# The very Best "Cool Solutions" for Infor XA Users!

1. **Engineering Change Management System**
2. **Express Project Management**
3. **Excel to General Ledger Journal Entries (IFM and AM)**
4. **Requisition Workflow Approval System via System-Link (and MOBILE Req Approvals!)**
5. **Supplier RFQ System via Web Supplier Portal**
6. **Web Forms: The Electronic Forms and Messaging System for XA**
7. **Material Bar Code Scanning for XA**
8. **XA Price Object Updates via Excel and System-Link**
9. **RMA and Case Management System for XA**
10. **The Outside Service Processing System for XA via Web Portal**
11. **Total Project Management System and Cost Tracking With Comparison to Budget**
12. **Quotation Management System for XA via a "Web Portal" and Workflows**
13. **The System-Link Productivity Foundation for Developers**
14. **The A/P Invoice Upload from Excel to IFM via System-Link**

**Process-driven to know WHO, WHAT, WHERE, WHEN!**



With over 35 years serving MAPICS and XA customers, MKA has proven web-based and Integrator applications that streamline and automate business.  Each application is tightly integrated with XA and most applications do not require an additional XA user license.  Major features of many applications include user-defined:

- electronic forms and workflows
- file and document support
- optional rules
- triggers and notifications
- back-up assignments
- e-mail integration
- performance statistics and measurements
- audit trails/history

1. **Engineering Change Management System for XA** includes XA "Impact Analysis" to dynamically show the effects that a change will have on XA PO's, MO's, Inventory, and Planning.  The system tracks and manages all EC's, provides process flows, does Task Management, and measures the time it takes for every EC and task in the process.  Know what's on time and what's behind—and what's needed.
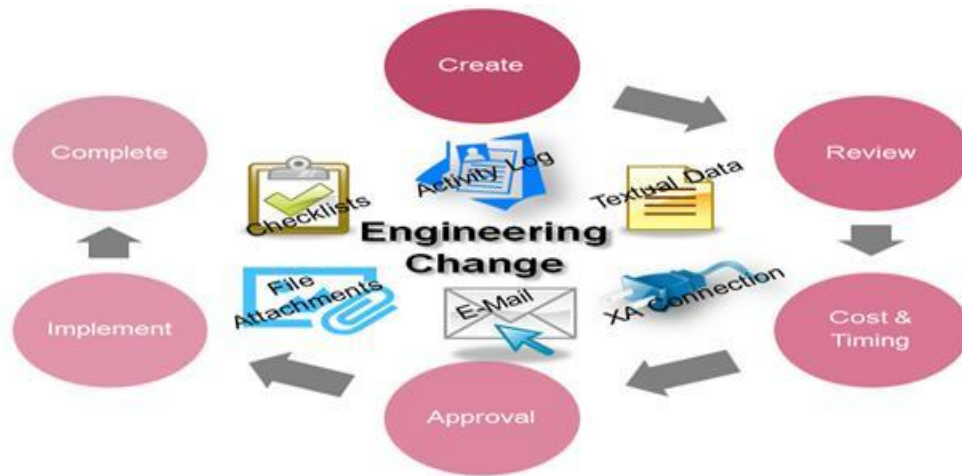


Via a web portal, know your costs, know exactly where a change is at in the process, who's working on it, and know how long it's taking.  Most importantly, KNOW HOW AND WHERE A CHANGE WILL IMPACT YOUR XA ERP SYSTEM.

| | Description | Dept Approvals | Tracking Checklists | Action Items | Files | E-Mail | Meetings | **Status** |
|---|---|---|---|---|---|---|---|---|

