

**Midwest Regional Conference for Infor ERP on IBM i**  
September 16 and 17, 2021. The Ingleside Hotel, Pewaukee, WI

**THURSDAY SEPTEMBER 16th**

7:00 - 8:00 Continental Breakfast						
8:00 - 8:30	Doors open & Registration					
8:30 - 10:00	<p><i>Opening Keynote Session - "A Global Manufacturing Perspective - 2 years later"</i></p> <p><b>Dr. Doug Fisher</b></p> <p>Oakton Ball Room</p>					
10:00 - 10:15	( BREAK )					
	Planning and Operations Track	Customer Experience Track	Welcome Track	CLOUD Track	Shop Floor and Operations	Finance Track
Room Name:	Woodland A	Woodland B	Woodland C	Woodland D	Hearthside	Oakton Ballroom
10:15 - 11:30	<p>U1 XA Planning Tools - What are my options?</p> <p>Rick Worley</p> <p>TriMin</p>	<p>V1 Infor Configure/Price/Quote (CPQ) - Modern tools that Increase Sales and Revenue</p> <p>Deb Lopez</p> <p>Infor</p>	<p>W1 Guidance for anyone new to this event - How to get the most from this conference</p> <p>Dave Regard &amp; Tony Flatschman</p> <p>Infor and ISE</p>	<p>X1 XA Roadmap</p> <p>Ross Freeman</p> <p>Infor (This session will be repeated on Friday)</p>	<p>Y1 Mobile Technology for the Production Floor</p> <p>Gerry Skalla</p> <p>Emkat</p>	<p>Z1 First Introduction, For Finance - NEW BI tools over ERP</p> <p>Pat Collette</p> <p>TriMin</p>
11:30 - 12:30 Lunch, Partner Introductions, Summerfest Introduction						
	Planning and Operations Track	Customer Experience Track	System Link, Integrator Track	CLOUD Track	Shop Floor and Operations	Finance Track
Room Name:	Woodland A	Woodland B	Woodland C	Woodland D	Hearthside	Oakton Ballroom
12:30 - 1:30	<p>A1 VPI and Launchpad - Advanced Planning Tools for Infor ERP</p> <p>Joe Gill</p> <p>ISE</p>	<p>B1 COM-NET2 CX - The integrated eCommerce Solution for Infor XA (and possibly LX and System 21)</p> <p>Mark Shubel</p> <p>Lexel</p>	<p>C1 System Link and Enterprise Integrator - Overview and Intro</p> <p>Mike Tolley</p> <p>ISE</p>	<p>D1 Introduction to Infor Cloud Offerings. Does it align within my company's strategies?</p> <p>Chris Hillock</p> <p>Infor (This session will be repeated on Friday)</p>	<p>E1 KPI's and Dashboards - Leveraging Data to help you run your plant</p> <p>Rick Reith</p> <p>Paper-Less</p>	<p>F1 Cash Application, Bank Reconciliation and Electronic Payments for Infor XA</p> <p>Jim Payne &amp; Barb Skretts</p> <p>Cashbook</p>
1:45 - 2:45	<p>A2 Sales, Inventory and Operational Planning (SIOP)</p> <p>Herald Cavallaro</p> <p>Cavco</p>	<p>B2 Configure/Price/Quote with Infor XA - Live Demonstration</p> <p>Charles Hood</p> <p>ISE</p>	<p>C2 IDP &amp; Integrator Best Practices</p> <p>Kevin Gerard &amp; John Merges</p> <p>TriMin</p>	<p>D2 Why Abacus for IBM Cloud and Hosting</p> <p>Christian Hilton</p> <p>Abacus (This session will be repeated on Friday)</p>	<p>E2 Streamlined Picking and Shipping for Infor XA - Paper-Less Pick to Ship</p> <p>Dave Shipton</p> <p>ISE</p>	<p>F2 Introduction to the Enterprise Financials Suite - Session 1 (of 2)</p> <p>Jeff Weitkamp</p> <p>TriMin</p>
3:00 - 4:00	<p>A3 Shipping and Freight Automation for Infor ERP</p> <p>Nick Fisher</p> <p>ARI Traffic Consultants</p>	<p>B3 E-Commerce - Developing an eCommerce Strategy. Your Company Needs One!</p> <p>Mark Shubel</p> <p>Lexel</p>	<p>C3 Integrator, Cool Applications</p> <p>Kevin Gerard</p> <p>TriMin</p>	<p>D3 XA-10 Introduction</p> <p>David Foster</p> <p>Infor</p>	<p>E3 Infor Quality Management</p> <p>Steve Smeiles</p> <p>Advanced Quality Services</p>	<p>F3 Introduction to the Enterprise Financials Suite - Session 2 (of 2)</p> <p>Jeff Weitkamp</p> <p>TriMin</p>
5:00 - 10:30pm OFFSITE EVENT - ROOFTOP VENUE AT SUMMERFEST, MILWAUKEE LAKEFRONT						

\*Black Text indicates XA Specific Content

\*\*Yellow Text indicates this content is applicable to customers running any Infor ERP Platform

