

CUSTOMER-STAFF USER GUIDE

Product Enhancement Request System

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1. What is the Infor Product Enhancement Request System?

With input from the Infor Customer Experience Board and Infor Product Management the Enhancement Request System (ERS) was developed and launched in 2015.

This unified system is used for most Infor product lines.

It is a tool available to Infor customers and Infor Product Management.

The intent is to collect, track, analyze and report on the Product Enhancement requests and changes that customers are most interested in seeing in future releases.

Important note: As the process is collective and conditioned to endorsement thresholds and timelines, the ERS is not to be used for business-critical requests. Business-critical requests should be submitted to Infor Support via an incident and reported to your usual Infor contact(s).

2. System & Process Overview

2.1 Finding and Accessing the system (ERS)

Access to the ERS is restricted to customers and partners with an active Infor maintenance/subsorption contract.

The ERS can be found via your browser on concierge.infor.com

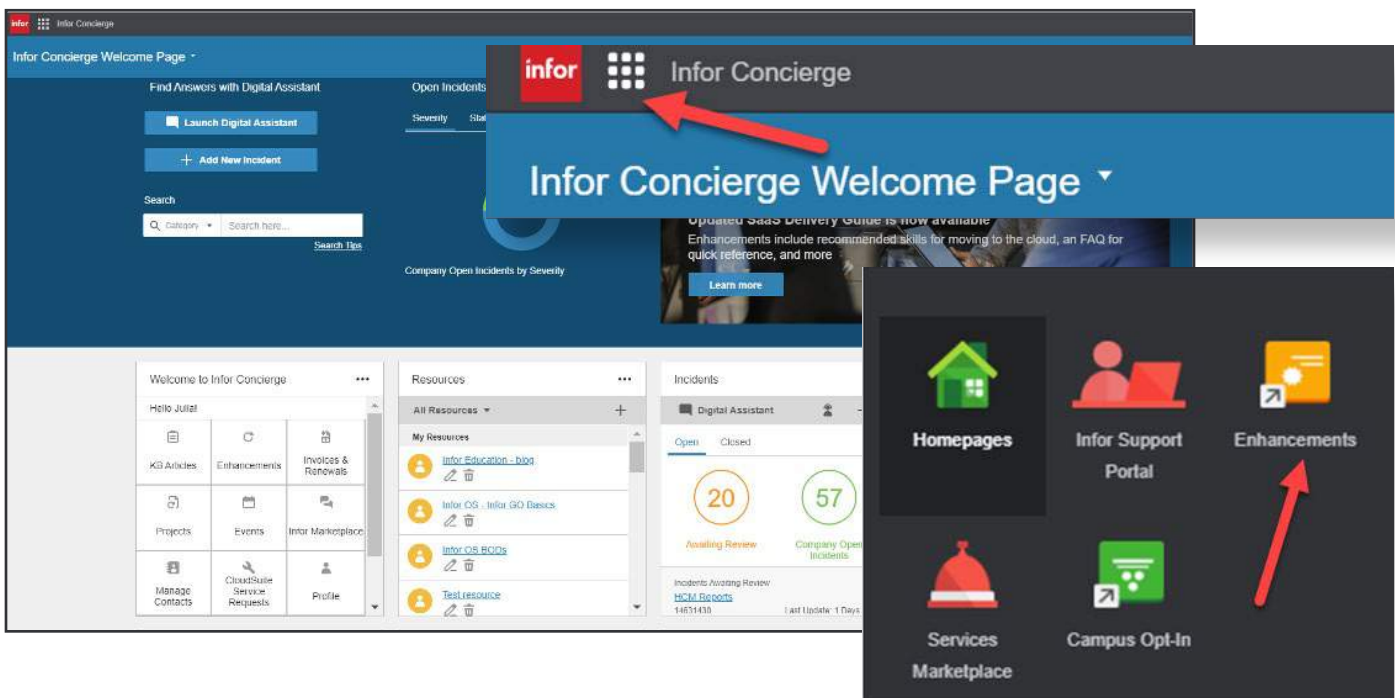
Please sign up using your Infor Concierge/Infor Support Portal account (email address).

If you are not sure if you have an account, please click on Reset my password to verify.