Current Status: [Complete] -  As of 06/24/2016 at 07:28:33

| Seq | Section | Description | Completed | User | Time | Performance | % |
|---|---|---|---|---|---|---|---|
| 10 | [ECInitiator] | New EC | 03/16/16 03:46 PM | Tar | 46.58 Minutes | | | 0.05% |
| 15 | [ECRestart] | Rejected EC to be Restarted | . | . | . | . | . |
| 20 | [DeptMgr] | Approve / Reject | 03/24/16 04:40 PM | Ma | 144.92 Hours | ||||||| | 8.42% |
| 40 | [CheckPoints] | Assess Impact of Change | 04/06/16 04:59 PM | Chi | 216.31 Hours | |||||||||| | 12.57% |
| 50 | [Planning] | Assess Cost & Timing Impact | 04/07/16 08:14 AM | Su | 15.25 Hours | | | 0.89% |
| 55 | [QRMReview] | Review EC's in QRM Meeting | 04/07/16 08:45 AM | Sh | 31.68 Minutes | | | 0.03% |
| 60 | [Approval] | Review & Approve | . | . | . | . | . |
| 70 | [Marketing] | Present to Customer | 04/07/16 12:00 PM | Jer | 3.24 Hours | | | 0.19% |
| 80 | [Customer] | Awaiting Customer Disposition | 04/13/16 12:22 PM | Jer | 96.37 Hours | ||||| | 5.6% |
| 90 | [Implement] | Implement the Change | 06/23/16 03:33 PM | Do | 1227.18 Hours | ||||||||||||||||||||||||||||||||||||||||||||| | 71.33% |
| 100 | [ShipVerif] | Implement the Change | 06/24/16 07:28 AM | Jeff | 15.92 Hours | | | 0.93% |
| ▷ 110 | **[Complete]** | **EC Complete** | | | | | |
| 998 | [Rejected] | EC Rejected by the Customer | | | | | |
| 999 | [Cancelled] | EC Cancelled | | | | | |
| | | | | Total Time: | 71.69 Days | | |

2. **Express Project Management for XA** is a web-based, collaboration portal for complete project management. Integrated with XA, the system links data, documents, tasks, people, processes, timelines, estimates-to-completion, costs, and other data into a <u>time-managed system</u> that can let you know if you're ahead of, or behind, schedule.  Express Project Management can be used with or without MS Project.  The system can automatically download and/or update MS Project (some companies prefer to define their tasks and dependencies in MS Project first, and then download those into Express Project Management).



3. **Excel to General Ledger Journal Entries (IFM and AM)**.  Quickly and easily upload journal entries from Excel to General Ledger.   The system:

- facilitates the download/upload process
- performs unit/nature combination validation
- posts multiple journal entries
- automatically creates reversing entries
- handles multiple journal entries
- handles multiple financial divisions
- stores all monthly entries in one workbook

**This application can be implemented in just hours!**

### 4. Requisition Workflow Approval System for XA, including Supplier RFQs.

Used by large and small companies, including sites in Europe and China and across multiple environments, this is far more than just a workflow. Via **System-Link**, it's an integrated, WEB-BASED system used to streamline your procurement process with your own approval rules, limits of authority, workflows, comparison of procurement costs to budget, and it can include electronic Supplier RFQ management via the internet. Electronically start, submit, and track requisitions from the SOURCE to RECEIVING.
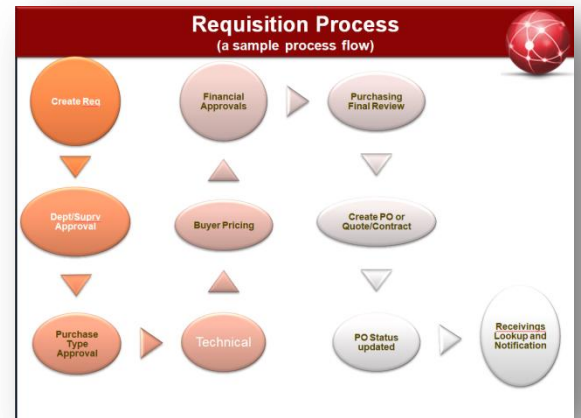


**The system helps CONTROL your procurement process and costs and tells you where a requisition is at all times. It's a great system for approving and tracking CAPITAL PROJECTS, too. ALSO, USE THE MOBILE APPLICATION TO PERFORM REVIEWS AND APPROVALS ON YOUR HAND-HELD DEVICE!**

## Mobile Review and Approval of Requisitions!

When the requisition is opened, the system detects the type of device being used. If the system determines it is a mobile device, then special formatting is used to make the information more accessible. The mobile review mode is not just a phone app, but a special set of Internet pages formatted for use on smaller mobile devices. The mobile device must be able to access the Internet and have a compatible Internet browser.

