Infor XA "Brainstorming" User Conference!
** Descriptions of the Main Tent and Detail Sessions **

8:30 Main Tent Sessions in the Grand Room

Brainstorming for Improved Use of XA

The conference introduction explains a new conference format to better engage users so that they leave with new ideas and approaches. The format encourages people to discuss various challenges, ideas, and solutions. Many sessions will be co-hosted with a customer or customer case. BRAINSTORM and PARTICIPATE.

XA: On Premise or In the Cloud? Two customers discuss different situations and how they arrived at different decisions.

Two customers closely evaluated "XA in the Cloud" and other cloud options. Each company has its own environment, goals, and objectives that drove their final decision. For some companies, "XA in the Cloud" is the perfect solution. For others, XA "on premise" might be more appropriate. Hear from two companies about how and why they made their decisions.

XA: What's Next? Net-Link, R9.3, and Enhancements for Enterprise Financials

Infor is spending a lot of development time to make Net-Link the strategic interface for XA. Using a web browser, Net-Link is being developed to have the capabilities of Power-Link, but without the client software. Moreover, it has a more modern "look and feel," like a web app.

Release 9.3 is coming in 2020. What's in it? Why will it be important for XA users? How soon will it be available? Come and learn about R9.3 and when to expect it.

Likewise, the Enterprise Financials (GL/AP/AR/Cash) continue to be enhanced. Learn what is coming next with EF.

10:00 a.m. Detail Sessions

+**Perspectives on Power-Link: What works best and WHAT ELSE can I do?**
Hauenstein Room

This session will highlight the various uses of the Power-Link architecture and some of its best uses for being a productivity tool. **It will also feature a customer** providing some of their insights as to the best features of Power-Link. Come and learn what you could be missing! It will cover both Basic and Advanced capabilities. This session is focused on end-users.

Enterprise Financials for Existing IFM Users: What Are the Considerations and Implementation Issues?
Pfeiffer Room

The suite of applications called Enterprise Financials (GL, AP, AR, Cash) is the strategic set of financials for Infor XA. This is where Infor will spend time and money in the future when enhancing financials. This session will help you answer many of the questions related to "Why" move to EF, "How" to move to EF, and "What" some of the benefits will be. The conversion and training issues are very different for IFM and AM users, so this session is focused on IFM users. Three main topics will be covered.

Topic 1 will provide highlights of what capabilities are viewed as the biggest advantages of Enterprise Financials.

Topic 2 will be somewhat of a self-assessment discussion to help you determine where you are at today with IFM; what you may like or dislike about IFM; what capabilities you may need that don't exist today with IFM and/or perhaps are handled better by EF.

Topic 3 will cover what it takes to convert to EF, such as the considerations that will need to be made and the tasks that will be required. There will be a high level overview of the user training that will likely be needed and the time a conversion may take.

Looking at Multiple Ways to Handle Outside Services in XA, including via the Web and System-Link
Klopcic Room

Understand the methods that XA uses to handle outside services processing. This is available "right out of the box."   Or, for complicated continuous processing operations, see how to let your suppliers do the work to track parts directly in your XA inventory system. Minimize confusion and transaction data entry by capturing real-time the movements of parts at the source and utilizing these capabilities:

- The creation of shippers for shipment to outside service suppliers
- The Acknowledgement from suppliers of item receipts via a web portal
- Advanced shipment notice of completion of parts including reporting defective parts and/or discrepancies
- Tracking return shipment and/or drop ship to another supplier or location
- Receipt of outside service parts
- Providing planned orders to suppliers for production planning purposes

Security Management Plus for XA
Royce-Klopic Room (lower level)

Do you have issues involving security and XA? Security Management Plus can help, but what other "security" issues are there to be dealt with? This brainstorming session will open security topics for discussion. The session is sponsored by the developers of SMPlus. The discussion will focus on how SMPlus can fill the gaps in managing XA security, checking for separation of duties, and assisting with role-base security and audits. Other topics of interest are visibility of enterprise-wide security, how SOX requirements of database changes are being met, GDPR, and others. Bring your challenges for all to consider and you might just walk away with a better solution.

