Infor LN Version Definition

Version 10.2.1

Important Notices

Trademark Acknowledgements

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Contents

Management summary

This document describes the features in Infor LN release 10.2.1.

Changing the way that work is done

We continually invest to further improve the user experience by reducing the number of clicks to perform tasks. See these features:

- Role-Based Home Pages that fuse analytics, alerts for management by exception, workflows, quick links to favorite pages, and frequently used screens into a unified experience for casual users. We added a Role-Based Home Page for the Project Manager.
- Workbenches for experienced users who need to quickly triage and process transactions like requisitions or planned orders. Each workbench is a single, task-oriented screen. We added workbenches for the Service Scheduler, Shop Operator, and the Enterprise Modeler.
- Social collaboration that facilitates communication and collaboration between information workers while viewing the Infor LN data in context to their work.
- In-Context Attachments that make business documents like contract clauses and vendor terms available directly in context of the application data.

This release also includes the new “white” visual style that provides better contrast, readability, and navigation.

Completing the application

We developed features that further support specific industries and geographies:

- Engineer-to-Order Project Manufacturing planning and material handling processes were enhanced for Aerospace, Defense, Industrial Machinery, and Equipment.
- For supply chain intensive industries like Automotive, various enhancements were made to facilitate supply chain collaboration and automation. For example, we enhanced handling unit generation and improved shipment consolidation.
- Fixed Pricing was added in Service Management.
- Invoicing processes were redesigned to enhance usability.

- International support was enhanced. We enhanced multicurrency and added intercompany of labor.

Engineered for speed

With Infor LN 10.2.1 various content packs are released as implementation templates that can be changed to meet your specific business needs:

- DEM Content Pack includes predefined business process models based on industry best practices. For 10.2.1, the models were redesigned.
- ION Content Pack includes alerts for management by exception and workflows for segregation of duties and process automation. This release adds specific content for Quality, Project, and (Project) Contract Managers.
- IOR Reporting Content This content includes form reports such as Invoices and Quotes as well as operational reports such as Aging Analysis and Open Orders.

User experience

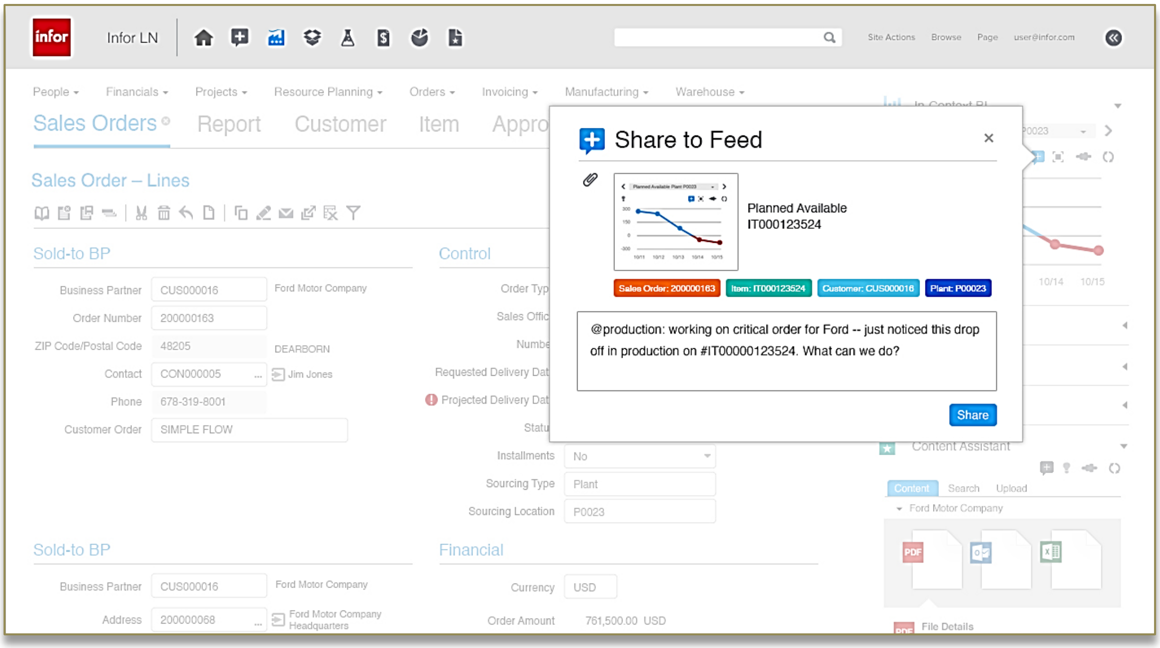
Social collaboration

Infor LN users must exchange information about Infor LN related data. Traditionally, inquiries are done externally from the LN system through e-mail and instant messenger applications by exchanging document numbers, screen prints, or other information. This process results in separate threads of information that cannot be directly related to Infor LN application data. See these examples:

