
ERP TECH

SUMMIT 2024

Infor's Product Direction

Fourth Shift Roadmap

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infor



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Agenda



Introduction



ICG's Approach & Value We Deliver



Fourth Shift Product Roadmap

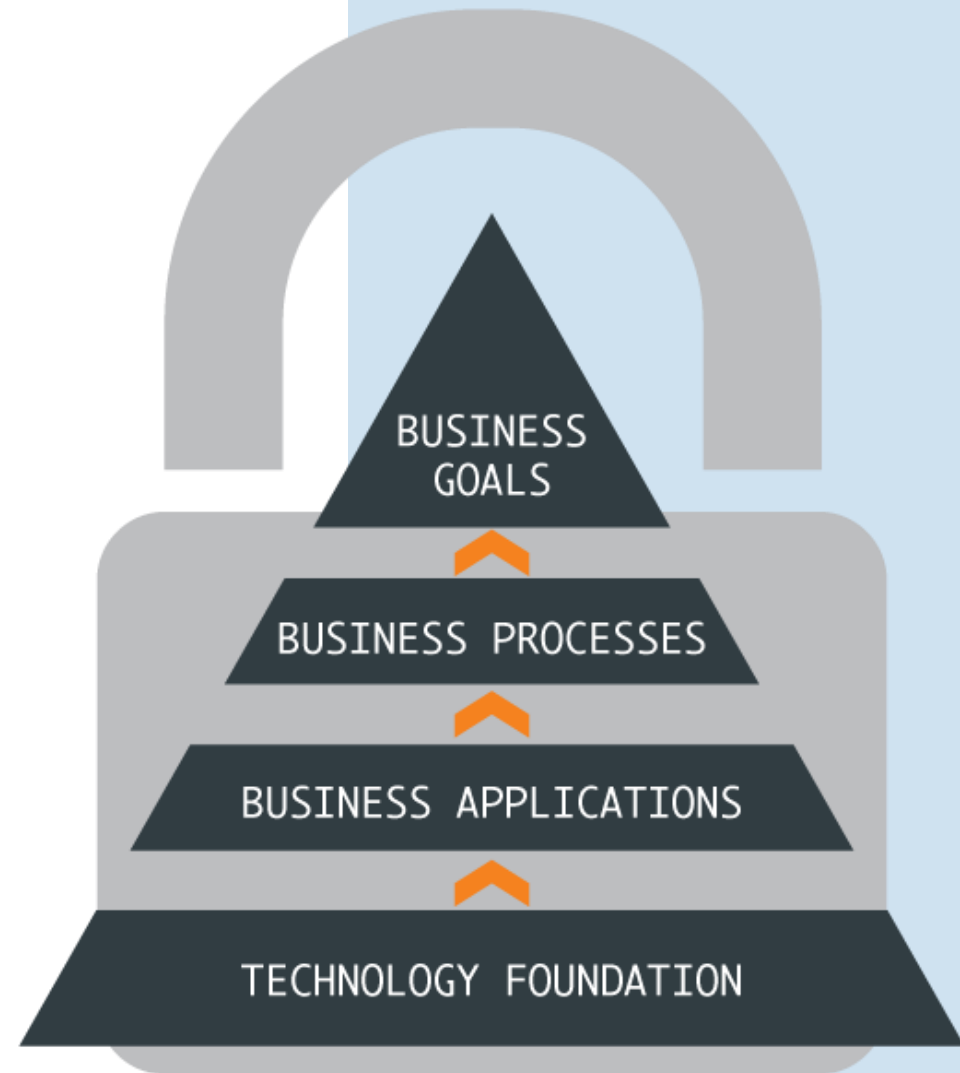


Discussion & Next Steps

The ICG Approach

A solid **technology foundation** delivers your **business applications** when and where you need them. These two combined implement your unique **business processes**, allowing you to reach your **goals**.

ICG is a process-driven business technology company that ensures your IT platform securely delivers your applications and processes whenever and wherever you need them.



O U R M I S S I O N :



Deliver innovative and reliable business and technology solutions that exceed our client's expectations, resulting in reduced cost, improved efficiency, and a guaranteed ROI.



O U R V I S I O N :



Enable enterprises of all sizes to leverage technology for business growth and success.



