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TheUserGroup.org
TUG 2011 U2U

interface

Market Crash Reshaped U.S. Financial Culture: Varney

In his keynote address Tuesday morning, Fox Business Anchor Stuart Varney delivered a rapid-fire, entertaining, occasionally alarming overview of the world events that shape America's economy, politics, and markets.

"We are surrounded, deluged by news events of major proportions on a daily basis," Varney told participants. He listed the major stories that had crossed his desk

the morning of his presentation—including plutonium pollution and rolling electricity shortages in Japan, revolt in Libya, offshore oil drilling in Brazil, a financial bailout for Portugal, and collapsing home prices and surging financial markets in the U.S.

Varney said the panic following the 2008 market crash has reshaped America's "financial culture," contributing to public resentment

when media report on the luxuries and perks that come with extreme wealth.

"Our financial culture right now is all about fairness," he said. "Our politics demand income redistribution, like it or not."

But he said fertility rates and longevity will be the biggest challenge for the United States and many other countries. A rate of 2.1 is needed to keep a population

Market Crash Reshaped U.S. Financial Culture: Varney

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stable, and 45 developed countries are below that replacement level. The result is an ever-larger population of retirees whose pensions and health care are funded by a shrinking work force, whose members are themselves having fewer children.

Already, in the U.S., “an aging population has made an enormous difference because of the pension issue. We cannot afford to keep the financial promises we have made,” he said. “We may want to live up to existing contractual obligations, but we absolutely cannot afford it.”

Earlier in the session, IBM’s Director of Business Development and Strategy for Power Z, Ari Kugler, noted that the company would be celebrating its 100th anniversary in June. A firm that began selling weigh scales in upstate New York now has 400,000 employees around the world and offers a broad portfolio of hardware, software, and services.

IBM also had the distinction of fielding the Watson computer against a top-rated Jeopardy contestant. “The computer did very well,” Kugler said.

He said the company has built its partnership with Infor because customers “needed good stuff to run” on IBM’s platform. “If we just make things faster and better but it makes your life more complex, it doesn’t serve anyone’s purposes.”

Randy Starr, Vice President of Technology at Blue Dot Solutions, said his company provides more than a dozen mobile modules for different Infor product families, and has worked with several Infor customers to implement, deploy, and support advanced mobile solutions. With the advent of new mobile platforms and the nearly ubiquitous availability of fast wireless networks, “we’re taking the best of that technology and putting it to work for your mobile work force.”



CRM Business Delivers Seamless Integration

Infor CRM Business (ICB) delivers value to the entire enterprise by providing a CRM that connects seamlessly to SX.enterprise. In a Tuesday afternoon breakout, Infor’s Stephen Knudsen demonstrated both the current version of ICB and the upcoming 2011 version.

The new version of ICB features integration with ION, bi-directional transfer of information between the CRM and ERP, and improved work flow. Infor Product Manager Mike Bristol said ION is at the center of SXe, EAM, CRM, A+, and LN. “Everything integrates with ION,” and integration allows the different systems to communicate with each other.

Users can customize their view of data in ICB. A user could create a view that showed all customers who purchased in the last six months. From that view, the user could click for details of each purchase. The views are set up in ICB, and can be customized by the user. They can also be shared with other users.

Work flow is a key component of ICB. “Work flow is a way to surround any consistent business process with consistent rules, so nothing falls through the cracks,” Knudsen said. He showed how a sales rep could enter a lead, and how tasks would appear in the system as soon as that lead was entered.

Tightly integrated with Microsoft Outlook, ICB presents a familiar interface to users, and leverages its integration with other Microsoft Office products. Email templates, for example, are edited in Microsoft Word.

Bristol discussed Infor’s decision to integrate with Microsoft, noting that “Salesforce and Microsoft are the two big gorillas” in the CRM industry. He said he had recently acquired approval to build an adaptor to Salesforce.



Program Update

At 1:00 PM today, Session #326, Writing Simple Q & Ds with Jeff Focke, takes place in Bayhill 22.

At 2:30 PM today, Session #508, Lean Office with Diana Austinson, takes place in Bayhill 25.

Integration Tools Boost User Efficiency

Infor's commitment to integrating data across functions and ERPs has translated into a suite of tools to help clients work more effectively and spot process exceptions more quickly, Product Manager Kaushal Vyas told a packed session Tuesday morning.

In the past, users had to switch back and forth between screens and platforms, spending valuable time assembling the data they needed to perform specific

functions for their companies. Vyas described a process of connecting business applications, organizing business processes that might span multiple applications, and giving users the right data to work more effectively.