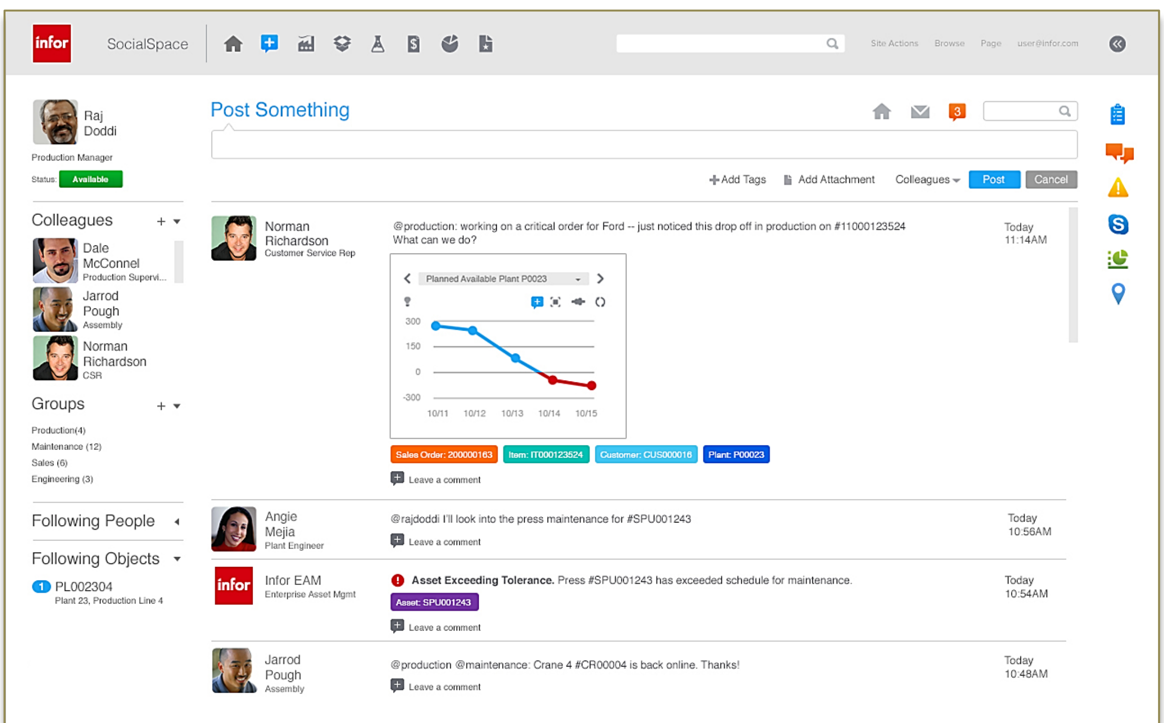
- A sales administrator receives a request from a customer ABC to see if the ordered goods on sales order #123 can be delivered earlier. The sales person then checks with the supply chain manager or buyer to determine if this request can be satisfied.
- A project manager checks the hours registered on a project XYZ, and sees a suspicious entry that may have been entered by mistake. The project manager then checks with that project team member to see if the entry was entered in error.
- A quality manager is about to assign a nonconformance but key information is missing. The quality manager then checks with the shop supervisor who entered the nonconformance.

By using Infor SocialSpace in Infor Workspace, users can exchange the requested information in the context of the Infor LN environment. With the release of Infor LN 10.2.1, users can utilize the Share button on any Infor LN screen. For example, a sales administrator is viewing sales order 200000163 where the customer is requesting an earlier delivery. With this release, the sales administration can click the **Share** button to enter a message and send it to the production planner and buyer. The message will be tagged with the order ID and other key fields such as the customer and order type.

