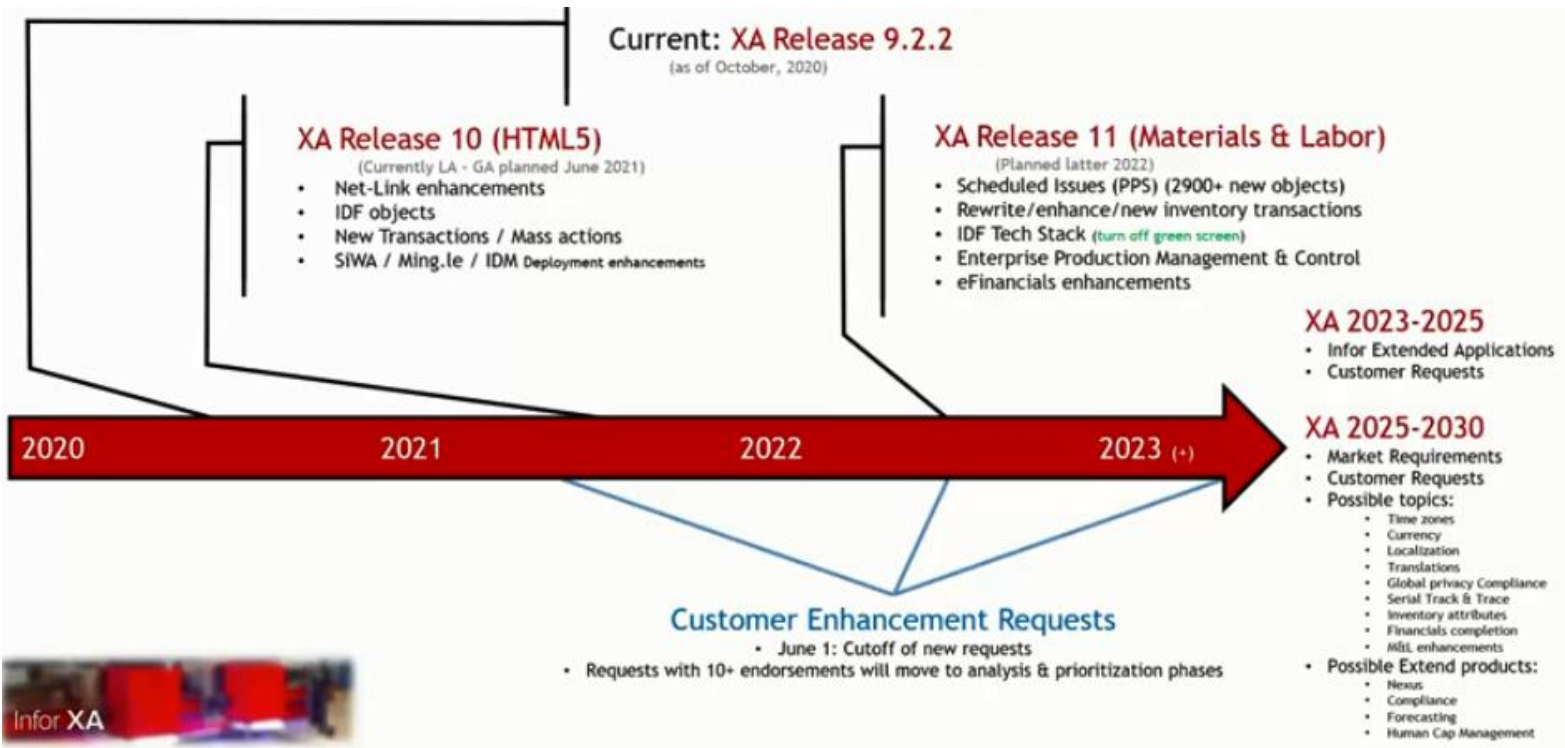# Infor XA

Introduction

For more than 30 years, continuous functional and technical development has allowed Infor® XA to deliver industry-leading functionality for discrete manufacturing customers. The solution is fully globalized, and can scale from smaller mid-market customers to global enterprises.