The IBM Power i and Power HA: How They Provide Advantage

IBM continues to make significant investments in the "Power Systems." The results are substantial improvements that deliver benefits and advantages to companies. The Power 9 is IBM's chip technology that builds on a technology leadership that began 30 years ago and has made the Power i platform the most cost effective multi-user business computer available. Come and hear more about IBM's Power 9 hardware and operating system platform improvements and take a peek into where this system will go next!   Also, learn about the latest IBM Power HA for Disaster Recovery and High Availability systems and how this system works for XA. The IBM HA system is replacing a lot of expensive software applications and is becoming the HA/Disaster Recovery system of choice at the lowest cost.

11:00 a.m. Detail Sessions

+ Quoting and XA: Is Your Process Efficient? A customer case and integrated approach.
Hauenstein Room

A customer will participate in this session to discuss their issues and problems with quoting, and will discuss their "before and after" processes. Quoting is critical to your business. Every company quotes differently because of their unique needs and requirements. Do you like your current quotation process? Is it based on spreadsheets and databases that aren't really shared?   Is it effective and efficient? Is it based on information only known by one or two people? Is all the quote data available for good analysis? Could you win more business with better quoting and a more efficient process?

Discuss what works and what doesn't. Learn what other companies have done to improve their business and streamline the quotation process, including integrating quotes with XA. Learn about ways to simplify and address this unique area of your business with workflows, cost elements, XA bills of material, XA routings, quote revisions, quote options, quote copy, and even the ability to click one button and electronically send a formatted quote to a customer.

Enterprise Financials for Existing AM Users: What Are the Considerations and Implementation Issues?
Pfeiffer Room

The suite of applications called Enterprise Financials (GL, AP, AR, Cash) is the strategic set of financials for Infor XA. This is where Infor will spend time and money in the future when enhancing financials. This session will help you answer many of the questions related to "Why" move to EF, "How" to move to EF, and "What" some of the benefits will be. The conversion and training issues are very different for IFM and AM users, so this session is focused on AM users. Three main topics will be covered.

Topic 1 will provide highlights of what capabilities are viewed as the biggest advantages of Enterprise Financials.

Topic 2 will be somewhat of a self-assessment discussion to help you determine where you are at today with AM; what you may like or dislike about AM; what capabilities you may need that don't exist today with AM and/or perhaps are handled better by EF.

Topic 3 will cover what it takes to convert to EF, such as the considerations that will need to be made and the tasks that will be required. There will be a high level overview of the user training that will likely be needed and the time a conversion may take.

How to Implement Planning Systems
Klopcic Room

Have you tried to use Material Planner and failed? Are you running MRP or VPi only to have the data ignored? Are you manually entering MOs and POs? Why does planning not work in your environment? Learn some basic steps to implement planning systems.

COM_Net2 CX : Integrated E-commerce with Quotations, Proposals, and CPQ
Royce-Klopic Room (lower level)

COM_Net2 CX is the proven e-commerce solution for Infor XA. More than just taking orders over the web, COM_Net2 is a complete sell-side portal for XA. The new version, COM_Net2 CX, provides extensive new functionality and a new "responsive" user interface. Supporting Infor CPQ, learn about how COM_Net2 CX manages quotations and generates proposals and how COM_mander® could simplify and "replace" COM and CSM for order entry processes. Join us to learn why COM_Net2 CX should be the key component of your Customer Experience presence and strategy.

+ Upgrading in a 24/7 Manufacturing Environment, Including Release 9.2 Considerations
Frey Studio (lower level)

Many companies operate around-the-clock and may only have one or two times the ENTIRE YEAR to bring down their systems for an upgrade. How do you run in this type of environment? What can you do? How do you plan to upgrade to R9.2, especially if you are a 24/7 environment? Discuss these topics and get tips and techniques from an XA customer who will share his thoughts and experiences on running and managing systems in a 24/7 environment.

12:00 Lunch in the Grand Room

Meet at 12:00 back in the Grand Room for lunch and a special luncheon speaker. A veteran XA advocate will give his perspectives on the future of XA and why it's a bright one!

1:00 p.m. Detail Sessions

+ XA in the Cloud: What It Is, How It Works
Hauenstein Room

This session will cover the details of the XA In the Cloud Program: what it involves, what it gives you, what is needed to make an assessment of how you would deploy XA in the Cloud for your environment, and all the major highlights of this innovative and successful program to help alleviate worries or concerns about running and updating your XA system. A specialist will lead this session.

