

INFOR ERP SYTELINE

Functional Overview

INFOR™



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INTRODUCTION

Developed by experts in discrete manufacturing, Infor™ ERP SyteLine has more than 25 years of experience built in. That means you can be confident you've got the tools you need to get the job done—and that you're getting it all from an experienced support team.

You get a solution that works for you, and lets you define your own business processes. So you can make the system your own instead of letting it dictate to you and quit trying to drive a square peg into a round hole.

Complexity and competition continue to increase in discrete manufacturing. Personalize your enterprise resource planning system, focus on your work, and be confident you've got the right software and support team for the job...all with Infor ERP SyteLine.

Because built-in processes go to work for you immediately, you'll:

- Go to market faster
- Deliver products on time
- Do more with less.
- Reduce the impact of change.

Infor ERP SyteLine's comprehensive functionality supports your business and operational challenges. Regardless of your mode or mixed-mode method of manufacturing, Infor ERP SyteLine has the business processes configured for you:

- ETO - Engineer to order projects manufacturer
- MTO/CTO - Make/configure to order
- MTS – Make to stock
- Repetitive
- Service management

Infor ERP SyteLine provides flexible application screens, efficient data management and tactical processes, which adapt to your unique business requirements and ensure smooth, efficient process

execution. SyteLine's advanced process automation technology handles routine tasks and lets you continuously improve processes in response to changing business conditions. Built-in scalability lets you add users, products, production sites or warehouses and make other changes as business grows.

Infor ERP SyteLine is built and deployed on the Microsoft .NET technology platform for more flexibility, better application integration and improved interoperability compared to mixed-platform solutions - all at a lower total cost of ownership.

This Functional Overview is meant to provide a view into the features, functions, and modules of Infor ERP SyteLine. This information is provided at a strategic level and is intended to help you in your selection of Infor products, as well as in strategic planning for your internal system development.

This document is not intended to serve as a complete listing of all the new capabilities, nor does it reflect the extent to which we may enhance the products. Rather, it represents an overview of the product as of the date of publication and is subject to revision or change without prior notice.

You can obtain more information about features and functions through the Infor ERP SyteLine team. Please contact your designated customer service or sales representative if you have questions or need more detailed information is required.



SYTELINE SOLUTION MAP



Customer Relationship Management

- ▶ Contact Management
- ▶ Lead Tracking
- ▶ Opportunity Tracking
- ▶ Sales Forecasting

Human Capital Management

- ▶ Human Resources
- ▶ Payroll

Financial Management

- ▶ GL, A/P & A/R
- ▶ Fixed Assets
- ▶ Expense Management
- ▶ Multi Currency
- ▶ Project Accounting

Sales & Order Management

- ▶ Quote/Order Management
- ▶ ATP/CTP
- ▶ Pricing/commissions
- ▶ Order Configuration

Production Management

- ▶ Serial / Lot Control
- ▶ Product Configuration
- ▶ Production/Process Costing
- ▶ Shop Floor Control

Services Management

- ▶ Warranty Mgt.
- ▶ Call Center Mgt.
- ▶ RMA Depot Repair
- ▶ Mobile Service

Master Data Management

- ▶ Master Item Data
- ▶ Document Mgt.
- ▶ Bills of Materials

Enterprise Planning

- ▶ Forecasting and S&OP
- ▶ Item Planning (MPS/MRP)
- ▶ Channel Planning

Performance Management

- ▶ Home Pages
- ▶ Business Intelligence
- ▶ Financial Reporting
- ▶ Planning & Budgeting

Supply Chain Management

- ▶ Sourcing & Procurement
- ▶ Inventory Management
- ▶ Shipping/Receiving
- ▶ EDI

Event Management & Configurable Platform

- ▶ Real-time Alerts
- ▶ Workflow
- ▶ Notifications and Escalations

INFOR ERP SYTELINE

SyteLine Framework

Infor ERP SyteLine is built with extensibility from the ground up. The SyteLine framework gives you the ability to adapt the system to your business, rather than requiring you to force your business to fit the software. The model in the SyteLine framework makes it possible to adapt the Infor ERP SyteLine application to new business requirements without incurring the high cost and delays involved in modifying or writing new code. This, in turn, makes it feasible to rapidly adapt the system to your business, while continuing to receive new features and fixes.

In most ERP applications, adaptability is provided as a separate layer over the base application, so your ability to extend and build new functionality is limited. The changes you need to make will inevitably involve modifying the base application logic and that means modifying code. But the base Infor ERP SyteLine application is built with the same metadata-driven approach provided to customers, so your capabilities to extend and adapt the application are virtually unlimited.

To meet these objectives, the Infor ERP SyteLine Smart Framework uses a model defined by metadata (data defining the application behavior, stored in rows and columns in databases); for the user-interface (forms), the business objects (IDOs, or Intelligent Data Objects); and business processes (Application Event System). In the metadata approach, changes can be kept separate from the base application and your changes automatically upgrade.

The Infor ERP SyteLine Framework makes it possible to perform the following changes without programming:



- **Extend any portion of any screen:** By using the same tools as those used to build the base application, you can extend any portion of any screen, including new tabs, new fields, validation logic, and enabling logic. You can even embed controls you write in technologies like Silverlight in any SyteLine form.
- **Extend any business process:** Using the Application Event System (AES), you can define rules that execute whenever an insert or update occurs to any business object (order, item, etc.) in the application or when trigger conditions you define become true. These event actions include updating any data in the application, automating any process provided by the application, prompting a user or group of users to approve the change, integrating to an external application, or simply notifying users of the change. Defining these types of actions is all done without writing code.
- **Extend any business object:** You can extend any of the Intelligent Data Objects (IDOs) to create new relationships to other IDOs in the base application, add new calculated fields, add new tables, and publish their properties on the IDO. You also can create your own IDOs over your tables. All of these are done without writing code,

although if you want you can write your own .Net classes and have that logic incorporated in the IDO processing as well.

- Add completely new functionality: You can build new functionality, such as new tables, IDOs, and forms as required by processes unique to your business. These are automatically deployed with the base application and automatically take advantage of other framework functions, such as translations, Web Service access, and the Application Event System.
- Introduce workflow, automation, or other business process-level changes using the Application Event System, without writing code. With drag-and-drop editing, you can construct rules that can, for example, query, update and execute functions on any IDO, notify or prompt users, or invoke web services from external applications. You can have your rules executed on a wide variety of events, including trigger rules you specify (e.g. item quantity on hand is below safety stock), or whenever data on an IDO is updated in various ways.

This ability to extend and tailor the application helps you to lower the cost of your IT ownership and increase productivity for your business.

Multi-Company/Multi-Site Operations

Infor ERP SyteLine is inherently a multi-company, multi-site, multi-lingual and multi-currency solution. SyteLine allows your companies to work together or separate based on your needs. A "site" or organization/company represents any place where work is done. So, a "site" may correspond to company headquarters, a manufacturing plant, or a distribution center.

Sites and Entities: Sites have relationships with each other. They combine to form financial entities, supply each other parts, Ship-to common customers, and share administrative functions.

Sites may report to financial reporting units called "entities." An "entity" has a specific currency, a chart of accounts, and the ability to produce financial statements. The entity is the highest-level organizational component. For financial reporting purposes, you can group sites under a particular entity. However, sites can belong only to one entity.

- **Inter-Site/Warehouse Transfers**— SyteLine provides functionality for any one site to enter a Multi-Site Quantity Move or Transfer Order for items to be RECEIVED at that site from an additional shipping site. SyteLine also provides functionality for any one site to enter a Multi-Site Quantity Move or Transfer Order for items to be SHIPPED to an additional receiving site.
- **Centralized and Decentralized Order Entry**— Any site can originate a multi-site order, and line items can be shipped from any site. Credit checking and inventory visibility is provided from site to site. In Multi-Site order entry, you can enter an order that spans across sites. In decentralized environments, you can enter an order at any site.
- **Centralized Purchasing** — Any site can set up a PO that encompasses

purchase orders to be created remotely at multiple target sites. A multi-site purchase order can take advantage of quantity breaks from the vendor for items that are required at multiple sites. Items being purchased may be subject to a Master Buy Agreement. This option accumulates quantities of like items from one vendor, to determine the best quantity break available. You can create printed documentation that groups purchase order information from various sites. Cross site vendor maintenance can also be done.

- **Multi-Site Linked MRP and APS**— SyteLine supports site-based, linked MRP and APS. When you run the Planning activity in Global mode, the activity regenerates the plan at each site in order of site priority (defined on the Planning Parameters form). The activity generates planned transfer orders for Transfer items across sites.
- **Multi-Site Transfer Accounting**—Multi-Site Transfer accounting automates inter-company financial transactions and inter-company financial consolidation. SyteLine provides parameter set-up for profit/cost eliminations, and offers separate account tracking for inter-company profit, cost, Accounts Receivable, Accounts Payable, sales, and cost of sales.
- **Manual Voucher Builder**—The Manual Voucher Builder allows you to quickly create a voucher in one or more sites for a single vendor's invoice. On any site, you can specify the portion of the vendor invoice amounts to allocate. You can enter all or some subset of the vendor invoice amounts. You can use the originating site as the To Site.
- **Multi-Site Journal Processing**—The multi-site journal processing activity allows for the creation of a single journal processing form that will distribute

transactional information into each sites respective MS Journal.

- Multi-site Vouchering — Multi-site vouchering functions enable a single user to create a cross site voucher based on PO generated receipts.

The screenshot displays the 'Sites/Entities' configuration interface. On the left, a table lists sites, with 'Demo' selected. The main area shows the configuration for the 'Demo' site. The 'System Info' section includes the following details:

- Type: Site
- Language: ENU
- Last Consolidated: [Blank]
- Reports To: [Blank]
- System Type: SL8.01.00
- Time Zone: Eastern Standard Time
- Intranet Name: DEMO
- Database Name: SLDemo80200_Demo_App
- Forms Database Name: SLDemo80200_Demo_Forms
- Message Bus Logical ID: [Blank]

Sites have relationships with each other. They combine to form financial entities, supply each other parts, Ship-to common customers, and share administrative functions.

System Manager

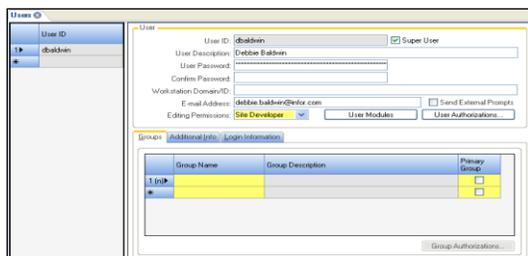
You manage and administer Infor ERP SyteLine using various end-user tools, which are built into the product. Some of the management tools available within SyteLine include:

- **SyteLine Configuration Wizard** — Allows administrators to create and configure new SyteLine environments.
- **User Maintenance Screens** — Set up new users and administer security settings and user privileges.
- **License Management Screens** — Manage licensed modules and administer user/module privileges
- **Session Management** – Monitor and manage user sessions.
- **Background Task Administration** — Create, monitor and manage background system tasks.
- **User Audit Tracking** — Set up user audit trails to monitor user activity. Audit trails can be set to field level capturing time stamped previous and new values.
- **User Extended Tables Administration** — Change the schema of the database to add fields that may be required to provide specific user functionality securely and safely.

SQL tools are designed to aid administrators with the common tasks involved with managing SQL databases.

The database is administered using SQL tools, such as:

- Enterprise Manager—Centralized view of SQL databases with access to all common administration tasks,
- Query Analyzer—Easily create, parse, and execute T-SQL queries,
- SQL backup and restore—Create automated online backup routines and maintenance plans to automatically protect your data,
- Query Optimizer Built-in tool to analyze and maximize the performance of T-SQL queries.



Set up new users and administer user settings through the User Maintenance Screen.

Mobile Access

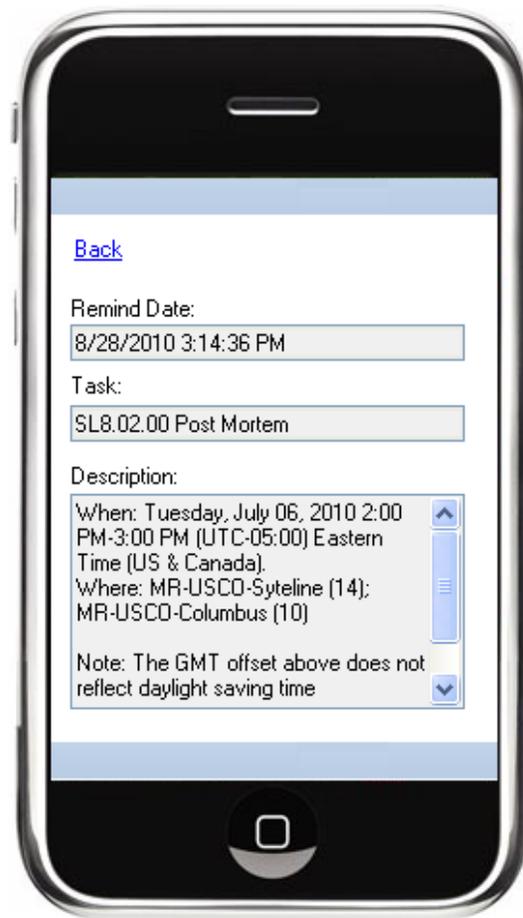
For It administrators and production supervisors), Infor ERP SyteLine Mobile Access puts key functions on your mobile device.

The Mobile IT functions will help you identify and resolve various issues in order to help provide a stable and responsive IT environment. There are a number of Windows Services and Processes that are required for the smooth functioning of SyteLine and other programs, e.g. TaskMan, Web Server, Exchange Server, etc. You want to know the status of these services, whether you're on site, off site, or temporarily away from your desk. You can create a list of services to be monitored and SyteLine can trigger an alert (in the form of text message) to your mobile device when one of these services is stopped or not responding. You can view the list of services you're monitoring on your smart device and perform tasks like start, stop, or restart the service, if required.

Views into critical production status give the production supervisor the ability to be notified and resolve issues as they occur even when away from their desk. Alerts can be configured to be sent in certain unexpected cases such as when the material issues are more than required or when the Actual labor hour posting is more than planned. Using production calendar forms, planned production can be viewed for the day and into the future.

- Service monitoring/alerts and resolution
- Unlock locked out users
- Kill active tasks
- Unlock locked functions
- Unlock locked journals
- Jobs to complete
- Jobs to release
- Jobs completing late
- Job labor status

- Alert when the material issues are more than required
- Alert when the actual labor hour posting is more than planned
- Alert when a job is projected late for a customer.
- Alert when completed quantity is more than released
- Alert when there is any transaction with status error in the DCSFC table (shop floor transactions)



The Mobile IT functions will help you identify and resolve various issues in order to help provide a stable and responsive IT environment.

Application Event System

The Application Event System is a key element in providing an organization with the means for automation of business processes.

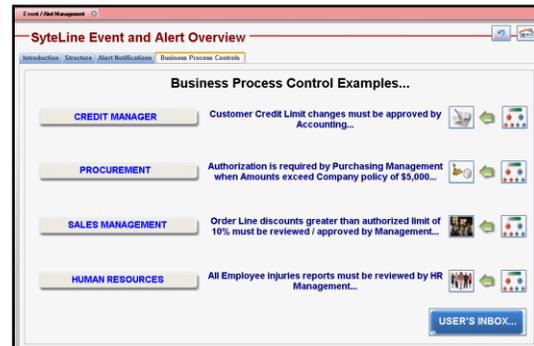
Event-Driven functionality is rapidly becoming a fundamental core desktop technology, as important and omnipresent as e-mail, spreadsheets, databases, intranets and the Internet.

Infor ERP SyteLine Application Event System enables the right people to make the right decisions at the right time. The software's e-mail and internet-enabled environment provides Information access, delivery and work support across organizational dimensions.

Infor Application Event System streams the flow of work throughout your enterprise, providing complete visibility and routing for all the vital documents, notes and data required for each person in the supply chain- from the executive suite to the factory floor and including suppliers and customers-to react and execute the tasks necessary for adapting to change rapidly and competing more effectively.

You can export and deliver business Information to and from Infor ERP SyteLine. Triggered by events in SyteLine, the Application Event System activates tasks and e-mails details for subsequent execution by the user. Information is automatically passed to the right participant at the right time according to a set of intelligent business rules.

Open business issues, such as customer credit issues, proposal sign-off, or purchase order approvals are automatically routed to the designated recipient(s) for action. Once a decision has been made or a task completed, the Application Event System processes the new Information into SyteLine and moves forward with the next open issue until the entire process is completed.



Easy access for user control of all your business processes.

Managed Services

Cost controls and business demands typically drive the decision to use Managed Services. Your organization can gain flexibility, continuity, and important cost reductions when you bring selected IT functions to Infor Managed Services.

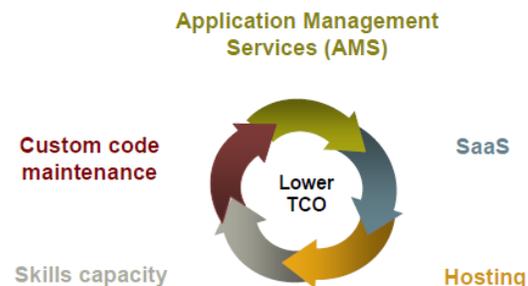
You can stop worrying about data security because you'll be hosting your applications on our global infrastructure. You won't need to invest in multiple, redundant data centers to prevent data loss – our complex of multiple, fully ISO-certified data centers already stands available and completely ready to run, store and backup your data to eliminate the risk of data loss.

We follow proven methodology, taking care of updates and patches, and adding new feature packs to your applications so that you can stay focused on the things you do best. Infor Managed Services assures consistent uptime and top performance through three- to five-year Service Level Agreements, billed monthly. By tailoring an agreement to the specific needs of your business, you get to choose the ideal mix of services and support in four critical areas:

- **Application Management Services (AMS)** - covers all operational services, including service desk, system administration, capacity planning, facility management, service pack maintenance, backup, recovery, and archiving, as well as a full range of services for optimum application performance. Service level agreements may even include migrations and upgrades to upcoming versions with richer functionality.
- **Hosting Service** - Provides hardware and infrastructure to you to support and run Infor ERP SyteLine in an Infor supported data center versus you running the

solution on-premise. Hosting can be part of an AMS agreement depending on the level of assistance you require.

- **Software as a Service (SaaS/Cloud)** - Offers access to Infor ERP SyteLine as a subscription rather than as a locally installed on-premises application that must be individually managed by you.
- **Customization Care and maintenance** - Services to enhance your application framework to meet specific business needs. It includes architecture, customization, integration, enhancements, and migration development.



Microsoft Outlook Integration

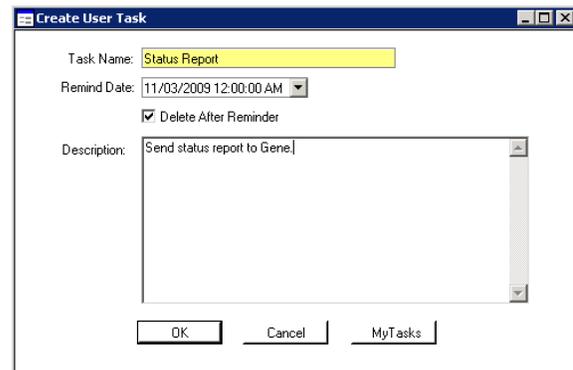
For many people, especially those in sales and marketing positions, Microsoft® Outlook® is an essential tool for communication and organization. You use Outlook tools to manage your e-mail, your calendar, your task list, and your contacts.

Infor ERP SyteLine includes a user calendar, task lists, and sales contacts that can be tightly integrated with their Outlook counterparts, so you can work with the same information seamlessly in both Outlook and SyteLine. With the click of a button, you can selectively duplicate contacts, appointments, and tasks from either Outlook or SyteLine into the other application.

When you view e-mails in Outlook to or from certain customers, the SyteLine details for orders made by that customer display along with the e-mail, for easy reference when you reply to or call that customer. The details of SyteLine customer interactions are also available with the Outlook e-mail, so you can see all interactions with that customer and refer to ongoing discussions.

You can also add selected incoming or outgoing Outlook e-mails to the SyteLine Customer Interactions form by clicking a button in Outlook.

