environment between you and your suppliers for rapid demand fulfillment.

We are continuing to extend our portfolio based on the domain expertise of our product specialists, market conditions, and most importantly, customer input. This ongoing effort means our customers can continue to rely on Infor to supply them with extended business value regardless of industry or geography. For example, a manufacturing company facing dramatic and unexpected shifts in customer demand may add Infor's demand planning solution to its existing Infor ERP implementation to increase responsiveness. In another example, a financial services company, which is using the Infor CRM solution and is suffering poor customer service because of inconsistent employee performance, might complement their CRM implementation with Infor HCM Talent Management to manage an employee training and certification program.

This extended business value is being delivered through interoperable solutions by leveraging our Infor Open SOA. This allows customers to augment what they have today with minimal disruption to their business and provides them with extended capabilities through seamless business process execution regardless of technology platform. Of course, the end user won't care or know that he/she is accessing multiple solutions. Our role-based home pages provide individuals with a consolidated view of their daily activities relative to their specific role in the business, with the personalization, consolidated reporting, and analytics they need to excel in their jobs.

Role-based home pages

Infor's role-based home pages are planned for dozens of organizational roles ranging from executive level to managerial level and are universally applicable to multiple Infor product lines via Infor Open SOA. Each home page represents "a day in the life" of an individual performing a given role and provides a portal-like view of workload, alerts and exceptions, analytics and KPIs, favorites, and reports in an easy-to-read format with colorful charts, graphs, and icons. By viewing their home page, users can get quick visibility into everything that is important to their role on a daily basis. They can also personalize their home page to incorporate preferred content, set thresholds to further highlight critical conditions, move panels, and add additional links.

For example, a buyer can see what requisitions and price variances need to be evaluated and use workload hyperlinks to access screens where the work can be executed immediately. He or she also can receive alerts about items that need special attention and priority, such as requisitions that are coming due and receipts that are late, as well as monitor KPIs on requisition-to-receipt lead time. A sales administrator can view alerts for expired quotations, workload focused on unapproved orders, and KPIs for discounts outside of tolerance, as well as set up quick links to "create order" and "create quotation." Each user's home page unites the relevant information on one screen.

Infor developed the home page design template according to established user-centered design techniques and the results of extensive research into the specific requirements for each role. Home pages support Infor's mission to improve the user experience by providing every user with easy access to all the information and tools they need to do their jobs, thus increasing the overall productivity and effectiveness of the organization.

Evolve

Infor understands that our customers want evolutionary, not revolutionary change. Lengthy implementations that consume resources or forced marches to a proprietary platform that entail abandoning your existing solutions just won't work. That's why we are continually evolving our product portfolio to develop innovative new components that are designed for easier deployment and greater reuse across all applicable business processes, so you can stay competitive over the long term.

Infor product evolution is both a high priority and a collaborative effort. It's a high priority because we know that in order to help customers effectively address the challenges of today, we must develop the breakthrough products they will need tomorrow. It's a collaborative effort because we know that the only way to truly understand how to innovate on behalf of customers is to work closely with them at every step, understanding the specifics of their challenges and working with them to identify the new software capabilities that best serve their needs.

The resulting net new development is optimized for our Infor Open SOA design to enhance, upgrade, or consolidate existing functionality. What this means to our customers is that they will benefit by having greater choice in the solutions they deploy as they mix and match Infor and non-Infor solutions and components for continuous and non-disruptive innovation.

Responsiveness to our customer's most challenging business requirements makes us a better and stronger partner to our customers. Evolving our product portfolio to realize this responsiveness is key to our business performance and vital to our growth as a company.

The following are examples of "evolve" projects that are currently in process:

Actual costing

In today's complex business environment, cost accounting often must help meet both internal and external objectives. At most companies, external financial reporting requirements have increased, putting a greater burden on cost accounting. The use of cost accounting strictly as a tool for inventory valuation has been eclipsed by the need for accurate product costs for strategic decision support. While standard costs are viable as operational targets, real-time actual costs at a product or sub-product level have become a business imperative.