**FRIDAY SEPTEMBER 17th**

**7:00 - 8:00**

**Continental Breakfast**

**Day 2 at 8:00 - Special Session for Infor LX Customers:**

**Infor LX Roadmap - Presented by Dave Rapacz**

**Lapham Boardroom, Second Floor**

	Planning and Operations Track	IBM Technology Track	System Link, Integrator Track	CLOUD Track	Shop Floor and Operations	Finance Track
Room Name:	Woodland A	Woodland B	Woodland C	Woodland D	Hearthside	Oakton Ballroom
<b>8:00 - 9:00</b>	G1 XA MRP Filters and Multi-Source Vendors  Joe Gill  ISE	H1 IBM Power VS - IBM i in the Cloud  Joe Armstrong & Dan Sundt  IBM	J1 <b>Blat - Business Intelligence over Infor ERP</b>  Pat Collette  TriMin	K1 Introduction to Infor Cloud Offerings. Does it align within my company's strategies?  Chris Hillock  Infor (Repeat from Thursday)	L1 Industrial Internet of Things (IIoT), the Future of the Plant Floor - NOW!  Rick Reith  Paper-Less	M1 Why IT Should Care About Tax Compliance  John Regan  Avalara
<b>9:15 - 10:15</b>	G2 Infor Warehouse Management System (WMS)  Aravindan Sakthivel  Barry Wehmiller Design Group	H2 Core Concepts - High Availability and Disaster Recovery for IBM i and Infor ERP  Tony Fleischman  ISE	J2 Compound Cards - The new Workbench  Phillip McWhinney  Infor	K2 Why Abacus for IBM Cloud and Hosting  Christian Hilton  Abacus (Repeat from Thursday)	L2 Optimizing your shop floor for Operational Efficiencies  Steve Nordness  Automation Solutions	M2 Modern EDI - EDI in 2021 and Beyond  Matt Rogers  SPS Commerce
<b>10:30 - 11:30</b>	G3 CADLink - BOM and Part information linked directly from CAD to ERP  Ray Sustamante  QBuild Software	H3 IBM Roadmap for IBM Power and IBM i  Joe Armstrong & Dan Sundt  IBM	J3 Case Study: Rapid Development via Enterprise Integrator - Non Contaming  Shawna Vickers  Entrans	K3 Moving to the Infor SaaS Model - Customer Case Study  Erin Lake, Missy Robinson  Estwing & ISE	L3 Extending the plant floor via APi's. The future of Paper-Less MES  Tim Eliason  Paper-Less	M3 Modern EDI - Technology Review - EDI with Infor XA  Matt Rogers, Jean Humphreys  SPS Commerce, ISE

**11:30 - 12:30**

**Lunch**

	Planning and Operations Track	IBM Technology Track	System Link, Integrator Track	Infor Technology Track	Shop Floor and Operations	Trending Topics
Room Name:	Woodland A	Woodland B	Woodland C	Woodland D	Hearthside	Oakton Ballroom
<b>12:30- 1:30</b>	G4 Exploring the Many Uses of XA Material Logistics  Rick Worley  TriMin	H4 IBM Navigator for i  Alec Nault  ISE	J4 Building IDP Dashboards using SQL Views over ERP data  Kevin Gerard  TriMin	K4 XA Roadmap  Ross Freeman  Infor (Repeat from Thursday)	L4 Customer Success Story - Paper-Less MES  Shawna Vickers and Miah Finlay  Entrans and Sub-Zero	M4 Considerations for moving to the newest releases of XA (R9.2.2.x & R10)  John Merges  TriMin
<b>1:45 - 2:45</b>	G5 Customer Fulfillment Logistics - Fulfilling demand in multi-site environments  Rick Worley  TriMin	H5 IBM i Access Client Solutions  Alec Nault  ISE	J5 More Cool Integrator Apps - ISE RAPID Applications  Bob Vanderstouw  ISE	K5 Infor Operating Service (Infor OS) - The Big Picture  David Foster  Infor (Repeat from User Group Conf. on Wednesday)	L5 Lift and Shift Strategies for Leveraging Cloud Computing  Vern Hanzlik  ISE	M5 Upgrading to XA10 - The details  Irma Zamot  Infor
<b>3:00 - 4:00</b>	G6 Changes to XA9 Inventory Transactions  Dave Shipton  ISE	H6 IBM Rational and Free Form RPG  Mike Tobey  ISE (Repeat from User Group Conf on Wednesday)	J6 System Link and Enterprise Integrator - Open Forum  Technical Resources  Infor, ISE and TriMin	K6 Infor Document Management (IDM) and Forms  David Foster  Infor	L6 Real world impact of MES - On-time delivery, better inventory and rate accuracy.  Rick Reith/Klaus Frost  Paper-Less	M6 Security Management Plus for Infor XA  Buddy Bates  Barry Wehmiller Design Group

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**Thursday, September 16**

**Oakton Ballroom**

**Keynote Session 8:30 - 10:00**

**Welcome - Tony Fleischman and David Mackay**

8:30 - 8:45

Agenda and Logistics  
Sponsor and User Group Introductions

**A Global Manufacturing Perspective - Dr. Doug Fisher**

8:45 - 10:00

Doug joined us 2 years ago to provide some general perspectives on changes that are not all 'headlines' but with impact on the legacy business models at the time: trade with China, world demographics, the emerging 'digital ecosystem,' and the need for new skills and talent. Fast forward to 2021, and the immense amount of change, completely unpredicted beforehand, and we have much to discuss. There are no shrink-wrapped "perfect" solutions to address these issues – but they need to be addressed. Leadership still matters. After 35 years in business, and ten in higher ed, Doug will share his perspectives on the impact of the pandemic, of why this is an exciting time to be in business, and considerations for moving forward. The economy has been solid and is likely to continue. The pandemic has accelerated the digital transformation as well as business disruption. Disruptions of many varieties in the supply chain as well as the labor shortage create critical challenges for all manufacturers -- both near and long term. The changes and disruptions can be dramatic.