This screen print shows the dialog box that the system administrator uses to enter the message:



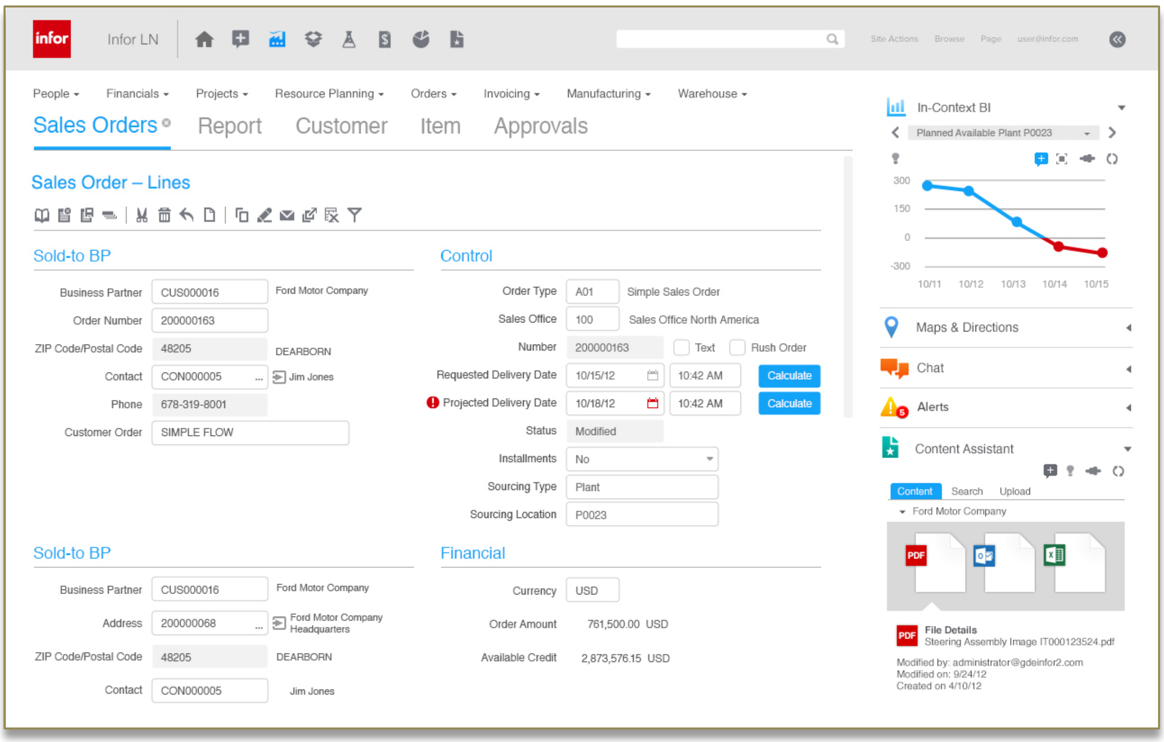
The production planner and buyer will then see this request in Infor Workspace, and can start an Infor LN screen that shows the order by clicking the buttons for the tagged information in the message:



After these users have an answer on the request, they can respond to the request by adding comments to the initial request. By exchanging data though Infor SocialSpace, all information exchanged is unified in one thread rather than in multiple threads (like e-mail) in multiple, disconnected systems.

In-Context Attachments

Release 10.2 of Infor LN included In-Context web parts such as Business Intelligence, Maps, and Tweets. In Infor LN release 10.2.1, we added In-Context Attachments, which is a new In-Context web part. This web part uses the Microsoft SharePoint document management application functionality to quickly retrieve documents in-context of the LN data that you require. For example, if an attachment is added to sales order SOM000107, the document attachment is tagged with the sales order ID and the customer ID. With these tags, you can quickly retrieve documents by leveraging the power of the Microsoft SharePoint search engine.