If you do not have an account, please go to Sign up now or request access from your organization's Infor Contact Administrator.

There is a widget called "Enhancements" which displays views of the enhancements your organization, or you as an individual, have added, endorsed or subscribed to. **See below.**

The complete ERS system can be accessed by clicking on the 9 dots (Waffle Icon) in the top left-hand corner and then clicking on the "Enhancements" icon



A user guide is available under “About” then “Help”.

The screenshot shows the 'Enhancement Request System' interface. At the top, there are buttons for 'Add New Request' and 'Load all'. Below that, it says 'Enhancement Requests (1,000 Results)'. A 'Views' dropdown menu is set to 'Open'. The main area is a table with columns: ID#, Product Line, Product, Title, Status, Planned Release, Endorsed, Acknowledged, Requested, Created Date, and Created By. The table contains several rows of requests, all with a status of 'New' and a creation date of 2020/8/20.

ID#	Product Line	Product	Title	Status	Planned Release	Endorsed	Acknowledged	Requested	Created Date	Created By
60050	Expense Management	EM - Archive Purge	Enhance Archive and Purge Background P...	New		0	0	0	2020/8/20	Tom Voss
60048	M3	M3 BE Sales Management	API for Bulk Order Allocation	New		0	0	0	2020/8/20	Alex Choi
60036	TM	TM Talent Acquisition	Allow Managers to be able to drill top down	New		0	0	0	2020/8/20	Sara Nashlovsky
60035	CloudSuite Business or Indu	CSI - Technical	DataView Running Totals	New		0	0	0	2020/8/20	Steve Sammarco
60004	M3	M3 BE Financial Accounting	AR5200 Ability to display &215 in the view	New		0	0	0	2020/8/20	Jerome Paradis Bolduc
60038	CloudSuite Business or Indu	CSI - Developer	Mongoose Report Headers	New		0	0	0	2020/8/20	Steve Sammarco
60027	CloudSuite HCM	CloudSuite HCM	Incentive compensation payout calculation	New		0	0	0	2020/8/20	John Pauwels
60006	M3	M3 BE Manufacturing Execution	API to load potency records into PD5004	New		0	0	0	2020/8/20	Paul Mosley

2.2 Views of the ERS

This screenshot is similar to the previous one but shows the 'Views' dropdown menu open. The menu options are: New, Open, To Be Archived, Implemented, In Progress, Prioritization, All, My Requests, and Submitted. The 'Open' option is currently selected.

Open

- All open ERs (Enhancement Requests) that can be socialized and endorsed.
ERs in the “Open” view will stay there for at least one year unless they get 10 unique endorsement prior to that. On 31 May of each year, ERs that have received at least 10 unique endorsements will move into the June prioritization phase. If a product manager has already given an ER the status of “Will not Be Implemented”, “Implemented” or “Duplicate” they will not appear in this view and will not move to prioritization, regardless of number of endorsements.

Unread

- All open ERs that the logged in user has not read

To be Archived

- ERs that will not be implemented, will be staged in this view for 30 days to allow the submitter to copy and start again.

Implemented

- ERs that have been implemented.

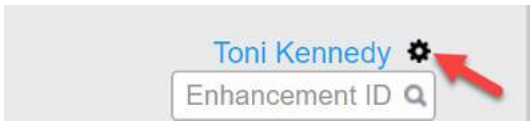
In Progress

- ERs currently being developed.

Prioritization

- ERs that met the minimum number of endorsements during socialization and are available for each company to select their top 10. You may no longer endorse ERs in this view – you are asked to pick your top 10. This opportunity is only available for the month of June each year.

By clicking on “Views” (upper bar above the system) and on “Add” you can personalize your view.



Profile Settings

At the top of your screen on the right-hand side next to your name, you will find the “Email digest” icon, you will find the cogwheel.

By clicking on this, you can set your notification preferences. You can select to receive email notifications for “Subscribed ERs” and ERs related to entitled Product Lines.

- When “My Subscribed ERs” is selected you can select to receive immediate email notifications for Subscribed ERs for which there have been changes in status or comments.
- When “ERs related to my Product Lines” is selected, you can select to receive Enhancement Requests email notifications for the selected Product Lines
- You can also define the frequency for email digest delivery - daily, weekly or monthly.
- This new feature will help YOU stay on top of ERs more easily to be able to review them and keep current on status updates.