**Morning Break**

10:00 - 10:15

**Session Listing Thursday, September 16**  
**10:15 - 11:30**

Technical Rating 5 is very Technical 1 is minimally technical
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#	Name	Description	Session Type	Presenter	Technical Rating	Time	ERP Alignment	Room
U1	XA Planning Tools - What are my options?	XA offers a variety of planning configuration options that range from the classic MPSP, MRP, CRP model to the advanced features of Visual Planner and ThruPut. This is augmented by the simple processes of reorder (min/max) planning. We will briefly explore each of the choices and discuss where each solution may have a place in your organization.	Module Introductions	Rick Worley - TriMin	2	10:15	Infor XA	Wood-Land A
V1	Infor Configure/Price/Quote - Modern Tools that Increase Sales and Revenue	Infor's Configure/Price/Quote (CPQ) module works within the core of ERP, and enables you to capture product knowledge, then use it to guide users through product configuration and generate configuration-specific orders, data and documents. Web-based tools allow you to deploy anywhere, and to tailor functionality suitable to the level of your internal expertise, or an external partner.	Product Introduction	Deb Lopez - Infor	2	10:15	All	Wood-Land B
W1	Guidance for anyone new to this event - How to get the most from this conference	This conference offers many opportunities to expand your knowledge of Infor offerings and expand and enhance your ERP usage. We'll provide a high-level overview of the conference, with guidance regarding available sessions, and the targeted audience for each session. We also have several options with one-to-one meetings with Infor and our partners.	Technical Overview	Dave Rapacz - Infor, Tony Fleischman - ISE	1	10:15	Infor LX	Wood-Land C
X1	XA Roadmap	The release of XA10 in July provides substantial technology enhancements for XA. Ross will review the most recent release enhancements, and also provide guidance regarding the future planned enhancements. <b>(This session will be repeated on Friday at 1:00)</b>	Product Roadmap	Ross Freeman - Infor	1	10:15	Infor XA	Wood-Land D
Y1	Mobile Technology for the Production Floor	Tablets, handhelds, scanners, barcode printers, wireless networking, and device management... We'll cover data collection technology that is prevalent on the shop floor. What to consider, and how to approach shop floor automation, wireless mobility and barcode data collection.	Technical Overview	Gerry Skalla - Emkat	3	10:15	All	Hearth-Side
Z1	Birst Introduction - For Finance. New BI tools over ERP	Birst is a modern/user-friendly analytics platform supporting critical business insights across data from multiple sources, including Infor ERP data. Join this session to understand how other Infor customers are leveraging Birst and how quickly Birst can be implemented for your organization. The session will include a Birst overview, deployment example, and a walk-through of Birst Dashboards/Reporting in action. Using the power of Birst, TriMin presents an environment where manufacturing, sales, procurement, and finance analytics are readily available from a single Enterprise BI platform.	Product Introduction	Pat Collette - TriMin	2	10:15	All	Oakton Ballroom