Procurement Control (Requisitioning/Purchasing) and Budget Tracking by Project/Department
Pfeiffer Room

Standardize and enforce your procurement approval process for better auditability and control. Use a workflow approval process for procurement, and use your own rules of authority and approval steps to do so. Get total budget comparison real-time for projects and/or departments. Choose to escalate your approval level if over budget, or simply restrict requisition entry if over budget.   Effectively use your accounting system real-time for better **visibility** and **control.** Also, learn about a new mobile application for requisition approval. See and approve a requisition from your cell phone!

Using Various XA Inventory Practices
Klopcic Room

What is the difference between a controlled and uncontrolled warehouse? What does it take to use batch/lot control? Does EPDM affect my inventory? What is safety stock? Floorstock? Non-netable inventory? Can I stock a phantom? How do I backflush in XA? Does MDCC and/or MES change my inventory processes? Learn the premises of inventory tracking in XA in this session: how to make inventory more accurate.

MES Shop Floor Reporting and Management
Royce-Klopic Room (lower level)

MES (Manufacturing Execution System) for XA is a combination of shop floor reporting and Quality Management, and it truly serves as two-way communication with the office and everything that needs to happen and be monitored on the shop floor. Machine monitoring can also be integrated with MES. Learn how the XA Manufacturing Execution System is integrating the shop floor and business. Far more than just a "data collection" system, MES provides many tools to manage almost all activities needed on the shop floor:

- 2-Way Paperless Shop-Floor Reporting and Scheduling
- Quality Management
- Kanban
- Genealogy Tracking
- Workforce Management
- Lean Manufacturing

Net-Link: Why/Where/When and How to Use It
Frey Studio (lower level)

Net-Link is the strategic and browser-based user interface for XA. Infor development time and money are going into Net-Link to make it a "lean" and modern interface with many of the capabilities of Power-Link, but without the need for software on a client (PC). This session will talk about Net-Link and where and when to best deploy it.

2:00 p.m. Detail Sessions

+ The Use of Scanning for Material Control. A customer case. What we did and how.
Hauenstein Room

Companies want to scan to transact inventory.   What do you need to know to start? How should it integrate with XA?   Who should scan and how? What devices are needed and how do they work? Come and hear from a customer about their project and how they handled their unique needs. Do you need serialization and lot tracking?   How do you set up locations for scanning? This session features a customer from Speedrack Corporation to highlight what they did and HOW they implemented scanning. It will allow you to interact with other companies and see what they are doing.   The presentation will take you through the front-end questions and considerations as well as cover what it takes to implement a scanning system.

Project Management and Customizable Project Cost Tracking at Multiple Levels Using XA IFM
Pfeiffer Room

Define project milestones and tasks, and then track budget and costs against those milestones using unique codes within IFM. Project Managers can now create and automatically set-up everything necessary to establish approved budgets and then can begin purchasing against projects using the browser-based Web/Requisition system. Gain the ability to track budgets and costs in the IFM accounting system, which is where they belong.   Monitor and control project milestone spending real time. Get away from manual spreadsheet tracking—this will no longer be required!

 By using your Infor XA system and a web-based, fully integrated Program/Project Cost Management System, use customizable workflows and electronic forms for required project <u>approvals</u>. The system will allow Program Managers to see their critical project data (tasks, resources, on-schedule or late, …) via a single "portal." At the same time, gain access to project financial information pulled directly from XA for project income and expenditures.

Give Program Managers real-time access to the information they need. In addition, use this information to realize where you stand against the budget for the program or project. Gain <u>more control</u> of expenditures and also provide <u>more visibility</u> to the status of what Project Managers and financial approvers are working on.

+ Material Logistics: Multi-Site Planning, Execution, and Logistics
Klopcic Room

Many companies need to plan and execute the demand/supply relationship between many sites, plants, and warehouses. Moreover, specific "rules" may define what plant builds and/or supplies other plants, warehouses, or customers. Customer AND inter-site fulfillment are key functions built-into this Power-Link application. It provides flexible and streamlined ways of handling multi-site and inter-site "demand and supply" issues, including automatic drop-ships from the <u>most efficient</u> plant or warehouse based on customer location, available stock, and currency. This session will be covered by a multi-site logistics expert who has implemented Material Logistics around the world.