2.3 Features of the ERS (What you can do in the system as a customer-partner)

Important note: Before searching for ERs it is preferable to “Load All” so as not miss any.

- Searching for ERs is the first thing to do in order to endorse or avoid recreating a duplicate.
- You can use the search option in the top right corner under your name – if you know the ER number you are looking for:



- Under each of the views mentioned in the previous paragraph you have the possibility of filtering the ERs by: “ER Id”, “Product Line”, “Product”, “Title”, Status”, “Planned release”, “Endorsed”, “Acknowledged”, “Rejected”, “Created Date”, “Created By”, “Update Date”, “Product Manager”, “Company”, “Release”, “Module”, “Industry”, “User Group”, “Region”, “Country”, “Priority”, “Level of Effort”, “Category”, “Request Type”, “Development Manager”.
- By ticking the field “Update Status” on the left of the ERS (system) you will know you have already read an ER.
- The field “Linked ERs” is meant to identify ERs with related content. You will also see those at the bottom of some open ERs.
- The field “Duplicate ERs” that can be seen at the bottom of an open ER indicates ERs that are requesting the same enhancement or change.

Tip:

If you are on Chrome and cannot see all the columns or the lower bar of the ERS go to the Chrome menu icon on the browser toolbar at the top right. This icon is a box with three vertical dots. Click and go to “Zoom”. By default, Chrome sets the zoom level at 100%. Use the “-“ and “+” combos to adjust your settings so that you can see all parts of the ERS.

- When you do not know the ER Id enter the “Product Line”, the “Product” (module) and type some key words in the “Title” field. This should facilitate your search.
- By clicking on the “xls” icon on the right above the ERS you can export your selection to Excel.
- The second icon on the right above the ERS (funnel) will clear the filters you may have put in the ERS.

2.3.2 The various statuses for the enhancement requests

All ERs will start with the status of “New”.

As the Product Management team reviews the ER, one of the 7 statuses below will be applied:

- Awaiting Customer Input (ER was sent back to the customer for more information)
- Deferred/Future Consideration (may be a good idea but cannot be put in the roadmap for the next 1-2 years)
- Duplicate (another ER with the same or similar intent already exists)
- In Development (ER is currently being developed)
- Researching (ER is being researched by Infor Product Management for feasibility)
- Roadmap Item (ER is marked for the Roadmap in 1-2 years)
- Will Not Be Implemented (ER will not be implemented. PM should give a reason)

PMs will add appropriate timeframes where they can, however “In Development” and “Roadmap” will be estimates and could change.

2.3.3 ER Evaluation Criteria by Infor Product Management

The ERS process gives us great input from our customers; and the “endorsement process” is helpful to us to gauge the level of importance of a topic. The endorsements help us to see the possible breadth and level adoption of a topic prior to us developing it; without people endorsing – all suggestions look equally important! We also see topics described in different ways – and this helps to ensure anything we develop meets a broad range of use-cases if possible.

It is worth noting that standard software does take time to deliver; and so ERS process should not be used to register defect reports (enter support ticket for this). The topics in ERS help us to determine the long-term development plans – so even if they are great; they will not make it into the product in the short term.

Infor Product Management will review ERs in order to give valuable and meaningful feedback to customers who have taken the time to report these. Infor strives in enhancing our products with those improvements that give the highest return to as many of our customers.

In this review process, some of the following criteria will be applied:

1. Enhancement describes generic requirements and not customer-specific ones
2. Enhancement will align with the product strategy, in terms of industry depth and market to serve
3. Enhancement will align with Infor technology strategy
4. Enhancement is not available within the latest product release and no reasonable workaround exists to reach the same result
5. Enhancement is supported by legal arguments

It should be noted that Roadmaps are driven by input from various sources, the ERS being one of them.

Delivery time of ERs can strongly fluctuate, influenced by one or more of the following factors:

- a. Topic is already in development
- b. Effort that is needed to execute the required enhancement
- c. Capacity needed for other priority commitments
- d. Other dependencies

2.3.4 Acknowledging/Endorsing/Completing/Rejecting existing ERs

Once you have identified an ER you are interested in, click on the “ER Id” to open it.