**Session Listing Thursday, September 16  
12:30 - 1:30**

Technical Rating  
5 is very Technical  
1 is minimally technical



#	Name	Description	Session Type	Presenter	Technical Rating	Time	ERP Alignment	Room
A1	VPI and Launchpad - Advanced Planning Tools for Infor ERP	If you already run VPI, you now also have access to the LaunchPad enhancement as well. Launchpad for VPI provides functionality to manage multiple planning warehouses in one centralized location, using a single server install. We'll discuss key benefits of the enhanced toolset, and show working examples.	Functional Enhancement	Joe Gill - ISE	3	12:30	Infor XA	Wood-Land A
B1	COM-NET2 CX - The integrated eCommerce Solution for Infor XA (and possibly LX and System 21)	More than simply a web store front, COM_Net2 CX is a complete sell-side portal for ERP. For eCommerce, it provides on-line order entry, quoting, order status/tracking, and electronic catalogs for B2B and B2C. Extending past eCommerce, it is also a secure document portal and allows reprinting of invoices and online bill-pay. With implementation measured in days ...not months, and fully integrated to ERP, COM_Net2 leverages existing XA COM/CSM data and business logic. Fully integrated with the Infor CPQ and System-Link, customers or salesreps can place orders, quotes and generate proposals for complex configured items and/or stock items. Join us to hear more about this proven Infor solution and more exciting new functionality coming in version 12!	Product Introduction	Mark Shubel - Lexel	2	12:30	All	Wood-Land B
C1	System Link and Enterprise Integrator - Overview and Intro	These 2 tools are key to moving forward with XA and LX, and should be the cornerstones for extending ERP. We will look at how E/I along with S/L can extend the core functions of the Infor Development Framework, with some use case examples. Also, we will look at the use of S/L to replace "off-line load" and look at this powerful integration tool.	Technical Overview	Mike Tobey - ISE	3	12:30	All	Wood-Land C
D1	Introduction to Infor Cloud Offerings. Does it align within my company's strategies?	We'll sort through the hype of Cloud-based topics. Should you move now, or just be aware of your options? What are the key benefits of moving, why is it important to your company? We'll provide core information about industry trends toward the cloud, Infor's status with IBM-based ERP and other applications, and long-term implications for you and your company. <b>This session will be repeated in session K1, Friday at 8:00 A.M.</b>	Product Review	Chris Hillock - Infor, Christian Hilton, Abacus	2	12:30	All	Wood-Land D
E1	KPI's and Dashboards - Leveraging Data to help you run your plant	Everyone is using data to improve their processes and ultimately their bottom line. Join us for a session to learn how the Paper-Less KPI's & Dashboards can unlock hidden value to help improve you shop floor. Job Efficiency, On-Time Manufacturing, Expected vs. Actual key performance indicators are just a few examples of the metrics that will be reviewed in this session.	Plant floor Automation	Rick Reith - Paper-Less	2	12:30	All	Hearth-Side
F1	Cash Application, Bank Reconciliation and Electronic Payments for Infor XA	Join Cashbook as we show you how we can transform your finance department by automating your complex financial processes with our Cash Application, Bank Reconciliation and Electronic Payments software modules. In this session, we will be discussing real life results from various XA client projects completed across multiple industries over the years. Our Cash Application automation module automates the full accounts receivable process. This includes automation of: bank statements, lockboxes, customer remittances, customer portals, email remittances and deductions management. Discover how Cashbook has helped our XA users to drastically reduce their DSO (Days Sales Outstanding). The Cashbook Bank Reconciliation software module allows for reconciliation between your ERP system and your bank accounts. Bank reconciliations are hugely important in maintaining internal control along with a steady and consistent cash flow. Our Bank Rec module is a global product that provides a multi-currency, multi-site solution which can be deployed across numerous environments. Our Electronic Payments automation can help you to streamline your XA payments process by managing all payments data on one single and secure platform. A single solution for all payments no matter what bank or currency you are using. Join our session and see first-hand the huge benefits of automating these financial processes for XA.	Product Introduction	Jim Payne, Barb Skrletts - Cashbook	2	12:30	XA	Oakton Ballroom

**Session Listing Thursday, September 16  
1:45 - 2:45**

Technical Rating  
5 is very Technical  
1 is minimally technical

#	Name	Description	Session Type	Presenter	Technical Rating	Time	ERP Alignment	Room
A2	Sales, Inventory and Operational Planning (SIOP)	The general concept of planning tools has changed dramatically in the last several years. Well beyond just material planning, we'll discuss the concepts of SIOP, and the tools available to dramatically change how you can implement planning across your entire enterprise. We'll wrap up with discussion regarding applying SIOP within the native XA planning tools, ThruPut and Visual Planner.	Industry Perspectives	Harold Cavallaro - Cavco	2	3:00	All	Wood-Land A
B2	Configure/Price/Quote with Infor XA - Live Demonstration	Watch live demonstrations of Configured Customer Order Items being configured in CPQ and flowing into XA EPDM Item Processes, automatically creating Bills and Routings for each unique configuration. Since the vanilla CPQ-to-XA integration stops at producing a new item process for a "generic configurable item number" to create the bills and routers, a huge challenge still remains. By not creating a new item revision for each unique configuration, the opportunity is lost to capture important data for Item Classes and Codes, Unit Weight, Base Prices, Inventory Control, Planning, and Accounting, along with Custom Data used by your organization. In these demonstrations, you will see how ISE's Unique Item Generator creates a unique item number for every unique CPQ configuration, so that your organization can retain important information for every single configuration. You will also see the different web-based Portal options available for Customers to enter and configure their own configurations.	Technical Review	Charles Hood - ISE	3	1:45	XA	Wood-Land B
C2	IDF and Integrator Best Practices	The TriMin development team has put together a showcase of fantastic uses of XA Development and how it can be used to extend and augment gaps in XA, including introduction of new tooling to support uploading complex eGLI transactions to XA using a spread-sheet bridge. Stick around at the end for a chance to win a fantastic door prize!	Technical Enhancement	Kevin Gerard and John Merges - TriMin	4	1:45	All	Wood-Land C
D2	Why Abacus for IBM Cloud and Hosting	Abacus is a certified partner for both Infor and IBM, with long standing relationships with both companies. We provide a foundation for the Infor SaaS offerings on the IBM platform, and many hosted options for customers, large and small. We'll discuss the full suite of Abacus offerings, our extensive infrastructure, and our ability to address the needs of even the most complicated environments. <b>This session will be repeated in session K2, Friday at 9:15 A.M</b>	Partner Introduction	Christian Hilton - Abacus	2	1:45	All	Wood-Land D
E2	Streamlined Picking and Shipping for Infor XA - Paper-Less Pick to Ship	The COM module in Infor XA includes the traditional green screen Pick, Pack and Ship module. Many XA customers find the need to enhance these functions substantially, to address their unique need for order fulfillment. ISE has developed a suite of functionality, deeply aligned with COM, to electronically streamline the picking and shipping process. Dave will show key functionality within the Pick-to-Ship tool, aligned to dramatically optimizing your order fulfillment processes.	Product Introduction	Dave Shipton ISE	2	1:45	XA	Hearth-Side
F2	Introduction to the Enterprise Financials Suite Session 1 of 2	The Enterprise Financials Suite has been introduced over the last few years, with substantial changes and productivity improvements. We will provide a high-level introduction to the AP, AR and Cash functions in this session as well as a guide to follow-up sessions at the conference.	Product Introduction	Jeff Weitkamp - TriMin	1	1:45	XA	Oakton Ballroom