+ Taking A/P to the Cloud: Paperless A/P Payments (for $0!)
Royce-Klopic Room (lower level)

Achieve zero cost Accounts Payable check writing. Here's how. This "Paperless Pay" program removes the burden and costs of your company entering, printing, and sending Accounts Payable checks. Through a combination of moving most of your vendors to electronic payment and with ACOM printing and sending the remaining checks at their cost, you can truly achieve near $0 cost of A/P check writing. Come hear how multiple XA customers have already achieved this with $0 cost and with very limited investment on their part.

Infor's Operation Services (OS): Managing Communication in a Modern ERP Setting
Frey Studio (lower level)

Infor has led the software industry with enterprise application solutions, but are you confused about what "Infor OS" is all about? ION, Ming.le, and other Infor technology solutions work across various Infor systems and applications.   Leave this session with the knowledge of what "Infor OS" actually is and how it can be used to more effectively provide communication across your enterprise. This is not a technical review, but rather it is a management review of these technology applications.

3:00 Break and Refreshments in the Grand Room

Meet at 3:00 in the Grand Room for a break, refreshments, and then a few interesting presentations about XA.

- **"XA: What's After That?"** This will cover what's coming after R9.3 in Release 10 and Beyond.

- **"Top 10 Enhancements Survey"** XA users provided input to Infor about the enhancements they'd like to see for XA. Learn the results of the survey and what companies thought should be done with XA.

- **"Infor's Investments in XA Are More Surprising Than You May Know!"** There has been a lot of investment behind the scenes with XA to make it a more secure and improved system. What are some of those key investments? This presentation is from a leading XA expert who will provide details about things Infor has done to make XA a better ERP system. These are things that are good to know!

4:00 p.m. Detail Sessions

What's Trending with XA Users?
Hauenstein Room

This session will cover productive and creative ways that XA customers are solving unique business problems and it will highlight what tools or solutions they used. It will be a great session for users and I/T professionals who would like to see and learn about innovative techniques, applications, projects, or methods that have been implemented by others to better utilize XA and "systems" at their company. A large range of topics will include ideas and solutions with System-Link; when to use Off-line File Loads or not; using Excel as a Report Writer directly against XA (no downloading needed); methods for Business Analytics; what to do with Quoting; Outside Services; how to handle projects and tracking costs to budget; and other topics. Help present and contribute to this session by sharing your "wins" in the past year with other XA users.

Birst and XA: Business Intelligence for XA Users
Pfeiffer Room

"BI" (Business Intelligence) Systems have been the rage for the last several years as technology has improved and data storage has become cheap. These systems offer very powerful analytics, Key Performance Indicators (KPI), and unique insights into your business via volumes of data in your system. However, they are NOT "plug n' play" systems. Data definitions need to be established and training is needed to know how to define or set up the data, access the data, and make it meaningful to your business. Attend this session to understand how Birst BI can be implemented in your XA environment.

How Are You Handling Engineering Changes? A collaborative session and integrated approach.
Klopcic Room

What are you using to create, track, and monitor changes? Are you capturing the costs of those changes? Can you manage tasks and workflows or automatically route information to key users?

XA customers have tried many methods to effectively manage Engineering Changes. A complex spreadsheet is most often the tool of choice, but that can't tell you the impact an EC will have on your XA system. It's also not shared information—it is locked in someone's PC. A spreadsheet can't quickly **identify and see the IMPACT** that changes will have on XA items, or on outstanding and planned Purchase Orders, MO's, or inventory.   A spreadsheet can't give users or management the proper status of an EC when they need it—and it can't tell them when it's expected to be completed.

Share your issues and concerns with others. Also, evaluate a workflow and web-based portal to manage your entire EC Management process, integrate with XA, and help eliminate the problems of obsolete materials and tracking EC costs. Create, monitor, and track all your Engineering Changes, including all related tasks, files and e-mail. Provide complete visibility to EC's by Originator, Assignee, Customer, Date Created, EC number, Part Number, Status, and other ways. Present all tasks, data, documents, dates, changes, and other information so something doesn't get "lost" or slip through the cracks. Use workflows and EC integration with XA. Deal with "change" issues and deal with them from a web-based portal for quick and easy accessibility.