- Outlook Add-In
- Emails Added to Customer Interaction Logs
- Emails Added to SyteLine CRM
- Task List Associated with Calendar Events
- Sync Contacts and Tasks
- Sync Calendars
- Sync Task Lists



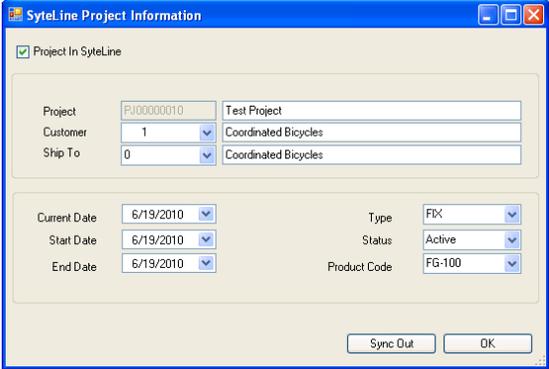
With the click of a button, you can selectively duplicate contacts, appointments, and tasks from either Outlook or SyteLine into the other application.

Microsoft Projects Integration

Infor ERP SyteLine interfaces with Microsoft Project®. The interface includes an add-in that adds a SyteLine toolbar and menu option to Microsoft Office Project, similar to the ones in Outlook and Excel. This add-in allows you to pull in data from SyteLine and also to send data from Microsoft Project to SyteLine.

The Microsoft Project add-in is very easy to install and configure. Once the add-in is installed, you can create a SyteLine project from within Microsoft Project. Infor ERP SyteLine can import and export project task data to and from Microsoft Project. If you have Microsoft Project installed on the local machine, import and export buttons appear on the Project Tasks form.

- Sync In, Sync Out, and Enable Auto Sync Out—Sync In and Sync Out synchronize changes on the Project between SyteLine and the Microsoft Project client. Enable Auto Sync Out enables you to Sync Out changes
- Create new projects in SyteLine using Microsoft Project
- Create a new estimate project in SyteLine using Microsoft Project
- Create a new project task in SyteLine using Microsoft Project
- Create a new resource (Material) in SyteLine using Microsoft Project
- Create a new work resource (employee, user, etc.) in SyteLine using Microsoft Project
- Assign existing work resources to different tasks using Microsoft Project



The screenshot shows a dialog box titled "SyteLine Project Information". At the top left, there is a checked checkbox labeled "Project In SyteLine". Below this, the dialog is organized into several sections. The first section contains three fields: "Project" with the value "PJ00000010", "Customer" with a dropdown menu showing "1", and "Ship To" with a dropdown menu showing "0". The second section contains three date fields: "Current Date", "Start Date", and "End Date", all with dropdown menus showing "6/19/2010". The third section contains three dropdown menus: "Type" showing "FK", "Status" showing "Active", and "Product Code" showing "FG-100". At the bottom right of the dialog, there are two buttons: "Sync Out" and "OK".

Infor ERP SyteLine can import and export project task data to and from Microsoft Project.

Microsoft SharePoint Integration

If your company uses Microsoft SharePoint® to share information among employees, the SharePoint pages can include charts and lists that display current Infor ERP SyteLine data. For example, you can display a chart showing sales year-to-date by salesperson, or a list of customers on credit hold. If a list is set up to allow it, you can also drill back to open the SyteLine form that contains the data.

Infor SyteLine SharePoint web parts retrieve and display on a SharePoint site the IDO data from a specific SyteLine configuration. You can download, deploy, and configure these web parts, so that the web parts display specific SyteLine information. Administrators can include the configured web parts on shared pages, or they can export the configured web parts so that users can import them to their pages. Individual users can reconfigure each web part to point to a different SyteLine configuration or to log in with a different user name.

- Display a chart based on a SyteLine IDO using the Infor Chart Web Part.
- Displays a list based on a SyteLine IDO using the Infor List Web Part. This is similar to the collection of information you see on many SyteLine forms.
- Drill back to SyteLine forms from SharePoint.

CUSTOMER RELATIONSHIP MANAGEMENT

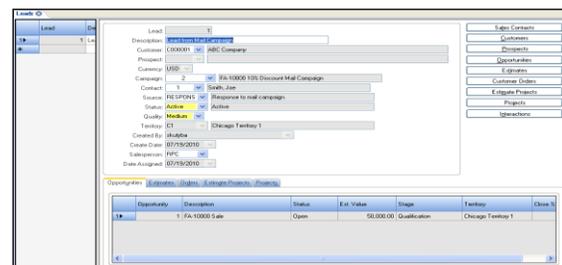
Customer Relationship Management (CRM)

CRM is a customer relationship management solution that provides an efficient method for managing the entire sales process within SytelLine, from customer lead origination and sales opportunity tracking through converting prospects to customers and placing the order.

The features in CRM provide an integrated solution between your front and back offices. It delivers productivity gains by streamlining sales and customer service processes, decreasing the cost of sales and cost to serve, and ultimately increasing revenue.

- Track all elements of a marketing or sales campaign through Opportunities
- Manage all tasks associated with an opportunity using the Opportunity Tasks form
- Manage contact information and basic company information of your competitors
- Create and manage campaigns
- Track estimate orders assigned to prospects or customers
- Maintain territory information, the SIC code, company revenue and number of employees for each customer
- Cross reference your sales contacts with customers and prospects
- Assist prospects and customers from initial interest through order placement using the Prospects and Leads forms

- Convert prospects to customers
- Organize prospects and customers by Territories
- Create and manage sales teams for customers, prospects, and opportunities
- Track communications with sales contacts, prospects, and customers
- Maintain basic information about your sales contacts
- Create sales forecasts
- Add opportunities to a sales forecast
- Create sales periods
- Sales person homepage
- Mail Merge and email Blasts



Track all elements of a marketing or sales campaign with CRM.

SyteLine Customer Portal

The Infor ERP SyteLine Customer Portal enhances your customer relationships by giving them direct access to SyteLine data that they care about. Checking on order status, viewing estimates, requesting an RMA, or reprinting an invoice can now be handled directly by the customer. In addition, detailed product information can be made available including browsing products by category, displaying featured products and top sellers, and then drilling down to individual items with pictures, pricing and associated recommended items. Product and support information can be published as videos and white papers, etc. along with answers to frequently asked questions.

- Order Status
- Product Lookup
- A/R Balance
- Top Sellers
- Featured Products
- Estimate Lookup
- My Company Profile
- My Profile
- Inbox
- Returns
- Contact Us
- Reprint Invoices
- Announcements
- Press Releases
- Video Library
- White Papers
- FAQ
- Knowledge Base

Order	Cost PO	Order Date	Status
109	NP-0081233	11/26/2007	Shipped
111		12/13/2007	Ordered
123	9532001	12/18/2007	Ordered
140	1239FDD	1/24/2008	Shipped
MSP0000001		6/19/2010	Shipped
160		6/9/2010	Ordered
0000000001		6/20/2010	Shipped
166		6/11/2010	Ordered
169	JP123	6/11/2010	Ordered
4900000001		6/17/2010	Ordered

Item	Qty Ordered	Ship Date	Shipped To Date	Expected Ship Date	Last Ship Date
M51-091X7	100.00	OH	000.00	12/19/2007	12/30/2007
Bicycle, Model-30,26"					
B1-1300	100.00	OH	100.00	12/21/2007	12/30/2007
Bicycle, Model-50,26"					
W4-27000	30.00	OH	30.00	12/21/2007	12/30/2007
Wheel, Assembly, 27"					
B1-1300	100.00	OH	0.00	1/17/2008	
Bicycle, Model-50,26"					

Checking on order status, viewing estimates, requesting an RMA, or reprinting an invoice can now be handled directly by the customer.

SALES

Estimating

Infor ERP SyteLine's Quoting and Estimating capabilities allow you to create professional and comprehensive quotations and turn these quotes into sales orders. You can create Estimates quickly and easily by copying from another Estimate, an existing work order, or a Bill of Material, then modifying the new Estimate to match the customer's specifications.

Infor ERP SyteLine computes a cost estimate that includes material, labor, burden, and outside services. When awarded a contract, you can easily create both a sales order and a work order from the Estimate. SyteLine lets you track events that occur during the Estimating process and can keep all documentation involved attached to the Estimate.

- Engineering Sandbox Development
- Quoting and Cost Analysis
- Copy an Estimate from another Estimate, a work order, or Bill of Material, and then make modifications as necessary.
- What-if Scheduling
- Pricing tables
- Multiple Price Breaks
- Estimate Status to reflect Customer acceptance
- Estimates Quick Entry Form
- Estimate Response Form for customers

Line	Item	Item Description	Qty Ordered	U/M	Unit Price	Extended Price
1	UNICYCLE	Main Inventory Item	1.00	EA	1,000.00000	1,000.00
2	74-3000	Frame, Standard Carbon Steel	1.00	EA	26.25000	26.25000

SyteLine lets you track events that occur during the Estimating process and can keep all documentation involved attached to the Estimate.

Customer Order Entry and Invoicing

Infor ERP SyteLine Customer Order Entry and Invoicing features allow you to access complete sales order information instantly, while providing your customer service representatives with online support to enter and track customer orders and create invoices. Infor ERP SyteLine is fully integrated from the point of customer quotes through customer order entry, engineering, production, costing, shipping, and customer service.

This integration allows customer service representatives to take action on credit problems, reschedule requirements, and release orders in a timely manner to meet required shipment dates. It also provides access to crucial data including general customer information and credit status, order backlog, material and resource availability, order acknowledgments, commissions, percentage of completion, and shipping information. Comprehensive sales analysis reports help decision makers track everything from customers to sales representatives.

- Centralized and decentralized order entry
- Customer Orders Quick Entry Form
- Automatic credit checking, warnings and hold
- Order change history
- Volume, customer/item, contract and matrix pricing
- Hard and soft allocations
- Three-tier Customers (Corp—Bill To, Sold To(s), Ship To(s))
- Drop Shipping by order/line/release
- Regular/Blanket Orders

- Kit orders
- Ship Early/Partial processing
- Time-phased item availability
- Ability to link customer order lines directly to Job Orders, Inventory, Purchase Orders and Transfer Orders
- Order/Line Discounts
- Available to promise for real delivery dates
- Features and Options order configuration
- Multi-lingual customer paperwork, including invoices
- Foreign currencies
- Sales tax calculations: VAT & GAT
- Progressive billings
- Customer Document Profiles
- Letters of credit
- Order acknowledgements
- Advanced Shipping Notices
- Consolidated invoicing
- Drop ship orders (direct from vendor)
- Customer Service Homepage

Line	Item	Qty Ordered	UOM	Due Date	Unit Price	Net Price	Status	Ship Site
1	54-1000	1.00	EA	09/09/2010	264.00	264.00	Ordered	Desco

Infor ERP SyteLine Customer Order Entry and Invoicing features allow you to access complete sales order information instantly.

Delivery Orders

Infor ERP SyteLine Delivery Order allows you to ship multiple customer orders to a single customer/ship-to combination under one tracking number. In addition to shipping under one tracking number, delivery orders are also invoiced using one invoice number through consolidated invoicing.

- Consolidate multiple Delivery Orders onto one invoice
- Invoice for a specific Delivery Order
- Create Delivery Orders before, during, or after Shipping
- Track multiple shipments with one Tracking number
- Create Export Documents
- Printing a Delivery Order can be used to create a Bill of Lading, Packing List, Pro Forma Invoice, Advance Ship Notice, Generating an Electronic Data Interchange (EDI) Advance Ship Notice (ASN) for a Delivery Order
- Specify Information about the Delivery Order such as carrier, consignee, consignor, invoicee, and special instructions

The screenshot shows the 'Delivery Order' form in Infor ERP SyteLine. The form is titled 'Delivery Order' and has a status of 'Approved'. It displays the following information:

- DD/BOL: 2
- Customer: 25
- Ship To: 0
- Date: 12/17/2007
- Value: 63,000.00
- Currency: USD
- Carrier: UPS
- Contact: Arnold Johnson
- Carrier Number: 568004
- Vehicle Number: DT-0075
- Pro Number: 314860-01
- Container: 55
- Route: [Empty]
- Pickup Date: 03/02/2008
- Total Packages: 25
- Total Weight: 8,000.00
- Weight U.M.: [Empty]

Infor ERP SyteLine Delivery Order allows you to ship multiple customer orders to a single customer/ship-to combination under one tracking number.

Return Material Authorization (RMA)

Infor ERP SyteLine allows companies to manage Return Material Authorizations (RMAs); documents that control the return of parts previously sold and shipped to a customer. Easily tailored to your particular business, SyteLine offers codes and parameters that allow you to define your processes or to track important issues.

Many times, Customer Returns must be routed through multiple groups within your organization. Infor ERP SyteLine RMA capabilities allow you to easily manage the steps of a returned part. RMA supports you in performing such basic tasks as authorizing returns, issuing credit, sending a replacement, and receiving returned material. You can also repair the returned item using a rework order.

Infor ERP SyteLine provides access to the business information created through your day-to-day transactions of customer returns. This information can help you identify problems quickly, track issues, verify progress, and improve processes.

- Generate a unique RMA number automatically
- Receive returns to non-nettable locations
- Customer credit memos based upon receipt of the returned item
- Add Notes or Documents to RMAs
- Manage cost of returned product by linking to the original order shipped
- Issue repair or replacement orders for returned materials
- Track information that will help you improve both customer service and overall part quality

- Maintain documented control over the return of parts

The screenshot displays the 'RMA Line Items' window in Infor ERP SyteLine. It features a table on the left with columns for RMA, Qty, and Cu. The main area shows the details for RMA RMA0000001, including customer information, line details, and various tabs for configuration. The 'General' tab is selected, showing fields for 'Order', 'Return', 'Warranty', 'Original Invoice', 'Tax Code', 'DO', 'Qty Credited', 'Qty Received', 'Last Return', and 'Reason'.

RMA supports you in performing such basic tasks as authorizing returns, issuing credit, sending a replacement, and receiving returned material.

SyteLine Configurator

The Infor ERP SyteLine Configurator is a new-generation product and sales configurator that is easily integrated with any or all of your web, enterprise, desktop, or laptop systems. Powerful and intuitive, The SyteLine Configurator has the flexibility to handle any customizable product or service, and support practically any type of user or application.

Intuitive user interface — A dynamic user interface makes the entire configuration experience highly intuitive, productive, and personalized.

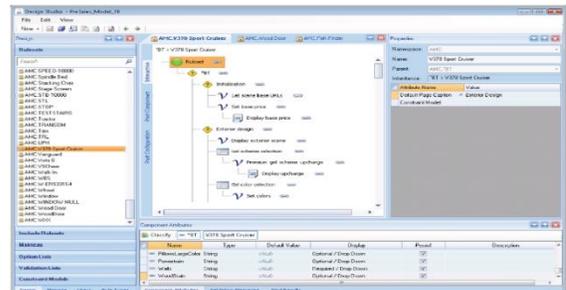
Powerful configuration engine — The core configuration engine processes the rules, constraints and associated data in product models based on inputs from the user interface or other applications to provide guided product selection, product configuration, pricing, real-time product visualization, and output generation.

Graphical Design Studio — The product models that drive the SyteLine Configurator are developed in the Studio. You can easily create comprehensive product models that make selection and configuration of even the most complex products intuitive and error-free.

Deploy anywhere, manage centrally — Besides its flexibility and ease of use, the SyteLine Configurator has uniquely powerful integration and administration capabilities. Using these tools, you can easily deploy the SyteLine Configurator for a specific function, or across all your applications and computing platforms. You can decide to make it available to particular individuals or to your global community of employees, partners and customers.

- Accelerate key processes such as quoting, order entry, and price book/catalog generation.

- Increase sales by making every sales person, customer service rep, dealer, and distributor a product expert.
- Decrease costs by reducing the need for engineering support in sales and other processes.
- Eliminate errors in product specification and pricing.
- Enable growth with the ability to quickly train new employees and sales partners.
- Speed new product introduction by reducing or eliminating the need to distribute product and pricing updates.
- Streamline production and improve quality by providing accurate configuration-specific information to manufacturing.
- Differentiate from the competition by becoming “easy to do business with” when dealing with your customized products.



SyteLine configurator's dynamic user interface makes the entire configuration experience highly intuitive, productive, and personalized.

Infor ERP Storefront

With each passing year, online shoppers are demanding more. Whether your company is a manufacturer or distributor of products, your customers are expecting you to deliver more convenience, information, and services. Offering an attractive and complete online catalog may have carried the day a few years ago. But now your customers want a higher level of service, such as in-depth product information, a more intuitive and capable search experience, personalization, easy order entry, and shipment tracking. And many companies must provide enhanced e-commerce services on a global basis, taking into account a variety of currency, tax, and cultural differences.

The bottom-line goal for distributors and manufacturers with an e-commerce offering is to increase product browsing to improve order conversion rates and the overall service performance of their site. To meet this goal many distributors and manufacturers are building on their existing enterprise resource planning (ERP) capabilities by implementing Infor ERP Storefront to integrate and enhance their e-commerce capabilities.

Infor ERP Storefront's state-of-the-art web foundation is designed to provide a world-class shopping experience on both B2C and B2B websites. Featuring a robust catalog with advanced searching, order entry, tracking, and account maintenance capabilities, Infor ERP Storefront delivers the capabilities distributors and manufacturers need to automate selling, servicing, and sourcing.

The solution has deep customer personalization features, such as custom shopping lists and wish lists that help convince users that your website is best at meeting their needs.

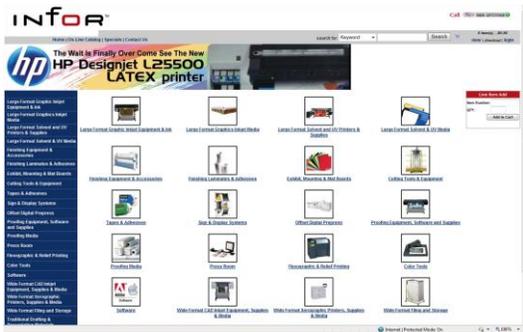
To help distributors and manufacturers keep pace with demands for more advanced e-commerce services, Infor has enhanced

ERP Storefront with improved performance, scalability, customization, search capabilities, and overall user experience.

Customers can now scale components across several servers for better performance in environments with a high user count or high product count. Infor ERP Storefront has advanced caching to minimize database access, and features an optimized data structure to improve performance and ensure data integrity. The application is Java-based and uses XML transactions, making maintenance, upgrades, and product customization less expensive.

With Infor ERP Storefront, you can:

- Increase revenue by increasing conversion rates and expanding online sales.
- Enhance customer satisfaction by making it more convenient to do business with your company.
- Expand your e-commerce services without burdening your customer-service staff.
- Deliver a wide range of convenient services to supplement core e-commerce activity.
- Upgrade to new e-commerce capabilities as business needs dictate.
- Offer B2C and B2B services in multiple markets around the globe.
- Provide easy access to product and account information for you and your customers.



Featuring a robust catalog with advanced searching, order entry, tracking, and account maintenance capabilities, Infor ERP Storefront delivers the capabilities distributors and manufacturers need to automate selling, servicing, and sourcing.

SyteLine Instant Order Fulfillment

Infor ERP SyteLine Instant Order Fulfillment (IOF) simplifies order entry and expedites the pick-pack-ship process.

An efficient process improves customer satisfaction, contributes to a condensed order-to-cash cycle, and reduces time/labor required. Automation minimizes administrative tasks and decreases errors.

In order entry, visibility from single screens streamlines processes, makes them more convenient and easier to administer. In the fulfillment portion of the cycle, IOF provides automatic picking functionality meaning pick lists will be generated automatically when needed material becomes available. Packing slips are easily updated to speed the pick/pack process thus making IOF an optimal add-on for high-volume or distribution environments.

- **Simplified order entry** — Create customer orders and lines from a single screen, so you can enter an order while the customer is on the phone. Keep a running total of order amount, cost, margin amount and margin percentage. Lock/Unlock orders for large order entry and editing.
- **Inventory visibility** — See on-hand availability by warehouse of the item being entered on same screen. View the time-phased availability of the item being entered and leverage standard inventory reservations. Customer order and line item comments are visible and editable from the same screen.
- **Efficient order fulfillment** — Utilize highly configurable features to establish a post-picking routine, maintenance of the packing slip, and generation of the BOL upon shipment.
- **Convenient interface** — Integration to Infor ERP SyteLine means you can use standard SyteLine features and options.

SyteLine Workflow is accessible from a single screen. Visibility of customer records enables credit status review before shipping.

- **Pick/pack generation** — Pick lists and packing slips can be automatically created based on all pending orders and jobs in the system.