As the ERP software industry has matured, the need for advanced tools and technologies that complement deep functionality has become even more important. Only ERP products that provide the functionality and innovation that can maintain and aggressively grow their customer bases can be considered viable go-forward solutions. Infor is committed to ongoing investment in Infor XA to provide the capabilities that both new and existing customers need to remain competitive now and long into the future.

Infor XA is based on the IBM® i operating system. Infor is the dominant supplier of manufacturing ERP solutions on this platform, with an estimated 39% market share. The IBM i market is characterized by intense customer loyalty and a large number of weak ERP competitors. Of the few vendors that remain active on the platform, none have the combination of commitment and capability that Infor offers.

" Infor continues to invest in the XA product with a dedicated development group. This important IBM i product incorporates innovative technology and cloud enablement initiatives, all with a redesigned user interface to provide a consumer-grade user experience—while retaining the core features by industry you've come to rely on to run your business."

SOMA SOMASUNDARAM
CTO, President of Products, Infor

Current: XA Release 9.2.2
(as of October, 2020)

XA Release 10 (HTML5)
(Currently LA - GA planned June 2021)
- Net-Link enhancements
- IDF objects
- New Transactions / Mass actions
- SiWA / Ming.le / IDM Deployment enhancements

XA Release 11 (Materials & Labor)
(Planned latter 2022)
- Scheduled Issues (PPS) (2900+ new objects)
- Rewrite/enhance/new inventory transactions
- IDF Tech Stack (turn off green screen)
- Enterprise Production Management & Control
- eFinancials enhancements

XA 2023-2025
- Infor Extended Applications
- Customer Requests

XA 2025-2030
- Market Requirements
- Customer Requests
- Possible topics:
  - Time zones
  - Currency
  - Localization
  - Translations
  - Global privacy Compliance
  - Serial Track & Trace
  - Inventory attributes
  - Financials completion
  - M&L enhancements
- Possible Extend products:
  - Nexus
  - Compliance
  - Forecasting
  - Human Cap Management

2020 | 2021 | 2022 | 2023 (+)

Customer Enhancement Requests
- June 1: Cutoff of new requests
- Requests with 10+ endorsements will move to analysis & prioritization phases

Infor XA

Only Infor has demonstrated the commitment to continue to develop and sell on the platform, the financial and technical resources to deliver products on the platform, and the global scale and footprint to serve IBM i customers around the world. Infor XA is the ERP solution of choice for discrete manufacturing customers using IBM i.

Serving these markets effectively requires speed and agility. This document outlines Infor's plans for continually investing in and developing Infor XA to ensure that it continues to offer unparalleled functionality, innovation, and value.

Product investments

Our plan is to rapidly deliver valuable product enhancements to Infor XA, combined with strong field programs, to educate and motivate customers to engage. In this section, both sides of that effort are documented.

High-level results

Over the last four years, Infor and Infor XA have made great progress on this journey, as demonstrated by the following statistics:

- Infor XA shares in the product development of all Infor solutions, ensuring that delivery of advanced capabilities in Infor XA are greatly accelerated. Ongoing development of Infor XA core functions is complemented by new developments in the Infor OS (operating services) tech stack, enhancements in extended applications that expand XA functionality, and other shared development initiatives.

- New technologies have been adopted to deliver a game-changing Infor XA experience, including Infor ION®, Infor Ming.le® , Infor Birst®, and the Infor Development Framework (IDF).