Value We Deliver

ERP SOLUTIONS

One-Stop Shop for Fourth Shift, VISUAL, Acumatica

- Sell ERP
- Cloud Hosting
- Implementation
- Optimization
- ERP Upgrades
- Training
- Develop/Customization
- And More!

ICG is uniquely qualified with both IT and ERP under one roof!



IT SERVICES

We Architect & Implement Strategic IT Solutions:

- Managed Services
- Technical Support
- Cybersecurity
- Cloud Infrastructure
- Data Center Infrastructure
- Virtual Desktop Infrastructure
- TSR and Health Checks
- And More!

Fourth Shift Product Roadmap



Fourth Shift End of Life?



Release Timeline and
Product Roadmap



Release 8.00E Candidates
Product Specifics





Fourth Shift End of Life?

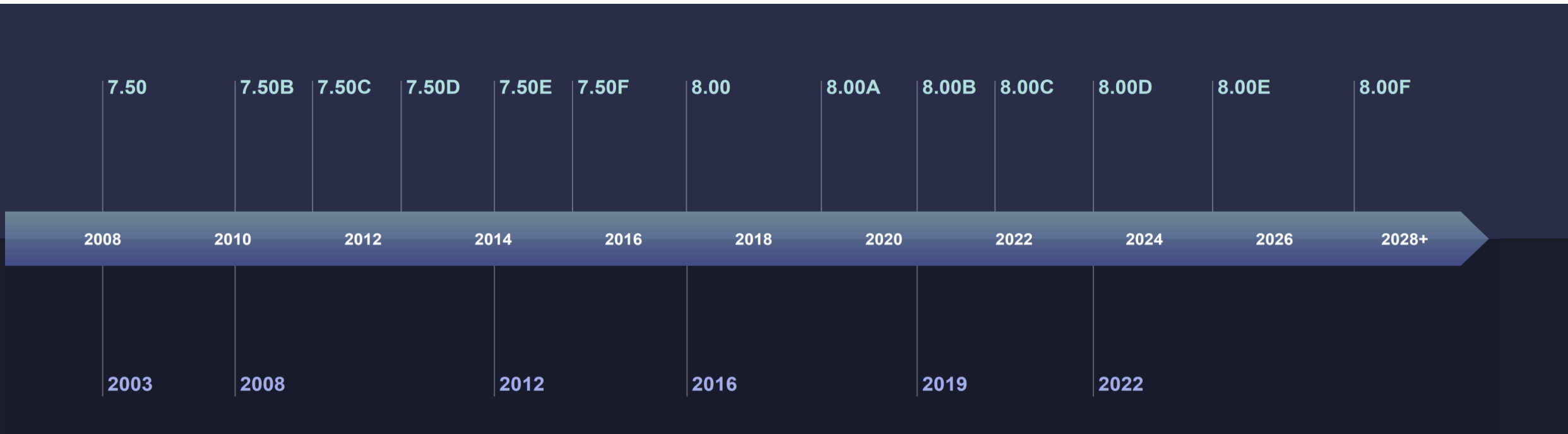
HERE WE GO AGAIN – AD INFINITY

This is a topic ICG addresses with prospects and customers on a regular and recurring basis. Contrary to what you may have heard from others, including Infor account managers and sales reps, there has been no end-of-life announcement for the Fourth Shift product from Infor.

The current roadmap, just released this April from Adrian Masters, Fourth Shift Product Manager, shows continued development with Release 8.00E looming on the horizon – more about this in a bit. **Also, ICG and partners have been breathing new life into the product with many products and extensions.**

Warning however – there are issues to be concerned with regarding the slowing pace, dwindling content of upgrades, and the overall degraded level of support customers seem to be receiving from Infor.

Fourth Shift Product Release Timeline



Infor Fourth Shift Product Strategy Update



Enrich the Core

- PO Line Approval



Technical

- Utilities



Platform Support

- Microsoft

8.00D INVA Reason Code Control

User can configure the reason code control from CNFG setup screen.

New screen INRC will maintain the “system level control” defined reason code.