The screenshot displays the 'Instant Order Entry' screen in SyteLine. It includes fields for Customer (14), Home Department Store, Credit Hold Reason, Order (116), Ship To (0), Order Credit Hold Reason, Order Date (08/03/2004), Status (Ordered), Ship Via (PRT), Warehouse (MAIN), Salesperson (BAR), Taken By (MGR), Total Price (48,616.90), Total Cost (48,352.53), and Margin (264.37). Below these are sections for Customer Order Lines and Item Availability. The Customer Order Lines table shows 5 lines with details like Item, Qty Ordered, UOM, Cost Date, Request Date, Unit Price, Warehouse, Status, Ship Site, and Reference. The Item Availability table shows 3 items (DIS1, MAIN, PMA) with Qty On Hand and Available quantities.

Line	Item	Qty Ordered	UOM	Cost Date	Request Date	Unit Price	Warehouse	Status	Ship Site	Reference
1	1 1A-10000	10,000	EA	08/02/2004	08/02/2004	290.00	MAIN	Filed	Demo	Inventory
2	2 1A-20000	50,000	EA	08/02/2004	08/02/2004	330.00	MAIN	Filed	Demo	Job
3	3 CP-10000	50,000	EA	08/02/2004	08/02/2004	1,000.00	MAIN	Filed	Demo	Inventory
4	4 1A-50000	25,000	EA	08/02/2004	08/02/2004	20.00	MAIN	Filed	Demo	Inventory
5	5 CP-10000	50,000	EA	08/02/2004	08/02/2004	2,300.00	MAIN	Filed	Demo	Inventory

Quickly create customer orders and lines from a single screen, so you can enter an order while the customer is on the phone.

SyteLine POS (Point of Sale)

Infor ERP SyteLine Point of Sale (POS) module is used in retail applications to manage over-the-counter cash transactions or phone-in requests where customers pick up or are shipped product/materials. POS streamlines the Order Entry, Order Fulfillment, Order Invoicing and Order Payment process speeding data entry of sales transactions.

The POS transaction process automatically prints an invoice and posts payments at the same time. POS supports multiple cash drawers generating invoices simultaneously. Standard FS-Plus SROs (service repair orders) are created for POS transactions making it possible to add items to an order at a later time. For material transactions, visibility into item availability by warehouse, location, or lot is also provided.

A complete audit trail is kept and maintained aiding in cash drawer reconciliation. Built-in security supports multiple types of payment on each transaction including cash, credit card, on account, and check.

- **Convenience** — Record materials, labor, and miscellaneous charges and payment transactions from a single screen.
- **Payment types** — Supports multiple types of payments, including cash, credit card, on account and check.
- **Update inventory** — As items are added to customer's POS order, the item's availability status is automatically updated.
- **Visibility** — Access details on each of the items being purchased from the POS Entry screen.
- **Easily update orders** — Add, change or delete items to the customer order from the Point of Entry Screen.

- **Integration** — Seamless integration to SyteLine allows all POS data to flow through to other financial and service reports.

Sales Amount	Sales Tax	Sales Tax2	Freight	Misc Charges	Discount	Prepaid Amt	Total Due	Total Paid
153.01	0.00	0.00	0.00	0.00	7.66	0.00	145.35	145.35

You can access details on each of the items being purchased from the POS Entry screen.

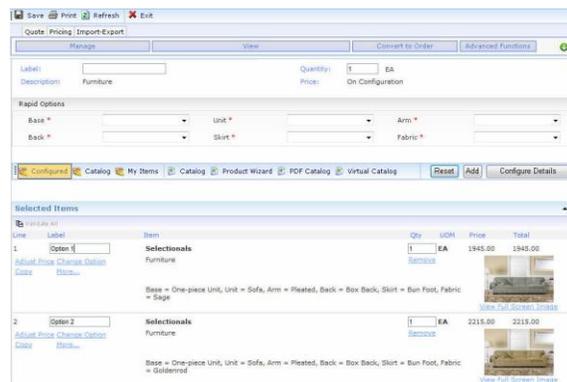
SyteLine Channel Sales

Infor ERP SyteLine Channel Sales is a comprehensive quoting and ordering system for selling both configured and standard products through all your channels, including dealers, distributors, and/or your direct sales force.

Channel Sales provides a full range of capabilities to guide your sales people, channel partners, and key customers through product selection, configuration, pricing, quoting, proposal, ordering, and status inquiry.

- Select, configure, price, quote, and order with confidence:
 - Flexible product catalog
 - Guided product selection
 - Product configuration
 - Product visualization
 - Dynamic pricing
 - Quote/proposal document generation
 - Ordering
 - Status and History Inquiry
 - Internationalization
- **Collaborate throughout your sales channel** — Support fast, effective communication among all levels of your sales channel, from customer to dealer, distributor, and you as the manufacturer. Export/import and Internet-based communication capabilities for RFQs, orders, and other transactions allow your multi-level sales channel to work closely together to win more business. Customer service reps can work on open quotes or orders with dealer or outside sales reps to provide assistance
- **Deploy anywhere, manage centrally** — Modular, Internet-centric deployment architecture that lets you get the right tools into the hands of all your sales people, regardless of where they work. You can deploy the system online as a website, distributed to offline laptop or desktop PCs, or both. In any case, you

manage one system and one data repository with the confidence that everyone's information is always be up-to-date.



Channel Sales provides a full range of capabilities to guide your sales people, channel partners, and key customers through product selection, configuration, pricing, quoting, proposal, ordering, and status inquiry.

ENTERPRISE PLANNING

Projects

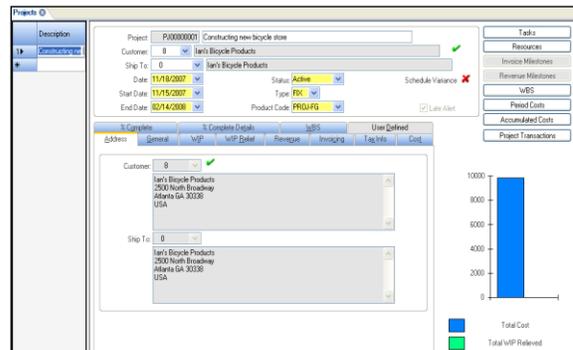
If you are a project-based business or a professional services firm, Infor ERP SyteLine offers a solution that will have you managing your projects with ease and accuracy. It's time for you to take advantage of features that unite your project managers with integrated data for capturing costs, maintaining contracts and projects, handling long lead-times, and delivering on-time complex projects.

Your project-oriented customers need complex goods built to specification and delivered within budget. Your project managers need real-time integrated tools to track revenues, expenses, and profitability.

Project Management automates workflow, increases efficiency, and, most importantly, promotes customer satisfaction. This solution facilitates teamwork and encourages the exchange of information.

- User defined activity tracking
- Full interface to manufacturing, purchasing, accounts payable, accounts receivable, order entry, inventory, payroll, & general ledger
- User defined project types and cost codes
- Multi-level % to complete analysis
- Revenue recognition by milestones
- Invoice milestone billing
- Invoice and Revenue milestones in different currencies
- Retention invoices

- Microsoft Project interface (import/export)
- Work Breakdown structures
- Budget by period
- Labor and expense reporting
- Shipping
- Microsoft Project add-in
- Late Alerts on Projects, Project Tasks, and Project Resources to alert managers about scheduling problems
- Out of Range (Schedule or Cost Code Variance) Indicators by Project
- Grid View of Project Transactions



Project Management automates workflow, increases efficiency, and, most importantly, promotes customer satisfaction.

Advanced Planning & Scheduling (APS)

To meet your lean manufacturing goals—to do more and more with less and less—lean planning capabilities are vital. Planning must focus on customer demand today, pulling to the customer due date and synchronizing the flow of material and capacity accordingly. Infor ERP SyteLine APS is a powerful solution that synchronizes the use of work centers, inventory, resources, and supply with customer orders.

With SyteLine APS, you can rely on a solution that is built, serviced, and managed by manufacturing professionals who understand your specific requirements—the need for processes to flow smoothly and without mistakes; unnecessary steps; wasted resources; and waiting downstream because upstream activities are late. Our solution helps you meet this goal by providing seamless advanced planning capabilities, increasing your on-time performance and throughput while reducing inventory and operating costs.

- Greater visibility in planning — Our solution provides exceptional visibility into the lean manufacturing plans it creates. You get a continuously visible plan for each order, so that every order “knows” the jobs and POs it needs, and every supply “knows” the demand it supports. You also gain new insight into your inventory and your resources (machines, operators, work centers, cell, and facility utilizations).
- Simultaneous materials and resource scheduling — Our solution concurrently plans all materials and capacity needed to satisfy the customer order. It balances available capacity with the actual projected workload without assuming that capacity is unlimited or “infinite.” Plans are continually adjusted based on the changing dynamics of your manufacturing environment.

- “What-if” capabilities — The “what-if” capabilities of the SyteLine APS engine let users determine the impact of decisions. For example, you can insert a high priority order into your current production plan, add overtime hours, or outsource specific components. The system instantly determines which customer orders will be affected and how delivery timeframes will change.
- Real-time promise dates — At the time of order entry, our solution provides the ability to obtain a promise date for the order which considers the finite constraints of both material and capacity. Users only need to perform a Capable to Promise (CTP) check within the order entry screens. This powerful feature gives you real-time date promise capability at both the order header and line detail level.

Type	Demand ID	Item	Days Late	Request Date	Due Date	Projected Date	Customer	Pull To Order
19	CD ABC000001	Demand Detail APS						
2	CD ABC000001	CD ABC000001-10						
3	CD ABC000001	CD ABC000001-10		7/4/2000	7/4/2000			
4	CD ABC000001	WP-H 545000, Child Center, Green		21.58	22.14			
5	CD ABC000001	116 00000 000000010, WP-100		7/4/2000	7/4/2000			
6	CD ABC000001	116 00000 000000010, WP-100		22.14	22.14			
7	CD ABC000001	WP-ASSEMBLE GRP, Assembly Operators						
8	CD ABC000001	WP-ASSEMBLE GRP, Assembly Operators		7/1/2000	7/4/2000			
9	CD ABC000001	WP-H 545000, Work, Green Sidewall		21.58	21.58			
10	CD ABC000001	Use New Supply (400.00)		21.58	21.58			
11	CD ABC000001	WP-H 545000, Child Center Assembly, Green		7/4/2000	7/4/2000			
12	CD 163.2	WP-H 545000, Child Center Assembly, Green		09.22	09.22			
13	CD ABC000001	120 00000 000000005, WP-100		09.22	09.22			
14	CD ABC000001	WP-SHEAR GRP, Shear Operator						
15	CD ABC000001	WP-SHEAR GRP, Shear Operator		7/4/2000	7/4/2000			
16	CD ABC000001	WP-SHEAR GRP, Shear Operator		09.45	16.22			
		WP-S 545000, Sheet, Green		7/3/2000	7/3/2000			
		122 00000 000000010, WP-100		19.47	21.75			
		WP-SHEAR GRP, Shearing Machines		19.47	21.75			
		WP-SHEAR GRP, Shear Operator						0.41

At the time of order entry, our solution provides the ability to obtain a promise date for the order which considers the finite constraints of both material and capacity.

Material Requirements Planning (MRP)

Infor ERP SyteLine Material Requirements Planning (MRP) module assists you in managing the balance between supply and demand. MRP is a mode of planning that plans requirements in order by the lowest level in which the item appears in a bill of material. That is, it plans all end items first, then all items at the next level, and so on, backward planning each requirement from the requirement's needed date to the item's lead time and batching together requirements needed at the same period of time.

Unlike APS, MRP does not consider routing times, resource capacity, or shifts. The responsibility rests with you, the planner, to make sure your shop floor has the available capacity to work the plan. MRP generates planned orders and exception messages to help you implement an accurate plan. MRP helps reduce inventory, increase manufacturing productivity, and ultimately facilitates cash flow.

- Explode all assembly schedules into component requirements
- Consume the forecast with actual orders as they are received
- The master production schedule (MPS) allows you to control production of key end items to help you protect your schedule from fluctuations in order-based demand (forecasts, customer orders, parent job orders, etc.). MPS is a manually created, anticipated build schedule for an item. You create it based on your expectations of demand and your estimation of resource capacity.
- Material Planning Workbench for automatic creation of Purchase Orders, Jobs, or Transfer Orders
- Run MRP for all sites or individual sites

- Define a source per part – Manufactured, Purchased, or Transferred to define sourcing by site.
- Available To Promise
- View Exception messages when exceptions occur such as on-hand quantity drops below safety stock, or when a planned receipt is no longer needed (or needs to be moved in or out in time)
- Use the Order Action Report to determine the job orders and purchase orders you must generate and release for a given item to be available when needed
- Replicate MRP planned transfer orders to the supply sites in your multi-site environment
- Peg each supply against demand using the Pegging Display form

Process Line	Item	Fixed Lead Time	Release Date	Required Qty	Purchase Order	Ven.	Safety Stock	Lead Time	Unit Cost	Alternate Vendor	Alternate Lead Time
1	AL-10000	20	04/12/2008	240.00		6	8.00	9	5.90		
2	AL-10000	20	04/29/2008	1,000.00		6	8.00	9	5.90		
3	AL-10000	20	07/06/2008	400.00		6	8.00	9	5.90		
4	AL-10000	20	08/10/2008	300.00		6	8.00	9	5.90		
5	AL-10000	20	08/20/2010	100.00		6	8.00	9	5.90		

MRP generates planned orders and exception messages to help you implement an accurate plan that reduces inventory, increases manufacturing productivity, and ultimately facilitates cash flow.

Scheduling

The Infor ERP Scheduler calculates the dates and times to work on a subset of existing orders - those manufacturing orders that you need to complete in the near future. You can run the schedule over any horizon: a shift, day, week, month, etc. However, you will usually run it for a one-day horizon, and you will usually run it each day.

The Scheduler adjusts operation start and end times, suggests operation sequences, and reports changes in inventory levels. It also generates summary information (such as job performance) you can view in reports and graphs.

The Scheduler processes individual operations for any Released jobs within the defined time horizon based on their routing and setup, run, and move times.

- Schedule Planned orders generated by MRP or APS, Firm jobs, Working estimate jobs, Planned estimate jobs, production schedules
- Schedule jobs forward in time
- Schedule resources to perform operations
- Event-based scheduling
- Utilize scheduling shifts, holidays, resources, resource groups, departments, and work centers
- Prioritize jobs by setting sequence and selection rules
- Identify late jobs and causes using the Scheduler output analysis forms or Analyzer
- Runs automatically in the Background Queue

- Dispatch lists by individual resources or resource groups
- Graphical views of capacity and schedule
- Schedule analysis by exception
- Resource Bottleneck analysis forms

SyteLine Forecasting

For discrete manufacturers, many factors contribute to an efficient operation and healthy bottom line. One important factor that can get overlooked is forecasting — determining the right amounts of raw materials and components needed to meet production requirements. A manual, informal process can result in costly excess inventory or order fulfillment and production efficiency problems.

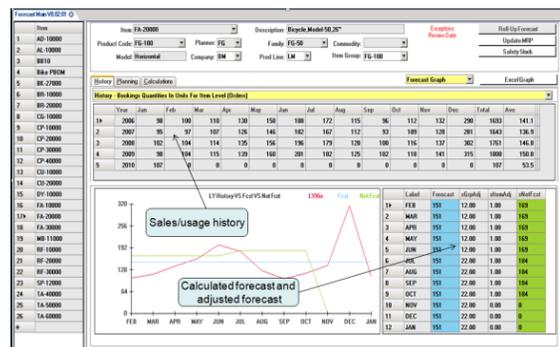
At many companies, forecasting is done using inefficient and error-prone spreadsheets. To compensate, many companies maintain an inventory “fudge factor,” keeping too much inventory on hand. Other times, they maintain too little and consequently lose sales, incur expediting costs, or ship late.

Forward-thinking discrete manufacturers overcome these operational challenges by automating their forecasting processes with a solution integrated with their ERP system to help them quickly calculate more accurate forecasts and optimal safety stock levels.

SyteLine Forecasting automates the calculation of forecasts and other inventory drivers such as safety stock, and alerts you when actual demand varies from the plan. Forecasting is easy to use and implement, and automates the following processes:

- **Collect data** — Collect historical sales of products or usage of components in both units and dollars.
- **Calculate forecasts** — Use historical demand and various algorithms with what-if analysis. Forecasts also can be generated collaboratively with customer specific demand. The solution also supports combined forecasting methods, such as when part of demand is forecast by statistics and part by imported customer data.

- **Analyze data** — Analyze forecasts, sales, bookings, or usage of materials by unit and dollar volume and compare forecasts to historical trends and to actual demand. Information is presented graphically by groupings, including product, family, commodity, planner, and user defined.
- **Adapt the forecast** — Adjust the forecast for specific market factors such as promotions, competitive situations, and new opportunities. These adjustments can be made at the various group levels or at the item level.
- **Calculate optimum inventory levels** — Calculate optimum safety stock, order size, and re-order points, factoring in average usage, variability, lead time, and desired service level.
- **Perform top-down forecasting** — For configure-to-order products, use planning bills to calculate or specify a single forecast for a group of items and then consume that forecast when members of the group are sold. For common components but with unlimited end-item possibilities, the solution enables you to forecast the components, rather than the end items, and consume the forecast when the components are used.



Statistically calculate forecasts based on historical demand using various algorithms with what-if analysis.

SyteLine SytePlan

Sales & Operations Planning is a business management process to achieve the alignment of all business activities to balance supply and demand. The Infor ERP SyteLine SytePlan process helps sales, production, inventory, and financial manager's work together to maximize customer fill rates, optimize inventory, and maximize profits.

SyteLine SytePlan provides workbenches, queries, graphs, and reports that facilitate the Sales and Operations integrated management process. These tools assist you in creating an Annual Operating Plan (AOP) and monitoring your performance against the plan.

SytePlan helps identify supply and demand problems and directs your management team towards the activities that will balance supply and demand and keep you on track with the plan. Identify problems such as:

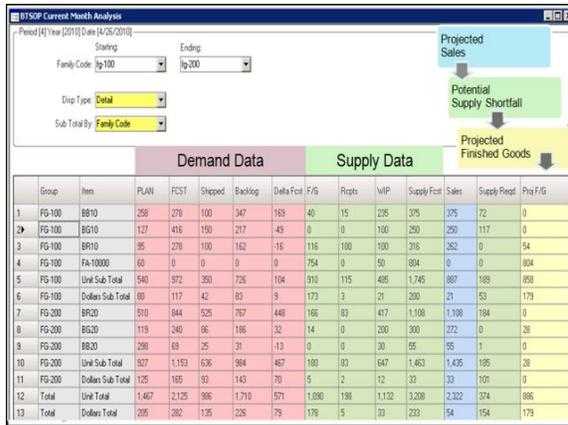
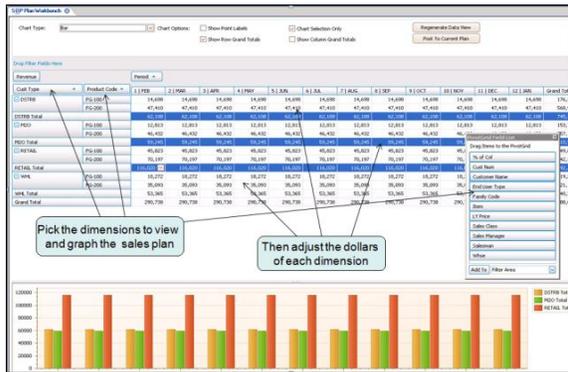
- Producing WIP/inventory for products in excess of the demand
- Booking more or less than the forecast
- Changing the forecast too much for production to respond
- Building up WIP/inventory for products that have a backlog
- Planned production that is inadequate to reduce the backlog
- Creating unreasonable forecasts considering our capacity
- Selling what is most available and most profitable
- On-time delivery problems

SyteLine tells you what jobs and POs are needed to fill demand. SytePlan tells you if you will make your revenue and inventory

plans; why you've failed to make them in the past; and how you can make them in the future—with a big picture perspective of dollars and units of various product groupings and drill down to identify root causes and corrective actions.

Features:

- Plan/Budget Definition
- Plan/Budget Detail
- Annual Operating Plan Workbench
- Master Report
- Current Month Analysis
- Last Month Analysis
- Historical Forecasts
- Forecast Stagger Chart
- Supply-Demand Weekly Summary
- Monthly Analysis Report
- Customer On Time Delivery Analysis
- On Time Delivery Detail
- Rough Cut Capacity Analysis
- Inventory Turns Analysis
- Gross Margin Analysis



SytePlan tells you if you will make your revenue and inventory plans; why you've failed to make them in the past; and how you can make them in the future—with a big picture perspective of dollars and units of various product groupings and drill down to identify root causes and corrective actions.