The requisition is divided up into sections very similar to the collapsible sections in the requisition when used from a desktop computer. Select a section from the list and the section slides onto the screen.

If the requisition is assigned to you, then the work flow approval or review buttons are listed. Select the menu option and, if authorized, the approval comments area is available. Security is by user, and there is no direct "exposure" of XA to the outside world.



The Best "Cool Solutions" for XA
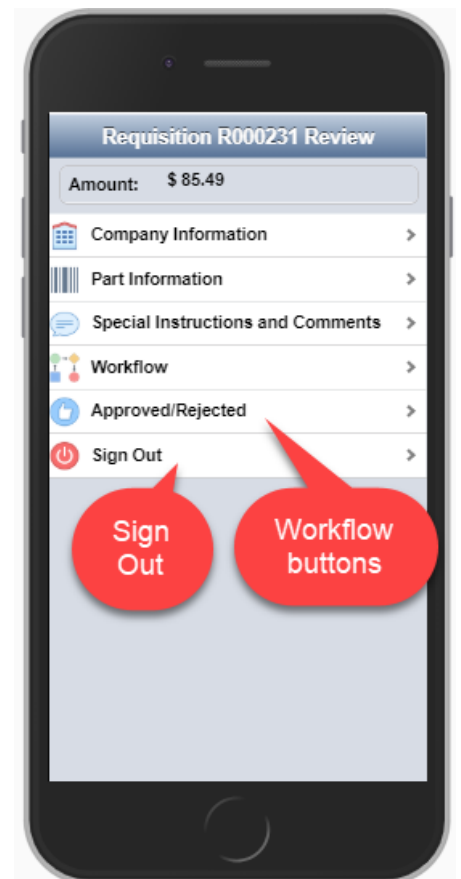
## 5.    Supplier RFQ System via Web Supplier Portal

**SAVE TIME and MONEY.  INTEGRATE YOUR SUPPLIERS INTO YOUR PROCESS.**

Buyers can electronically create a Supplier RFQ (Request For Quote) during the Requisition process and receive quotes electronically from suppliers.



**IT'S *EASY* and *FAST*.**

Suppliers receive an e-mail notification.  The Supplier simply clicks-on an embedded link in the e-mail to go right to the Supplier Portal and can respond to the RFQ online.  The Buyer receives notification when the requisition/RFQ is completed.  **Supplier RFQ responses can be compared and accepted all within the system electronically.  NO re-keying.**

Simply click a button to accept which Supplier RFQ you want.  Easy.  Fast.  Integrated.

**Optionally, you can also add Supplier Requirements from XA PO blanket releases and have suppliers send ASN's via the portal!**

## 6. The Electronic Forms and Messaging System:  Web Forms

This application automates and manages **electronic forms** such as XA Purchase Orders, Invoices, Order Acknowledgements, Shipment Notifications, Statements, and Past Due Notices.  See complete forms history; include attachments; copy a Buyer or Sales Rep; create your own custom notes or messages to go with the form.  There is no need for spool files.  Use eMail HTML or PDF.

Communicate better and more frequently with customers and suppliers—less expensively—by letting your systems do the work for you.  Also, track and retrieve what was sent—quickly and easily—with a complete electronic history of each form.