Starting Reason Code: XX

RC	Description	Active	Allow Product Line Override	Manual Input of Account	Master Account Number
C	Cycle count adjustment	Y	N	N	01-00-00-10100
S	Serialized item return	Y	N	N	01-00-00-10200
R	Return to vendors	Y	Y	N	01-00-00-10300
L	Test Code 1	Y	N	Y	
M	Test Code 2	N	Y	Y	
N	Test Code 3	N	N	N	01-00-00-10400

The default is set to “N”, which would behave identical to 8.0 functionality. Other options will be the system level control and by product line control.

8.00D INVA Reason Code Control

Press Alt F4 from Reason Code field.
 Now have ability to set offset accounts
 based on reason code or product line.

Inventory Adjustment			
Rc	Description	Override Account No?	Master Account No Dd-Pp-Tt-Aaaaa
A1	INV ADDING	N	01-00-BK-10210
A2	ADDING INV	Y	01-00-00-10000
A3	IIII	Y	
A4	INV AAA	N	01-00-BK-10000
C	Cycle Count	Y	
S	Serialization	Y	

8.00D Fourth Shift Technical



Planning Rebuild Tool

- New tool to handle re-sequence of tables when the maximum sequence is reached
- The tool will send a proactive alert email on the need for table re-sequencing



Fourth Shift F3 Html Help for Workplace and FS GUI

- Fourth Shift Application Help in Workplace supports by Chrome and Edge browsers



FS Database Objects Check Tool

- This troubleshooting tool compares standard database object and those held in the customer database.



FS Report Server configuration

- Following a restore, update Report server configuration values automatically via Backup Manager.

8.00D Microsoft Platform



Fourth Shift support for latest Microsoft platform:

- ✓ Futureproof on latest versions
- ✓ Microsoft 2022 Server and SQL Server
- ✓ Microsoft Windows 11

Product	Mainstream	*Extended	**Extended Security Update (ESU) Year 3
Windows Server 2016	Jan 11, 2022	Jan 12, 2027	tba
Microsoft SQL Server 2016	Jul 13, 2021	Jul 14, 2026	tba
Windows Server 2012 R2	Oct 9, 2018	Oct 10, 2023	Oct 13, 2026
Microsoft SQL Server 2012 (SP4)	Jul 11, 2017	Jul 12, 2022	Jul 8, 2025
Windows Server 2008 R2	Jan 13 2015	Jan 14 2020	Jan 10, 2023
Microsoft SQL Server 2008	Jul 11, 2014	Jul 9, 2019	Jul 12, 2022

*Extended Support, Microsoft continues to provide security and reliability updates, and bug fixes, but non-security updates are not provided without a paid support agreement.

**Extended Security Updates (ESU) are available through specific volume licensing programs.

What does this mean for me?

SETUP	RESULT
Fourth Shift 7.50D and earlier without a Microsoft (ESU) program	→ Running a Microsoft unsupported platform
Fourth Shift on Microsoft (2008)	→ Server and SQL Server are running a Microsoft unsupported platform
Fourth Shift with Microsoft SQL Server 2012	→ Will require a Microsoft (ESU) program to receive security updates
Fourth Shift with Microsoft Server 2012	→ Will require a Microsoft (ESU) program to receive security updates from Oct 10, 2023

Fourth Shift Compatibility Guide



Released March 1, 2024

**M - Microsoft have announced end of support for Windows: NT4.0, 2000, 2003, 2008 R2, Win 7 and XP versions.

*1 - Windows Server support is indicated for the Fourth Shift application server. Other components included on the Windows Server, such as IIS and Terminal Server, may not be supported with a specific Fourth Shift release. These components are listed separately with version support. Versions of Windows Server supported for other applications, such as BRMM and Demand Stream, are listed separately. Installation of other server applications on the Fourth Shift server is not supported.

*2 – 64-bit 2003 Server is not supported for the Fourth Shift application server. If SQL Server is run on a separate server, that server OS and SQL Server can be 64-bit.