PRODUCTION MANAGEMENT

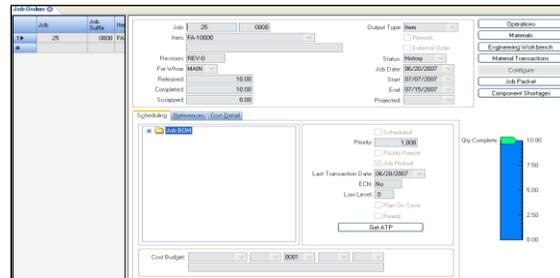
Manufacturing Work Orders or Jobs

Infor ERP SyteLine allows you to use jobs, also referred to as manufacturing work orders, to track specific manufacturing processes, including labor, material, machines, costs, scrap, work in process, and finished goods inventory. A job is a mechanism to launch and monitor production to meet a planned requirement.

Jobs are very flexible and easily changed to meet a specific customer's requirements and provide great detail in cost tracking and analysis. It's also a way to cross-reference production to a specific customer order that needs to be tracked in detail. Jobs have their own bill of material and routing structure and are individually released to manufacturing. In addition, job definition for rework order processing is available, allowing for recursive item repair use with planning impact basis.

- Infor ERP SyteLine provides several methods of creating and defining a job; you can use whichever method you prefer.
- Use the Material Planner's Workbench to manage the creation of all of your jobs in a single screen.
- Link customer orders directly to jobs
- Schedule jobs based on finite and infinite forward scheduling
- Issue materials to a work order or back flush materials automatically based on operation or job completions
- Validate material availability to determine whether or not a job can be completed on time

- Review estimated versus actual costs by job
- Payroll integration
- Machine-hour reporting
- Create jobs for By-products, Co-Products or Rework
- Allows for Overlapping Operations
- Outside Vendor Process
- Drive costs by Work Center & Department
- Track all actual (or standard) labor and material, as well as WIP (work-in-process) costs, through a detailed routing.
- Transactions can be entered manually, or posted automatically with bar code data collection or back flushing.



Infor ERP SyteLine provides several methods of creating and defining a job; you can use whichever method you prefer.

Production Schedules (Repetitive Manufacturing)

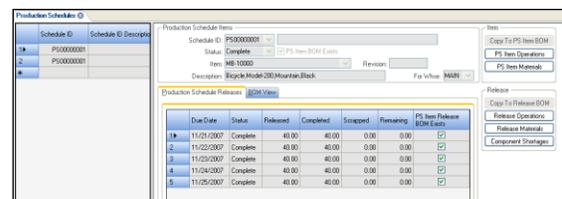
Infor ERP SyteLine Production Schedules are typically used when you manufacture the same item regularly — standard products — and do not need precise tracking of actual labor and material costs for every job.

Rather than being required to report all activity to a specific Work Order, SyteLine Production Schedules allow activities and their costs to be charged to Work Centers. Production schedules allow you to authorize and release production in a simplified manner. A production schedule functions as a blanket job order. Production schedules are sometimes also referred to as work order-less production.

With SyteLine's Production schedules, you create production schedules for an entire plant, planner, family of items, or specific customer for a selected time period. You can set up a production schedule for an item with releases for each month of the year; you don't have to create a separate job order each month or each time the item is manufactured.

- Allows manufacturers to be more spontaneous in authorizing production
- Flexibility in making schedule changes
- Reduce effort in establishing and maintaining production plans
- Reduce paperwork and system transactions
- SyteLine Production Schedules do not require actual labor and material tracking. Instead, after a Production Schedule is created you need only report the item produced and the quantity and the labor and material are back flushed.

- Costs are charged to the items produced in the work center based on the standard bill of material and routing
- Track the cumulative production for an item in time buckets you choose (daily, weekly, or monthly)
- Best suited for Make-to-Stock Finished Goods/Components, and High Volume-to-Order



The screenshot displays the 'Production Schedules' window in SyteLine. It includes a 'Production Schedule Items' section with fields for Schedule ID (PS00000001), Status (Complete), Item (999 10000), Description (Single Model 2004 Mountain Bike), and For Value (9999). Below this is a 'Production Schedule Releases' table with columns for Due Date, Status, Released, Completed, Scraped, Remaining, and PS Item Release. The table contains five rows, all with a status of 'Complete' and a remaining value of 0.00. To the right of the table are buttons for 'Copy To PS Item BOM', 'PS Item Operations', 'PS Item Materials', 'Release', 'Copy To Release BOM', 'Release Operations', 'Release Materials', and 'Component Changes'.

Due Date	Status	Released	Completed	Scraped	Remaining	PS Item Release
11/01/2007	Complete	40.00	40.00	0.00	0.00	[X]
11/02/2007	Complete	40.00	40.00	0.00	0.00	[X]
11/03/2007	Complete	40.00	40.00	0.00	0.00	[X]
11/04/2007	Complete	40.00	40.00	0.00	0.00	[X]
11/05/2007	Complete	40.00	40.00	0.00	0.00	[X]

With SyteLine's Production schedules, you create production schedules for an entire plant, planner, family of items, or specific customer for a selected time period.

Batched Production

Using the Infor ERP SyteLine Scheduler, you can group several potentially different items on different jobs into a batch and process that batch through, for example, an oven or a paint booth. After the batch is processed, the different jobs then continue on their own routing. Batching affects only the Scheduler, not the Planner.

Each batch definition describes how batches are formed, including a routing that processes the batched parts. The operations forms include a batch definition field. Any operation on which a batch definition is specified is referred to as the batch operation.

In a jobs or production schedule routing, an operation (the batch operation) references a batch definition when the job or production schedule can be combined with other jobs or productions schedules for processing. This causes batches to be formed, based on the rules defined on the Batch Definitions form, and transfers control to the batch definition routing. At the end of the batch definition routing, the job or PS returns to its original routing and continues processing as normal.

- User-defined or system-created batches
- Tell the Scheduler how batches should be formed including how jobs/production schedules will be batched together and when a batch will be released to be processed.
- Define operations that use the batch definitions
- Create user-defined batches which include specific released jobs and production schedule releases
- Define operations that use the batched production definitions

- View a summary of batch activity that occurs during a Scheduling run
- Maintain a list of the characteristics of items that can be separated into batches

The screenshot shows the 'Batched Production' tab of a form. At the top, there are input fields for 'Batch Definition' and 'Batch Item'. Below these are three tabs: 'Operations', 'Batched Productions', and 'Batch Summary'. The 'Batched Productions' tab is active. Underneath, there are three sub-sections: 'General', 'Release', and 'Override'. The 'Release' section contains a 'Separation Rule' dropdown set to 'All in Same Batch', a 'Release Rule' dropdown set to 'One Per Job', and three input fields: 'Value' (0), 'Minimum' (1.0), and 'Maximum' (1.0). The 'Override' section has a checkbox for 'Override Review' which is checked, and a dropdown for 'Override Rule' set to 'Waiting Time Exceeds Threshold' with a 'Threshold' input field set to 0. The 'Periodic Review' section has a checkbox for 'Periodic Review' which is checked, and a 'Review Interval' input field set to 0.

Each batch definition describes how batches are formed, including a routing that processes the batched parts.

Co-products and By-products

Many production processes result in more than one stock keeping unit (SKU). These additional materials may be Co-products or By-products and SyteLine models both.

A By-product is something that is a residual of or incidental to the production process. You are not in the business of making the by-product, and if you could eliminate it from the process, you would. But since it has value, you need to inventory it. Co-Products arise when you create many SKUs with the same job.

SyteLine lets you:

- Create jobs that make groups of items, rather than a single item
- Create Co-Product Mixes
- Support both Actual and Standard costs
- Support Production schedules and Estimates for By-products
- Perform Lot tracking
- Assign the cost distribution percentage between material, labor, and machine for each co-product job operation
- Process job material transactions to record receipt of By-products into inventory



Co-product	Description	Co-product Quantity
1▶ 908	Gear, 8 tooth	2
2 910	Gear, 10 tooth	1
3 912	Gear, 12 Tooth	3
*		

Infor ERP SyteLine allows you to model both co-products and by-products.

Infor Barcode

As a manufacturer competing in today's tough business environment, you know speed and accuracy are critical in every business process. You can already streamline planning, customer service, and complex manufacturing processes thanks to your core enterprise resource planning (ERP) solution, Infor ERP SyteLine—and that's a great advantage. But you need to constantly improve to keep successfully competing. And to do that you need to streamline your business processes, ensure your inventory is accurate, and streamline your logistics and production areas.

Simplify your business process to improve your shop floor and warehouse operations, with Infor Barcode for ERP SyteLine—a scalable, automated data collection solution that fully integrates with ERP SyteLine and has more than 25 years of discrete manufacturing experience built in. Activate only the functions you need and join hundreds of companies around the world who depend on Infor Barcode. You will eliminate warehousing, distribution, and manufacturing activities you don't need, because Infor Barcode helps you go lean.

With Infor Barcode for ERP SyteLine you can improve your business processes, go lean, and make sure you've got accurate inventory. From receiving to shipping and everything in between, you can integrate Barcode seamlessly with SyteLine. Not only can you quickly activate and use the application, you can configure and reconfigure it as your business processes change.

You can implement Infor Barcode with a range of hardware devices, including handheld, wall- and vehicle-mounted scanners; wireless access points, personal computers, and printers. Because you don't need to enter data manually, you won't make as many errors. Transactions are automatically posted, streamlining your warehouse and shop-floor processes.

You probably won't need anything more sophisticated than an automated data capture server and a high-end PC. You can scale the solution from several—to several hundred—devices, and get an extensive set of transaction analytics to manage it. Plus, with a powerful, parameter driven administration tool, you can configure Infor Barcode's standard and optional features yourself, without the need for programming—and that means lower IT costs.



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Infor Enterprise Asset Management (EAM)

Capital assets often generate unseen costs that turn profit into loss. If you don't pay attention to the total cost of operating capital assets, you may be passing up the opportunity to ensure the success of your business for months or years into the future. Successful companies know that effective enterprise asset management (EAM) does more than add to the bottom line—it also reduces risk and gives your business a measure of stability that makes a big difference in volatile business conditions. Infor EAM delivers a time-tested solution that helps your company increase the life and value of assets, optimizes asset utilization, decreases costs of operation, and improves decision-making. It also gives you an easy to use solution that you can implement quickly.

Infor EAM is a powerful enterprise asset management solution that enables small and mid-size organizations to control critical functions such as work orders, purchasing, inventory, and preventative maintenance, without the investment and extended implementation time required for a larger-scale installation. Designed for companies with single or multiple sites, this solution increases productivity while reducing downtime by enabling organizations to manage several essential business functions from within a single web-based solution

Infor EAM provides companies that have small or no IT departments with a full-featured solution that delivers unparalleled insight into operations and can fully integrate with additional enterprise applications, advantages typically reserved for applications designed for large, multinational corporations. The security model is also uncomplicated, reducing installation time even further. System users access the features and functions of web-based Infor EAM software through a browser, working with an easy-to-use graphical user interface.

Features:

- Graphical User Interface
- Predefined Reports
- Key Performance Indicators
- Web Architecture
- Minimal Hardware

Modules:

- Assets
- Work Management
- Preventive Maintenance
- Materials Management
- Purchasing
- Mobile

Flexible buying and deployment options: Infor now gives you unprecedented choice over how you purchase, deploy, and manage Infor EAM Business Edition. Now you can get the power of Infor EAM Business Edition three different ways:

- On-Premises—Traditional perpetual software license operated by the customer on site
- SaaS Hosted License—Traditional perpetual software licensing with hosting from Infor
- SaaS Subscription—Customer subscription for on demand usage

With such a wide range of deployment and buying options for Infor EAM, your company can choose the model that best meets your business needs.

SyteLine Shop-Trak

Top manufacturers have a new secret weapon—manufacturing execution systems (MES), because true quality management demands quality execution. Old-fashioned punch clocks and paper-based schedules simply can't keep a modern manufacturing workforce like yours operating at peak efficiency.

But, improving efficiency is only the first step — you need full interoperability with all business applications to truly deliver rich, real-time communications between your shop floor and the rest of your enterprise. That ensures that your sales, finance, design, management, and operations departments work with the same goals in mind at all times.

Benefit from Infor's decades of expertise at manufacturing execution and make your entire enterprise more productive every day. Infor ERP SyteLine Shop-Trak connects the comprehensive power of SyteLine with the power of manufacturing execution systems to deliver better results to every corner of your business. By creating a constant communication stream throughout your company, you'll be constantly positioned to take the corrective and preventive actions that lead to top quality and peak performance.

Infor ERP SyteLine Shop-Trak automates your entire range of shop floor workforce administration and execution tasks. You'll get more done with less effort at a lower cost by adding a powerful set of features to the SyteLine solution you already have.

You get quality at every step of your manufacturing process with Infor ERP SyteLine Shop-Trak. With support for your current plant entry security devices, as well as touch screen simplicity, biometric support, barcode printing, and data collection device support, you'll also gain higher quality faster at less effort.

Production Execution—Accelerate production throughout your organization using:

- Job moves and completes.
- JIT transactions.
- eKanban replenishments for internally and externally sourced parts and components.
- Rules-based, user defined labels—formatted specifically to individual customer or product requirements.
- Material Issues to production from multiple locations at once.

Production status and work dispatching

— Show workers real-time dispatch information for any work center or machine, in a personalized format that every employee can easily understand.

- Real-time production schedules and priorities go directly to the shop.
- Check production status by drilling through to transactional data.

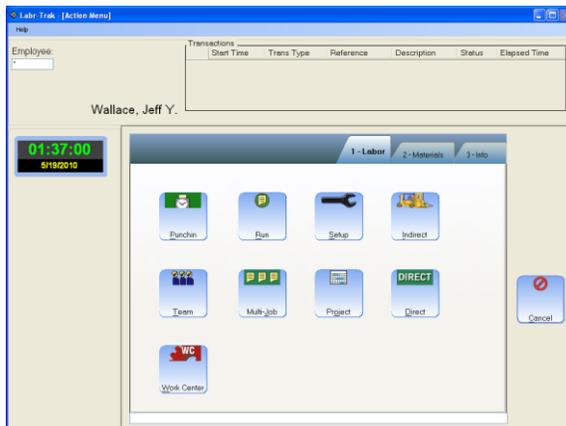
Time and attendance, with labor

collection — You'll streamline your full range of manufacturing tasks when you can:

- Achieve flawless accounting of payroll and job costing while starting or ending any number of machines at any time with Shop-Trak's simultaneous multiple machine management.
- Allow one employee to process multiple jobs on a single machine simultaneously or in rapid succession. Sophisticated cost allocations give you perfect precision and optimal productivity.
- Take advantage of Shop-Trak's support for work center teams or crews, allowing

one person to reassign a dynamically sized team from one job to another.

- Reconcile time and attendance, with shop floor labor, for better recordkeeping.
- Push time and attendance data directly into Infor ERP SyteLine Payroll or ADP.



Infor ERP SyteLine Shop-Trak automates your entire range of shop floor workforce administration and execution tasks.

SyteLine Quality Control Solution

Your customers require products made to their precise specifications. You require the same of your suppliers. You are equally committed to the same exacting level of quality within your company and across your entire organization. You face endless challenges in complying with government regulations, providing quality records to auditors and customers, and continually making improvements to your organization.

Infor ERP SyteLine Quality Control Solution (QCS) integrates best-in-class quality into the SyteLine functions you already use to run your manufacturing operation. It supports quality activities related to receiving, manufacturing, shipping, and returns.

QCS also manages advanced quality activities across your entire organization, including quality incidents, change management, and responses to audit findings. Infor ERP SyteLine Quality Control Solution creates the framework for building a culture of continuous improvement throughout your organization.

QCS supports quality activities of your entire enterprise, not just the manufacturing process.

The four distinct QCS modules, all built on a common foundation of powerful quality management tools, include:

- **The QCS Enterprise module encompasses:**
 - Topics
 - Changes
 - Web portal
 - Process flow

QCS includes support for quality incidents, change management, responses to audit findings, machine and maintenance issues, safety, training, and opportunities for continuous improvements. With Infor ERP SyteLine QCS, you can make specific

reviews mandatory and require that those reviews get addressed as a precondition to closing a change-management report.

Because communicating quality issues and their status is such a critical component of any quality system, the QCS Web portal allows all employees to view quality data, without the need to log into SyteLine. It also monitors and reports quality performance data, and offers basic document management functions.



The QCS Web portal allows all employees to view quality data, without the need to log into SyteLine. It also monitors and reports quality performance data, and offers basic document management functions.

- **The QCS Supplier module manages:**
 - Receiving inspection
 - Vendor Return Merchandise Authorization (RMA)
 - Supplier performance reporting

The process of managing your suppliers never ends. Beginning with a review of the supplier facilities and an approval process, the SyteLine QCS Supplier module helps track vendor communications and quality control (QC) status. The receiving process of this module includes material handling, safety alerts, printing tags, assigning unique tracking numbers, and putting material in a QC holding area pending disposition.

From here, QC inspects and assigns the material to inventory for production or tracks non-conforming material to its final disposition. It also provides integrated Vendor RMA support, including links with accounting. QCS automatically calculates vendor product quality and delivery

performance to help you build strong supplier relationships.

Beginning with a review of the supplier facilities and an approval process, the SyteLine QCS Supplier module helps track vendor communications and quality control (QC) status.

- **The QCS In-Process module covers:**
 - Job inspection and rework
 - Serial number tracking
 - Cost of scrap

Tracking quality requirements during production often becomes a chore, what with the need to record the disposition of materials at multiple inspection points, track sign-offs, capture test results, record defects, and track items requiring rework or repair. The QCS In-Process module streamlines your entire process.

Many situations require you to track and inspect manufactured items piece-by-piece, according to serial number or tag number. QCS supports all SyteLine production methods—jobs, production schedules, and just-in-time (JIT). It also allows you to enter all details while in a job, including disposition, non-conformance tracking, cost of quality, test results, defects, and failures.

In addition, QCS reports the cost of scrap including labor, material, and overhead. You can identify defective raw material at the point of use rather than at receipt, which helps you report the issue promptly. When you mark items as defective during

manufacturing, QCS lets you track each nonconforming item and capture the associated costs of quality. In addition, when a job requires you to send material outside for processing, QCS prints paperwork to attach to the product when it leaves your facility and when it returns again.

- **The QCS Customer module deals with:**
 - Shipping inspection and QA
 - Customer RMA
 - Customer complaints

Customers may require you to ship paperwork with each product to confirm that you have designed, manufactured, or inspected the product to meet regulatory or customer requirements. The QCS Customer module improves your work process by identifying which items require such confirmation and ensuring that these items are routed through QC prior to shipping. You can record inspection results, print necessary paperwork and then tag the product as accepted and ready to ship.

If your customers return the product, QCS works with the SyteLine RMA module to direct that product to QC for receipt, inspection, disposition, and non-conformance tracking. The Customer Complaint Reporting (CCR) function helps you respond to feedback from your customers, assign responsibility, track your internal review and corrective action, and measure customer satisfaction.

The Supplier, In-Process, and Customer modules are built on a common foundation to help you manage key quality requirements that span every facet of your organization. This common foundation includes:

- Non-conformance
- Quick reporting of quality issues
- QC item definition
- Corrective action
- Cost of quality
- Record inspection results

SyteLine Data Collection

Infor ERP SyteLine Data Collection speeds data entry, eliminates duplication of effort, and improves the accuracy and timeliness of data in the system. Data Collection can be implemented quickly and effectively. Data Collection fully supports lean initiatives, as it helps companies eliminate MUDA (a Japanese term for any activity that does not add value) in warehousing, distribution, and manufacturing.

Data collection enables companies to fully unleash the power of Infor ERP SyteLine in all the areas where material moves in, out, or through the operation, and where manufacturing resources — be they machines or manpower — add value to the product being produced. Using Data Collection to automate key material processes opens up a whole wealth of possibilities for streamlining logistics and production areas, and reduces the time and cost associated with key processes.

- Integrated Data Collection supports all three types of commonly used collection methodology: Store & Forward, Wedge, and Radio Frequency.
- Store & Forward uses portable readers and scanners that capture and store information until the reader is placed back in its cradle, at which time it transmits contents in batch mode.
- Wedge data collection uses a reader attached to the PC keyboard to enter data which is immediately validated and checked for errors, and then directly posted to the database.
- The RF method offers the ability to enter data and scan transactions through the use of portable radio frequency equipment. It provides on-line, real-time validation of the

Wedge method with the portability of the Store & Forward method.