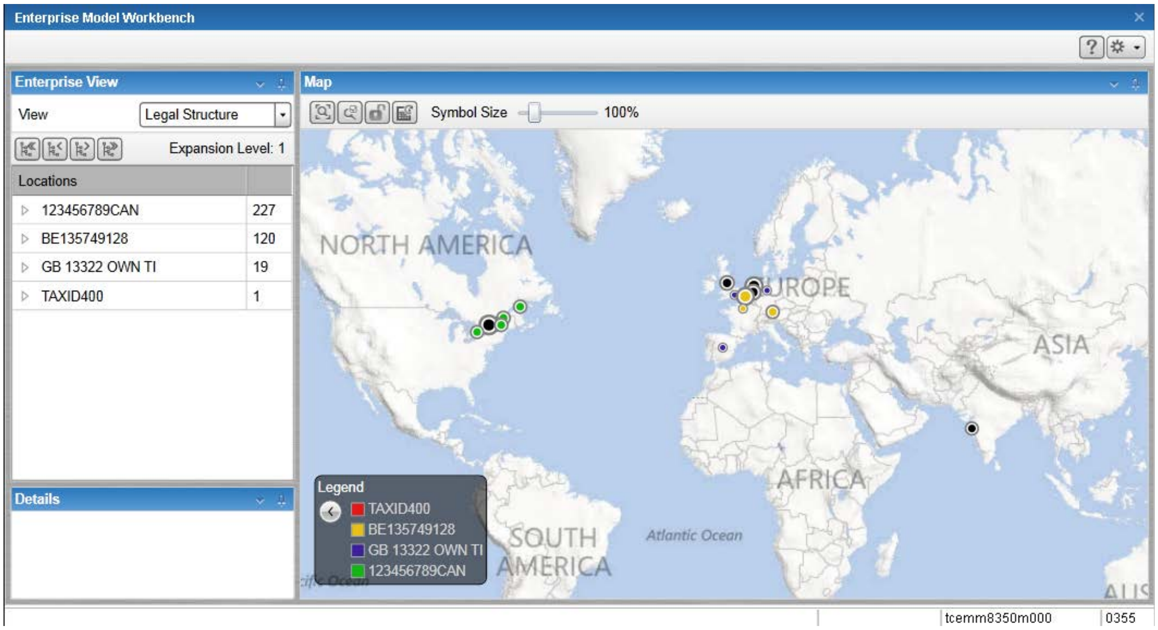
Globalization

We added functionality to provide support for complex environments such as working with multiple operating units that operate in multiple countries. We also added features to enhance usability.

Enterprise Modeler Workbench

This release includes the first version of the Enterprise Modeler Workbench. You use this workbench to view your global operations in one glance on a map. You can either browse all entity types at the same time, or browse only your organization by specifying a sub-entity such as sales, procurement, and accounting. At a later time, additional functionality may be added to support buy-sell relationships and to configure new entities.

This screen shows an example of the Enterprise Modeler Workbench:



Intercompany buy-sell of depot order labor

You may subcontract part of your service work order labor to third parties or to other organizational entities. With Infor 10.2.1, you can now configure service level agreements between companies in the context of depot repair.

Multicurrency enhancements

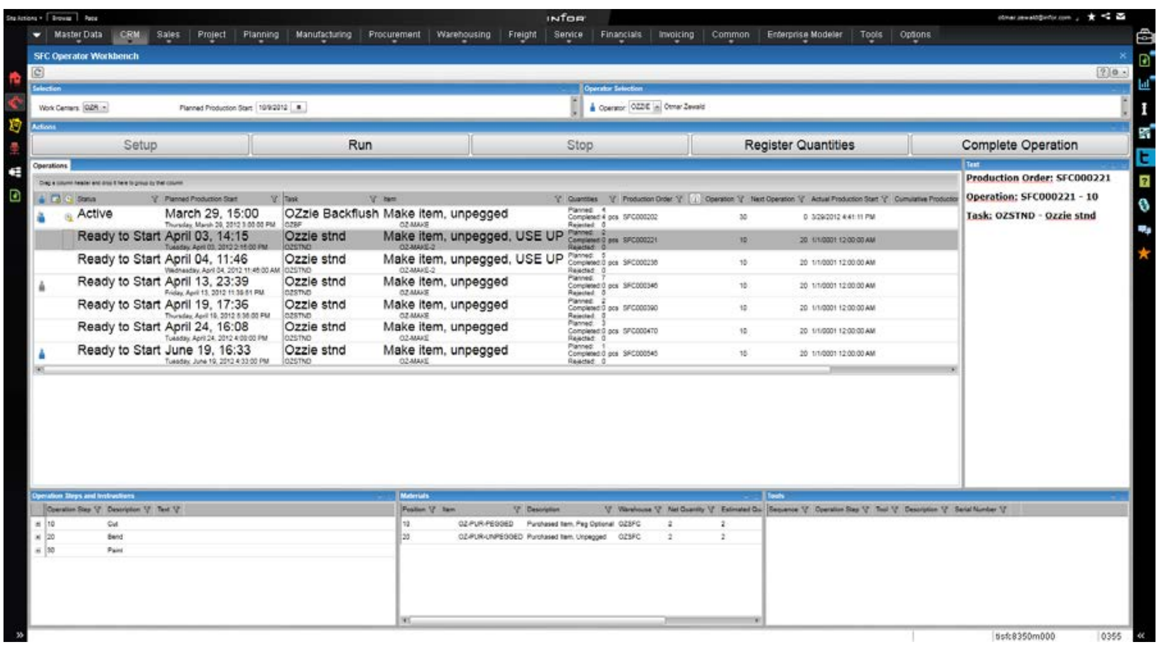
We added a parameter that facilitates the use of multiple functional currencies. Many multinational corporations are required to provide reports in more than one functional currency. With this new parameter, all three home currencies are stored against historical rates for nonmonetary ledger accounts such as inventory, work-in-process, and fixed assets. You can perform statutory (local) and corporate reporting in multiple home currencies in parallel while adhering to applicable IFRS/US GAAP standards on foreign currency translation, for example, IAS 21.

