




	Wednesday, March 4, 2026		
Rooms	Regency V	Learning Center	Regency VI
Time			
12:00 PM - 1:00 PM	Lunch - Centennial I (Centennial Ballroom LL1)		
1:00 PM - 5:00 PM Elevate Session #1	<p>Carsten Steinhofel Phil Knott</p> <p>Automation &amp; RPA / IDP: Everything you need to know series - RPA / IDP – Automation, automation, automation, other than GenAI, which is often driving automation, seems to be all we hear. True automation is built of 3 core pillars, 2 of these you have already within Infor OS - in this session we will work our way through the key need to knows, what you have already and what they can do. Then we'll dive in to the RPA / IDP parts, look at their capabilities and how you might want to use them, what the building blocks are, how they work, the runtime modes and what you might need to know.</p>	<p>Matthew Manning</p> <p>Factory Track Deep Dive - End-to-End Implementation, Configuration, and Best Practices - Deep dive into Factory Track in this four hour session where we'll walk through a complete implementation—covering environment configuration, Warehouse Mobility, Shop Floor, Time Track, and ERP alignment—with a focus on the details that separate a good deployment from a great one. Learn the “pro tips” that save hours of troubleshooting, discover best practices, and take home a repeatable playbook for Plant Floor success.</p> <div></div>	<p>Ron Heusser</p> <p>Finance Foundations - Finance Module and Costing Items: Detailed review of the ‘foundation’ for financials, including Chart of Account setup and Unit Code flexibility, will provide the basis for financial reporting. Reviewing the transaction flows to the General Ledger, how distribution accounts can be structured, and how Distribution Journals can be leveraged, will provide visibility to transactional data and how adjustments can be made. Additional reviews to include Product Codes and automation tools will provide increase insight. Reviewing financial statement report options, including recent CSI enhancements, will show how financial information can be generated. Additional reviews will include budgets &amp; multi-books. From a costing perspective, reviewing the item cost options and parameters will provide visibility to costing options. Review of cost related transactional data, how costs are categorized, and variance analysis will provide additional detail into the costing process.</p> <div></div>
	Thursday, March 5, 2026		
Rooms	Regency V	Learning Center	Regency VI
Time			
7:00 AM - 8:00 AM	Breakfast Regency VII		
8:00 AM - 12:00 PM Elevate Session #2	<p>Sheryll Limmex Rob Hollier</p> <p>ION Integration, Workflows &amp; IDM Document Output: Everything you need to know series - ION Integration, Workflows &amp; IDM Document Output – we'll dive in to all the core building blocks of ION, show what capabilities are available for integrations, from the basics of what a connection point is, to more advanced topics like scripting, merge and more – then we'll dive in to the Workflow features and explain the concepts and building blocks, moving on to the more advanced topics like decision matrix and Email templates. For IDM we will focus on Document Output, showing how you can turn your data in to documents that you can store, email, print or get eSignatures on - connected of course to Workflow tasks if required.</p>	<p>Suresh Jayaraman</p> <p>Unlocking Business Process Efficiency with Infor Process Intelligence - Join us for an in-depth exploration of Infor Process Intelligence and its transformative impact on business process optimization. This session will guide you through leveraging the Industry Process Catalog within the Viewer, tailoring business processes to meet specific customer requirements using the Modeler, and monitoring execution performance through advanced Process Mining techniques. Lastly, discover how to turn process insights into actionable improvements that drive operational excellence.</p> <div></div>	<p>Jill Papendick Kevin Heiman</p> <p>Data Fabric: Everything you need to know series - Data Fabric: What is it and what can I do with it? We'll walk through the core principles and building blocks of Data Fabric. Discuss all the security features that let you secure the data stored, making the right data available to the right systems. We'll also dive in to all the ways you can use your data while in Data Fabric, perhaps to drive Birst, some custom widgets or for use with external tools, reporting, integration, etc.</p> <p>Finally we'll make sure to highlight any new capabilities added to Data Fabric over the past few releases, ending with a brief discussion on what is to come.</p>

Common Details for the two “Everything you need to know series”

For these session we follow the same approach - You hear from the experts and see worked examples following the best practice of how to do things and what to avoid, understand the considerations on your usage and what is possible with your existing CloudSuite and what might require an additional investment.

All sessions will also have;

- A downloadable set of examples to import into your own tenants, allowing you to dissect how things were done or copy parts into your own solutions
- A set of videos walking though the examples, allowing you to take the time you need to understand how things work and to share within your organization

Attendance at these sessions of SUN Elevate 240 2026 will also entitle your company to a 90 day trial license of RPA and IPD for you to investigate before needing to commit, as well as a private follow up call with the expert presenting team.