**Session Listing Thursday, September 16**  
**3:00 - 4:00**

Technical Rating 5 is very Technical 1 is minimally technical
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#	Name	Description	Session Type	Presenter	Technical Rating	Time	ERP Alignment	Room
A3	Shipping and Freight Automation for Infor ERP	The ARTC suite of transportation management solutions is designed to lower freight costs and improve operating efficiency. CalcRate, the flagship module, offers a custom carrier rate database used to route and pre-rate orders at order entry and ship confirmation. The freight charges are passed to invoicing and accounts payable and used for audit, payment and accrual reporting functions. Additional modules are available to optimize truck routes, manifest parcel shipments, manage claims, track packages and produce related documentation. Nick will also discuss recent AR Traffic enhancements that are fully IDF/PowerLink enabled, and the Export Documentation bundle.	Product Introduction	Nicholas Fisher - AR Traffic Consultants	2	1:45	All	Wood-Land A
B3	E-Commerce - Developing an eCommerce Strategy. Your Company Needs One!	Does your company have an eCommerce strategy? If not, why not? Today, a comprehensive ecommerce strategy is a necessity. Your customers expect it. There is much more to consider than simply an online ordering presence. A proper eCommerce strategy will enhance your core business and set you above your competition....all while giving your customers what they need, increasing your sales and at the same time, reducing your costs. Join us for this informative presentation on how to develop an eCommerce strategy for your business.	Industry Perspectives	Mark Shubel - Lexel	1	3:00	All	Wood-Land B
C3	Integrator - Cool Applications	Come join us as we review some of the best tips and best practices from some of the best developers in the industry. Bring your own tips and ideas with you to share. Learn how to take control of your IDF layer and make it easy to manage your user experience.	Technical Enhancement	Kevin Gerard - TriMin	2	3:00	All	Wood-Land C
D3	XA10 Introduction	XA10 was released in July of 2021. This release will fully embrace the NetLink User Experience, including true thin-client access for XA, enhanced UX tailoring, new search functions, and the long-awaited Excel Export. Where does Infor OS fit in this picture? Dave will review them all!	Technical Enhancement	David Foster - Infor	2	3:00	Infor XA	Wood-Land D
E3	Infor Quality Management	The demand for Quality Management has never been higher. Regulations, customer requirements, and general industry practices often require that you can prove your Quality Management capabilities. Steve will provide a quick review of the Infor Quality Management (IQM) module, including core functionality and benefits.	Product Introduction	Steve Smeiles	2	3:00	All	Hearth-Side
F3	Introduction to the Enterprise Financials Suite Session 2 of 2	The Enterprise Financials Suite has been introduced over the last few years, with substantial changes and productivity improvements. We will provide a high-level introduction to the GL functions, key reasons to move, and primary considerations when moving to Enterprise Financials.	Product Introduction	Jeff Weitkamp - TriMin	1	3:00	XA	Oakton Ballroom

**Session Listing Friday, September 17**  
**8:00 - 9:00**

Technical Rating 5 is very Technical 1 is minimally technical ↓
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S1	Infor LX Roadmap	Attend this session to learn about the LX Roadmap. This includes enhancements to core ERP functionality, improved user experience through upcoming IDF and WebTop releases, and updates planned for our integration architecture.	Technical Enhancement	Dave Rapacz - Infor	2	8:00	Infor LX	Lapham Board-Room 2nd Floor
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#	Name	Description	Session Type	Presenter	Technical Rating	Time	ERP Alignment	Room
G1	XA MRP Filters and multi-source Vendors	This session will explore, in detail, two of the lesser-known enhancements to XA MRP/VPi – Customer Order Filters and Multi-Source Vendors. MRP/VPi Customer Order Filters enable users to link COM/CSM hold codes to a warehouse, allowing certain customer orders with hold codes attached to be ignored by MRP/VPi	Technical Enhancement	Joe Gill - ISE	3	8:00	XA	Wood-Land A
H1	IBM Power VS - IBM i in the Cloud	IBM has developed a large set of cloud-enabled applications and technologies, including moving your IBM i footprint to the cloud, through the IBM Power Virtual Server (Power VS) offering. Should you invest in a new Power server, or move to the IBM cloud? We'll discuss the IBM offerings, and core considerations.	Product Introduction	Joe Armstrong - IBM	3	8:00	All	Wood-Land B
J1	Birst - Business Intelligence over Infor ERP	Birst is a modern/user-friendly analytics platform supporting critical business insights across data from multiple sources, including Infor ERP data. Join this session to understand how other Infor customers are leveraging Birst and how quickly Birst can be implemented for your organization. The session will include a Birst overview, deployment example, and a walk-through of Birst Dashboards/Reporting in action. Using the power of Birst, TriMin presents an environment where manufacturing, sales, procurement, and finance analytics are readily available from a single Enterprise BI platform.	Product Introduction	Pat Collette - TriMin	1	8:00	All	Wood-Land C
K1	Introduction to Cloud Offerings. Does it align within my company's strategies?	We'll sort through the hype of Cloud-based topics. Should you move now, or just be aware of your options? What are the key benefits of moving, why is it important to your company? We'll provide core information about industry trends toward the cloud, Infor's status with XA and other applications, and long-term implications for you and your company. <b>This session is a repeat of session D1.</b>	Product Review	Chris Hillock - Infor, Christian Hilton, Abacus	2	8:00	All	Wood-Land D
L1	Industrial Internet of Things - The Future of the Plant Floor. NOW!	This informative session will explain Industrial Internet of Things (IIoT) and how machine level interfaces can greatly improve the Efficiency & Accuracy of data reporting. You'll get an overview of the Paper-Less MLI platform and how we make use of the OPC standard to talk to machines & sensors. Included will be some common use cases for IIoT as well as a demonstration using machine simulators to show how IIoT/MLI could be used to automate downtime within MES.	Product Enhancement	Rick Reith - Paper-Less	2	8:00	All	Hearth-Side
M1	Why IT Should Care About Tax Compliance	Sales and use tax might not be on the top of your to do list as an IT professional. Nowadays, IT is brought into tons of major decisions, including implementing new technology, such as a tax compliance solution like Avalara. Avalara helps solve common compliance challenges companies face. Our solution helps manage documents for exempt sales, knowing when and where to file, keeping up with complex rates and rules, being audit-ready, and enabling growth. Join us for an overview on how Avalara can help, and where you come in as an IT professional in helping your finance team automate tax compliance.	Product Introduction	Avalara	2	8:00	All	Oakton Ballroom