General manufacturing

This release contains several enhancements for discrete manufacturing users.

Shop Operator Workbench

The Shop Operator Workbench provides the information that a shop operator requires on one screen. This screen shows the queue of operations assigned to the shop operator. Buttons are available to start and stop work on an operation and to report work complete. Hours do not need to be entered manually because they are calculated. The number of mouse clicks and screens for the shop operator is dramatically reduced with this enhancement.



Buyer assignment on planned purchase orders

You can assign or re-assign buyers on planned purchase orders. Buyers can view the planned purchase orders that they are assigned to so that they can anticipate requirements as early as possible.

Commingling of purchase orders across planners

When planned purchase orders were transferred in batch, they were commingled by planner ID, and not across planners. As a result, economic buys could be missed. In release10.2.1, you can now configure whether to commingle purchase orders by planner.

Available to Promise and Capable to Promise calculations

The Available to Promise (ATP) and Capable to Promise (CTP) calculations now include lead times, lot sizing rules, and fixed delivery schedules.

Demand Pegging without sales contracts

Demand Pegging, previously named Hard Pegging, no longer requires the Terms and Conditions module. In release 10.2.1, you can now use this feature for sales orders where you want to track lead time or order value such as for critical orders or orders for delinquent customers.

Critical Safety Item

We added a **Critical Safety Item** (CSI) indicator to the item master. A CSI is a part, assembly, installation, or production system with one or more essential characteristics that must conform to the design data or quality requirements; otherwise, the item might result in an unsafe condition that could cause loss or serious damage to the end item or major components, loss of control, or serious injury to personnel. CSI is important, for example, on packaging labels, so that warehouse and freight personnel can handle the item with more care. In addition, we modified various reports to provide CSI information.

Supply Chain Intensive

We added several enhancements for supply chain intensive industries such as the Automotive Tier-N suppliers.

Customer item revisions

We added a customer item revision ID that you can use when collaborating with customers to track data on items with multiple revisions.

Auto-generation of handling unit structure

When a vendor sends an Advance Shipment Notice (ASN), it may contain detailed packaging structure information. We added functionality to generate a handling unit structure from the ASN.

Labeling at assembly

With this release, you can print and attach labels when completing work orders. Previously, you were able to print and attach labels only when preparing the shipment in warehousing.

Shipments

We enhanced the consolidation of multiple schedule lines into one warehouse order and shipment, regardless of whether fields such as required date or shipment reference are different.

In contrast, some customers such as the French Automotive OEMs, may request only one shipment line by shipment. We added a configuration setting to meet this requirement.

Full packaging

You can now specify whether a customer accepts full or partial packaging, for example, full or partial pallets or boxes.

Source inspection indicator

We added a source inspection indicator on the sales contract to indicate to the customer that you will complete a quality inspection before shipping the order to the OEM. This information is also printed on the shipping labels so that the warehouse staff can anticipate this requirement.