Platform Support for Fourth Shift	7.20C +	7.30X	7.40X	7.50X	8.00X
Windows Server for Fourth Shift and SQL Server (32-bit) *1**M	NT4.0 SP6a 2000 SP3 2000 SP4 2003* 2003 SP1(H+)*	NT4.0 SP6a 2000 SP2 2000 SP3 2000 SP4(E+) 2003* 2003 SP1(E+)*	2000 SP4 2003 SP1* 2003 SP2 (E+)* 2003R2 SP1* 2003R2 SP2(E+)*	2003 SP2 2003R2 SP2 2008SP1(B+)	
Window Server for Fourth Shift and SQL Server (64-bit) *1**M				2008R2 SP1(C+) 2008R2 SP2(D+) 2012R2 (E+)	2012R2 2016 2019 (B+) 2022 (D)
Window Server for SQL Server (64-bit) *2**M				2003 SP2 2003R2 SP2 2008SP1(B+) 2008R2 SP1(C+) 2008R2 SP2(D+) 2012R2 (E+)	2012R2 2016 2019 (B+) 2022 (D)



For Those Keeping Score



- INVA Reason Code Control - INRC



- SHIP Allow Returns



- ITMB – Control Backflush Activity



- PASS – Ctrl-Enter Confirmation if a System Admin Policy is Changed



Fourth Shift Roadmap

Disclaimer

This presentation reflects the direction Infor may take with regard to the products or services described herein, all of which is subject to change without notice. This presentation is not a commitment to you in any way and you should not rely on any content herein in making any decision.