Infor's actual costing enables companies to maintain multiple costing books. By combining cost elements and valuation methods into unique book editions, cost accountants can effectively satisfy both external reporting and managerial analysis requirements. For example, one book can be used to track full-absorption costs at standard for valuation, and a separate book can be maintained for direct, variable costs using the actual cost method. Actual costing uses a three-prong approach to bring efficiency to the costing process. Standard costs are developed as a component of the financial budget, providing a measure of operational accountability to the fiscal plan. Actual costs are captured on a unit basis, e.g. lot, serial number, or project. Specific unit costs, as well as units affected by the deployment of the original unit, are continuously updated as transactional costs are incurred. This occurs after the unit disposition, through consumption or sale. To bridge the gap between standard and actual, comprehensive variance analysis reporting enables process improvement through real-time cost visibility.

C3 (Customer Collaboration and Communication)

For companies in the automotive supply chain or those on the outside hoping to get in, there is no business challenge more fundamental than finding an efficient way to respond to customer demand. In an industry known for EDI mandates and other stringent supply chain requirements, a general solution designed for use in many industries won't do. It takes a solution that specifically addresses the unique business practices and trading partner requirements of the automotive supply chain.

Infor's C3 solution helps companies in the automotive supply chain enhance their ability to receive and respond to demand from automotive customers, especially OEMs. It enables automotive suppliers to receive and manage forecasts and firm schedules, shipping/JIT delivery schedules, sequence delivery schedules, and Kanban pull signals from customers. It extends and complements traditional ERP order-to-cash business processes for automotive suppliers and supports standard automotive business practices and trading partner business requirements, enabling an efficient, integrated response to customer demands.

Inventory control

Managing inventory levels to provide the best possible customer service while holding inventory costs down is a key ingredient to better profitability. For many companies this is proving to be a major business challenge. To maintain lower inventory levels, companies need accurate time-sequenced available-to-promise inventory, streamlined sourcing, and visibility across the network of warehouses and manufacturing sites. Additionally, customers are moving more towards vendor-managed, consignment inventory that is stored close to where it is consumed. And companies in many industries are challenged by mandates such as inventory tracking at individual unit level and reporting of inventory levels of hazardous substances in a location at a given point.

Infor's inventory control allows global companies to manage their inventory locally while providing access across warehouses/regions, as dictated by their business model. The ability to deploy inventory control in a decentralized manner allows for better performance and scale without sacrificing cross-warehouse inventory visibility and promising. Infor's inventory control capabilities make possible cross-company ownership of inventory in a single warehouse, which supports both third-party logistics as well as vendor-owned inventory. In conjunction with our actual costing capabilities (see above), inventory control will be able to provide actual costing by cost origin at the lowest unit level inventory.

Multi-books

Many companies are challenged by the need to comply with multiple accounting requirements while maintaining a single internal financial system that is both accurate and efficient. For companies operating in multiple countries, the currencies, accounting calendars, and charts of accounts that vary by country necessitate reporting the same business transaction in multiple ways. The challenges are not limited to global corporations. Companies that have grown through mergers and acquisitions generally must consolidate multiple general ledgers. And many listed companies, particularly in Europe, must comply with different accounting requirements for tax filings and stock exchange filings.

With Infor's multi-books, global companies are able to efficiently comply with multiple accounting requirements without adversely impacting enterprise-wide business reporting. The multi-books ledger enables companies to maintain core, common data transaction fields as well as additional renditions of the information that meet the needs of business units in individual countries or specific accounting requirements. For example, having primary and secondary books with the same transaction data makes it possible for this data to conform to both the International Financial Reporting System (IFRS) requirement in the European Union and the US GAAP (Generally Accepted Accounting Principles) requirements.

Pricing, promotions and contracts

No matter where a company lies in the supply chain, pricing affects the bottom line in multiple ways. As part of an effective sourcing strategy, businesses must leverage purchase volumes and supplier incentives to minimize costs and ensure contract compliance. Developing an internal transfer pricing policy that sets proper performance measures and minimizes tax liabilities is a core component of supply chain planning. And to maximize market potential and customer profits, businesses must develop an effective pricing and promotions strategy.