Remittance advice

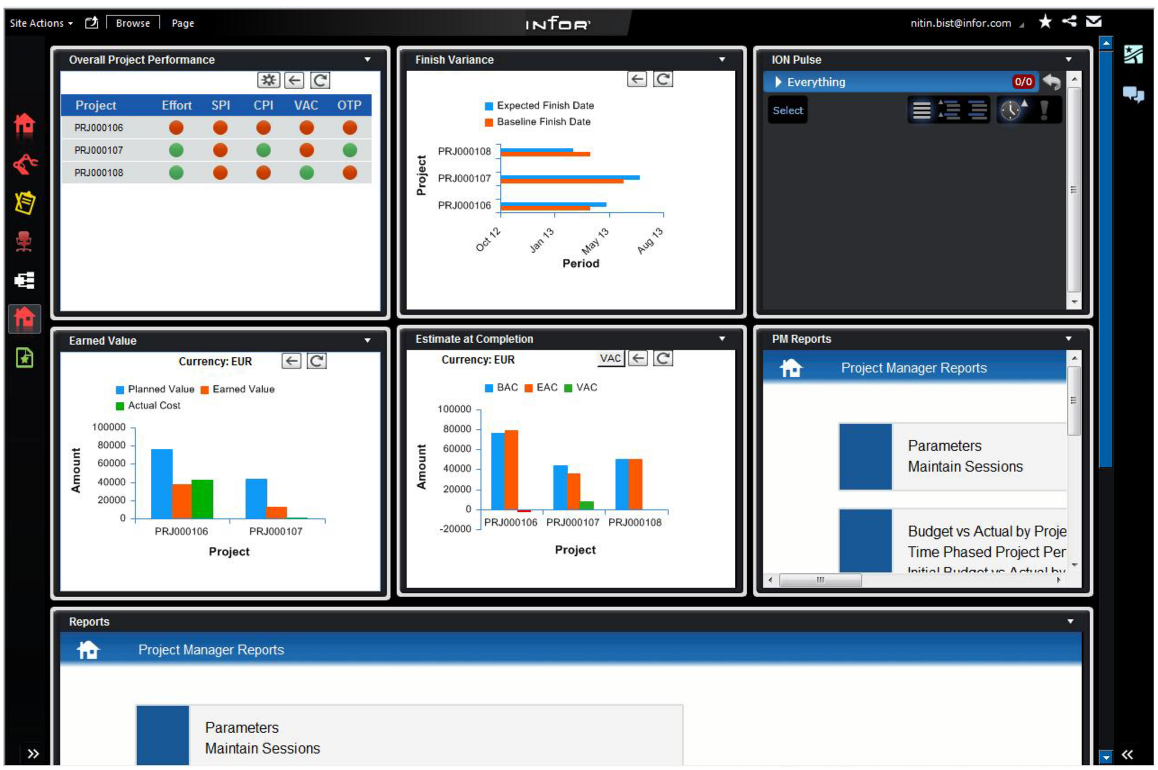
To meet the requirements of Evaluated Receipt Settlements (ERS), where customers pay directly when the goods are received, we made changes in the Receivables module. If the customer is not billed, these attributes instead of the invoice ID: shipment ID, packing slip ID, or customer order ID are used to automatically match remittances to alternate IDs.

ETO Project Manufacturing

We made several changes to enhance the ETO Project Manufacturing solution.

Project Manager Home Page

The Project Manager Home Page merges role-based metrics, alerts, workflows and project details in one unified, configurable screen. This screen is the navigation hub for the project manager. The manager can navigate to alerts and workflows and take corrective actions as a result of issues in the alerts. Because this page and its alerts and KPIs are configurable, you can use this page as a template to meet your specific business needs.



Contract shipments, returns, and backorders

A new (Project) Contract module was introduced in Infor LN 10.2 where multiple hardware and non-hardware deliverables can be shipped to the customers. Returns and backorder processes are now supported in this module.

Contract delivery monitor

We added an inquiry screen to monitor if a delivery is on time or at risk.

Commingling by project element or activity

For project elements or activities, you can now specify whether to use commingling.

Views for planned orders and inventory movements

In release 10.2, we included functionality to add project pegging distributions to orders and inventory movements for project cost accounting purposes. In release 10.2.1, we added views to exclude the pegging information for the supply chain planner and the buyer because they do not require the pegging information.

Invoicing

We enhanced the usability of invoicing by consolidating data and screens.

Billable lines

All billable lines, regardless of their origin, are now consolidated on one screen. This enhancement facilitates navigation and reporting, and expedites invoicing.

Invoicing 360

Invoicing 360 is the primary navigation hub for the billing administrator. By using this hub, billing administrators can quickly search processed invoices for a particular customer or order. From this screen, the billable lines can be processed into invoices.

Self-billing, three-way match

In a self-billing environment, a customer creates a bill based on received quantities. As a supplier, you must validate whether a customer has self-billed everything that was shipped. You must track variances to determine any further action such as a creating a debit memo or a write-off. The self-billing three-way match provides the functionality to identify these variances so that you can determine the corrective actions.

User profiles

We added user profiles for automation and authorization. You can now restrict changes to tax codes within invoicing, and specify default printing devices.