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Fourth Shift Roadmap



Fourth Shift – Next Release Candidates



Accounts Receivable Bank Statement Date



Enlarge the length of text to 100 characters on TEXT



SHIP: Allow Returns



Expand maximum value on POMT, PORV & APID/APIE



Show foreign currency value on APUV report



Usage improvements to the Average Actual Costing Process



Add component item number to OVAR batch detail fields



ITMB: Control Backflush Activity



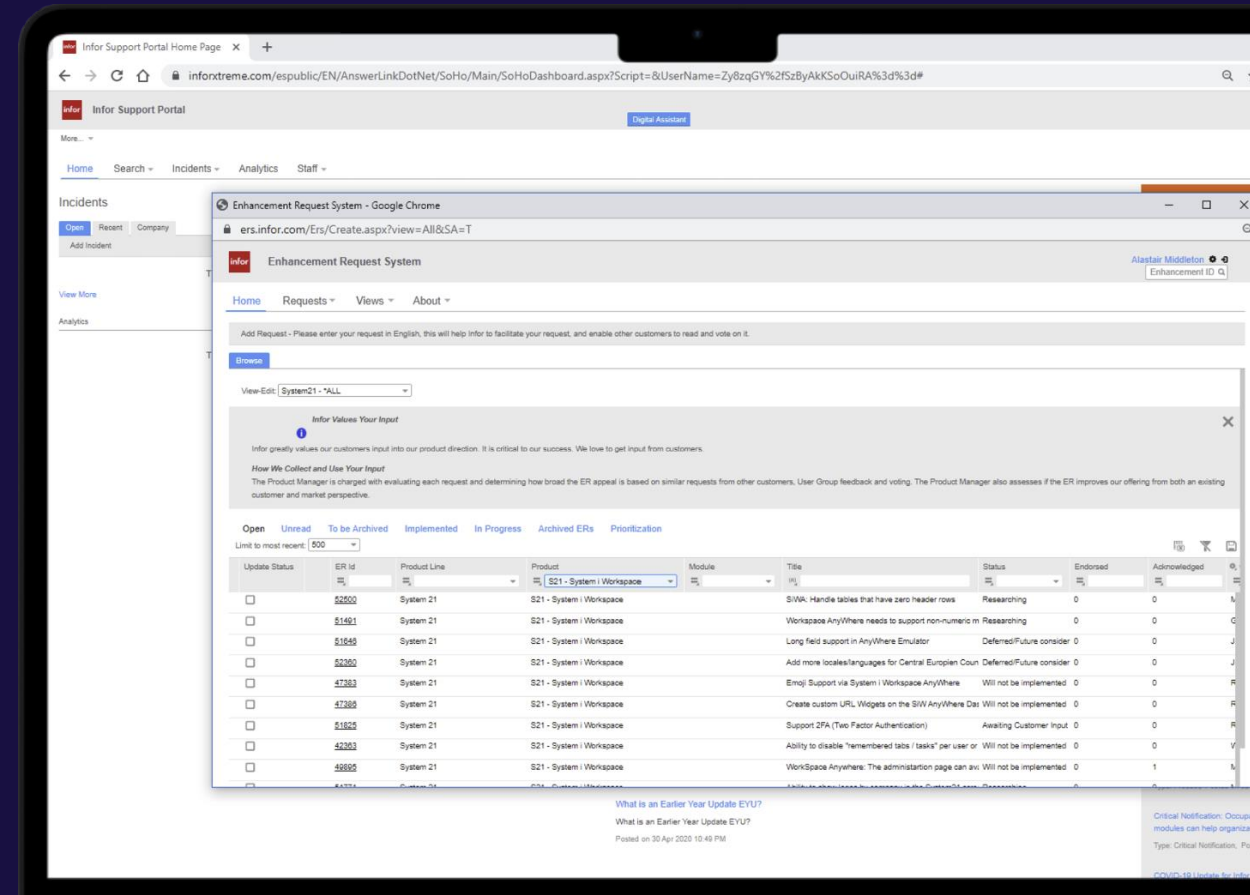
Enhancement Request System... >

Fourth Shift Enhancement System



Available through Infor's Support Portal

- In Support Portal go to Resources > Enhancement Request System
- Product Line = Fourth Shift
- Product = <select>
- Review and endorse
- Submit new requests



Fourth Shift 8.00E Release Candidates



SHIP – Allow Returns



ITMB – Control Backflushing



PO Approval



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8.00E Candidate – SHIP Returns



FSMR - Fourth Shift - Shipping

File Edit Tools Options Help

SHIP

Ship

Order Type: C Issue Type: V

Co Number: CO200 Shipment: No: 000000008 Ref: Status: 4 Date: 072117

Cust Id: 100010 Ship To Id: 000000 Modified: N

Name: COLORADO BIKE AND SKI Name: COLORADO BIKE AND SKI

Addr: 62 BASELINE DRIVE

----- Order Related Information -----

Po No: Frt Code: 1 City: DENVER St: CO

Pcs: 0 Frt: .00 Zip: 80223 C: USA

Wgt: 0 Ord/Ship Sta: 4 Carrier: UNITED AIR FREIGHT

Vol: 0 Text No:

Starting Ln#: 001

Ln#	Ln#	Item	Quantity	Ship	Stk	Bin	I	Return	Clo
	Typ		Due	Date			C	Quantity	Req
▶ 001	C	PAINT-100	8.0	072017	PN	050	O		
002	C	PAINT-200	8.8	072017	PN	050	O		

Lot: Scrap Quantity: Replace Quantity

You May Make Entries In Highlighted Areas Status: CHG 07/21/2017

Allow return from customer (SHIP V) to be done for customer order lines at status 4 and 6.

Returns from a status 6 CO line will create a credit memo and the quantity returned will be placed back into inventory – equivalent to return to vendor on a closed PO.

Return from a status 4 CO line would prompt for the quantity returned and quantity scrapped. Only the quantity returned will be placed back into inventory and the CO line shipped quantity will be updated.

8.00E Candidate – Control BKFL

Currently, an item can be backflushed by a CORV, MORV, PORV, and PICK transaction. In this enhancement a new field is added to the Item Master to control only CORV/MORV/PORV backflush activity.

The new field will be used to determine if order dependent BOM's containing this component will be backflushed or not.

Parent Item	To Location	Function	Receiving/Issue Type
Manufactured	stock	MORV Receipt/Reverse	E
Custom product	stock	CORV Receipt/Reverse	E
Custom product	staged	PICK	E
Custom product	mode of transport (shipped from WIP) Stk-Bin = none	PICK	E
Sub-contract (Ln# Typ = S)	stock	PORV	E

8.00E Candidate – PO Approval Config

This screen enables administration to create various approval levels with a value range for each one. The system will validate the value range to ensure it is not in conflict with other value ranges.

FourthShift PO Release







PO Release Approval Configuration

[Return to Home](#)

Approval Level Name *

Approval Value From Approval Value To

Add
Reset

Role Name	Start Value	End Value		
Level 1	0.00	99,999.00		
Level 2	100,000.00	499,999.00		
Level 3	500,000.00	99,999,999.999.00		

8.00E Candidate – PO Approval Admin

This screen links users to an Approval Level Role. A user may have multiple roles.