**Session Listing Friday, September 17  
9:15 - 10:15**

Technical Rating
5 is very Technical
1 is minimally technical

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#	Name	Description	Session Type	Presenter	Technical Rating	Time	ERP Alignment	Room
G2	Infor's Warehouse Management System (WMS)	Core ERP solutions offer the basics for managing the warehouse, often limited to locations and simple picking. But what if you need more? The Infor WMS solution is a full suite of tools for the warehouse. In a brief tour, we'll cover the core concepts of WMS, along functional tools provided.	Product Introduction	Aravindan Sakhivel - Barry Wehmiller Design Group	2	9:15	All	Wood-Land A
H2	Core Concepts - High Availability and Disaster Recovery for IBM i and Infor ERP	While IBM servers and Infor ERP provide an extremely stable platform, business environments today often require redundancy and resiliency to ensure reduced downtime and business continuity. We'll discuss core concepts related to High Availability and Disaster Recovery, and provide a budgetary comparison of many options available options	Functional Enhancements	Tony Fleischman - ISE	1	9:15	All	Wood-Land B
J2	Compound Cards - The new Workbench	Many Infor customers have embraced workbenches in PowerLink. As the user interface moves to a true thin client in NetLink, we need to replace the traditional workbench. We'll introduce Compound Cards, the set of functions included, and the ability to build and tailor them as a long term replacement, available through NetLink.	Technical Enhancement	Phillip McWhinney - Infor	4	9:15	All	Wood-Land C
K2	Why Abacus for IBM Cloud and Hosting	Abacus is a certified partner for both Infor and IBM, with long standing relationships with both companies. We provide a foundation for the Infor SaaS offering running on the IBM platform, and many hosted options for customers, large and small. We'll discuss the full suite of Abacus offerings, our extensive infrastructure, and our ability to address the needs of even the most complicated environments. <b>This session is a repeat of session D2.</b>	Partner Introduction	Christian Hilton - Abacus	2	9:15	All	Wood-Land D
L2	Optimizing your shop floor for Operational Efficiencies	During our informative session, attendees will get a high-level overview of the role and impact of automation on business, a look at some "real life" situations where our processes helped customers achieve new levels of efficiency and profitability, as well as some discussion around how to future-proof your business for optimal success. Joining us will be especially helpful if you are experiencing any of these current trends: Are you struggling to keep up with production requirement demands (current process not fast enough to meet tact goals)? Are you experiencing stoppages or shutdowns due to the lack of workers? Does your process require a high degree of repetitive manual tasks? Are there safety issues in your production process which could lead to potential claims or injuries? Is your (or your employees') quality of life diminished because of the tasks being performed (such as heavy lifting or physically taxing process)? Is the lack of "failure notification" leading to increased downtime or reductions in quality output (the production of unusable product)? Is there a lag in management's access to operational procedures due to the manual transfer of data between your ERP system and your factory floor? Are you already at or near capacity (is your process equipped to handle expansion/growth)? Do you have difficulty quantifying or measuring results and output (including the ability for remote monitoring and automated reporting to management)?	Partner Introduction	Steve Nordness - Automation Solutions	3	9:15	All	Hearth-Side
M2	Modern EDI - EDI in 2021 and Beyond	Core EDI concepts have been in place for many years. However, the speed of business and internet-enabled communications have dramatically changed how companies embrace EDI today. We'll review current EDI trends, market trends, and the approach taken by SPS Commerce to address today's EDI needs. Session 1 of 2	Product Introduction	Matt Rogers - SPS Commerce	2	9:15	All	Oakton Ballroom