*This is an application that implements in a few days—WITH YOUR LOGO on each form.*

| Reduce Cost | • Eliminate forms, envelopes & postage<br>• Reduce printing<br>• Eliminate fax calls |
|---|---|
| **Increase Productivity** | • Automate the delivery of the PO, Invoice, Order Acknowledgments, Shipment Notification, and Past Due Notification<br>• Access online form history quickly and easily<br>• Eliminate the print process and need for spool files |
| **Be Proactive** | • Send Order Acknowledgements when an order is entered<br>• Send a Shipment Notice when the product ships<br>• Send Past Due Notices as soon as Invoice is overdue |

## 7. Material Barcode Scanning System for XA

The Material Scanning System for XA is a material movement system that integrates with XA Production Monitoring & Control and Inventory Management to provide for **barcode scanning** of materials.

The system's primary function is to provide material movement and material validation processes via scanning devices. Inquiry capability provides real-time status to various users. The system supports 24 inventory transactions, multiple warehouses, inventory inquiry by item number or location, batch/lot control, quality, scrap, and much more, including extensive new Quality Control capabilities and serialized labels for SINGLE scanning.



**Key Features of the Material Scanning System**

- Multiple warehouses
- Inventory inquiry by item number or location
- Support for 24 XA transactions, including the following key transactions:

|     |     |
|-----|-----|
| RP  | Receipt to purchase order |
| TW  | Inventory Transfer |
| IS  | Miscellaneous Issue |
| IP  | Planned Issue |
| RC  | Miscellaneous Receipt |
| RM  | Receipt to Manufacturing Order |
| PH  | Physical Inventory |
| VR  | Vendor Return |
| IU  | Unplanned Issue |
| RS  | Return to Stock |
| QC  | QC Inspection |
| SS  | Scrap from Stock |

"Scrap" may require separate transactions to capture multiple "reason" codes (such as if 100 pieces are scrapped: 10 for Reason A, 50 for Reason B, and 40 for Reason C.)

- Any valid Inventory Management transaction can be added except IA.

- All XA validations for Batch Lot control where coded by item.

- Standard screen size – 15 lines x 24 characters across

## 8. XA Price Object Updates via Excel and System-Link

**The problem:** Pricing in XA can be complex and time-consuming to update. How can you quickly and efficiently update pricing for these COM Price Objects <u>at very little cost</u>?

- Item Revision Base Price
- Item Revision Foreign Price
- Customer Contracts
- Customer Contract Line Items
- Price Book (view only)
- Price Book Base Price
- Discount Markup Amount
- Discount Markup Percent
- Quantity Price Break Amount
- Quantity Price Break Percent
- Customer Item Discount

And how do you get this done with all the appropriate edit-checking via System-Link?

**The answer: XA "Price Object Updates" via Excel and System-Link**

The application called "Price Object Updates" allows users to quickly and efficiently update COM pricing objects in Excel and then upload them to the appropriate XA files, saving days of time.

A user first downloads existing XA pricing objects (data) into Excel with all of the Subsets and Sorts available to the user in Power-Link, which utilizes XA security. Once the data is in Excel, the new pricing (including price effective dates) can be calculated by taking advantage of the features that make Excel so powerful—like formulas, VLOOKUP, or drag/drop. Then the data is uploaded back to XA at the click of a button. Full XA security, business logic, and user-defined modifications made in Enterprise Integrator are utilized when processing the updates via System-Link.

The spreadsheet can be used across multiple environments on multiple iSeries systems (one production and one test environment on one system are standard in the system). The spreadsheet code uses object-oriented programming methods to efficiently pass data to and from Infor XA by using web services published as Deployment Profiles in Enterprise Integrator, and/or direct System-Link commands. The Deployment Profiles can also be secured beyond that of the XA Business Objects, limiting the functionality that is exposed and controlling user account access. Many transactions that are not published to Deployment Profiles require direct calls to System-Link, which still utilize XA security on the business object.