The screenshot displays the 'Enhancement Request System' interface. At the top, it shows 'Enhancement Request - 60053' with a status of 'New'. Below this, there are navigation tabs for 'Endorsements', 'Rejecters', and 'Acknowledgements'. The main content area is divided into several sections: 'Request Type: General', 'State: Open', 'Created Date: 20 Aug 2020', 'Customer Information' (including ES Global Support, USA, and Tom Voss), and 'Product Information' (Expense Management, FM - Archive/Purge, Release 10.2.0). A 'Description' section contains a summary and a proposed solution. On the right side, there is a 'Vote' section with buttons for 'Endorse', 'Acknowledge', and 'Reject', along with an 'Explanation' text area and a 'Submit Vote' button.

- The left part of the ER includes the information and description by the customer who has added the ER.
- Documents may have been uploaded and Work Around(s) proposed.
- On the upper right-hand side, you can see the exchange(s) between Infor Product Management and the customer who added the ER.
- On the lower right-hand side, you may see comments from other customers regarding this ER.
- You now have the possibility of either:

Acknowledging the ER:

- This means that this ER provides no value to your company but should not adversely impact your operations.

Endorsing the ER:

- Endorse the ER if you can see the value to your company. You can add more comments or/and documents as well as possible (other) work arounds to support your endorsement.
- You can “Subscribe” to this ER to follow up on its progression.
- You can also “Copy the URL” of the ER and send it to your colleagues and peers for consideration and endorsement.

Rejecting the ER

- If you consider that this ER if developed will disrupt your business, you can reject it and comment why.

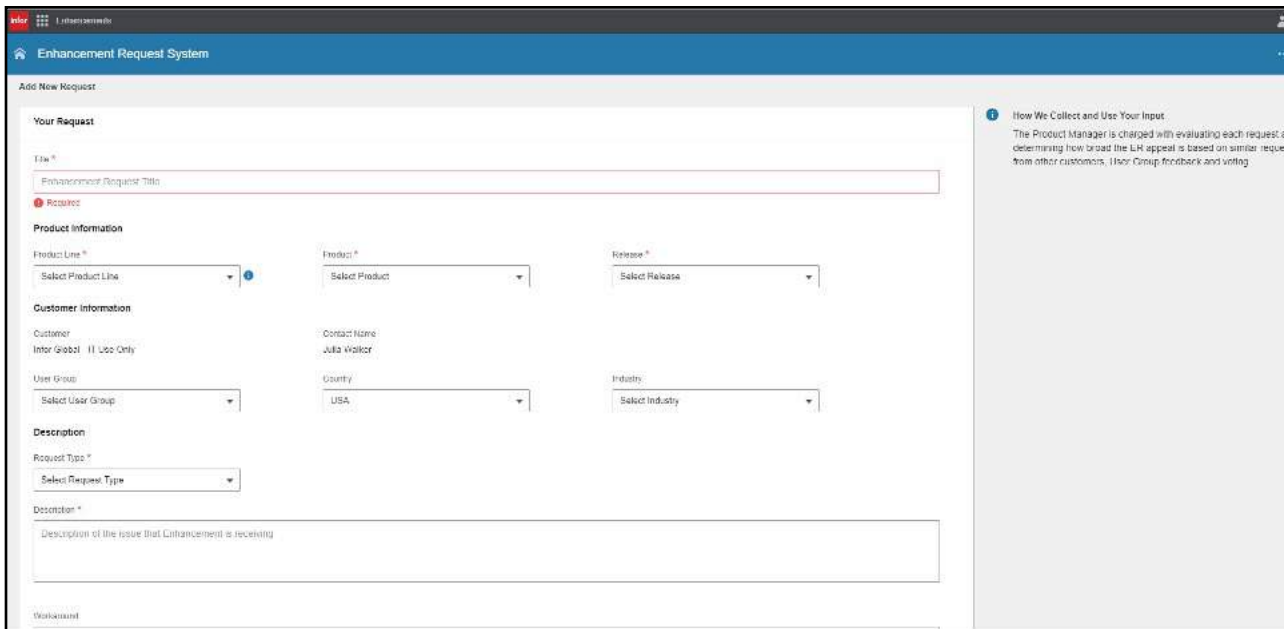
2.3.5 Adding a new Enhancement Request (ER)

- To “Add” a new enhancement request (ER) go to the upper menu above the ERS (system) under “Requests”.
- Click on “Add”

The screenshot shows the 'Enhancement Request System' header with a home icon. Below the header, there are two buttons: '+ Add New Request' and 'Load all'. Underneath these buttons, it says 'Enhancement Requests (1,000 Results)'.