- Inventory Control: Cycle Counting, Physical Inventory, Material Movements.
- Time & Attendance: Clock In/Clock Out, Lunch In/Lunch Out.
- Manufacturing Control: Labor and machine reporting against jobs and production schedules, with moves, completions, and scrap (including reason codes).
- Style sheets have been developed for the 1/4 VGA screen, 240 pixel wide Intermex CK31 device

Using Data Collection to automate key material processes opens up a whole wealth of possibilities for streamlining logistics and production areas, and reduces the time and cost associated with key processes.

SyteLine Advanced Plant Maintenance

Infor ERP SyteLine Advanced Plant Maintenance (APM) makes it possible for organizations to manage their entire internal maintenance process, from scheduling preventative maintenance events to handling the unexpected service repair.

Advanced Plant Maintenance reduces equipment downtime, improves resource utilization, and streamlines service operations. It helps protect against unscheduled maintenance when part and materials may not be available. It helps prevent interruptions in production which can lead to bottlenecks in the system, inventory shortfalls and hampered abilities to fulfill customer orders.

Advanced Plant Maintenance seamlessly integrates to Infor ERP SyteLine and provides organizations with an internal system to manage preventative maintenance schedules and/or service repairs. It manages inventory, purchasing, accounting, shop floor, and scheduling files. Any organization with equipment needing routine inspection, calibration, preventative maintenance, or potentially service repairs on equipment can benefit from this integrated service management solution.

Advanced Plant Maintenance helps the organization be proactive in its approach to maintenance of machines, tools, fixtures, fleet, facility, or plant assets. A preventative maintenance schedule means fewer equipment failures. Routine service can be planned according to a schedule that will least affect production demands.

Preventive maintenance reduces the threat of sub-par performance due to improperly maintained equipment and fixtures. Overall quality levels can be sustained. By maintaining equipment/tools/fixtures on a routine, scheduled basis, the life expectancy of assets is significantly extended. In addition, by tracking maintenance expense

over time, organizations can make better, informed decisions about future “repair versus replacement” options.

Advanced Plant Maintenance helps profit-minded organizations enact such proactive, asset-protecting strategies. Now your organization can effectively manage the entire maintenance process:

- **Unit configuration** — Manage complex equipment, tools, and fixtures, the Unit Configuration Screen can be used to track the detailed configuration of any date. Each line item can have its own set of comments and its own warranty tracking information. SROs for PM, inspection and calibration can be generated automatically. For tools and less complex equipment, the configuration need not be built.
- **Automated SRO scheduling** — Each Unit has a Unit master record. SROs of any user-defined type such as “PM” for preventive maintenance or “INSP” for inspection may be established to automatically generate either on a time or meter basis. All SROs are tied to the proper machines and tools giving the user the ability to track all costs.
- **Resource scheduling** — When reviewing the schedules for a resource or resource group, the user can view “Shift Exceptions” for blocks of time required to perform maintenance on the resource. With a click of the mouse, the list of maintenance orders generated for a resource or resource group can also be shown.
- **Incident/event tracking** — All service repair requests can be managed via the Incident Maintenance screen. Calls may be related to specific PM or SRO item or any item/part within the unit configuration. Full user- defined traceability is supported for multi-level reason and resolution codes. If a unit is identified as part of the incident,

warranty information is made available to the user. Priority and status codes are a basis for escalation and reporting.

The screenshot shows a software window titled "Automatic SRO Generation". At the top, a small text box explains: "This Automatic SRO Generation Utility will process all the Units in a given range and determine if there is any Planned Maintenance that needs to be performed on the Units. It uses the information from the Maintenance Tab on the Unit Maintenance screen to create the necessary Service Orders." Below this, the interface is divided into sections. On the left, under "Starting", there are dropdown menus for "Unit", "SRO Type", "Dept", and "Work Center". On the right, under "Ending", there are corresponding empty dropdown menus. In the center, there is a "Through Date" dropdown menu set to "11/05/2010", with two checkboxes below it: "Increment Date" and "Keep Operation Numbers". To the right of these are radio buttons for "Preview" and "Commit", and a "Process" button. At the bottom, there is a table header with columns: "SRO", "Start Date", "Maintenance Date", "S/N", "SRO Type", and "Description". The table body is currently empty.

Advanced Plant Maintenance seamlessly integrates to Infor ERP SyteLine and provides organizations with an internal system to manage preventative maintenance schedules and/or service repairs.

SUPPLY CHAIN MANAGEMENT

Purchase Order Requisitions

Infor ERP SyteLine Purchase Order Requisitions can help you enforce your organization's internal financial controls by managing requests for purchases that are originating from within various departments in your organization.

Purchase Order Requisitions authorize the purchasing department to procure goods and services. Requests are documented and routed for approval within the organization and then delivered to the accounting group. Then, Infor ERP SyteLine allows you to manually create a PO requisition, or the requisition can be created by cross-referencing from a customer order, transfer order, BOM, or job. A planned order can also be firmed into a PO requisition.

Proposed purchases are subject to approvals and can be approved by users with the proper authorization levels.

- Generate a unique Purchase Order Requisition number automatically
- Create PO's for Inventory and Non-Inventoried Items
- Create PO Requisitions from Customer Order Lines, Customer Order Blanket Releases, Estimated Materials, Estimate Project Resources, Job Materials, Project Resources, and Transfer Order Lines automatically
- Set Approval Levels by PO Requisition Limit and PO Requisition Line Limit
- See and approve all of the PO Requisitions that an approver owns
- Convert approved PO Requisitions to Purchase Orders automatically

Infor ERP SyteLine Purchase Order Requisitions allow you to manually create a PO requisition, or the requisition can be created by cross-referencing from a customer order, transfer order, BOM, or job.

Purchase Order Processing

Infor ERP SyteLine allows you to easily coordinate material purchases by providing online decision support that simplifies record keeping. Purchasing supports your company in managing its expenditures and reimbursing vendors promptly for services or goods provided. It helps you maintain control of inventory to enhance your company's cash flow and shorten delivery times.

Infor ERP SyteLine handles all types of purchases, including inventoried items, supply items, outside service operations pertaining to a manufacturing order, and subcontracted items that require components being sent to the vendor. Drop shipments can include specific locations other than the primary ship-to address, such as various warehouses or customer locations.

Infor ERP SyteLine's purchasing module provides standard form reports such as purchase orders, acknowledgments, and order lists for purchasing personnel, as well as analytical accounts payable-related reports, including purchase order lists and voucher's payable reports.

- Enter purchase orders, order receipts, and returns in real-time and let Infor ERP SyteLine automatically calculate the adjustments to POs
- Purchase materials directly to a job
- Link a PO line item to a specific job requiring that item
- Issue materials to a work order when you receive items purchased directly to a job.
- Generate vendor purchase requisitions with approval limits

- Maintain Blanket Purchase Orders, supporting multiple delivery schedules and shipping addresses
- Buyer Home Page
- Store and track information about a particular item from a specific Vendor using Vendor/Item Cross Reference function.
- Specify multiple parts and delivery dates on purchase orders and include the vendor's part number for cross-referencing.
- Access Vendor Performance information, the Vendor Communication Log, and a listing of vendor information for items purchased regularly. In this manner, you can ensure that you have selected the best vendor for each purchase.
- View the planned costs, actual unit costs, promise dates, and due dates for each line item.
- Place vendors on payment hold if their goods or services are unacceptable using the Payment Hold feature.
- Because a Purchase Order represents a contract with a vendor, Purchasing provides you with a utility for changing Purchase Orders and tracking the changes you make.

Line	Item	Ordered	UoM	Due Date	Item Cost	Extended Cost	Status	W/Inth
1	CP-15000	100.0000	EA	08/24/2010	2.65000	265.00	Planned	MAIN
2	BP-20000	100.0000	EA	08/24/2010	2.81000	281.00	Planned	MAIN

Enter purchase orders, order receipts, and returns in real-time and let Infor ERP SyteLine automatically calculate the adjustments to POs.

Goods Receiving Notes (GRN)

Infor ERP SyteLine Goods Receiving Notes allows you to link a receipt to multiple purchase orders for the same vendor. The GRN lists which items and quantities have been received and when. This GRN can be sent to the Accounts Payable department and can be used in the matching process.

Once the supplier sends the invoice, this is matched to the GRN and purchase order. In addition to receiving under one GRN number, multiple receipts can also be vouchered under one voucher number during the voucher generation process.

- Consolidate multiple Goods Receiving Notes under one voucher
- Generate a Voucher for a specific Goods Receiving Note
- Create Goods Receiving Notes from Purchase Orders or Posted Receipts
- Create a GRN record when an Advanced Ship Notice (ASN) is sent by a vendor automatically
- Use in place of packing slip for three-way matching

Vendor	Note (No)
23	Rd
23	Rd
23	Rd

Vendor: 23 Rough Riders Bike Supply
GRN: 2
Warehouse: MAIN
Date: 04/11/2008
Status: Approved
Progressive Cycles Main Warehouse

General | Contacts | Landed Cost | GRN Lines

Shipped Date: []
Ship Via: FED Federal Express
Tracking Number: []
Container: []
 EDI ASN

Received By: 15
Wolf, Jenny A.
Inspected By: 4
Taylor, Kirk C.

You can consolidate multiple Goods Receiving Notes under one voucher.

Inventory Management

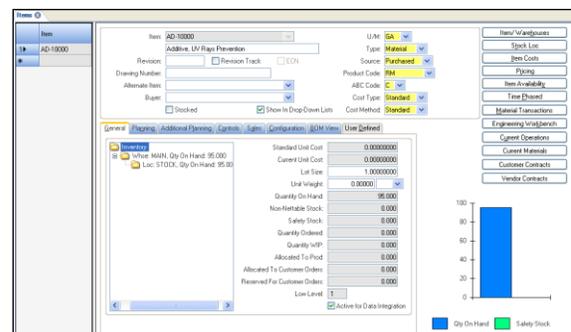
Infor ERP SyteLine gives you more control over your inventory by providing greater accuracy and immediate access to inventory information throughout the company. SyteLine automates the process of tracking parts by adjusting inventory whenever you create a transaction involving a part.

Infor ERP SyteLine updates and maintains raw materials, WIP and finished goods inventory quantities and costs. Inventory items can be designated as purchased, manufactured, or transferred so that you can immediately place a purchase order or issue a job order when you need a particular item.

Infor ERP SyteLine also allows you to easily track material and costs on a per-project basis. The extensive reporting capabilities of SyteLine provide complete profiles of any part in the system.

- Assign comprehensive part definitions including variable length part numbers up to 30 characters long, extended part descriptions, user-definable fields, and supplier information.
- Stock goods in one unit of measure while purchasing, selling, and/or consuming on a work order in another unit of measure.
- Assign multiple warehouse locations for a part and/or multiple locations within a single warehouse.
- Issue materials by work order, operation, or sub-assembly automatically.
- Issue floor stock items automatically.
- Set up specialized item pricing such as quantity and discounted pricing, contract pricing, etc., for both purchasing and selling.

- Perform automated physical inventories, cycle counting, and ABC analysis.
- Real-time material tracking and allocations.
- Safety Stock, Reorder Points, Order min/multiple/max, Lot/serial control.
- Kitting.
- Selectable dedicated warehouses (as for spares).
- Temporary and permanent item locations.
- Inter and intra Warehouse transfers and moves.
- Obsolete and slow moving inventory flags and analysis.
- Inventory aging reporting.
- Cost methods, including standard, actual, LIFO, FIFO and Lot Specific by item.
- Costs by Item or Item Warehouse.
- User defined unit of measure conversion.
- Multi-lingual item descriptions.



Infor ERP SyteLine automates the process of tracking parts by adjusting inventory whenever you create a transaction involving a part.

Physical Inventory

Infor ERP SyteLine Physical Inventory is the process of manually counting all inventory for a specific warehouse or location. Upon completion of the actual physical inventory, all numbers are then recorded, and discrepancies are identified and explained.

Accurate inventories result in more profitable and successful businesses. Customer relationships are improved because you can ship their orders. Accurate inventories also lead to buyers being confident in buying goods at the right time and the right quantity avoiding over- or under stock.

Infor ERP SyteLine Physical Inventory allows you to obtain accurate information about quantities on hand, which will help you make more informed business decisions.

- Freeze/unfreeze inventory
- Inventory tags or inventory tag sheets
- Generation of inventory count for every item/location/lot/serial combination
- Inventory pre-adjustment report that lists quantity and cost variance
- Physical inventory approval
- Void/unvoid inventory tag sheets
- Void tag sheet report
- Generate blank tags or sheets

Tag	Item	Location	Lot
-----	------	----------	-----

Infor ERP SyteLine Physical Inventory allows you to obtain accurate information about quantities on hand, which will help you make more informed business decisions.

Cycle Counting

Infor ERP SyteLine Cycle Counting allows you to perform an inventory count on small subsets of your total inventory on any given day. Cycle counts are similar to a total physical inventory in that it allows you to track your on-hand inventory but do not require a warehouse inventory freeze.

Therefore, Cycle counts do not disrupt your daily operations, provide continuous measures for inventory accuracy, and can be triggered to focus on the items with high value, high volume, and that are critical to on-time delivery.

- Multiple ways to determine the ABC Code on Items (Year-to-date usage, Future usage, or Unit Cost)
- Determine ABC percentages for Purchase, Manufactured, and Transferred Items
- Mass update to determine Cycle Type, Cycle Frequency, and Last Count Date for Items
- Count sheets automatically generated based on Cycle Triggers
- Exception reporting that does not allow records to post until corrected, such as:
 - Item is not in Items
 - Stockroom location not found
 - On-hand quantity is not equal to on-hand quantity when cycle count was generated
- Variance reporting
- Eliminate the need for yearly physical inventory counts

Cycle counts can be triggered to focus on the items with high value, high volume, and that are critical to on-time delivery.

Shipping/Receiving

Infor ERP SyteLine Shipping and Receiving allows you to ship and receive items coming in or out of your inventory. This might include shipping against a customer order, receiving raw material from a purchase order directly to a job or directly into inventory, or shipping an item from stock.

Infor ERP SyteLine Shipping and Receiving are online transactions that are easy to use, efficient, and cost-effective. You get:

- Hard and soft allocations/reservations
- Picking and Packing lists
- Delivery Orders
- Goods Received Notices
- Available to ship analysis
- Multiple units of measure
- Receipt rejections and reason codes
- Landed Costs
- The ability to create payment vouchers from purchase order receipts
- The ability to create invoices from shipments to a customer

Select	Line	Release	Quantity	U/M	CR Return	Return To Stock	Reason Code	By Consignment	Ship Stat
<input type="checkbox"/>	1	0	0.00	LB	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	Ordered
<input type="checkbox"/>	2	0	200.00	EA	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	Ordered

Ship against a customer order, receive raw material from a purchase order directly to a job or directly into inventory, or ship an item from stock.

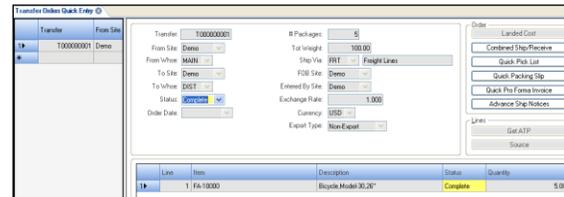
Transfer Orders

Use Infor ERP SyteLine Transfer Orders for moving items or materials between distribution centers, or for component and sub-assembly movement between plants that require a more formal multi-stage transaction. Transfer Orders do not require an approval process or a requisition function.

SyteLine Transfer Orders support the following:

- Visibility of in-transit inventory across the system including Transfer Order number, item, quantity in-transit, quantity to be shipped, date, shipment mode, freight cost, and value of shipment.
- Financial transactions
- Landed cost
- Cross-reference functionality
- Picking List functionality
- Packing Slip functionality
- Bill of Lading functionality
- Pro Forma Invoice functionality
- Various costing and pricing methods
- Automatic updating of inventory fields for Planned Transfer Orders
- Ability to enter a transfer order without knowing the location or lot number. Location not required until receipt.
- Partial shipping and receiving
- Ability to track quantity differences, such as: loss, shrink, damage, rejects, and advance shipmen using Reason Codes.

- Data Collection for shipping and receiving transactions
- Quick Entry form to enter all information on one screen



SyteLine Transfer Orders give you visibility into in-transit inventory across the system, including Transfer Order number, item, quantity in-transit, quantity to be shipped, shipment mode, freight cost, and more.

Electronic Data Interchange (EDI)

Any organization that exchanges information, including enterprises involved in procurement/purchasing, finance, trade and transport, health, law, and revenue/tax collection, can use Electronic Data Interchange (EDI).

EDI can help you reduce paperwork and administrative lead times, send timely business transactions, access information quickly and easily, and eliminate redundant data entry. These benefits allow your enterprise to adopt more efficient practices such as Just-In-Time Delivery.

Infor ERP SyteLine is integrated with an EDI translator. The system imports inbound transactions from the translator and exports outbound transactions to the translator. The EDI translator interface supports six demand side and six supply side transaction sets.

Infor ERP SyteLine EDI complies with the American National Standards Institute (ANSI) X12 and EDIFACT (International) standards.

- Create standard transactions to meet your trading partners' EDI requirements
- Convert inbound EDI documents into customer orders
- Manage releases and ship schedules from your customers
- Maintain fabricated and raw material authorizations
- Create data files for Advanced Ship Notices, Vendor Purchase Orders, and Invoices
- Cross-reference Customer Part IDs to Infor ERP SyteLine Part Numbers

The screenshot shows the 'EDI Customer Profile' configuration window. It includes fields for Customer (1), Ship To (0), and Trading Partner Code (EDI). The 'Release Processing' section has options for 'Post Planned Releases' (unchecked), 'Generate Invoices' (checked), and 'Print Invoices' (checked). The 'Invoice Code' field is empty. The 'Use Price' dropdown is set to 'EDI', and 'Use Date' is set to 'Calculated'. The 'Due Date Offset' is 0. The 'Generate Ship Notice' section has 'Generate Ship Notice' (unchecked), 'Include Serial Numbers' (unchecked), and 'Print Ship Notice' (checked). The 'ASN Code' field is empty. The 'Generate Acknowledgments' section has 'Generate Acknowledgments' (unchecked) and 'Print Acknowledgment' (checked). The 'Acknowledgment Code' field is empty. The 'Auto Post' dropdown is set to 'Neither', and the 'Note Processing' dropdown is set to 'Append'. The 'Last Item Extract' and 'Last Address Extract' dates are both 08/26/2010 11:30:54 AM.

Create standard transactions to meet your trading partners' EDI requirements.

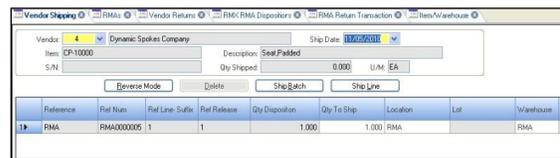
SyteLine Outside Process Management

Infor ERP SyteLine Outside Process Management (OPM) extends the value of Infor SyteLine ERP allowing the SyteLine user to streamline the process of tracking and shipping materials from a standard SyteLine job to an outside vendor/service.

OPM leverages the “Outside Service” field on the standard SyteLine Work Center to flag material that requires the services of an outside vendor. With OPM, no changes to the standard SyteLine Bill of Material are required. However, when the job material is moved into an operation flagged with an “Outside” work center, the system automatically creates a purchase order for the materials along with the necessary records to identify those items to be shipped and to which vendor.

Users also have the ability to print packing slips and ship items from a new Vendor Shipping screen. When the outside vendor completes the contracted service, items are received back into the job using the standard SyteLine Purchase Order Receiving functionality.

- Create Purchase Orders automatically and cross reference the job.
- Track partial quantities for jobs producing multiple items.
- Track job materials with lot quantities.
- Generate packing slips automatically, as required, to include with shipments.
- Receive items back from a vendor.
- Produce various reports including “Items At Vendor” and “Vendor To Be Shipped”.



OPM leverages the “Outside Service” field on the standard SyteLine Work Center to flag material that requires the services of an outside vendor.

SyteLine Request for Quote

Infor ERP SyteLine Request for Quote (RFQ) module allows SyteLine users to create and maintain within their SyteLine system the RFQs they send to potential vendors and subcontractors. Users can record a variety of RFQ responses including lead time, quote quantities, and price breaks for each individual RFQ. Via an optional web extension, vendors can update the RFQ records via the Internet. RFQs are created and managed out of the standard Purchase Requisition function of SyteLine.