## 9. RMA and Case Management System for XA

**The problem:**  How can you:
- efficiently track **Return Material Authorizations**?
- process credit requests using approval rules with "Limits of Authority"?
- handle cases (complaints or issues) that include multiple items and dispositions?
- enforce accurate Status settings for each item or incident of a "case"?
- provide broader access to case information for greater awareness?
- leverage XA data for Order, Shipment, and Item information?
- manage "Action Items" for soliciting information and assigning duties?

**The Answer:**  **The RMA and Case Management System for XA**

**The RMA and Case Management System for XA** is a web-based application that controls the processing and tracking of customer reported problems with orders, shipment issues, and warranty.  A "case" may require issuing Return Material Authorizations, Credit Memos, or both. It may involve dealing with customer complaints.  In addition to customer reported problems, "cases" are also used to track RMA's for Customer Supplied Material, product Re-builds, and items sent back for Restock.  The system is integrated with XA Orders and Shipment History for ease-of-use.

## 10. The Outside Service Processing System for XA via a Web Portal

**The problem:** How do you deal with your Outside Service Processors to efficiently track items that you send out for painting, finishing, or other services?

**The Outside Service Processing System for XA** gives you visibility, tracking status, and control of manufactured parts requiring outside services. The system allows your OSP suppliers—via a web portal—to view and create the necessary transactions to process outside service parts, including:

- The creation of shippers for shipment to outside service suppliers
- The Acknowledgement from suppliers of item receipts *via a web portal*
- Advanced shipment notice of completion of parts including reporting defective parts and/or discrepancies
- Tracking return shipment and/or drop ship to another supplier or location
- Receipt of outside service parts
- Provide planned orders to suppliers for production planning purposes

## 11. **Total Project Management System** (and cost tracking to budget)

**Total Project Management is a web-based portal** providing enterprise accessibility to Project Management and Project Cost Management.  It is a combination of:

- Project and Task Management
- Integrated workflow processes for all approvals and tasks associated to a project
- Project Costing, Visibility, and Control throughout the project
- Integration with the XA ERP System

Total Project Management seamlessly integrates project definitions, tasks, documents, people, phase gates, issues, purchases, inventory, costs, and systems. This leads to more effective and efficient management of programs and projects.

### The Total Project Management System

The key points to MKA's Total Project Management System are that the system will:

- ➲ Give visibility to—and provide the status of—all projects, people, tasks, and resources as well as the status of the **COSTS** of the Program or Project (and compare them to budget).

- ➲ Provide the right information to the right user at the right time.  Users shouldn't have to always go look and search for project information.

- ➲ Have automatic alerts and notifications, such as an automatic process that alerts users of their tasks and what needs to be done.

- ➲ Manage Task progress updates via an automated update Wizard or simple e-mail response

- ➲ Let Project Managers add new tasks "on-the-fly."

- ➲ Let users create and track open issues.

- ➲ Allow Purchasing and all users to see what they need when new components or services are sourced.

- ➲ Keep detailed history of a project so NHK Seating can use it for evaluation and estimating future projects (as well as have an audit trail and create "templates" based on past projects).

- ➲ Have a log of meeting notes, emails, and project history.

- ➲ Integrate with Infor XA to provide item and BoM information, supplier information, purchasing information, accurate costs from the system, and integration with the IFM General Ledger system

## 12. Quotation Management System for XA

**Reduce quote time, improve accuracy, win more business, and get rid of those complex spreadsheets that are islands of data! What if you could do the following?**

- Reduce your quoting time from weeks to days or days to hours.
- Improve the costing and pricing accuracy of quotes.
- Use quote revisions and options to offer flexibility and speed for users.
- Use "what-if" quote scenarios.
- Integrate quote information, documents, e-mails, drawings, … from a web "portal."
- Increase responsiveness and your professional image to customers.
- Incorporate suppliers into the quoting process for purchased items.
- Have user-defined **workflows** so people work on the right things at the right time.
- See where every quote stands in the process, and how much time each process takes.
- Use quote history and analysis, and have a complete audit trail (who, what, when).
- Pull data from XA to build the estimate (unit costs, routings, PO History, BoMs).
- ENFORCE CONSISTENT FORMULAS, RATES, AND RULES FOR CUSTOMER QUOTES.