All the various functions and data sources come together through the ION DESK interface, an easily customizable dashboard that allows users to automate much of the process of spotting and solving problems. The equivalent, he said, would be a diagnostic system in a private vehicle that spotted an engine problem, used the onboard GPS to locate the nearest repair depots, integrated with the driver's schedule, and issued a pop-up advising the user to make a service appointment.

"If I come in looking for information, I want to see data that's important to me," consolidated on a single screen, he said. "I want the right data and solid data, presented to me in the right way," with better integration and cross-communication with a variety of applications.

Vyas said Infor emphasizes a single sign-on, unified navigation, and a common look and feel, to make it easier for users to navigate to multiple parts of a business process. Data and functionality might come from different parts of the system, but "the end user really doesn't have to know and shouldn't really care."

A dashboard hosted on SharePoint Foundation Edition gives users a single snapshot of key data and analytics, while allowing them to drill down to detailed data, production orders, or the field-level information in the source ERP. The system also provides easy access to shortcuts and documentation that users can customize to their own needs. Embedded business intelligence metrics will be available later this year.



Enlightened Self-Interest

By Don Harrington

I have been knocking around the SX.e community for nearly 20 years now, and I have spent not a few of them significantly involved in one user group or another. As much as I enjoy the creative chaos they often entail, I have to admit my passion for the work is really a matter of enlightened self-interest.

I stay involved to influence the direction of the product appropriately for the benefit of my business and industry. Adding my small voice to that of others makes me more effective in doing so. And it works. I'm also here to share my company's ideas and experiences with the rest of the community in the hopes they add some value to others, and to blatantly appropriate everyone else's good ideas for the benefit of Horizon Solutions.

In all our relationships, we most often fare better—and produce better results—when they are based on integrity, clear and open



communication, and constant feedback. Our relationship with Infor is no different; to be our partner and to give us what we need when we need it—to produce better results for us—they require and deserve our honest input. Our network of user groups is one of the most successful ways I have found to provide it.

At one point or another, I've been involved in nearly every aspect of my company, from sweeping the warehouse floor, to accounting and sales, to IT and management. I can recognize the many ways in which our involvement with SIGs has contributed materially to our substantial success in nearly every area—which, after all, is what it's all about.

The recent initiative to more closely coordinate the SIGs and the SIG leadership is bearing positive fruit. I hope it makes each of us more effective, and it certainly supports the cross-pollination that makes all the SIGs stronger. When we speak with a unified voice, Infor hears us more clearly. I believe our efforts will translate into needle-moving functionality, delivered more quickly. In the SIG world, that's pretty exciting.

I wouldn't invest in the SIGs if my involvement didn't deliver direct benefit to my company. But the icing on the cake is the relationships I've established with other people, including more than a few very good friends. Add all that to some of the things I've heard at the conference so far, and I have a renewed sense of hope and confidence in our mutual future direction.

Storefront 2.0: When is a Mod Not a Mod?

With the release of Infor Storefront 2.0 scheduled for June or July, panelists at a Tuesday afternoon breakout session encouraged participants to get involved with the Storefront SIG and have their say on the new package.

The SIG has just sent out its enhancement request voting list, and Senior Product Manager Danna Nelson said there's still an opportunity to take part in the process. "Quite honestly, that prioritized list is a big part of the Roadmap. It makes my life easier, because we want to spend your maintenance dollars as efficiently as possible to please as many people as possible."

The 2.0 revision addresses two sets of goals: customer-facing changes that make it easier to shop on a website, and internal revisions that support site administration and content production. On the external side, "it's not just a look," she said. "It's a new, refactored UI for your customers. We're using Divs instead of tables, and we're also making sure the new design is more flexible."

But the Storefront development team has also realized that a mod for this product is not always as unwelcome as it might be with an ERP. "You're establishing your branding to your customers," Nelson said, "so there will be times when you want a modification that is very specific to the way your customers do business with you."

An ERP administrator might ask whether a particular revision will eventually make its way into the core product. But "I've had Storefront customers come up to me and say, 'I've done this mod, and I hope you



don't make it a standard product, because we're killing our competition with it."

So while Storefront will offer as much functionality as possible, the development team recognizes there will be times when mods are desirable. "It's important that we provide you the correct platform to do those modifications should you want to," Nelson said.

Among other features, she said Storefront 2.0 will

- Suit a wider range of display types and screen sizes
- Provide better cross-browser support
- Make it more convenient for users to brand their sites by uploading logos and choosing backgrounds and colors
- Offer full CSS support
- Introduce the ability to create customized labels and text on websites and emails

Storefront 2.0's easy functionality is intended particularly for organizations that have not yet fully committed to e-commerce as a sales tool. "You may have an owner who is reticent," Nelson said. "This really is for customers who've said, 'we're going to see how it goes'. Those customers can get in and get branded" at low cost.