- Numerous new and completely redeveloped enhancements have been delivered in recent years, such as the all new Infor XA Enterprise Financials (GL, AP, AR, and Cash), Infor XA in the cloud, and cloud-ready user interface.
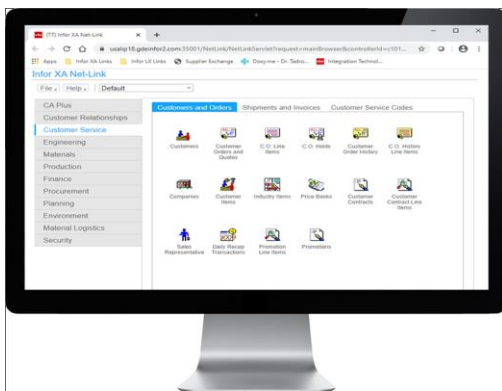
These are very encouraging results, and we have every expectation that such trends will continue. With the launch of Infor XA Enterprise Financials, and an aggressive future roadmap, Infor XA is prepared to meet or exceed market expectations and continue to grow in capability.

Development

All of these initiatives depend on rapid and effective development. To an extent, this is a function of sheer numbers—how many developers can be utilized for an Infor XA customer? In this area, Infor has rapidly delivered progress on two fronts. First, with sheer weight of numbers: Infor has added more than 700 developers in the last 4 years to deliver products to our customers, including our Infor XA customers. Second, Infor has the ability to share new components across many platforms, effectively multiplying the impact of our development investments across multiple products.

At the same time, some developments are specific to a single product. In this area, Infor has expanded headcount in the Infor XA development team, while also jointly developing applications with related System i ERP products, such as Infor LX and Infor System21.

Infor standard user homepage
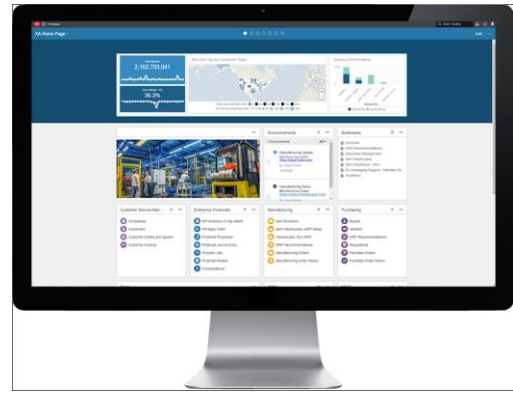
Infor XA utilizes advanced Infor user interface technology to provide additional functionality to the users. This includes custom home pages that allow access to Infor XA directly, as well as any Infor Extend solutions, workflow tasks, alerts, chat, and many other features provided as standard with Infor ERP solutions.

Enhanced application technology and Infor operating services

Infor Development Framework (IDF)

Infor XA is developed using Infor's standard System i ERP development architecture, IDF. This architecture is used by Infor XA, Infor System21, and Infor LX—which allows for joint development projects and therefore delivers enhancements to three times as many customers. The IDF is a fully modernized, Java®-based development architecture that offers the following key features:

- Open standards compliance
- A full object-oriented, service-oriented architecture (SOA) that utilizes XML messaging internally to provide rapid development, and supports easy extensions and integrations; customers typically report 5- to 10-times improvement in development and integration development productivity
- A metadata-driven user interface that allows almost infinite personalization by non-skilled users, while providing seamless integration of extended objects
- A user-friendly system and data navigation that puts information into the users' hands; single right-clicks provide access to all related objects and records, which can easily be put together into custom views and reports

HTML 5 User Interface menu system

Infor XA provides multiple ways for users to navigate the system, with many ways to personalize that experience for efficiency, convenience and access to data.

- Master data management under the control of the security model—with support for multi-environment and multi-server deployments; full security control means that data is consistent and controlled

- Support for multiple deployments from a single business object (each object can deploy as a full client, thin client, web part, or via XML at the click of a button); one executable object with four deployments means that everything is consistent, regardless of deployment, and extended objects behave in the exact same manner with no extra work; the extremely powerful IDF security model is deployed consistently across all objects and all deployments

IDF also provides release transparency; extensions and integrations are untouched by upgrades to the core ERP object, which makes upgrades much simpler and less risky.