Infor's pricing offers robust pricing capabilities to allow companies to develop an effective approach to managing each node in the supply chain. Supplier pricing and promotional incentives can be leveraged with real-time purchase cost simulation tools to help drive down sourcing costs. Activity-based landed cost accruals can be tied to suppliers or third-party vendors for robust costing and expense period-matching. Various transfer pricing scenarios such as cost-plus pricing, variable cost pricing, negotiated transfer pricing, and market-based pricing can be used to effectively balance profit and tax objectives for intra-company and inter-company transfers. For customer pricing, robust tools to efficiently manage the pricing process and increase promotion effectiveness help increase sales and reduce invoice errors. To help businesses better understand the cost to serve their customers, activity-based selling expense accruals can be linked to sales transactions to properly match costs to revenues. By leveraging similar pricing tools from supplier to customer, businesses can increase profit at each step in the supply chain.

Project costing

Managing profitable projects extends beyond simple time and materials billing. Understanding costs, both billable and non-billable, is an essential step in achieving project revenue and profitability targets. And to ensure project success, this approach must be employed from the planning phase to project completion.

With Infor's project costing, companies are able to develop hierarchical project budgets and effectively measure against these plans. As projects change in scope, alternate budget versions can be used to provide an auditable history of changes and ensure proper revenue realization. To help understand costs at a granular level, elemental cost components can be customized to suit the needs of each business. As materials are transferred to projects or jobs, costs are allocated and expensed to the proper project or task cost element. In addition to direct labor costing, activity-based costs and overhead burden can be charged to the project using powerful allocation methodologies. With retro-burdening, expense allocations can be generated on demand, at period-end, or for prior periods to properly value project costs and guarantee accurate billing. To ensure compliance and profitability, on-demand variance analysis can limit risk, enable process improvement, and optimize project revenues.

Reporting services

Faced with the proliferation of business information and the need to use it for improved decision-making, many companies are striving to enhance the quality, efficiency, and cost effectiveness of their reporting processes. Often these business challenges coexist with numerous IT challenges, including heterogeneous ecosystems where data is not easily integrated, the prospect of costly new application implementations, and the competition for server resources between reporting and normal business operations.

Infor's reporting services helps companies address these challenges by providing the ability to capture and consolidate data from both Infor and non-Infor applications in a centralized database that provides secure access to the data for reporting processes. To enhance reporting efficiency, reporting services provides advanced client tools and pre-built analytics designed for different roles that can be deployed centrally, by department and/or by region. The ability to easily cleanse data promotes improved decision-making, and functionality for managing and tracking data access helps companies comply with the audit trail requirements of Sarbanes-Oxley and other regulations. The reporting services architecture allows customers to drill back from a report to the original source of the data as well as scale their deployments across multiple reporting servers without impacting standard transaction processing. Application upgrades are made easy because reporting services provides an open interface for accessing reporting data, eliminating the need to know the intricate details of the reporting database. In addition, the modular architecture enables customers to upgrade or integrate additional reporting components at their own pace.

Task management

At most companies, labor represents the largest expense and, therefore, the most critical cost to control. But even though labor usually overshadows all other expenses, the enterprise software at most companies is focused on optimizing other parts of the business. In other words, many companies have excellent visibility into the status and location of every product or raw material, but can only guess at the efficiency of the workers assigned to move, build, or sell products. They may only be able to closely manage a small percentage of their workforce. Or they may be unable to fully leverage what they do know about their workforce in other business processes such as forecasting, scheduling, and budgeting.

Infor's task management can rectify this situation by providing visibility into a workforce down to the individual and making the information available to the business at large for improving productivity and other key performance indicators. The solution proactively controls, sequences, and optimizes the tasks of individual workers, making it ideal for use in retail stores, warehouses, distribution centers, and on the manufacturing floor.

