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## Infor

### ERP Solution Provider Increases Sales, Better Meets Customer Requirements with OBA

#### Situation

The manufacturing industry is under pressure to maximize customer responsiveness while minimizing expenses and overhead. Modern manufacturing organizations are expected to quickly provide detailed and accurate production quotes, schedule different production orders using the same production lines, and reduce inventory holding costs while avoiding stock-outs. These organizations not only compete with one another, they compete against the clock.

To balance the various constraints associated with production, most competitive manufacturing firms use enterprise resource planning (ERP) systems to efficiently manage all of the data and tasks associated with their day-to-day operations. An ERP system provides production managers, supply chain managers, and customer account managers with a central location to plan production runs, set optimum inventory levels, and generate customer quotes.

However, at a certain point, the data contained in an ERP system must be brought out of the system and used for other purposes. ERP data is extracted, manipulated, analyzed, and presented using business productivity software like the Microsoft Office system. The ease and speed with which ERP data can be moved to and from a business productivity system directly affects the competitiveness of the manufacturing organization, and the overall business value of the ERP system.

Infor ERP SyteLine is designed for small to mid-size manufacturers. Since its first release in 1987, SyteLine has evolved to incorporate the best available technologies on the market. In 1999, the SyteLine development team transitioned to a SQL Server database model, and in the early 2000s, the team adopted a user interface and supporting toolkit built with Microsoft .NET technology. The SyteLine team continued its practice of keeping pace with emerging Microsoft technologies as customers began requiring deeper integration with the Microsoft Office system.

The SyteLine development team frequently received requests from customers to improve information access and updating between the ERP system and the Office system products. The team believed that improving this vital link would reduce overall system costs, improve end-user productivity, and enhance organizational performance. In order to better meet their customers' requirements, SyteLine began aggressively developing points of integration between its ERP system and the Microsoft Office system.

#### Solution

The latest SyteLine release, SyteLine 8, incorporates advanced Office Business Application (OBA) concepts. The release is based on Microsoft technologies, a rare approach in ERP system development, but one that gives SyteLine unique advantages over competing products.

“ All of our potential customers are already using the Microsoft Office system. They view SyteLine as an extension of what they already own. ”

**Dinah Gradis**  
Senior Product  
Manager  
Infor ERP SyteLine

At the core of the SyteLine ERP system is a Microsoft SQL Server database solution. SQL Server provides an efficient and scalable data model with built-in security, access rights management, Open XML file support, and integration points for custom solution add-ons. The SyteLine 8 framework and SQL Server integration also enables a WebService interface to the SyteLine business objects, called Intelligent Database Objects, and a business process model called the Event System. Customers can extend SyteLine business objects and processes or create their own without writing code. Thanks to its integration with SQL Server, future versions of SyteLine will be able to support all custom extensions developed for older versions of the software.

The user interface is built with the .NET Framework, and is designed to look and feel like the Microsoft Office system. The SyteLine team built the interface as a smart client, which allows the interface to be readily adapted to different user roles and preferences. Users can adapt their environment without any software development experience, simply by dragging and dropping system components onto their workspace. By adapting their ERP environment, users can vastly improve their daily productivity, and remove cycle time from mission critical business processes, such as reviewing and approving a purchase order.

The interfaces between SyteLine and the Microsoft Office system have been expanded with SyteLine 8: workflow pieces built into the new version streamline

#### SOLUTION OVERVIEW


[EMAIL LINK](#)
**Organization Size:** 500 employees

#### Organization Profile

Infor is a market leader in business software that provides an array of enterprise resource planning (ERP) software for different industries and customer segments.

#### Business Situation

The Infor ERP SyteLine team recognized an opportunity to extend the usefulness of their ERP product by enhancing its products integration with the 2007 Microsoft Office system.

#### Solution

The Infor Development team developed a set of Office Business Applications that allow SyteLine users to quickly move important ERP data from the SyteLine system to the 2007 Microsoft Office system.

#### Benefits

- Enhanced sales
- Grow market
- Reduce development cost
- Speed time-to-market

#### Software and Services

- Microsoft SQL Server
- 2007 Microsoft Office System
- Microsoft .NET Framework Software Development Kit

#### Vertical Industries

IT Services

#### Country/Region

United States

common tasks such as generating performance reports in Microsoft® Office Excel® 2007, creating customer proposals using Microsoft® Office Word 2007, and creating project and production plans using Microsoft® Office Project 2007.

This deeper integration with commonly used Microsoft Office system clients further reduce cycle time and labor cost from common business processes supported by SyteLine. Rather than manually copying and pasting budget data into an Excel 2007 spreadsheet, formatting the data, and then adding calculations for analysis, a SyteLine user simply clicks a “Create GL Budget” button within SyteLine, and a complete general ledger budget is created in Excel 2007 automatically from data stored in the ERP system. With the data connection between SyteLine and Excel 2007, users can quickly move and update data to and from the SyteLine ERP system from Excel 2007.

Production planning is another area where SyteLine and the 2007 Microsoft Office system combine to create substantial benefits for manufacturing organizations. Manufacturing firms that manage large orders and an array of different product types must carefully manage their resource utilization and the sequencing of tasks for their resources. A bottleneck in any one sub-process for a single production order can quickly escalate and affect other orders. SyteLine 8 includes a project planning component that feeds order and planning information to Microsoft Office Project 2007.