Infor Ming.le

Infor XA uses Infor Ming.le to tap into the social enterprise—with enterprise-wide collaboration, analytics, and business process management in a single platform. This solution delivers a unified user experience across enterprise applications and allows in-context information to be pushed to personalized user dashboards.

Infor ION

Infor XA supports Infor ION functionality. Perhaps most importantly, Infor XA also integrates with the Infor ION Business Vault to support Infor Birst and Infor d/EPM®.

Infor Document Management

Infor Document Management provides the ability to manage document lifecycles from capture, storage with security and versioning, to output management.

Infor SoHo experience

Inspired by modern and intuitive, consumer-based user interfaces, the Info SoHo experience consolidates the information you need into a single source, and offers personalized tools that help eliminate wasted time, reduce frustration, and allow you to work in the most efficient way possible.

Flexible unlimited data access
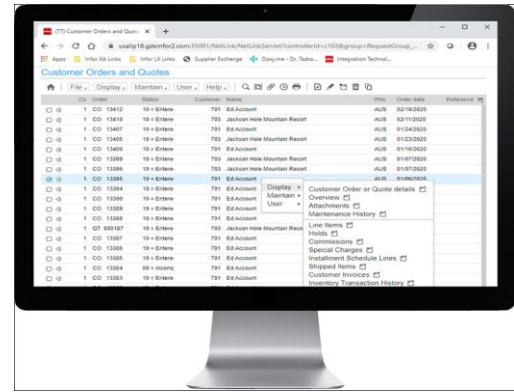
Every business object in the XA ERP can be easily linked to all related business objects with a single right click. In effect, the entire system provides a simple query tool for every user. Users can create as many views as they wish across any number of business objects without needing any programming or database knowledge.

Infor XA extended applications

Infor XA is now the center of a large suite of products that greatly expand the capability of Infor XA. No longer a traditional ERP product, Infor XA offers 17 extended functionality applications fully integrated into Infor XA. Customers can deploy Infor XA in an all-encompassing product suite covering nearly all aspects of the enterprise:

- Customer portal
- Supplier portal
- EDI portal
- Advanced warehouse management and logistics
- Advanced customer fulfillment and multi-everything logistics
- Advanced planning and scheduling with capable-to-promise
- Asset management and maintenance
- Customer relationship management
- Product and customer order configure/price/quote
- Forms management
- Business analytics
- Manufacturing execution system
- Enterprise financial management and planning
- Project manufacturing
- Freight management
- Product lifecycle management
- Electronic banking and cash management

All new world class financials
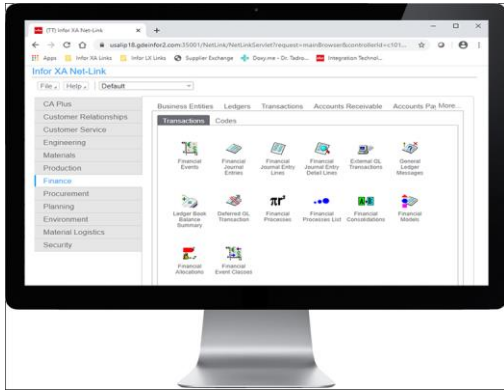
Based on a well proven Infor global general ledger system, XA has delivered completely upgraded financials. Built in the XA architecture, the new financials deliver the power of the architecture with the robust financial functionality required by your enterprise.

Infor XA recent and planned releases

Infor XA continues to provide user-driven enhancements that are designed to increase functionality of the core solution. The following is a high-level summary of recent core releases and the next planned core release. Infor values our relationship with our customers. We've continued to invest in Infor XA to provide value for our customers' maintenance investments with features such as:

Recent releases

- **Infor XA 9.1**—This release featured extensive additions to the Infor XA application suite, including:
  - Enterprise General Ledger—world class financial management and reporting capability in a fully globalized application
  - Full adoption of the Infor OS tech stack, including the Infor ION integration platform and the Infor Ming.le user interface
  - Added Infor ION-based integrations to eight additional Infor applications, including Infor CloudSuite™ CRM, Infor CloudSuite EAM, Infor Supplier Exchange, Infor F9, Infor CloudSuite Configure Price Quote, and others
  - New materials planning functionality, delivered in IDF
  - Master data management in the core application