**Session Listing Friday, September 17**  
**10:30 - 11:30**

Technical Rating 5 is very Technical 1 is minimally technical ↓
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#	Name	Description	Session Type	Presenter	Technical Rating	Time	ERP Alignment	Room
G3	CADLink - BOM and Part information linked directly from CAD to ERP	CADLink uses a real-time, bidirectional link to pull and push information from your CAD model and ERP system. Draw comparisons and make changes to two different data sets in one interface with CADLink to reduce making multiple data entries, and costly mistakes. CADLink can automatically create parts you just modeled in your item master, highlight discrepancies between the data sets and synchronize your CAD and ERP Bill of Materials in an organized and controlled way.	Product Introduction	Rey Bustamante - Qbuild Software	1	10:30	All	Wood-Land A
H3	IBM Road Map for IBM Power and IBM i	Infor LX and XA customers rely on the rock-solid foundation of the IBM Power server to run their business, every day of the year. Join us to for a general update on the long-term direction with IBM Power Servers and IBM i. Joe will provide us with updates on the next generation of the proven IBM Power platform, plus the next release of IBM i.	Roadmap	Joe Armstrong - IBM	3	10:30	All	Wood-Land B
J3	Case Study: Rapid Development via Enterprise Integrator - Non Conforming Materials in XA	Shawna will discuss the Enterprise Integrator tool she created from scratch, as a non-programmer, to send notifications and alerts via e-mail, SystemLink and subscriptions for inventory transactions and manufacturing order creation, all in PowerLink. This is a great example of native tools providing a great solution for some common challenges.	Technical Overview	Shawna Vickers - Entrans	3	10:30	All	Wood-Land C
K3	Moving to the Infor SaaS Model - Customer Case Study	The session will include an interview with Estwing who moved to the Cloud in 2020. We'll discuss their status before moving, the process of moving, lessons learned, benefits seen, and plans for the future.	Case Study	TBD	2	10:30	All	Wood-Land D
L3	Extending the plant floor via API's. The future of Paper-Less MES	Application Program Interfaces open the door for any number of custom uses and Paper-Less MES has expanding its capabilities via API's. Join us for a session detailing the PPL MES API's, their abilities and how to use them. Also take a peek at future of Paper-Less MES.	Technical Overview	Tim Eliassen - Paper-Less	3	10:30	All	Hearth-Side
M3	Modern EDI - Technology Review - EDI with Infor XA	We'll continue our EDI discussion, going deeper into the technology, including specific focus on integrating Infor XA with SPS Commerce, for a full end-to-end EDI solution.	Technical Overview	Matt Rogers - SPS Commerce, Jean Humphreys - ISE	3	10:30	XA	Oakton Ballroom

**Session Listing Friday, September 17  
12:30 - 1:30**

Technical Rating  
5 is very Technical  
1 is minimally technical



#	Name	Description	Session Type	Presenter	Technical Rating	Time	ERP Alignment	Room
G4	Exploring the many uses of XA Material Logistics	The features and functions of Material Logistics, CFL and the suite of tools related to Material Logistics have so many uses beyond the standard inter-plant order management. We will explore some of the applications for the tools and briefly discuss how other customers have arrived at some very creative uses for the product. After the presentation we hope you will agree with the belief that this product should be a part of the foundation for XA.	Functional Enhancements	Rick Worley - TriMin	2	12:30	XA	Wood-Land A
H4	IBM Navigator for i	Are you missing IBM i Navigator for Windows yet? Or maybe you're still using it? IBM dropped support for IBM i Access for Windows in April 2019, which means IBM i Navigator for Windows is no longer supported. In this session you will see how IBM has taken most of the capabilities of that older product and incorporated them into IBM Navigator for i, IBM's best supported and completely browser based interface for IBM i systems management. And you will see some new functions that are only available in IBM Navigator for i.	Product Introduction	Alec Nault, ISE	2	12:30	All	Wood-Land B
J4	Building IDF Dashboards using SQL views over ERP Data	If you have not explored the value of SQL views in XA IDF you need to see this! This session will give you the SQL basics you need to create dynamic views in Power-Link such as summarizing sales or combining open and history data. You don't have to be an RPGLE programmer to harness this power. You will also get some best practices when deploying SQL views.	Technical Review	Kevin Gerard - TriMin	4	12:30	All	Wood-Land C
K4	XA Roadmap	The release of XA10 in July provides substantial technology enhancements for XA. Ross will review the most recent release enhancements, and also provide guidance regarding the future planned enhancements. <b>(This session is a repeat from Thursday Morning.)</b>	Product Roadmap	Ross Freeman - Infor	1	12:30	XA	Wood-Land D
L4	Customer Success Story - Paper-Less MES	Come join us for customer driven conversations about how Paper-Less MES has helped improve their company's bottom line. It's always nice to hear from your peers and how they are using an application, what worked well for them, what they have learned from their implementations, how they are using the application, etc...	Customer Interview	Miah Finlay, Sub-Zero, Shawna Vickers - Entrans	3	12:30	All	Hearth-Side
M4	Considerations for moving to the newest releases of XA (R9.2.2.x & R10)	During this session we'll review many facets regarding upgrading to the latest releases of XA. We'll discuss how to plan for your upgrade ahead of time (you aren't running i OS i7.2 or Oracle Java are you?). In addition, we'll outline considerations for using the data migration tool, prepping for Enterprise Financials as well as discuss the latest news on R10.	Technical Review	John Merges - TriMin	3	12:30	Infor XA	Oakton Ballroom