Using RFQ, a user can shop the purchase request to all or a predefined set of vendors. RFQ contains the complete flow from the creation of the RFQ Header to the selection of the winning Vendor. It helps streamline the entire purchasing process, making it more efficient and effective, helping managers make decisions to optimize use of resources.

- **Multiple price and quantity breaks** — Record pricing received from vendors or suppliers based on up to 10 different buckets for convenient evaluation and comparison of cost advantages based on variations to the RFQ.
- **Predefined vendor sets** — Determine specifically which vendors or suppliers will be given the option to submit a quote based on the item or product code that is being purchased. (For example: One set of vendors may be used for buying materials but another set may be used for purchasing electronics.)
- **Automatic vendor/supplier** — Have the system automatically generate a list of vendors/suppliers to use based on the standard SyteLine Vendor/Item Ranking, a past RFQ, or one of the Predefined Vendor Sets.
- **Multiple quote distribution** — Generate quotes and send to vendors or suppliers via email, fax, printed and

mailed, or posted on the Internet via the Web add-on module.

- **One-time vendor support** — Supports the use of vendors/suppliers that are not in the standard SyteLine Vendor Master for quoting purposes only. This will allow a user to shop without creating a vendor until it is selected.
- **Multiple selection methods** — Select a vendor/supplier based on multiple selection methods, such as price, lead time, or response time.

SyteLine Request for Quote Web Access:

- Web access for vendors
- Review of quote requests
- Update of quote requests with vendor delivery & pricing
- Feeds updates back to SyteLine RFQ

Seq	Vendor	Name	Currency	Break Qty 1	Break Cost 1	Lead Time 1	Break Qty 2	Break Cost 2	Lead
1	7	Brunswick Hardware	USD	10,000	75.00000	5	20,000	75.00000	
2	5	Vector Services, Inc.	USD	10,000	89.99000	1	20,000	89.99000	
3	3	Bicycle Parts Company	USD	10,000	85.00000	2	20,000	85.00000	

Have the system automatically generate a list of vendors/suppliers to use based on the standard SyteLine Vendor/Item Ranking, a past RFQ, or one of the Predefined Vendor Sets.

SyteLine Shipping & Logistics

For discrete manufacturers, today's demanding business environment leaves no room for errors or inefficiencies. You need to manufacture high-quality products with tight inventory management and super efficient production. But the need for excellence doesn't stop once finished goods arrive at your loading dock. On the contrary, shipping finished products to customers on time, at the lowest possible cost can contribute as much to your overall success as producing the right product at the right cost. As a result, many discrete manufacturers are seeking ways to streamline their supply and logistics processes to reduce costs and improve customer service levels.

To help discrete manufacturers meet the need for excellence in shipping and logistics, Infor ERP SyteLine Shipping & Logistics provides enhanced shipping, warehouse, and logistics capabilities. Infor ERP SyteLine Shipping & Logistics helps accelerate and simplify the picking, packing, and shipping processes for engineer-to-order, configure-to-order, and highly repetitive manufacturing companies.

Infor ERP SyteLine Shipping & Logistics features a modular design for easy installation without modifying your Infor ERP SyteLine solution. Users get powerful new shipping tabs in key Infor ERP SyteLine screens to better manage shipping processes. Your customers get more flexibility in tracking their shipments and your company benefits from advanced capabilities for shipping the goods you manufacture.

- **Improve visibility** — Visual workbench that helps users quickly view shipments by due date, priority, type of shipment, customer groups, or user-defined group.
- **Automate shipping processes** — Reduce numerous manual steps by automating core shipping-related tasks and reducing associated paperwork.
- **Give employees more flexibility** — Access the solution using a web browser and view shipping schedules in real-time and easily verify orders to ship. As needed, print labels and paperwork, including a bill of lading and export paperwork. Freight costs and tracking numbers are instantly captured and email notifications are sent automatically. Employees also can leverage wireless/radio frequency (RF) technology to manage real-time warehouse and barcode scanning.
- **Deliver new services to customers** — Respond to customer requirements for special labeling, paperwork, and other services. In addition, customers get the ability to track their shipments via a web browser.
- **Scale the solution to fit your needs** — Flexible and scalable packages including:
 - **Standard Shipping.** Provides workbenches for pick-pack-ship, UPS/FedEx integration, less than truckload (LTL)/truckload planning and paperwork, documents, inventory staging, auto shipping, and web portal and web reports.
 - **Advanced Shipping.** Provides additional functionality for carrier selection, contents packing, export shipping and paperwork, lot/serial tracking, LTL contracts and rating, freight quotes, load/route planning, transfer order shipping, and miscellaneous shipping.
 - **Shipping, warehouse, and mobile.** A complete shipping, warehouse, and mobile solution with additional capabilities for using wireless/radio frequency (RF) barcode scanning, inventory allocation, capable to ship services, and kitting.

MASTER DATA MANAGEMENT

Bills of Material

Infor ERP SyteLine supports the creation of Bills of Materials for manufactured parts. A Bill of Material (BOM) is the set of materials needed to complete each of the operations. The BOM can be multi-level, which means one of the materials required for operation xyz is a subassembly that has its own routing and BOM.

Changes to Bills of Materials are automatically captured at the time a Job is released. You can create a new BOM by copying it from another inventory item (which uses the current routing and BOM), another job, estimate job, or a production schedule item or release.

- Create both the routing and Bill of Material on one screen using Engineering Workbench.
- Copy bills of materials from jobs, items, estimates, or production schedules
- Assign fixed and variable overhead rates to materials
- Maintain reference information (bubble number, reference designator, assembly sequence)
- Define alternate Bills of Materials
- Set Items to back flush
- Enter the percentage of scrap expected for use with planning or purchasing
- Effectivity and obsolescence dates
- Phantom Items
- Where used

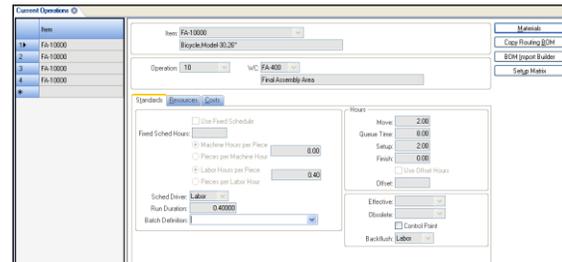
- CAD BOM import

You can create a new BOM by copying it from another inventory item (which uses the current routing and BOM), another job, estimate job, or a production schedule item or release.

Routings

Infor ERP SyteLine supports the creation of routings for manufactured parts. A routing is a group of operations, or steps which must be performed to assemble an item. In SyteLine, Routings must be created first and Bills of Materials are linked to the Operations where they are consumed.

Routings are used for the Planning, Scheduling, and Costing of manufactured items. Changes to Routings are automatically captured at the time a Job is released. You can create a new routing by copying it from another inventory item (which uses the current routing and BOM), another job, estimate job, or a production schedule item or release.



You can create a new routing by copying it from another inventory item (which uses the current routing and BOM), another job, estimate job, or a production schedule item or release.

- Create both the routing and Bill of Material on one screen using Engineering Workbench.
- Copy routings from jobs, items, estimates, or production schedules
- Define your production standards — pieces/hour, hours/piece, fixed hours
- Support of Outside Service routing steps
- Capture move, queue, setup, and finish times
- Assign fixed and variable overhead rates
- Unlimited Notes to operations
- Resource planning available

Costing

The Cost Accounting features within Infor ERP SyteLine support both actual costing and standard costing, providing you with the flexibility to choose the Cost Type and Cost Method that works best for you.

Infor ERP SyteLine captures costs as changes occur, ensuring up-to-date and accurate costing. You can also link purchases directly to existing work orders through the Purchasing or Manufacturing module, earmarking costs specific to the appropriate job.

Additionally, you can link work orders to specific customer orders, which allows you to know the true margin earned for each customer order. Infor ERP SyteLine automatically charges work order costs for customer orders to the Cost of Goods Sold upon shipment to the customer.

- Costs by Item or Item Warehouse
- Cost methods include Standard, Actual, LIFO, FIFO and Lot Specific
- Update stockroom and WIP inventory records in real-time automatically.
- Link POs to work orders to capture costs for a job.
- Link work orders to customer orders to measure true margins.
- Drive costs by Work Center and Department
- Break out Job tracking and costing into five cost buckets
- Create and post journals to the General Ledger quickly and easily.

Std Unit Cost	
Material Cost:	104,200,000
Material:	0,000,000
Freight:	0,000,000
Duty:	0,000,000
Brokerage:	0,000,000
Insurance:	0,000,000
Local Freight:	0,000,000
Labor Cost:	30,450,000
Fix O'vhd Cost:	21,820,000
Var O'vhd Cost:	21,820,000
Outside Cost:	0,000,000
Total Unit Cost:	178,290,000

Manufactured Current Unit Cost	
Material Cost:	104,200,000
Labor Cost:	30,450,000
Fix O'vhd Cost:	21,820,000
Var O'vhd Cost:	21,820,000
Outside Cost:	0,000,000
Unit Cost:	178,290,000

Purchased Current Unit Cost	
Material:	0,000,000
Freight:	0,000,000
Duty:	0,000,000
Brokerage:	0,000,000
Insurance:	0,000,000
Local Freight:	0,000,000
Unit Cost:	0,000,000

Infor ERP SyteLine captures costs as changes occur, ensuring up-to-date and accurate costing.

Engineering Change Notices (ECN)

Use the Infor ERP SyteLine Engineering Change Notices (ECN) form to control and track revisions made to a Bill of Material or to the routing of an item. The ECN process is crucial in ensuring high quality, safety, and consistency of products.

- Approvals of changes before it can be used on Jobs or Estimates
- Mass replace/delete
- Enter a priority code to determine the order in which you want to implement the ECN
- Maintain reason codes
- Maintain distribution codes for who must be notified of the ECN change
- Identify what needs to be changed
- Copy ECN functionality
- Revision Control
- Track ECN and revision history
- Maintain an audit trail of changes to the ECN record throughout the change process.
- Reporting that will allow you to see the Jobs that are affected by ECNs
- Maintain a comprehensive audit trail of changes to the Bill of Material and routings
- Update part or document revision levels automatically upon incorporating changes.

The screenshot shows the 'Engineering Change Notice Item' form. At the top, there's a table with columns 'ECN' and '1'. Below that, the form fields are: ECN: 1, Status: Complete, Line: 1, Job: 0000, Status: Approved, Type: Current Operation, Revision: REV-2, Action: Update, Item: SP-11000, Operation: 30, Group: Sprocket, Chromium, 45-Tooth. There are tabs for 'Material', 'Costs', and 'References'. Below the tabs, there's a section for 'Hours' with fields for Move (2.00), Queue (0.00), Setup (0.00), Finish (0.00), and Offset (0.00). There are also radio buttons for 'Machine Hours per Piece', 'Pieces per Machine Hour', 'Labor Hour per Piece', and 'Pieces per Labor Hour'.

Use the Infor ERP SyteLine Engineering Change Notices (ECN) form to control and track revisions made to a Bill of Material or to the routing of an item.

Infor Product Lifecycle Management

Sharing critical business information across the enterprise is essential for strategic product lifecycle management (PLM). But this requires organizing and managing data from many disparate systems, then making that data easily accessible to those who need it. Infor PLM helps leading manufacturers capture, share, manage, track, and store documents, tasks, and product information in a central data repository. By making information more accessible throughout the enterprise, PLM empowers these companies to work better and faster, increasing operational efficiency.

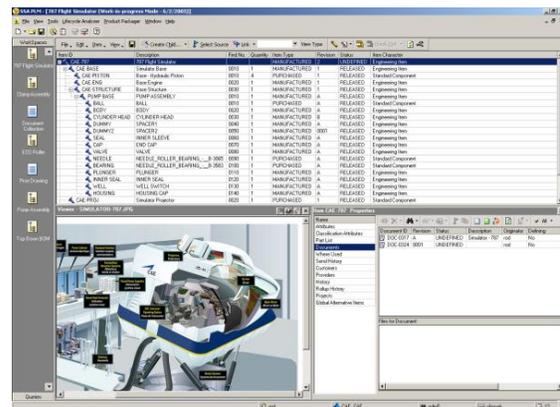
Everyone in your company will benefit from Infor PLM 8, from individual users, to managers, and executives—spanning purchasing, production, engineering, customer service, senior management, and finance. At the user level, it prevents errors by eliminating confusion about which version of a document or design is the latest. At the managerial level, it provides transparency on the progress of projects, ensures improved access to information and better decision-making prevents delays, reduces costs, and boosts efficiency. The solution also facilitates global collaboration and communication, as well as document vaulting and change management.

Companies react more reliably and profitably with streamlined and repeatable business processes, accurate information, and smarter decisions. Whether in PLM, CAD, or ERP, you'll benefit from role-based access to relevant, accurate PLM, quality, and operational data. When combined with integrated workflows and programs, you'll better respond to bids and minimize time to market for standard or configured products.

As time and cost pressures skyrocket, you must consistently react with accurate costs, better quality, and greater profitability. From assessing the feasibility of initial requests to broad and deep validation of incoming CAD files for identifying version or date

mismatches to assessing the impact on inventory, production, and sales, Infor PLM provides access to more information, deeper validation, and better change control. Informed decisions, combined with automated approvals and standard integration to SyteLine, streamline the process—without increasing risks or costs.

- Vaulted document management
- Document version control
- BOM revision control
- Workflow collaboration
- Engineering change notices (ECN)
- ECN approval process workflows
- Security by project, user profiles and roles
- Drawing viewer
- Design “What-ifs”
- BOM Comparisons
- Optional CAD integrations
- Vendor collaboration



Infor PLM provides access to more information, deeper validation, and better change control.

SyteLine Doc-Trak

The turbocharged pace of just-in-time manufacturing demands rapid, perfectly synchronized access to information. In a world of information overload, paper documentation adds delays, confusion, and errors to your work process. It also bloats your environmental footprint and raises the costs of storing and managing paper documentation. To further complicate matters, it restricts the flexibility you need in your manufacturing process to stay competitive. Worst of all, unnecessary paperwork robs you of the agility you need to respond to rapidly changing business conditions and seize new opportunities.

Infor™ ERP SyteLine represents the culmination of decades of manufacturing experience on the part of our global team of experts. You get the benefit of their years of manufacturing success in SyteLine, making it the ideal solution for keeping your business agile, competitive, and responsive to the rapidly evolving manufacturing marketplace. Doc-Trak adds the crucial information management connection that your company needs to work effectively every day.

With Infor ERP SyteLine Doc-Trak, you get best-in-class document management that streamlines your office and manufacturing operations, saves time, and eliminates the annoyance of managing paperwork. You can manage nearly any file type with Doc-Trak and give everyone real-time access to the information they need to make better decisions.

Linking documents — You can waste less time searching for documents by letting Doc-Trak link documents and other information directly to the point of use in SyteLine. When your documents electronically follow the flow of the related data — customer documents stay connected to customer information, order documents stay connected to the order — you can stay focused on your business and get more done.

- Link documents in Infor ERP SyteLine Doc-Trak by specifying the location of the document in an ordinary web browser or file manager.
- Take advantage of automated, rules-based attachments in SyteLine Doc-Trak that can intelligently link your documents and folders.
- Find any document instantly by letting Doc-Trak automatically archive any form that you print on your network and link it back to the point of origin in SyteLine.

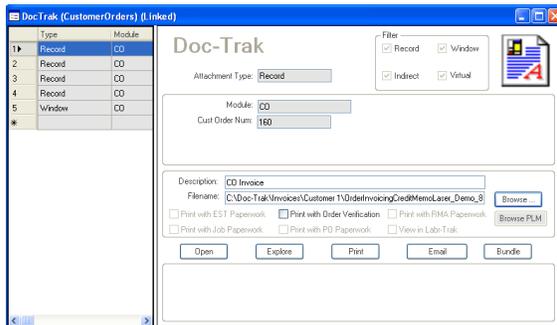
Document automation — Eliminate duplicated effort and save time by letting Doc-Trak process documentation in the background while you perform normal functions in SyteLine.

- Bundle or merge documents together with SyteLine forms, such as purchase orders or order verifications, to provide all documentation you need to ensure accuracy with your vendors and customers.
- Archive SyteLine forms and scanned documents based upon your own rules by document type that defines where individual documents are stored on your network and how they are named.
- Ensure document traceability when you, your customers, or your suppliers require material certification document tracking throughout the use and genealogy of materials.

Integration with Infor ERP SyteLine Shop-Trak — Workers on your shop floor will have complete, real-time information about all assigned work when you integrate powerful document management capabilities with the unparalleled flexibility of Infor ERP SyteLine Shop-Trak manufacturing execution software. They can instantly view or print the documents they need to

complete their work without ever leaving their workstation.

With drawings, schedules, quality specifications, and manufacturing notes at every shop employee's fingertips, Infor ERP SyteLine Doc-Trak helps you create and distribute paperwork faster. You'll also prevent the confusion caused by having employees work from outdated versions of drawings or specifications.



You can manage nearly any file type with Doc-Trak and give everyone real-time access to the information they need to make better decisions.

SyteLine FASView

Infor ERP SyteLine FASView is a productivity tool that extends the value of Infor SyteLine ERP in two ways:

- By making it possible to view external files from within SyteLine
- By making it possible to send emails containing merged data from SyteLine fields from within the SyteLine user interface.

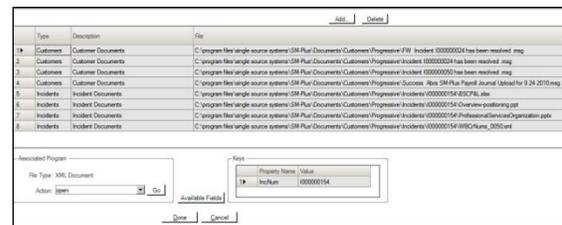
An unlimited number of Windows-supported document files can be attached to any field, wild-carded field or combination of fields displayed on a SyteLine screen. Supported file types include, but are not limited to, Microsoft Word, Excel, PowerPoint, CAD drawings, videos, html, etc.

FASView provides built-in flexibility to manually attach files or automate the process. The user can choose which approach—or use a combination of the two—to meet the needs of the business environment and how the business documents are organized. Having both attachment options available allows the organization to maintain a standard file storage directory structure while at the same time providing the end-user flexibility to manually attach files as needed to support a specific job function.

The real power of FASView is in automating the file attachment process. Automated file attachment links are set up via user-definable naming conventions (i.e., “co-num”) and a predefined directory structure. Files may be stored anywhere on the network or on any server accessible to the network. This approach creates automatic links between the attachment files and the predefined SyteLine field name(s) thus eliminating the need to manually attach each document to each SyteLine screen. For example, if a CAD drawing is linked to “item,” the CAD drawing can be displayed from any screen where “item” is displayed

(i.e., customer order line item maintenance, job maintenance, job materials, purchase order item) allowing the linkage to go throughout the entire SyteLine system.

- **View Attachments** — From any SyteLine screen using a standard Hot-Key, a browser will appear that contains all of the documents that have been attached either manually or through the automated process. To view the document, the user simply double-clicks on the file name.



SyteLine FASView lets you view external files from within SyteLine.

SyteLine Document Management

Manufacturers are required to process and store an ever-expanding quantity of paper and information as compliance requirements increase. Companies must find ways to keep costs down, and respond quickly and efficiently to market demands, in order to maintain competitive positioning. This process has become more difficult not only because of the compliance issues, but also due to economic and competitive challenges.

Business-critical documents are increasingly governed by the practice of knowledge management, which advocates electronic—rather than manual—document processing, management, and retrieval. In order to comply with knowledge management principles while processing and storing a growing amount of information, enterprising companies are utilizing new document management technology.

Infor ERP SyteLine Document Management enables you to store all documents—including those relating to accounts payable, human resources, customer or vendor sign-offs, manufacturing specifications, and Material Safety Data Sheets—in one secure database that has easy-to-use query and look-up capabilities. Infor's configurable interface allows you to view images of documents from any of the Document Management forms. Forward-thinking companies leverage Document Management to improve their business in three significant ways:

Saving money

- Reduce costly labor expenses relating to filing, retrieving, emailing, routing, and searching for documents.
- Eliminate costs associated with copying, printing, and faxing documents.
- Improve productivity by validating data against Document Management or another database during scanning.