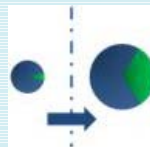
Once the data is in Project 2007, production managers can quickly identify and rectify trouble spots in upcoming production schedules. The Project 2007 interface helps enable true mixed-mode manufacturing, where a manufacturing organization must balance repetitive manufacturing tasks like assembly line manufacturing with engineer-to-order or just in time manufacturing.

## Benefits

By integrating 2007 Microsoft Office system components into SyteLine 8, Infor has been able to expand business opportunities and better meet the requirements of its customers. With its latest release of SyteLine, Infor reduced product development expense and time to market by leveraging existing Microsoft research and development (R&D) expenses. The company has also leveraged the Microsoft Partner Program to market its products, connect with solution partners to deliver services around SyteLine, and stay up-to-date with the latest Microsoft technology.

### Expanding Business Opportunities

Infor SyteLine has enjoyed considerable growth over the past few years, partly due to its alignment with the Microsoft Office system. In its target market, the integration with 2007 Office system components gives SyteLine a competitive edge. “All of our potential customers are already using the Microsoft Office system. They view SyteLine as an extension of what they already own,” says Dinah Gradis, Senior Product Manager for SyteLine.



### Better Meeting Customer Requirements

Infor SyteLine better meets customer requirements by offering flexible and inexpensive deployment options, by reducing product learning curves and training costs, and by increasing worker productivity and overall operational efficiency.

“ **With our Office system interfaces, the customer gets a faster turnaround on accessing data, manipulating data, analyzing data, and using that knowledge.** ”

Since October of 2008, Infor has offered a Software as a Service (SaaS) deployment model which gives manufactures another option on how to purchase and deploy their ERP system. With the Hosted deployment option for SyteLine, enabled by Microsoft SQL Server and Web services, Infor hosts the ERP system on their servers. A Hosted deployment is seamless to Infor’s customers and provides them with the same 24-by-7 access to their data, workflows, customized features, and the same integration with 2007 Microsoft Office system components that they would have if they deployed SyteLine on their own premises. As Hosted SyteLine customers grow, SyteLine can easily be transitioned to an On-Premise deployment with minimal additional deployment cost. This way, smaller manufacturing firms can minimize upfront deployment and IT infrastructure costs with a hosted subscription model for SyteLine and then transition to an on-premise license model when the move makes business sense.



#### Jerry Walden

Director of Presales for  
North America  
Infor ERP SyteLine

SyteLine further reduces deployment costs over competing solutions because custom application development is minimized. Instead, SyteLine relies on 2007 Microsoft Office components to provide value-added functionality. “Our customers know that we integrate with the Microsoft Office system, and that they won’t require any other specialized software to realize the full benefits of SyteLine,” says Doug Rudy, Chief Architect for SyteLine at Infor.

Customization costs are also mitigated because the SyteLine ERP system is built from the same components that the 2007 Office system is built with, and comes with an easy to use programming framework. “We have a lot of customers that want to do ad-hoc customization,” says Rudy. “With SyteLine, we give users the ability to perform ad-hoc integration with Office System components directly on their client machine without writing any code.”

Infor ERP SyteLine reduces training costs, one of the primary contributors to total cost of ownership, by using elements of the familiar 2007 Microsoft Office user interface. “Our customers know how to use Microsoft Office already,” says Jerry Walden, Director of Presales for North America at Infor SyteLine. All we have to tell them is—“if you know how to navigate in Office, you know how to navigate in SyteLine. There’s a quick turnaround for users to become productive with the SyteLine product.”

End-user productivity is enhanced with SyteLine over competing products because many of the manual steps in

moving information into and out of an ERP system removed. "With our Office system interfaces, the customer gets a faster turnaround on accessing data, manipulating data, analyzing data and using that knowledge," says Walden.

By providing a comprehensive and scalable business solution built on top of a single technology platform with deep integration with the 2007 Microsoft Office system, Infor ERP SyteLine offers customers a solution that maximizes their IT investments.

#### Leveraging the Microsoft R&D Effort

The SyteLine OBA product development strategy leverages previous Microsoft R&D efforts to minimize software development costs and reduce time-to-market with each new release.

By building their solution using proven Microsoft technologies, the SyteLine team was able to save a considerable amount of time and resources over comparable non-OBA products. The SyteLine team was able to avoid unnecessary development cycle time and project risk.

"Microsoft Office has become the standard, and that has brought a lot of efficiencies for us in terms of product development," says Rudy. "The efficiencies make the development cycle shorter and less risky to manage. If you use other third-party components, you can often find yourself stuck in the quality assurance cycle. With Microsoft Office and other Microsoft technologies, that doesn't happen."



The architects and developers for Infor ERP SyteLine view Microsoft and the 2007 Office system components as a stable development platform. "The biggest benefit of using Microsoft technologies is the excellent standardization and documentation of the Microsoft Office system components, including Excel," says Rudy. "Because of the standardization, we can carry over our code with each new Office system release. We really haven't had to mess with our core extensions into Office."

#### Leveraging the Microsoft Partner Program

The Infor ERP SyteLine team also leverages the Microsoft Partner Program to connect with customers, solution partners, and to keep pace with evolving technology at Microsoft.

The company stays ahead of the developer curve by participating in the Microsoft Technology Adoption Program. "The most important thing in my experience as an architect and developer is the ability to be involved in early adopter sessions to preview new technologies that are coming on Microsoft's product development roadmap," says Rudy. "For instance, we knew well in advance what new releases of SQL Server were going to look like—what new features would be available, and we capitalized on that with our subsequent SyteLine releases."