WebStore

Seeing how eCommerce is transforming the retail industry, many distribution and manufacturing companies are hoping to leverage the Internet to reduce costs and better serve customers. They are seeking new channels to sell their goods and ways to operate 24 x 7, as most customers now expect. And they want to automate and integrate as much of the process as possible, so their costs are kept under control. But an eCommerce solution that is good for a retailer is not necessarily right for a distributor or manufacturer.

Infor's WebStore provides a state-of-the-art web interface and attached product catalog specifically designed to meet the needs of distributors and manufacturers. For example, the solution provides high performance web-enabled order entry capabilities that integrate into a company's overall enterprise system. The solution is integrated directly with Infor's pricing and inventory control capabilities to streamline business processes, reduce costs, and enhance customer service levels.

Infor Open SOA

Service-Oriented Architecture or SOA is an architectural approach to building and deploying software that is interoperable by design. In a SOA, software capabilities can be connected to one another easily, enabling the efficient movement of information between applications. In addition, SOA supports the effective reuse of software, so companies can leverage the assets they already have to solve new and emerging business problems.

Customers are often excited about the prospect of using this architecture, but are mostly limited by the enormous complexity and cost of deployment. Infor has taken a different approach to SOA. It's called Infor Open SOA, and it represents our commitment to solution interoperability, innovation, and evolution across all product lines and is the technology framework supporting our product strategy. It is an approach to SOA that is truly customer-driven and differs in many ways from that taken by most software vendors. We have developed and continue to develop Infor Open SOA with three key objectives in mind:

- 1.) Deliver a SOA that is cost-free and an integral part of all Infor solutions.** Infor is building SOA capabilities into all major product lines and these capabilities are available to customers at no charge, delivered in regular product upgrades, as part of standard maintenance agreements. Infor Open SOA is a pragmatic approach which doesn't require customers to undertake a large software re-implementation event that necessitates replacing existing solutions that still meet current and near-term requirements. Infor's technology enablement gives customers an evolutionary path toward greater business agility and more efficient operations.
- 2.) Deliver a SOA that embraces our customers' heterogeneous ecosystems.** Recognizing that customers want the ability to pick and choose the business-specific software that best matches their business requirements regardless of platform, vendor, or technology, Infor is building Infor Open SOA to not only support, but also embrace our customers' heterogeneous ecosystems. We do this by providing interoperability with all of their enterprise solutions, including any custom solutions as well as those from Infor, partners, third parties, and trading partners.
- 3.) Deliver a SOA that addresses all customers regardless of industry or size.** Infor is helping customers overcome the complexity and cost associated with the traditional approach to SOA marketed by many vendors. With a complete understanding of our customers' requirements, we have been able to adopt common SOA concepts and create a design that enables companies of all sizes and in all industries to execute a SOA strategy. Compared to other vendors, Infor's event-driven SOA, which breaks down end-to-end processes into separate, autonomous software components and solutions, delivers more cost-effective interoperability and the agility customers need to respond to changing business requirements at a low total cost of ownership.

For more information about Infor Open SOA, download our whitepaper, "Introducing Infor Open SOA," at <http://www.infor.com/solutions/opensoa>.

Summary

In today's fiercely competitive environment, it is critical that the software solutions you choose help you address a wide range of key challenges and support your changing business requirements. Whether implementing the latest breakthrough solution or ensuring maximum value from solutions already in place, Infor is committed to working with customers to put your interests first.

That takes innovation—the kind of innovation that is woven into our product strategy. We developed this strategy with an understanding that the definition of success for any company's investment in enterprise software is getting business-specific solutions delivered quickly, at a low total cost of ownership, and with the assurance your software provider will help you enrich, extend, and evolve those solutions to meet your needs, at your own pace.

It's a different approach, for enterprising companies like yours, that lets you protect and optimize your investment today and be better prepared for tomorrow.

About Infor

Infor delivers business-specific software to enterprising organizations. With experience built in, Infor's solutions enable businesses of all sizes to be more enterprising and adapt to the rapid changes of a global marketplace. With more than 70,000 customers, Infor is changing what businesses expect from an enterprise software provider. For additional information, visit www.infor.com.

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