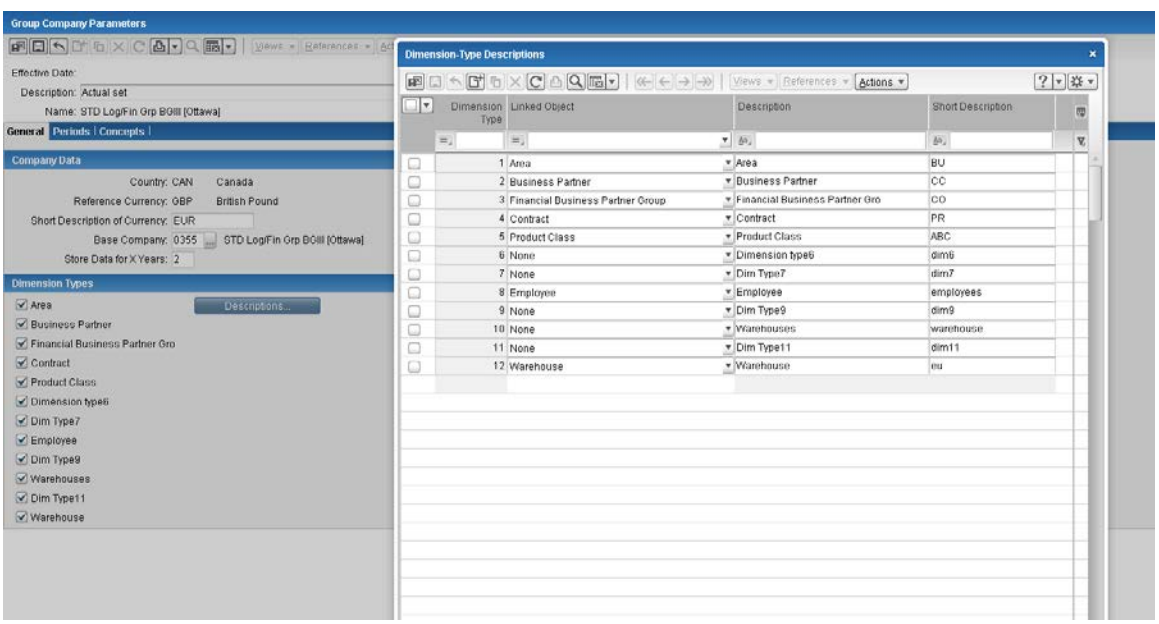
Financial Accounting

Improved navigation to subledgers

Depending on your authorization, you can now navigate from any journal in the general ledger to the corresponding subledger, such as receivables, procurement, sales, and production. You can also navigate from a subledger to the general ledger.

Streamlined GL reporting dimension mapping

Many implementations leverage the power of the 12 GL reporting dimensions for more precise financial reporting. Reporting dimensions are fed from the subledgers and typically reference master data such as area, project, and business partner. In release 10.2.1, you can now directly link dimension codes to master data code lists. Code lists can then be automatically replicated to the dimension codes. This process saves you time in maintaining the dimension codes and also makes the list of dimension codes more accurate. Previously, dimension codes were not automatically replicated from the master data.



Open periods by using a batch

You can now use a batch to open periods.

Payment batch user interface

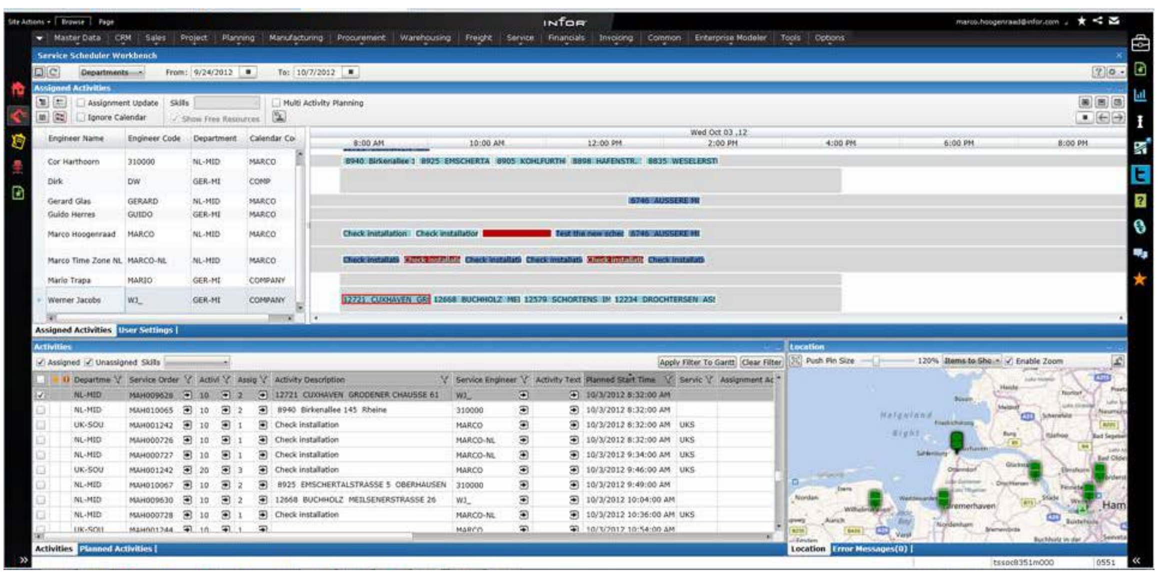
To reduce the number of clicks, we consolidated several payment batch screens into one screen.