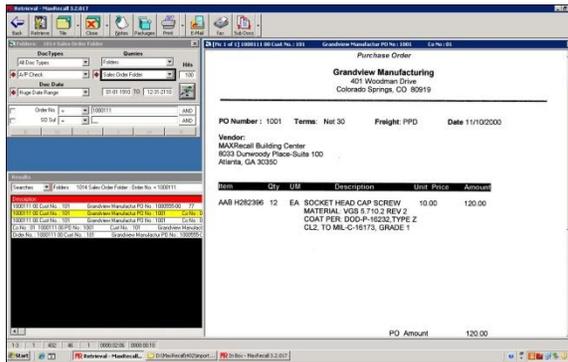
- Decrease time and cost of assembling documents for audits.
- Decrease time and cost of managing compliance programs.
- Increase business and transactional volumes without adding staff.
- Decrease Days Sales Outstanding (DSO) by automating delivery of invoices or past-due invoices.

Saving time and labor

- Streamline business processes by changing to a paperless, rules-based workflow.
- Publish documents through a web portal to free up customer service representatives.
- Reallocate employees' time to revenue-generating activities.
- Manage internal documents through configurable queries.
- Automatically import electronic transactions, faxes, Electronic Data Interchange (EDI) messages, lockboxes, and more.
- Leverage bar code and optical character recognition (OCR) technologies to quickly file documents electronically.

Increasing responsiveness

- Research and resolve customer disputes from your desktop.
- Review and approve accounts payable—comparing the purchase order, invoice, and packing slip—from your desktop.



Infor ERP SyteLine Document Management enables you to store all documents—including those relating to accounts payable, human resources, customer or vendor sign-offs, manufacturing specifications, and Material Safety Data Sheets—in one secure database that has easy-to-use query and look-up capabilities.

FINANCIAL MANAGEMENT

General Ledger

Infor ERP SyteLine's General Ledger tracks financial expenditures within the company and generates financial statements and reports for management, auditors, and investors. The General Ledger is tied to other parts of the system through the Chart of Accounts and the distribution journals. A Chart of Accounts is easily created to control how you want to report on your business.

Financial information collected during day-to-day operations is posted frequently to distribution journals. In addition to the distribution journals, there is a General journal that you can use to hold closeout and summary entries for year-end procedures.

You can also create user-defined journals — custom journals to store, retrieve, and track entries specific to your business. Unit Codes can be activated for each account in the Chart of Accounts, to collect key management data.

- Hierarchical General Ledger
- Define a Chart of Accounts that mirrors your enterprise structure.
- Statistical accounts
- Create recurring journals, reversal journals, and automatic allocations based on rules you specify.
- Account Class
- Export results of queries to Excel, ASCII file, Clipboard
- Full G/L drill down to source documents
- Budgeting
- Multi-site journal entries

- Bank reconciliation
- Obsolescence and effectivity dates on GL accounts
- Built in Financial Report Writer
- Cash flow analysis
- External Financial Interface
- Currency conversions
- Re-open closed years
- Security for out-of-period postings
- Multi-Site Ledger Consolidation
- Create your G/L reporting method (monthly, 4-4-5, 13 Period)

The screenshot displays the 'G/L Posted Transactions' window. At the top, it shows 'Sequence: 1257', 'Date: 11/29/2007', and 'Site: Demo'. Below this, 'Account: 40000' is selected, with 'Sales' listed as the account name. The 'Domestic' credit is 84,000.00, and the 'Foreign' credit is also 84,000.00. The 'Exchange Rate' is set to 1.0000. Other fields include 'Reference: ARI 10', 'Allocation Transactions: 0', 'Posted From Site: Demo', 'Cust/Vendor: 1', 'Invoice/Voucher: 10', and 'Control Number: 0000'. The window also has tabs for 'Sequence Detail', 'Budget and Plans', and 'Summary By Account'.

Infor ERP SyteLine's General Ledger tracks financial expenditures within the company and generates financial statements and reports for management, auditors, and investors.

Accounts Payable

Infor ERP SyteLine Accounts Payable brings world-class functionality and control to your cash management system. With features that streamline and simplify the critical daily tasks that make sound financial management possible, SyteLine Accounts Payable helps managers stay abreast of critical cash positions to improve efficiency and profitability.

Infor ERP SyteLine Account Payable's rich connections to the entire suite of SyteLine's modules will give your payables process full, fast, and accurate financial and operational information to help you make better decisions and execute your business strategy more effectively.

- Centralized or decentralized A/P payments
- Consolidate vouchers (one voucher for multiple POs)
- Create recurring vouchers and specify the frequency
- Create vouchers automatically through POs/receipts matching
- Enter voucher prior to PO receipt (Voucher pre-register)
- Vendor and voucher holds
- Remit-To vendors
- Vendor Debit Memos
- Electronic fund transfer payments with remittance advice
- Multi-currency
- Payment processing
- Multi-lingual vendor paperwork

- Assign vendor accounts to specific A/P accounts on the G/L.
- Write checks “on-the-fly” in support of immediate payment of invoices

Description	Amount	Due Date
Invoice Amt	200.00	
Freight	200.00	
Net Due Amt	200.00	

Create vouchers automatically through POs/receipts matching.

Accounts Receivable

Other than inventory, no asset is typically larger than your Accounts Receivable (AR). Infor ERP SyteLine's AR helps you become more efficient, thus having a positive impact on cash flow, reduction of bad debt, and improved customer relationships.

Infor ERP SyteLine's AR facilitates the process of applying receipts, allows you to view current account balances, and improves the communication between your billing, credit, and collection departments in real time. Payment information is tracked instantaneously, allowing you to gather statistical information about customer payment history which helps to improve customer support and cash flow.

With Infor ERP SyteLine AR, you gain the accurate, real-time information you need to make immediate decisions about extending credit limits, collections, and managing a key component of your cash flow.

- Centralized or decentralized AR Cash Receipts that automatically post to Bank Reconciliations
- Consolidated Invoicing by period or group of shipments
- Multi-user Invoicing
- Credit management including customer and order holds
- Progressive billing
- Support complex invoicing terms
- 3 Tier Customers (Corp— Bill To, Sold To(s), Ship To(s))
- Dunning letters
- Finance charges
- Letter of Credit support

- Multi-currency
- Multi-lingual invoices, credit memos & statements
- Generate A/R invoices automatically from shipping activities
- Assign customer accounts to specific A/R accounts
- Report customer prepayment and automatically deduct the amount of the prepayment or credit from the invoice total.
- Generate credit memos from returns
- Create credit memos for price adjustments, then apply them to open invoices

Customer	USD	Euro	EUR	Domestic	USD
Amount	10.00		0.00		10.00
Applied	0.00		Exchange Rate	1.000	0.00
Remaining	10.00				10.00

SyteLine's AR facilitates the process of applying receipts, allows you to view current account balances, and improves the communication between your billing, credit, and collection departments in real time.

Fixed Assets

Full control over your entire asset picture — from acquisition to retirement and replacement planning — is crucial when it comes to managing assets. Infor ERP SyteLine Fixed Assets, a complete capital asset information and management system, gives your enterprise worry-free, boundary-free control.

Infor ERP SyteLine Fixed Assets allows you to manage your assets through their entire lifecycle.

- Cradle to grave asset management
- User-defined asset numbers
- Unlimited number of Asset classes
- Comprehensive Asset Definition
 - Location
 - Insurance
 - Original PO and Invoice Number
 - Serial and/or Model Number
 - Manufacturer
 - Costs
- Seven predefined depreciation methods and allows additional, user-defined depreciation methods to be added as needed.
- Maintain multiple depreciation schedules for each Fixed Asset.
- Interfaces to the General Ledger:
 - Fixed Assets Disposal
 - Fixed Assets Transfer
 - Depreciation Posting (for BOOK schedule only)
 - Entering of a Fixed Asset purchase

The screenshot displays the 'Fixed Assets' system interface. On the left, a table lists assets with columns for 'Asset Number' and 'Description'. The first row shows 'PC-1000' and 'Personal Computer'. The main area contains a detailed form for asset 'PC-1000'. Fields include: Asset Number (PC-1000), Status Code (Active), Description (Personal Computer), Asset Type (Regular), Class Code (FKTU), Department (400), Location (Front Office), Date Acquired (04/26/2006), Manufacturer (IBM), Vendor Number (19), Model Number (P100), Serial Number (20938132019), Inventory Freq (0), Insurance Vendor (11), Insurance Policy Num (300810220-09), Insurance Expire Date (12/08/2009), Insurance Value (2,000.00), and Disposal Amount (0.00). There are also tabs for 'Fixed Asset Costs' and 'Fixed Asset Depreciation'.

Infor ERP SyteLine Fixed Assets allows you to manage your assets through their entire lifecycle.

Multi-Currency

Infor ERP SyteLine Multi-Currency allows you to buy and sell in foreign currencies. Tracking of base (domestic) currencies as well as extensive exchange rate tables, reduce manual transactions. SyteLine supports the following scenarios:

- Companies who process all transactions for a month at a given exchange rate. At the end of each month (or the beginning of the next month), the company performs a revaluation of all foreign currency translations.
- Companies who negotiate each foreign currency transaction at a fixed rate agreed with the customer/vendor. Payments are at that fixed rate. When using a fixed rate, specify that rate on the Customer Orders or Purchase Orders form's Amounts tab. (Running the Currency Revaluation utilities will not impact these entries.)

SyteLine also allows for a mix (using both the system exchange rate and orders with fixed rates) of the previous methods described above.

- Maintain Currency Rates and Tables
- Use either fixed or variable rates
- Euro conversion tools
- FASB52 compliance
- Recognition of currency exchange rate gains or losses
- Maintain customer and vendor records in the foreign currency but can quickly be translated to your domestic currency
- Maintain general ledger in your domestic currency
- Specify the currency used by the bank for each of your accounts

- Customer Orders defaulted in your Customer's currency
- Invoices defaulted to Customer's currency
- Converts Cash Receipts automatically
- Purchase Orders defaulted in your Vendor's currency
- Print checks in the Vendor's currency

Reduce manual transactions by tracking base (domestic currencies) and maintaining extensive exchange rate tables.

Infor Expense Management

Employee-initiated expenses can account for a surprisingly large percentage of total corporate spending. In challenging economic times, companies that can't track, analyze, and control these expenditures are missing an important opportunity for cost savings.

Consider, for example, the cost of unnecessary travel, unauthorized purchases, unused discounts and rebates, honest expense report errors, and under-billed clients. Other hidden costs can include the time and effort spent on administrative duties related to accounting for expenses and payments, as well as outright fraud. Organizations that gain control over employee-initiated spending and automate expense-related processes can see dramatic benefits to the bottom line.

More than just an end-to-end travel expense management solution, Infor Expense Management enables employees to plan and expense business travel; request and approve payment requests; capture time for charging to projects and cost centers; and calculate paid time off and overtime. These integrated applications share a single, intuitive interface, making them easy to learn, use, and maintain. With Expense Management, the result is comprehensive control over employee-initiated corporate spending.

Infor Expense Management allows even complex, multinational organizations to automate expense-related business processes and enforce policy compliance, reducing associated administrative costs and decreasing the opportunity for accidental error and intentional fraud. With Expense Management, you can implement instantaneous global updates to policies and processes to support continuous improvement, while simultaneously managing local policies and statutory requirements.

Expense Management includes four core modules: Travel Plans, Reports, Payment Requests, and Timesheets. Each module features real-time policy notification, alerting employees to violations as they enter data and allowing them to provide explanations or make corrections before submitting plans or expenses; configurable workflow for alerting reviewers, obtaining necessary approvals, and then triggering events such as the issuance of plane tickets or the reimbursement of expenses; and business intelligence tools to analyze the solution's database and search for opportunities to transform spending into savings.

These applications work where you do—in your office, on the road, and around the globe. They support multiple languages and currencies, work with all international date and currency formats, and enable you to apply rules and policies specific to independent divisions or geographic locations. Expense Management also accommodates country-specific per diem rates, local taxation requirements, variable VAT rates, and mileage rates.

Benefits include:

- Improve employee compliance with spending policies
- Lower administrative costs
- Increase savings through effective vendor negotiation and rebate usage
- Reduce unnecessary travel and purchases
- Reduce people needed to process documents
- Reduce manager time spent on approvals
- Increase accuracy of time billed to clients and paid time off due employees
- Higher amounts of foreign taxes reclaimed

- Increased efficiency through effective domestic and nondomestic VAT identification
- Reduced employee time spent on travel planning, expense reporting, time capture, and purchasing of goods and services

SyteLine Tax Interface

Infor ERP SyteLine Tax Interface performs all aspects of the tax compliance process, including billing, collections, remittance, and audit trail maintenance.

Managing tax compliance across multiple countries, states, providences, cities and counties can be a tedious and time consuming process. If compliance issues are not managed properly, the results can have serious repercussions. In addition to incorrect invoices, late payments and disgruntled customers, the company may be facing government fines and costly audits. This can all be avoided.

The SyteLine Tax Interface provides a seamless interface between Infor ERP SyteLine and tax management systems from AvaTax, Taxware, Vertex, and Quantum. These tax management systems and the SyteLine Tax Interface work together to streamline the sales tax compliance process reducing administrative costs, improving customer satisfaction and minimizing compliance risks.

Calculate taxes on the following invoicing functions:

- Customer Order Invoices
- Customer Order Credit Memos
- Customer Order Price Adjustment Invoices
- Project Invoices
- SRO Invoices (FS-Plus)
- Service Contract Invoices (FS-Plus)
- A/R Invoices
- A/R Credit Memos
- A/R Debit Memos

Features and functions:

- Calculate taxes using the tax software system and report them in SyteLine.
- Calculate “What-If” tax situations without affecting posted transactions.
- Calculate taxes on a line-by-line level, if needed.
- Include tax parameter and customer tax exemption maintenance.
- Provide tax exemption reporting.
- Interface directly with the tax systems’ geo-codes and sales tax APIs.
- Customize to suit individual needs.



HUMAN CAPITAL MANAGEMENT

Human Resources

Because employees can be a company's most valuable asset, Infor ERP SyteLine Human Resources (HR) provides a full range of tools to help you track all aspects of human resources. SyteLine HR maintains vital data about applicants and employees and provides numerous standardized reports. The flexibility of Infor ERP SyteLine Human Resources allows you to track as much or as little information as you require.

Because of its dynamic interaction with Infor ERP SyteLine Payroll, the shared data between the two modules eliminates the need for repetitive data entry, and ensures consistency and accuracy.

- Record and track applicant information, interview notes, and results.
- “Hire” an applicant to automatically create an employee record
- Record and track employee performance, education, salary, attendance, seniority, and grievances
- Report and track accidents and workers’ compensation claims
- Track Recruiting Programs such as Application sources, Want Ad Usage, and Want Ads
- Benefits Management
- Bar-coded employee badges
- Regulatory Requirements (I-9 Documents, EEO Classes, Ethnic ID, Employment Eligibility)

The screenshot displays the 'Employee' record for David Daniels. The top section includes fields for Employee ID (1), SSN (152-358-972), Nickname (Denny), Job Title (Painter), Department (200), Shift (1), and Emp Type (Hourly). A placeholder for a photo indicates 'No employee photo available'. Below this is a tabbed interface with 'General' selected. The 'General' tab shows personal and contact information: Last Name (Daniels), First Name (David), MI, Suffix, Address [1] (230 West Hill Street), Address [2] (Apt. D1), Address [3], Address [4], City (Columbus), Prov/St (OH), Postal/ZIP (43233), County (Franklin), Country (USA), Work Country, Phone (614-795-1111), and E-mail. At the bottom, there are dropdowns for 'Pay Freq' (Weekly) and 'Generate Payroll From' (Mtg Lbr), along with checkboxes for 'Automatic Lunch Clock Out' and 'Direct Labor Expense'.

HR maintains vital data about applicants and employees and provides numerous standardized reports.

Payroll

Infor ERP SyteLine Payroll automates the process of creating and maintaining complete employee payroll records. SyteLine Payroll supports all federal and state taxes and includes state-of-the-art functionality, such as direct deposit, 401(k) plans, electronic tax and wage garnishment remittance using ACH or EFTPS payment systems, magnetic media tax filing, and sophisticated report sorting and timing features.

Infor ERP SyteLine Payroll makes it so easy to do yourself; you won't need to hire an outside service.

- Manage Employee information (Hourly or Salary, Shift ID, Deductions, Pay Rates, Tax Codes, Union Dues, 401(k))
- Manage Tax rate changes (federal, state, and local)
- Flexible pay periods
- Direct deposit
- Retirement deductions
- Withholdings
- Worker's Compensation
- W-2 processing
- External Payroll Interface
- Vacation/Sick Leave Tracking
- Pay Types (Regular, Overtime, Double-time)
- Print payroll checks, the check register, and quarterly and year-end reports.
- Generate Pay from Manufacturing Labor or Time & Attendance

- Maintain a transaction history of the activities against your company's checking accounts through Bank Reconciliation
- Payroll transactions automatically posted to the Payroll Distribution Journal in the General Ledger

The screenshot displays the 'Payroll for Pay Period' window. It includes fields for Employee (1), Daniels, David, Sequence (0), and Check Type (Standard). The period is set from 12/16/2007 to 12/30/2007. The Department is 200, Employee Type is Hourly, and Employee Pay Freq is Weekly. The interface also shows a table of hours: Regular Hours (31.000), Overtime Hours (0.000), Double-Time Hours (0.000), Holiday Hours (0.000), Sick Hours (0.000), Vacation Hours (0.000), and Other Hours (0.000). On the right, there are options for 'Pay Salary' (checked), 'Pay Freq' (Weekly), and 'Bank Code' (BKT). Below that, 'Perm D/E Freq' has checkboxes for Daily, Weekly (checked), Bi-weekly (checked), Semi-monthly, Monthly, and Quarterly. At the bottom right, 'Suppl Earnings' is 0.00, 'Weeks Worked' is 1.00, and 'Workers' Comp Work Unit' is N/A. Buttons for 'Compute Payroll' and 'Payroll Distribution' are visible.

Infor ERP SyteLine Payroll makes it so easy to create and maintain employee payroll records, you won't need to hire an outside firm.

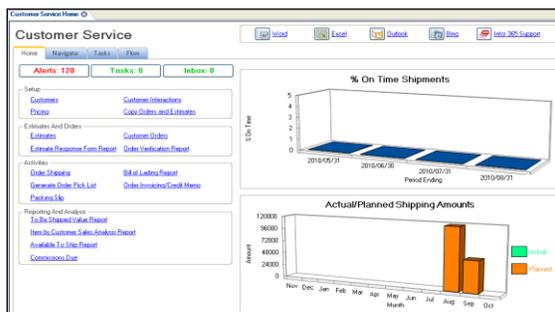
PERFORMANCE MANAGEMENT

Home Pages

Infor ERP SyteLine Home Pages are role-based home pages where we have identified the specific daily tasks of specific career positions in our customers' organizations and defined the exact collection of information and actions that help you accomplish that job effectively. We call each collection a home page, the set of actions and data most closely associated with a specific, defined job in an organization, such as customer service, controller, or production planner.

Infor ERP SyteLine Home Pages gathers the information that's most relevant to your responsibilities and puts it at your fingertips so that you can make rapid decisions and finish your daily work quickly and efficiently. This information is specific not only to your role in the organization, but also to the industry in which you compete. You can view and take action on the information from a single location on your computer. That way, you spend less time searching for information and more time getting your job done.

- Home Tab displays links to forms and activities useful for each Role
- Charts—Hover your mouse pointer over any of the columns to see the data value for that column
- Alerts, Tasks, Inbox buttons— Red and green indicators
- Navigator Tab includes pre-defined queries that equip each role with information to make informed business decisions
- Tasks Tab includes Alerts, Tasks, and Inbox
- The Flow tab for each form contains a business process flow including links to help topics and forms appropriate for each form. Double-click labeled ovals to open help topics. Double-click squares to open forms.



SyteLine Home Pages present the key information for specific job functions, for example Customer Service, to make it easier to get your job done.

SyteLine WorkBench Suite

WorkBench Suite for Infor ERP SyteLine gives users a "home base" panel that consolidates several role-related screens, performance gauges, navigation shortcuts, process flow guides, and advanced search/report tools—all in one easy-access, power location.

Providing employees with real-time performance data empowers them to identify predictive trends, take preemptive actions, and respond quickly to critical issues pertaining to their role, department, or division.

WorkBenches are tailored around specific company roles, from the C-level officer monitoring company-wide KPIs for long-range strategic planning, to the billing manager striving to expedite invoicing and maintain steady cash flow. WorkBenches provide quick, timesaving access to data (and supporting layers of related data), increase productivity, provide valuable role-related feedback, and support each employee's problem-solving efforts.