A form to complete will open (see below).

- Please ensure you provide input for every field in the form.
- Please write your ER in English. This will help Infor handle your ER and enable other customers to read and endorse it.
- Read next section 2.3.6 for tips on how to write a good ER.
- You can add attachments.
- Once your new ER is complete press on “Proceed” at the bottom of the page. You may be presented with some ERs that exist with similar topics – if you find one that is for the same topic – cancel out of your request and subscribe to the ER that already exists.
- You can add an ER directly from the “Enhancements” widget on the home page of Infor Concierge following the same guidelines as above.



- Please press on the “+” icon on the right-hand side of the widget and start writing your ER.
- Note that you cannot endorse your own ER(s), but you can endorse your colleagues, but Infor will not count more than one endorsement per company. Endorsements must come from other organizations/companies.

2.3.6 How to write a new ER

Remember: first research the idea in the ERS (system) to make sure it has not already been submitted

- If it has already been submitted, review, comment, add more detail and ENDORSE

If not, begin to write a new ER. After you type in the initial words, the system will do a keyword search and find any ERs associated with those words will come up at the bottom for your review

When you enter your description of the problem, be as succinct and complete as possible

Help other users visualize how your ER will enhance their processes adding value to their organization/company and/or to their customers. Make it easy for others to say that your ER will have a positive impact on their organization/company when

implemented. Do not include in your description processes that are specific to your organization/company.

Make sure you include the module and release you are currently on. Use case scenarios; for example, “when we do this...this happens...”.

Make sure you can reproduce the issue and include the steps.

- Describe how painful it is in time, resources, upset customers, vendors, etc. Add consideration for all the areas it will affect.
- Include screenshots and attachments so others can better understand your idea.
- Describe the work around you may be doing to get around this issue. Again, include the steps you follow, the time it takes...all the detail.
- Please refer to the **Infor Support Knowledge Base Article # 2072678** for more instructions.

This is all valuable information for other customers to endorse and Infor Product Management to review and provide comments while setting realistic expectations.

2.3.7 The importance of socializing your ERs

Really sell the value of your ERs to your user community, addressing how it may improve a tedious process or fix an issue which has repeatedly been discussed within the community.

Infor has limited development resources and if you want your Great Idea to have more chances to be implemented, you will first need as many endorsements as possible from other users.

Sell” your idea (ER) within your community!

Via:

- Discussion threads
- Relevant LinkedIn groups
- User Group meetings
- eMail
- Community webinars

Remember there is a “Copy URL” functionality at the top of the ER page. Copy and paste a link to an ER in a user community when socializing ERs to make it easy for other users to endorse.

If you do not know how to directly connect with other users, ask your user group leads or your Infor contacts for assistance.

Example of a successful ER socialization:

 **SX.e General Group** — David White [SX.e TWL Storefront epaCube]
(Kyana Packaging Solutions)

If your company is migrating towards WebUI, you might want to endorse ER 32621, [HTTPS://ERS.INFOR.COM/ERS/ERS_DETAILS.ASPX?ERID=32621](https://ERS.INFOR.COM/ERS/ERS_DETAILS.ASPX?ERID=32621). A nice feature of WebUI is the user's ability to save advanced searches, so that they can easily recover information that they need periodically, stuff we'd typically do with stored reports in GUI. Apparently, the date fields do not accept date range wildcards, so the user can't store a search for the past week, with a date range of `**/-7/**` to `**/**/**`; instead they have to enter the dates every time. If you think being able to save wildcard date ranges into saved searches in WebUI would help your team be more efficient, then please endorse ER 32621 that was created by Anna Rice of Comstar Supply.