- **Infor XA 9.2**—This release delivered major core enhancements in the financial application:
  - Enterprise Accounts Payable, Enterprise Accounts Receivable, and Enterprise Cash Management applications to complete the updated financial application suite— delivering more power, flexibility, and security in a globally robust suite
  - Significant additional enhancements to the Enterprise General Ledger application

Planned releases

- **Infor XA 9.2.2.0**—This interim enhancement release will deliver some major enhancements to the Enterprise Financials applications in invoice processing, along with a large number of other smaller enhancements.

- **Infor XA 9.2 Plus**—Future 9.2 enhancement packs will deliver a wide range of additional functionality for Infor XA:
  - Completely updated HTML5 user interface, compliant with Infor standards, featuring all the power and flexibility of the traditional Power-Link XA user interface, with additional enhancements
  - Completely rebuilt labor and shop-floor-reporting applications and transactions to improve functionality and support enhanced connectivity and reporting capability
  - Major enhancements for Enterprise Financials

- **Infor XA 9.3**—The final enhancement release for the Release 9, series 9.3, will feature the largest, single code delivery in the long history of the Infor XA product—nearly 3,000 system objects that are either new or significantly modified.
  - Fundamental enhancement of all Infor XA materials transactions to support better material visibility, consistency, and standardization of materials-related transactions—and delivering all in fully updated IDF form to support unlimited personalization, extensibility, and security
  - 20 major materials enhancements are included with this release, and this release opens the door to many more enhancements in subsequent releases

Future releases to be scoped

- **Infor XA Release 10**—Planning for Release 10 will start mid-2020. Decisions on the high-level scope will be made and announced in September 2020. Customer input to this process is actively encouraged via the Infor Enhancement Request System. Release 10 will feature many customer-suggested enhancements that have significant support across the customer base. Enhancement requests in the system by mid-2020 will be actively considered for Release 10 or subsequent releases.

Sales and customer engagement

Although we're significantly increasing the speed and scope of product deliveries for Infor XA, it means little if customers are not engaged. Infor has continuously added new and better ways to engage Infor XA customers. From offering attractive upgrade programs and delivering high-value, extended ERP products, to building a new user group and identifying sources of new customers, Infor is constantly working to expand the Infor XA community.

Upgrade and reengage program

Infor OS—Infor XA customers can adopt the expanded technology of Infor XA combined with Infor OS. The Infor OS upgrade program bundles all of the core Infor XA software and technologies into an attractively priced bundle. With the Infor OS upgrade, customers can be ready for the next evolution of Infor XA.

Infor XA Cloud—The same full bundle of core Infor XA applications combined with Infor OS is available via a cloud deployment. Infor XA Cloud provides all the advantages of the Infor OS upgrade, with additional benefits of lower total cost of ownership, continuous updates, protection of capital, predictable monthly costs, increased business agility, and the ability to focus limited IT resources on higher-value activities.

Infor CloudSuite—Some customers may find that an industry-specific Infor CloudSuite offering best meets the needs of their businesses from a functional, economic, or operational standpoint. In those cases, the option to explore an Infor CloudSuite is always available.

Infor supplier exchange
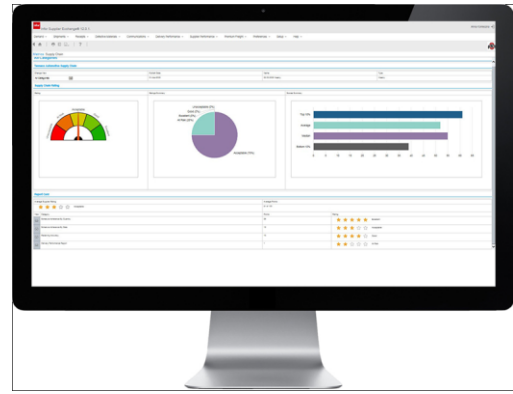
One of many Infor extended applications, Supplier Exchange expands the functionality of XA to cover the entire supplier relationship from initiation, and negotiation to ordering and delivery.