**This is a web-based application to simplify, facilitate, and streamline the process of creating and managing quotes. Copy quotes, keep Quotation Revisions, use Quotation Options, and measure your quote hit rates. Use WORKFLOWS to route quote approvals to the right people.**

## 13. The System-Link Productivity Foundation for Developers

MKA has created the "System-Link Productivity Foundation" for developers. The Productivity Foundation is a base set of programming objects for integrating applications with XA System-Link.  The "Foundation" will save programmers dozens or hundreds of hours of base development and test time.  Moreover, the Foundation can be used over and over for application development.

The major benefit of the "Productivity Foundation" system is that it **minimizes programming work for developers**.  The Productivity Foundation turns very tedious and time-consuming processes into a simplified Application Programming Interface (API).  It provides the "foundation" for your applications by:

- coding the communications protocols
- creating properly formatted XML
- handling responses from System-Link

With the Foundation, you simply do the following:

- create a "SystemLinkCommand" object in your code
- set the connection parameters to your XA environment
- tell it which XA Business Object you're working with
- add the Attributes and values you need
- run the "Submit" routine

The System-Link Productivity Foundation is easily deployed to Windows clients and servers that run the .Net framework, and is simply a reference in the code.

The Foundation validates your request and creates the connection (and it lets you know if the system is not available).  It then submits the request and returns the response to you as a .Net data-set that is easily parsed.  For example, when programming to move data from Excel to XA, the MKA Productivity Foundation provides the basic functionality of communicating with System-Link.  The developer would only need to set configuration parameters and pass the request into the Productivity Foundation.

A key benefit to using System-Link is that XA security applies to all requests based on the user who logs in.  XA error-checking, error messages, user exits, and maintenance history are also utilized.  These features make your external application function as if you're directly keying the data into Power-Link.  The Foundation works with XA and takes care of these aspects of XA integration, and more:

- handles log-ins and outs to and from System-Link
- submits System-Link requests
- transforms the System-Link response into a data table
- manages user sessions (e.g., if a session "times out," the user is re-logged in automatically)

## 14. A/P Invoice Upload from Excel to IFM via System-Link

**The problem:** How can you quickly and easily upload A/P invoices from Excel to IFM, particularly when you get credit card detail lines or other sources of A/P data electronically? And how can you do this by division, by effective date, and get it to the correct ledger?

**The answer:** A/P Invoice Upload from Excel to IFM via System-Link

**Here's how it works.**

The data in the columns is received electronically or entered by the user. The Employee and the Document Date are used for the IFM "Their Reference" field. The Merchant and the Description are used for the line item narrative. **The box in yellow is used for user input.** The Document Date, Effective Date, Ledger, Transaction Type, and Division are all entered by the user. When the user clicks on the "Upload/Process" button, the data is uploaded as Charge Lines. The invoices are processed right into IFM! ONE CLICK: Quick. Easy. Accurate.

# MK&Associates

## Our Mission:  HELP COMPANIES IMPROVE BUSINESS PERFORMANCE

**With over 35 years serving XA customers with implementations and integrated solutions, our success is based on helping YOU be more _efficient_ and _effective_.**

## SPECIALIZED SERVICES and IBM Systems

- XA ERP Consulting, Application Training, Implementations, and Facilities Management
- Integrator and Power-Link Training Sessions and Applications
- IBM System i Sourcing, Support, and Facilities Management
- Network Integration
- Custom Programming and Tailored Solutions
    - RPG, PHP, and other languages
    - Web-based
    - Microsoft .Net
    - Enterprise Integrator and System-Link

Have you got business problems or issues?

Do you need integrated solutions?

# WE have answers <u>and</u> solutions!

**Our Mission:  HELP COMPANIES IMPROVE BUSINESS PERFORMANCE**

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