 **SX.e General Group** — David White [SX.e TWL Storefront epaCube]
(Kyana Packaging Solutions)

I'd like to get this group's input to an enhancement that we're going to submit regarding the printing of Item Product Notes; I've attached a draft of my idea for you to review and comment on. I don't want to submit an enhancement that will damage someone else's processes, procedures or work flow, so let me know what changes you'd like for me to include, or exclude. The general problem that we're trying to address is that item product notes are either Do Not Print, or print everywhere. They lack the flexibility to include a note to print on a purchase order, for an item, that you don't want to show to customers; they lack the flexibility to print to a single or group of customers, but not to all customers; they lack the flexibility to show up just during picking (TWL), but not on documents that make it to the customer, they are generally just inflexible. Again please review the attachment and post your comments and revisions here and we'll try to include them into an enhancement request that will benefit the majority of the SX.e community.

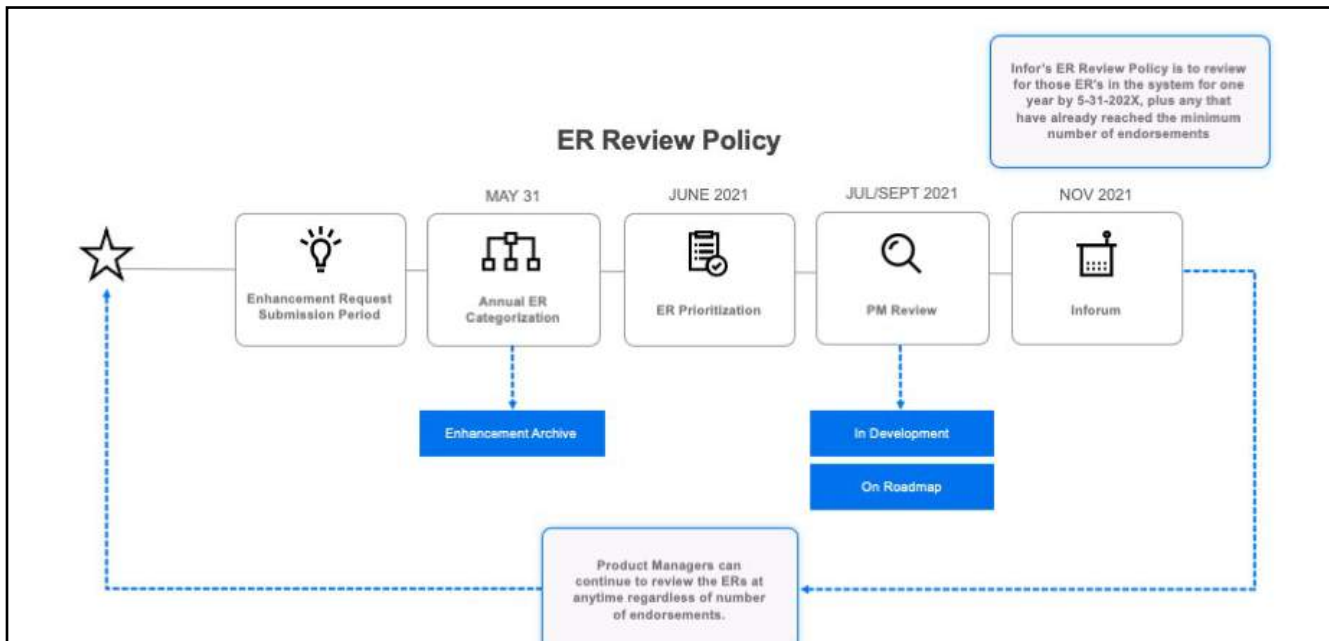


Prior to the customer's post on the TUG (Infor Distribution independent User Group) Forums, it had not received any endorsements. On the day this was posted, it received 11 endorsements.

This discussion got 15 comments on the TUG Forums that the customer incorporated into the ER and ultimately this ER reached 37 endorsements and has been linked to 3 other ERs with similar goals.

3. Process Phases, Timelines and Thresholds for Customers

2020-2021 ER Process Life Cycle



3.1 ER Endorsing/Socialization Phase

3.1.1 Process Timeline

You can endorse ERs that are in the Open View.

Product Managers can continue to review the ERs at any time regardless of number of endorsements.

ERs will remain in the system for one (1) year while customers-partners socialize them to get endorsements.