Service Management

Service Scheduler Workbench

Service dispatchers can use the Service Scheduler Workbench to perform the day-to-day planning of resources based on their available time, skills, and location. Service dispatches can either confirm the proposed resource allocation based on Territory Management proposals or can override the proposed allocation because of rush orders or illness.

Scheduling can be either performed by assigning activities to available resources or by assigning resources to unstaffed activities. Optionally, scheduling can be performed in the context of a selected region that is selected on the map. The map can also be used to do the sequencing of activities based on optimal routes.



Service pricing improvements

With Infor LN 10.2 pricing clauses on service contracts were determined by a contract. The assumption was that billing was done by monthly or quarterly fixed price installments. In Infor 10.2.1, we support more complex pricing terms, which are independent of the coverage terms: fixed price and time and material.

With a fixed price contract, the cost of the service work should be covered by the fixed price, regardless of the nature of the cost, for example, labor, materials, or other costs. Coverage terms do not apply.

With a time and material contract, all consumed hours, material, and other expenses are priced when the work order is closed. Coverage terms specify whether the costs are billable.

Content Packs

ION content

ION provides functionality to raise alerts for management exception, model workflows for process automation, and document authorization. This release adds content for Project Managers, Contract Managers, and Quality Engineers and Managers. You can clone these templates and customize them to meet your specific business needs.

DEM content

We enhanced the DEM content to represent common business practices in Automotive, Aerospace, and Defense as well as to comply with US GAAP, SOX and IAS regulations. We added an implementation wizard to assist you in determining which processes to enable. Processes that you do not enable will not be visible to your end users.

Reporting content

In addition to the traditional Baan tools and Microsoft Reporting Services, you can now use Infor Operational Reporting, which is powered by Cognos, to create visually attractive reports without performing customizations. Infor Operational Reporting includes over 70 predefined templates that you can configure to meet your business needs. You can configure logos and fonts as well as the location of data. For a list of templates, see Infor Xtreme solution ID 1187494.

This screen shows a sample Infor Operational Reporting report:

ORDER ACKNOWLEDGEMENT - Original

Sales Order	Order Date	Sales Representative	Customer Order	Reference A
-00000018	Jan 28, 2011			

Sold-to Business Partner:

Saints Address
Poortersdreef
3811 BR Amersfoort
The Netherlands

Delivery Address:

Saints Address
Poortersdreef
3811 BR Amersfoort
The Netherlands

We thank you for your order.

Item	Planned Receipt Date	Quantity	Price [EUR]	Discount [EUR]	Amount [EUR]	Tax
MVP Melis's Purchase Item	Aug 31, 2012	1.00 pcs	100.00/pcs	0.00	100.00	001

TAX SUMMARY

Tax Authority	Rate	Exempt Certificate	Amount
Treasury Department	12.00		12.00

	Goods	Discount	Promotion Discount	Tax	Total
	100.00	0.00	0.00	12.00	112.00
					Rounded: 112

Delivery Terms:
Payment Terms: 030 30 days
Carrier/LSP:

Reference B:
Sales Office: 005 Kums Sales Office

Tools

In-Context Modeler

The In-Content Modeler is an LN Application Studio feature to “tag” certain form fields that will then be available in a web service to other web parts that use these tags as input variables. A business example is to ”tag” the customer ID and customer address details on the Customer Master 360 and Sales Order screens, so that other Infor Workspace web parts like the Maps and Attachments web parts can show this data in the context of the customer that is selected. This data is refreshed when another customer is selected.

You can use this technology for Infor web parts or custom-developed web parts like a Shipment Tracker.