WorkBenches gives users colorful, highly visible gauges so key performance indicators and influencers can be easily monitored as needed, whether it is minute-by-minute, hourly, daily, or weekly. The performance indicators are tied to the live, integrated SyteLine database, rather than a static snapshot, and provide right-click access to multiple layers of influencing specifics behind the numbers.

- Monitor the easy-to-read gauges continuously for critical information, providing the ability to project outcomes and take appropriate preemptive actions.
- Identify influencing factors and avoid potential delays before they escalate and affect the bottom line.

- Access "role-based" critical numbers to help user's measure metrics relevant to their position, empowering self regulation and performance improvements.
- Consolidated screens and navigation shortcuts save user's time and improve productivity, leaving more customer attention.
- Process flow charts speed performance, simplify training, and encourage compliance with best practices related to each function.
- Extended search capabilities save time by simplifying detailed research and multi-level performance analysis.
- Dynamic DataViews allow users to analyze data in detail and write reports with real-time, drill down capabilities for confident strategic planning.

Easy-to-use Report Writer requires no technical skills to create custom reports, minimizing reliance on IT support.



WorkBenches gives users colorful, highly visible gauges so key performance indicators and influencers can be easily monitored as needed, whether it is minute-by-minute, hourly, daily, or weekly.

SyteLine Business Intelligence

Challenged by changing markets and competitive pressures, manufacturers need the power to sift through, understand, and leverage the business opportunities concealed within their vast wealth of business data.

Infor ERP SyteLine Business Intelligence is an interactive, graphical data access and analysis solution that provides flexible, multidimensional views of business and operations data.

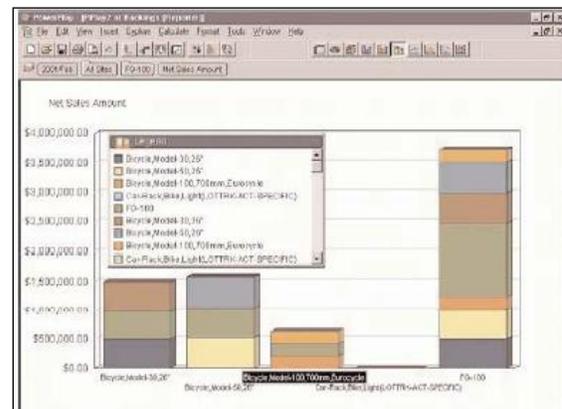
Infor ERP SyteLine Business Intelligence includes a complete set of standard manufacturing and financial analysis cubes, based on the business measures that are most critical to manufacturers. Infor ERP SyteLine Business Intelligence uses the information contained in these cubes to create three-dimensional graphical summaries for at-a-glance trends and exceptions.

Infor ERP SyteLine Business Intelligence with web access makes multidimensional data deployment and ongoing administration easy through centralized, server-based processing. Users explore information with a browser so there is no client software to deploy or manage. Because the software runs in a pure HTML environment, manufacturers have full administrative control over user access and security. All processing occurs on the server, which generates Web pages containing HTML, JavaScript coding, and GIF graphics for display in the browser.

Infor ERP SyteLine Business Intelligence's information catalog defines critical business knowledge and data-access rules—transforming data into easily usable, instantly accessible information. This intuitive catalog is designed to map ERP data to your own business functions, using familiar manufacturing terminology. Your questions can be asked in business terms,

eliminating the need to know the database structure or syntax.

- Delivered with a standard set of business analysis drill downs to SyteLine
- Graphical data analysis and drill down
- EIS tool that lets you look at, and analyze data relationships across multiple databases
- Allows both integrated graphical and spreadsheet multidimensional analysis
- Analyze buying patterns, customer behavior, spot strategic trends in product mix or cost structure, with customized graphical reporting



Infor ERP SyteLine Business Intelligence's information catalog defines critical business knowledge and data-access rules—transforming data into easily usable, instantly accessible information.

SyteLine Financial Reporting PM10

The speed, complexity, and global nature of today's business environment present challenges for even the best-managed organizations. To adapt to this constantly changing environment, you need broad, deep access to critical information in real time. You need cross-departmental, integrated views of operational and financial drivers and results to support company-wide collaboration, so you can harness the best thinking possible no matter where in the company or the world it originates. You must also gain firm control over your financial reporting and disclosure processes to provide more information—faster—to satisfy the requirements of regulators, shareholders, and other stakeholders.

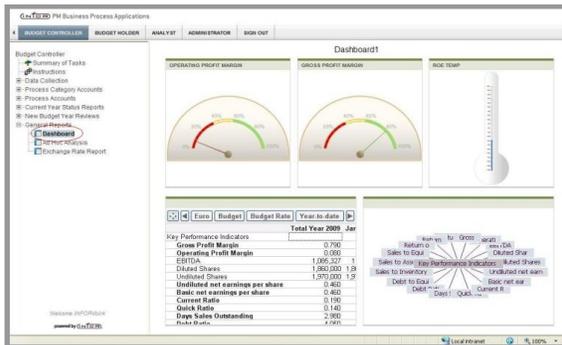
Delivering better information on demand to more — and more types of — business people presents serious challenges. To do so, you need the ability to leverage and extend existing technology investments. You must integrate data sources in a way that is transparent to system users and present data in a way that supports decision making. Plus, you need to know that the technology you choose today won't be obsolete tomorrow.

Companies of all sizes around the globe rely on Infor PM to better monitor, measure, and manage their business. With Infor PM, you can streamline and improve the effectiveness of your strategic management, planning and budgeting, forecasting, financial consolidation, and financial reporting processes with Infor PM. Plus, you gain the ability to monitor key business-specific performance indicators to support effective decision making.

With SyteLine Financial Reporting you are able to automate the generation, formatting, and distribution of book-quality financial statements and management reports. Present data in the most useful format—dashboards, scorecards, spreadsheets, color-coded tables, bubble charts, pie

charts, bar charts, and line graphs—and receive early-warning alerts when results deviate from expected performance. Compare actual figures against budgets and forecasts, drill down into details, evaluate trends, and see the results of currency fluctuations.

- Extends SyteLine's financial reporting capabilities
- Presentation quality financial reports.
- Embedded accounting intelligence with data integrity.
- Drilldown from report to transaction detail.
- Flexible reporting hierarchies.
- Consolidate multiple companies/accounts/calendars.
- Currency translation and reporting capability embedded in PM10 supporting IFRS, FASB52, and US GAAP.
- Import and export spreadsheet data.
- Electronic distribution options: e-mail & Web
- Easy to learn and also to create and maintain reports.
- Overall ease of use and flexibility.
- Created by accountants for accountants.
- Customized graphical reporting.



Present data in the most useful format—dashboards, scorecards, spreadsheets, color-coded tables, bubble charts, pie charts, bar charts, and line graphs—and receive early-warning alerts when results deviate from expected performance.

SyteLine Integral Enterprise Viewer

Infor ERP SyteLine Integral Enterprise Viewer (IEV) is an Enterprise Data Access tool allowing your company to access, and use, all of its data—no matter where or what format it resides in. You can combine different data stores together under one roof—empowering all of your users to visualize critical decision-making data.

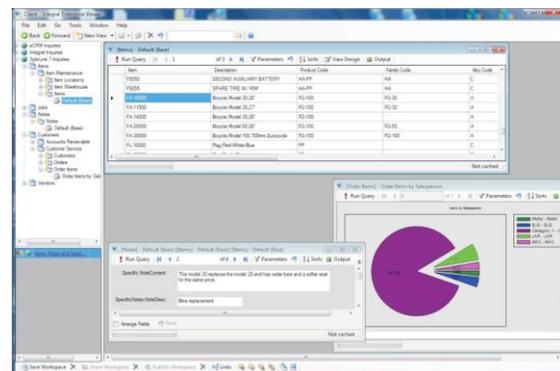
SyteLine IEV builds on this basic premise by offering reporting services – many common reporting output types are supported (such as PDF, Excel, Crystal Reports, XML, HTML, etc.) in addition to its own internal multi-level graphical reporting output.

SyteLine IEV is also a fast and easy way for any user in your company to query data—across sites, database technologies, and other common boundaries. You can optionally cache this information to off-load slow network connections or legacy data stores.

Finally, IEV is also an efficient and secure way to create web-based dashboards. Whether you want to graph important financial metrics on your company's intranet site in SharePoint, integrate additional customer-related data into CRM, or provide a portal dashboard for your vendors, IEV can do it with a few clicks.

- Powerful end-user reporting and viewing tools.
- Inquire, view, report, navigate, and export on any SyteLine data and any data in other OLE DB databases in your enterprise.
- Provides access to data locally or across the World Wide Web, in single or multi-site environments.
- Use IEV to call other applications and serve as a system integration tool.

- Extract data outputs to e-mail, Excel, PDF, other file formats, and printer report options.
- Built-in inquiries for SyteLine, APS, CRM, and other SyteLine solutions.
- Create, personalize, and drill down into any data source and save inquiries for quick retrieval.
- Easy to use and users can learn the IEV and begin to use it in just minutes.
- Used by executive managers, end-users, power-users, system administrators and developers.



Whether you want to graph important financial metrics on your company's intranet site in SharePoint, integrate additional customer-related data into CRM, or provide a portal dashboard for your vendors, IEV can do it with a few clicks.

SERVICES MANAGEMENT

SyteLine Field Service Plus

An efficient service department improves your company's performance and productivity. A streamlined service process helps you deliver error-free responses to customer inquiries and quick completion of work orders. You'll achieve an even higher level of performance when you schedule and dispatch field technicians efficiently, provide them with access to accurate historical data, and make sure they have the appropriate parts and tools on hand. With higher resolution rates and a shorter order-to-cash cycle, you'll enjoy higher profits and greater customer loyalty.

With exceptional flexibility and ease of use, Infor ERP SyteLine Field Service Plus is the ideal solution for nearly every field service requirement through the full spectrum of the service lifecycle. This robust service management solution meets the specific needs of companies that manufacture, install, or service complex products. Its powerful features include:

- **Contact center** - Give your call center easy access to detailed data for fast response to inquiries and work order creation.
- **Work orders** - Track and manage work orders for faster completion of service requests, more accurate billing, and greater customer satisfaction.
- **Scheduling and dispatch** - Gain visibility into each technician's schedule, route, certification level, and experience with Field Service Plus, so that you can match the right technician with the right job. You'll also increase resolution rates and minimize the cost of non-essential trips back to the warehouse.
- **Plant maintenance** - Schedule preventative maintenance for internal assets in order to prevent unexpected

downtimes, extend the lifecycle of equipment, and maximize warranty cost savings.

- **Service contracts** - Track and manage service level agreements with maximum efficiency. Visibility into the contract details, unit, and service history improves decision making and creates opportunities to up sell or extend service agreements.
- **Depot repair** - Manage product returns for repair, refurbishment, or shipment to a third party vendor.
- **Service History** - Access complete historical data, including customer profile, unit description, contract status, and service history.
- **Analytics** - Integrated data, total visibility, and accurate tracking make it easy to analyze data down to the detail level. Flexible reporting aids in decision making, planning, and providing engineering with valuable information needed to adapt product or part designs.

Field Service Plus also supports multiple languages and currencies, and has the ability to support local regulations. Its flexibility means it can grow to meet your expanding needs.

When you streamline your field service process with the full range and power of Infor ERP SyteLine Field Service Plus, your customers get better service faster and you will enjoy greater efficiency and productivity. Improved first-call resolution rates and error-free billing will boost long-term customer loyalty and will give you a unique competitive advantage. With a streamlined service lifecycle and a condensed call-to-cash cycle, you'll be positioned for maximum profit opportunities.

The screenshot displays the Infor ERP SyteLine Field Service Plus interface. On the left, there is a calendar for September 2008, with the 15th of the month highlighted. The main area shows a detailed schedule for a technician, organized by day. Each day's schedule includes a list of tasks with columns for 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', and 'Sat/Sun'. The tasks listed include various service activities such as 'Service Appt', 'Test/Confs', 'Automatic Response', 'On Site Service Appt', 'Parts Fulfillment', 'Incident Awaiting', and 'On Site Support Appt'. The interface also features a 'Filter' section on the left with options for 'Filter Selection' and 'Task Selection', and an 'Additional View' section with a 'Field's Field Schedule' button.

Gain visibility into each technician's schedule, route, certification level, and experience with Infor ERP SyteLine Field Service Plus, so that you can match the right technician with the right job.

SyteLine SM-Plus Mobile Service Management

Infor ERP SyteLine SM-Plus Mobile Service Management helps companies outfit their technicians with mobile devices, such as hand-held wireless devices and laptops. As a delivery mechanism, it bridges the costly gap between the field and the back office, improves operating efficiencies, and leads to increased corporate wealth and stakeholder value.

Customers expect faster and more efficient service order resolution. Faster response times and more first-call resolutions are the building blocks of increased field technician productivity. When field technicians have access to information concerning parts inventory, unit history, and repair instructions, there is a fundamental shift in productivity gains. Online or even synchronized access of information minimizes service order documentation and operational delays normally experienced with a manual process. SM-Plus Mobile minimizes the time spent on service order resolution and billing processes, improving overall operational efficiencies throughout the service delivery life cycle.

SM-Plus Mobile acts as a delivery mechanism especially designed for mobile field service organizations that rely on a steady flow of incoming and outgoing data. Field technicians require access to centrally stored customer, inventory, service order, scheduling, and resolution data. A competitive advantage is gained by seamless integration between field technicians and back-office customer service, service logistics, inventory, and accounting systems. SM-Plus Mobile helps organizations speed response time, complete more service orders per day and provide superior customer service.

World-class service firms use resource productivity (i.e. service orders completed per day/per technician), service response time, customer satisfaction, and first-time

resolution rate as some of their key performance indicators (KPIs) and look for ways to drive greater efficiencies with the wealth of data provided by mobile solutions. SM-Plus Mobile provides accurate and near real-time information, enabling field technicians, back-office users, and executives to make informed decisions.

- **Device compatibility** — Empower your workforce through the use of mobile devices, such as Microsoft Pocket PC-based handhelds or Windows-based notebook computers.
- **Information Access** — Field technicians can easily access customers, incidents, units, and service orders.
- **Transaction Processing** — Field technicians can process transactions for labor, materials, and expenses associated with a Service Request Order (SRO).
- **Real-time lookups** — With a wireless connection, technicians can access real-time data, such as inventory availability.
- **Industrial environments** — For technicians working in high-impact or industrial applications, industrial grade “ruggedized” devices can be used.
- **Selective synchronization** — Technicians can take with them to the job site only the information they need and synchronize when a wireless connection is available.
- **GPS tracking** — Technicians that have mobile devices equipped with GPS can transmit their coordinate information to the back office. The information is useful to a scheduling manager or dispatch which needs track the partners last known location for route optimization and chart historical locations for a given day.

- **Remote purchasing** — Streamlines the process of technicians acquiring material required to complete a work order,
- **Forms designer tool** — Standard forms can be modified and new forms can be created to personalize forms to each unique business process.



SM-Plus Mobile acts as a delivery mechanism especially designed for mobile field service organizations that rely on a steady flow of incoming and outgoing data.

SyteLine RMx RMA Extension

Infor ERP SyteLine RMx Return of Materials extends the functionality of the standard SyteLine RMA module through improved management of the disposition process, including return to vendor processing, as well as providing direct integration to FS-Plus Service Management. The disposition process is the means by which users evaluate/test/inspect the return to determine the appropriate next step. Items and materials can be tagged as scrap, rework, return to inventory, or return to vendor (for credit, exchange, or warranty repair).

Seamless integration with FS-Plus allows users to efficiently manage the return material authorization process automatically from within FS-Plus as well as handle “Rework”, “Advanced Exchange” and other related service procedures.

The screenshot displays the 'RMA Disposition Maintenance' interface. On the left, a list of RMA lines is shown, with line 4 selected. The main area contains a form for RMA000004. Key fields include: RMA: RMA000004, Customer: 1, Ship To: 0, Status: Opened, Name: Coordinated Bicycles. The form is divided into sections for Line 3, Item: CP-30000, S/N, Disposition Code, Qty To Return (20,000), Qty Received (20,000), Qty Disposition (4,000), Trans Num (3), Disposition Code (RTV-CRED), Description (Return to Vendor - Credit), Qty Disposition (1,000), and Qty Moved (1,000). A 'Return To Vendor' section shows Vendor: 6, Vendor RMA: 37513527143, and Unit Credit: 2.25.

RMA Disposition Maintenance is the main screen used to enter disposition codes, item descriptions, and quantities returned, received, or dispositioned.

The screenshot shows the 'Vendor Processing' screen. The form at the top includes: Vendor: 4, Dynamic Spoken Company, Description: Seat Pad, Ship Date: 11/23/2011, Item: CP-10000, S/N, Qty Shipped: 0.000, U/M: EA. Below the form is a table with the following data:

Reference	Ret Num	Ret Line	Suffix	Ret Release	Qty Disposition	Qty To Ship	Location	Lot	Warehouse
RMA	RMA000005	1		1	1.000	1.000	RMA		RMA

The Vendor Processing screen is used to process the return. Users can keep track of RMA numbers, line and item numbers, and quantities returned.

EDUCATION & TRAINING

Infor EPAK for SyteLine

Getting and keeping employees trained on all your business processes and systems is no easy task. Like most companies in the current economy, you're trying to do more with less—and the pressure on your employees to get things right, the first time is greater than ever. Add in new regulations that force you to adhere to strict compliance standards, and the need to document and capture critical business processes becomes even more critical.

The Infor Enterprise Performance Accelerator Kit (EPAK) can help you meet these challenges, so you reduce costs and errors and recognize ROI more quickly.

EPAK is a collaborative content development platform that drives end-user and project team productivity throughout all phases of the software ownership lifecycle. EPAK pre-built application specific content provides significant additional benefit beyond the EPAK Developer for organizations deploying Infor's applications.

Key to the value of EPAK application specific content is that it is authored in tight collaboration with the consultants in the field that are implementing these applications every day, thus creating content which accurately reflects industry best practices with detailed conceptual information.



Pre-built content for ERP SyteLine:

- Getting Started
 - User Interface
- Accounting
 - Accounts Payable
 - Accounts Receivable
 - General Ledger
- CRM
 - Marketing
 - Sales
 - Contact Management
 - Order Management
- Customer Service
 - Customer Order Entry
 - Advanced Order Entry
 - RMA
- Engineering
 - BOM/ECN
- IT
 - Crystal Reports
 - Forms Personalization
 - System Administration
- Materials
 - Purchasing
 - Inventory
 - Transfer Orders
- Production
 - Role
 - Job Shop Manufacturing
 - MRP
 - APS
 - Scheduling
- Projects
- Outlook Integration

Infor KnowledgeZone

For nearly a decade Infor's SyteLine customers have turned to the KnowledgeZone to help with their training requirements in:

- Implementation
- Migration to new software
- Upgrading to new versions
- Employee turnover
- Cross-training and retiring
- Expanded use of software

A KnowledgeZone subscription gives your people unlimited access to ALL our training materials and classes for all versions of your product for a full year. This includes a wealth of instructor-led and self-study training material:

- Training guides
- Online recorded classes
- Live instructor-led online classes

Your users can download all the training guides, attend all instructor-led classes, and take all the on-line recorded courses as often as they wish, 24x7, for the duration of the subscription. The subscription includes all existing and forthcoming materials and courses.

KnowledgeZone helps your project team members, daily end users, and super-users:

- Preview the software
- Prepare for on-site consulting or training events
- Remember and expand on what they've learned

- Get help and cross-train long after the official training is over

In addition, many IT departments use the KnowledgeZone to offload routine training questions users need answers to while on the job.

It is often unrealistic to send people to one class and expect them to be trained. Training takes time and repetition. Furthermore, attending a whole-day or multi-day class might not only be inefficient, but also unfeasible. The KnowledgeZone provides training that is:

- Available round-the-clock
- Requires zero travel
- Delivered in a variety of formats
- Broken into segments so you can focus on only the portion you need.

There is a better way.

At Infor, we work with a core belief. We believe in the customer. We believe that the customer is seeking a better, more collaborative relationship with its business software provider. And a new breed of business software: created for evolution, not revolution. Software that's simple to buy, easy to deploy, and convenient to manage. Our 70,000 customers in more than 100 countries stand with us. We look forward to your sharing in the results of our belief. There is a better way. For additional information, visit www.infor.com.

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