All ERs that have been in the system for one year as of May 31st will be flagged to be moved to the June "Prioritization" Phase if they have obtained the minimum number of unique endorsements (by separate organizations/companies).

If they do not reach the minimum number of endorsements by May 31st AND have been in the system for at least one year, they will be staged for 30 days in the "To Be Archived" view and then "Archived".

If they do meet the minimum number of unique endorsements by May 31st, they will be moved to the June "Prioritization" phase.

Also, if they already have the minimum number of endorsements by May 31st, regardless of time in the system, they will be moved into the "Prioritization" Phase.

3.1.2 Required Threshold

You can endorse as many ERs as you want for the products you are entitled to on your maintenance/subscription contract.

In general, the more endorsements an ER receives the sooner it may catch the attention of Infor Product Management team is likely read and review.

3.2 ER Socialization Phase

3.2.1 Process Timeline

You socialize your ERs in the Open View throughout the year.

The same Process Timeline as described in section 3.1.1. applies to your added ERs.

3.2.1 Required Threshold

You can add as many ERs as you want for the products you are entitled to on your maintenance/subscription contract.

Do not forget that socialization is key to the success of your ER adding effort. Read section 2.3.7 on how best socialize your ERs.

To make it to the "Prioritization" phase your ER will need a minimum of 10 unique* endorsements.

Please note the endorsement threshold is a general guideline and may vary between products and Product Management teams.

**unique refers to individual organizations/companies, not multiple employees from the same organization/company.*

3.3 ER Prioritization Phase

The ERs that make it into the “Prioritization” phase have met the minimum number of endorsements during the “Socialization” phase and are now available for each organization/company to select their top 10.

The Prioritization phase is no longer an opportunity to endorse an ER.

If your ER(s) did not receive the minimum number of endorsements, they will not move to this phase.

The Prioritization phase is an opportunity for customers to give Product Management an idea of their “top 10” ERs they most want PM to develop.

Remember that Product Management takes various criteria into account when considering ERs for development (see section 2.3.3).

3.3.1 Process Timeline

The “Prioritization” phase takes place during the month of June of each year.

You should prioritize your 10 top ERs during that timeframe. Each customer (organization/company) will be able to choose 10 ERs. This opportunity will only be available for the month of June.

3.4 ER to be Archived Phase

All ERs that did not obtain the minimum number of endorsements to move to the “Prioritization” phase will be moved to our archive database.

ERs will be held in the view “To Be Archived” for 30 days to allow customers-partners to copy and start on a new ER to be socialized again.

Once the ERs are archived customers-partners will no longer have access to the detail of the ERs.

The Archive Database is an exact replica of the live Product Enhancement Request system (ERS) but is only accessible by the Infor Product Management Team

3.5 ER Product Management Final Review and Report Phase

During the period July – September Product Management will review the ERs that have made it to the Prioritization phase.

After this period, usually during Inforum, the Product Management teams report on the ERs they are considering for the roadmap and provide explanations.

This feedback is provided to the “Infor Product User Group Advisory Boards” and then to local user group meetings in the fall as those meetings are scheduled.

4. Frequently Asked Questions

4.1 Is it possible for customers-partners to suggest improvement ideas related to the Infor Product Enhancement Request System (the ERS)?

Customers-partners can add Enhancement Requests (ERs) related to the ERS.

Go to the ERS as explained in section 2.1 and “Load All” enhancement requests.

Then enter “Infor ERS” as “Product Line” and “Enhancement Request System” as product, if your ER applies to the system regardless of any Infor product.

Complete and submit your ER as explained in section 2.3.5.

Note that you can also indicate an Infor product if your ER is related to the way the system is handling ERs for this product.

4.2 How can I contact Infor for questions regarding the ERS?

By clicking on the Infor Concierge widget named “Help with Infor Concierge” you can submit an incident related to the ERS.

Should you have any request regarding the ERS that this user guide or Infor Concierge do not address please send an email to erssupport@infor.com

Should you have any request regarding the ERS that this user guide or Infor Concierge do not address please send an email to erssupport@infor.com.

Help us complete this user guide and its FAQ section with missing information or questions that can be useful to the community of Infor customers-partners.

Thank you

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