User community program—Infor XA has an extremely active user community dedicated to education and delivering input to Infor. The **Infor XA user community** manages an online community, presents periodic education sessions, and runs a major user conference. This is complemented by Infor's Inforum conference and by numerous regional user conferences sponsored by Infor XA partners.

Expand the customer relationship program

Infor XA has integrated a number of Infor and partner products and features to provide extended ERP functionality with Infor XA as the hub system. Infor ION provides the integration, delivering enterprise functionality (e.g., Infor ION Business Vault, Infor Ming.le, single sign-on, etc.) and release independence for the integration.

A few of the key applications and features are as follows:

- **Infor CloudSuite EAM** provides industry-leading enterprise asset maintenance (EAM) functionality and full asset lifecycle management.
- **Infor CloudSuite Configure Price Quote** provides simple, yet extremely robust product configuration for customer orders and manufacturing orders. Both internal- and channel-partner-configured ordering is supported.
- **Infor Birst** brings pervasive analytics and operational reporting to Infor XA.

Infor F9 financial reporting

Complementing the new Enterprise Financials is Infor F9, a fast and easy financial reporting tool. For more advanced needs, Infor Dynamic Enterprise Performance Management provides complete financial management from Strategic Planning and budgeting to consolidation and reporting.

- **Infor Supplier Exchange** provides an efficient portal to interact with your supply chain. Automating sourcing, bidding, and purchasing, the Supplier Exchange portal simplifies and optimizes managing your supply chain.

- **Infor CloudSuite CRM** provides world class management of the entire customer lifecycle from marketing and prospecting through post sale support.

- **Infor d/EPM** brings world-class, in-context business intelligence, financial consolidations, and business performance management capabilities to Infor XA.

- **PLM Discrete** allows control of complex engineering processes to smooth product design and the product introduction process.

- **Infor Thru-Put**® delivers world-class, advanced planning and scheduling capabilities to optimize production and deliver true capable-to-promise functionality.

- **Infor F9** is a simple, fast, and effective financial reporting solution that delivers rapid implementation and short closing cycles in a highly cost-effective package.

- Many other extended applications also enhance Infor XA's functionality, including a customer portal, manufacturing execution system, electronic forms management, EDI integration, global multi-site fulfillment, and electronic banking.

New account program

Infor is the largest application vendor in the world on the IBM i platform, and there is no other manufacturing ERP vendor running on IBM i that invests consistently and significantly in their IBM i solution. Most vendors are too small to deliver the necessary enhancements to be viable in the market, while others have simply decided to ignore or abandon the IBM i platform. As a result, many customers are running highly customized applications that are nearing end of life. Infor is committed to the IBM i platform and continues to work closely with IBM on programs that support IBM i.

Summary

Infor is investing heavily in all of its key ERP products. As a key component of Infor's strategy, Infor XA is benefitting from those investments and continues to deliver the innovation and functionality required to meet market needs.

All these investments are focused on the overall goal of growing Infor XA. This year will see tangible steps to grow the Infor XA user base and to target the IBM i community. Far from viewing it as a "dead" platform, Infor recognizes that IBM i is still the leading hardware platform IBM sells and it continues to be a growing part of IBM's business. Because only Infor is focusing investment on this platform, we believe that Infor XA and our other IBM i ERP products have a strong future ahead of them.

Roadmap disclaimer

This document reflects the direction Infor may take with regard to the specific product(s) described in this document, all of which is subject to change by Infor in its sole discretion, with or without notice to you. This document is not a commitment to you in any way and you should not rely on this document or any of its content in making any decision. Infor is not committing to develop or deliver any specified enhancement, upgrade, product, or functionality, even if such is described in this document.

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