FourthShift PO Release









PO Release Role Administration Configuration

[Return to Home](#)

PO Approval Role
Level 1 (0-10k) ▼

User ID
AAA ▼

Add **Reset**

Role Name	User ID		
Level 1	AAA		
Level 2	BBB		
Level 3	CCC		
Level 2	CCC		

8.00E Candidate – PO Approval

The PO Release screen provides the Approver the ability to Approve/Reject a PO Line Item which is pending in the Approver Pool.

By default, the grid will show Approve values as 'Yes'. To Reject, the Approver selects 'No' and enters comments.

Purchase Orders Approval Request

[Return to Home](#)

PO Number: Buyer Code: Vendor Name:

PO Line Item Approval Status: Approved Role As:

<input type="checkbox"/>	PO Number	Line No	Vendor Name	Buyer Code	Line Type	Promised Date	Start Date	Approval Status	Item Number	UM	Qty	Unit Cost	Total Cost (USD)	Remarks	Approve?	Remarks
<input type="checkbox"/>	PO-1000	1	PRECISION METALS, INC	210	P	01-03-1997	12-06-1996		AT-100	FT	672	1.2	806.40		Yes	<input type="text"/>
<input type="checkbox"/>	PO-1000	2	PRECISION METALS, INC	210	P	01-03-1997	12-06-1996		AT-200	FT	1512	1.3	1,965.60		Yes	<input type="text"/>
<input type="checkbox"/>	PO-1000	3	PRECISION METALS, INC	210	P	01-03-1997	12-06-1996		AT-300	FT	987	1.4	1,381.80		Yes	<input type="text"/>
<input type="checkbox"/>	PO-1000	4	PRECISION METALS, INC	210	P	01-03-1997	12-06-1996		AT-400	FT	651	1.6	1,041.60		Yes	<input type="text"/>
<input type="checkbox"/>	PO-10000	3	KNIGHT IN SHINING STEEL	JHJ	P	01-27-1997	01-20-1997		19-BLUE	EA	1500	95	59,670.00		Yes	<input type="text"/>
<input type="checkbox"/>	PO-10000	4	KNIGHT IN SHINING STEEL	JHJ	P	01-27-1997	01-20-1997		19-BLACK	EA	100	100	0.00		Yes	<input type="text"/>
<input type="checkbox"/>	PO-10001	2	KNIGHT IN SHINING STEEL	JHJ	P	01-27-1997	01-20-1997		19-BLUE	EA	100	100	397.80		Yes	<input type="text"/>
<input type="checkbox"/>	PO-10001	2	KNIGHT IN SHINING STEEL	JHJ	P	01-27-1997	01-20-1997		19-BLUE	EA	10	100	397.80		Yes	<input type="text"/>
<input type="checkbox"/>	PO-1001	1	USA STEEL INCORPORATED	210	P	01-03-1997	12-06-1996		ST-050	FT	1848	0.25	462.00		Yes	<input type="text"/>
<input type="checkbox"/>	PO-1001	2	USA STEEL INCORPORATED	210	P	01-03-1997	12-06-1996		ST-200	FT	861	0.3	258.30		Yes	<input type="text"/>
<input type="checkbox"/>	PO-1001	3	USA STEEL INCORPORATED	210	P	01-03-1997	12-06-1996		ST-400	FT	2016	0.28	564.48		Yes	<input type="text"/>
<input type="checkbox"/>	PO-1001	4	USA STEEL	210	P	01-03-1997	12-06-1996		ST-500	FT	1373	0.3	396.90		Yes	<input type="text"/>

Closing Thoughts

- Infor is continuing to support current platform technology for Fourth Shift providing continued runway for the product
- The addition of new functionality has slowed, and content has been reduced to limited enhancements
- Customer Support for Fourth Shift has declined since it was outsourced to HCL then brought back to Infor last year – ICG provides much of the support
- It's apparent there are several more years before Infor decides to tell customers it's time to move on. We are looking at Q1, '25 for Release 8.00E and see Release 8.00F on Infor's roadmap



Discussion and Questions





Thank You!