**Session Listing Friday, September 17  
1:45 - 2:45**

Technical Rating  
5 is very Technical  
1 is minimally technical



#	Name	Description	Session Type	Presenter	Technical Rating	Time	ERP Alignment	Room
G5	Customer Fulfillment Logistics - Fulfilling demand in Multi-site environments	CFL is a subset of the functions found in Material Logistics. These tool and features allow you to seamlessly address the various complexities of managing demands and logistics across a multi-site, multi-warehouse configuration. We will cover drop ship customer order, drop ship orders from outside suppliers and intercompany orders with intercompany invoicing.		Rick Worley - TriMin	3	1:45	Infor XA	Wood-Land A
H5	IBM i - Access Client Solutions	IBM i Access Client Solutions (ACS) is IBM's newest, supported client platform for access to IBM i. This product is essentially IBM's replacement for IBM i Access for Windows, which is no longer supported as of April 2019. ACS is a platform independent solution that offers most of the same functions as IBM i Access for Windows, but with many new capabilities as well. We will cover a lot of ground in this session, but with special focus on the ACS Data Transfer function.	Product Introduction	Alec Naut - ISE	5	3:00	All	Wood-Land B
J5	More cool Integrator Apps - ISE RAPID Applications	ISE has developed several "RAPID Apps", using Enterprise Integrator and System Link. During this session, Bob will review 4 of them : Outside Operations, Power-Link enabled MRP Item Requirements Inquiry, Rapid item warehouse creation, and ISE XASPLF taking control of your spool files.	Technical Review	Bob Vanderstouw - ISE	3	1:45	Infor XA	Wood-Land C
K5	Infor OS - The Big Picture	This session will provide attendees with the big picture overview of the Infor OS suite and it's foundational components as they relate to the XA and LX community today. Leave this session with a good understanding of what Infor OS is and why your company will leverage it.	Product Introduction	David Foster - Infor	2	1:45	All	Wood-Land D
L5	Lift and Shift Strategies for Leveraging Cloud Computing	Is everything moving to the Cloud??? You have many options today, and we can help you understand the core considerations when considering cloud computing. The cloud offers many core benefits, including reduced upkeep, staying current with technology, improved security and 7x24 availability. We'll discuss core industry concepts, and how to get there.	Industry Trends	Vern Hanzlik - ISE	2	1:45	All	Hearth-Side
M5	Upgrading to XA10 - The Details	Following the July announcement of XA10, we all have many questions about the details. Irma will discuss the fine points of the migration to XA10, including the move from XA9, PTF's, upgrade steps and best practices, etc...	Technical Overview	Irma Zamot - Infor	4	1:45	Infor XA	Oakton Ballroom

**Session Listing Friday, September 17  
3:00 - 4:00**

Technical Rating  
5 is very Technical  
1 is minimally technical



#	Name	Description	Session Type	Presenter	Technical Rating	Time	ERP Alignment	Room
G6	Changes in XA9 Inventory Transactions	Infor has provided a good amount of changes within core inventory transactions in XA9. Dave will review the list, and provide guidance on how to best leverage these enhancements.	Functional Enhancements	Dave Shipton - ISE	2	3:00	XA	Wood-Land A
H6	IBM Rational and Free Form RPG	Mike will discuss new options to bring traditional RPG concepts forward, with new tools from IBM. We'll provide examples of key functions that will streamline development and improve your day-to-day development experience.	Technical Overview	Mike Tobey, ISE	3	1:45	All	Wood-Land B
J6	System Link and Enterprise Integrator - Open Forum	We'll wrap our 3rd day of Enterprise Integrator and SystemLink with an open forum, discussing any remaining topics, and how to go forward.	Open Forum	Infor, ISE and TriMin technical resources	5	3:00	All	Wood-Land C
K6	Infor Document Management (IDM) and Forms	Infor continues to enhance the scope of the Infor OS, now with embedded Infor Document Management (IDM). IDM will be available to all customers who have Infor OS licensing, and Infor OS integration with LX and XA will continue to be expanded. David will discuss the core functionality of Infor IDM, as a key tool within Infor OS.	Product Introduction	David Foster - Infor	2	3:00	All	Wood-Land D
L6	Real World Impact of MES - On time delivery, better inventory, and rate accuracy.	With today's world being driven by directives such as "Shorter Delivery Times", "Doing more with Less", "Maximize Utilization", "Commitment to Customer" it is even more imperative to know the true cost of business along with the up-to-date status for everything related to production. And the information must be accurate!! See how Paper-Less MES is a critical application, allowing businesses the ability to accurately predict & promise production activities	Industry Trends	Rick Reith and Klaus Frost - Paper-Less	3	3:00	All	Hearth-Side
M6	Security Management Plus for Infor XA	How are XA customers handling the demands of managing security? How do they achieve Separation of Duties in XA? How are they auditing security? This session will cover the basics of security management, separation of duties and audits within XA along with a demonstration of how the SMPlus product from Barry-Wehmiller Design Group can ease the pain of these responsibilities.	Product Introduction	Barry Wehmiller Design Group	3	3:00	XA	Oakton Ballroom

**Thank you for attending the conference this year. Your contributions and attendance make this a success!**