Jeff Civillico: Comedy in Action



Shine at Delivering Happiness using Enterprise Social Technology to Nudge your Distribution Management organization past The Tipping Point!

Stop by the bookstore outside Distribution Marketplace for all of those titles and more! You'll find a great selection of management, business, and technology titles at great discounts over list.

And check out Brent Grover's books, including *Distribution Management*, all on sale at 10% below the best price offered exclusively to members of the National Association of Wholesaler-Distributors. It's an exclusive deal reserved for TUG U2U attendees!



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On the ground...

“What’s the most important thing you’ll take away from the conference?”



Mickey Lass
MITS

“The most important things we’re bringing home right now are context, information, and a new relationship with Infor. We’ve been in business for two years, and we’re very excited about the opportunities we bring into this space.”



James Madden
Infor

“Distribution has been around forever, but our customers are interested in Infor’s long-term commitment to this industry. If they’re going to continue investing in Infor, which is really an investment in their own business, they want to make sure it’s worth the money, time, and effort, and worth the trust. That’s huge. It’s the trust that we’re their go-forward vendor, and that we’re going to be with them over the long haul.”

Lance Hill
National Restaurant Supply



“The most important thing is the networking, finding out what other users are doing and learning more about CorVu. We have it, but it’s about understanding its capacity. It would be great to get more tips from the vendors about what we can do with what we have, along with the information about the next bells and whistles.”



Preview: Guest Speaker ‘Builds a Supply Chain for Good’

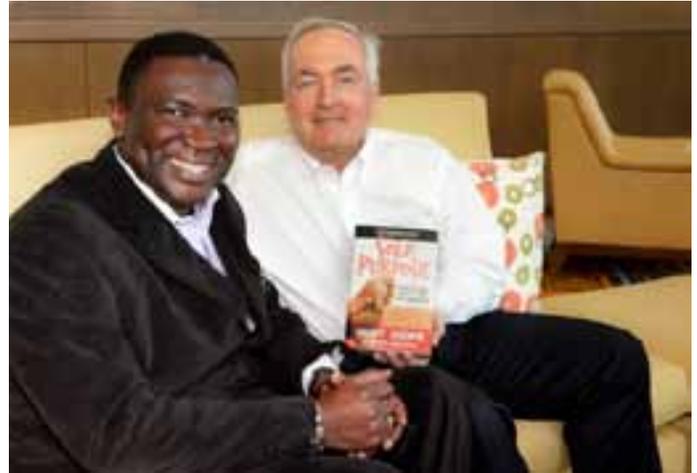
Delivering 10 million pairs of footwear to 10 million people in 10 years is the goal of Charlotte, NC-based Samaritan’s Feet, a charitable organization that applies the practices of a distribution business to meeting one of the most basic human needs.

The organization’s founder, Manny Ohonme, who grew up in West Africa and received his first pair of shoes at age nine, will deliver an unforgettable keynote address during today’s general session at 10:30.

Distributors “ship exactly what the customer wants, in the quantity they want, at the time they want it,” said Infor Senior Vice President Bruce Richardson, who will interview Ohonme onstage this morning.

“Manny is really about building a supply chain for good, shipping to the poorest and some of the most dangerous places in the world. He’s less worried about profit margins and more worried about fulfilling his mission.”

Ohonme’s past experience in supply chain technology came in handy when he left a six-figure software distribution job to form Samaritan’s Feet. “I used to try to find key decision-makers to talk about how to improve their operations, reduce their costs, and raise their profits,” he said. “Now, the challenge is to squeeze dollars out of our bottom line, out of our



supply chain, so we can deliver more good to more people.”

He said a million people per year die of injuries, infections, or illness that result from walking barefoot on dangerous or polluted terrain. And although his original focus was on the developing world, his travels through the United States brought him to too many communities where parents had to choose between feeding their children or buying them shoes. Samaritan’s Feet now delivers 25% of its footwear in the U.S.

Despite massive logistical challenges, the company has perfected a supply chain that enables it to deliver the right pair of shoes, anywhere in the world, for \$10. “That’s the cost of a couple of Starbucks coffees for a lot of people,” Ohonme said, “but it can save lives.”

So far, the organization is 30% of the way to its goal of 10 million pairs of footwear.

He said Samaritan’s Feet makes it easy for businesses to contribute—by donating cash, sponsoring shoe drives, holding a team-building exercise at a distribution center, or adopting a country, a city, or a village. “You can go to your alma mater or your company and get your coach or CEO to come to work in bare feet, to get employees to raise funds and be creative.”

