Infor CloudSuite Business Workflow and Alert Content Examples for Infor ION

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Contents

About this guide

This guide provides information about the event monitors and workflow models that were created specifically for BODs published by Infor CloudSuite Business. Recommendations are given on how to customize the standard ION content to suit specific customer needs.

Intended audience

This guide is intended mainly for system administrators who manage and customize standard ERP ION content, or who must troubleshoot or trace back tasks or alerts to the ERP.

We recommend that you discuss the process and results of your planning decisions with Infor Consulting Services prior to implementation.

Related documents

You can find these documents in the product documentation section of the Infor Xtreme Support portal, as described in "Contacting Infor" on page 6:

- *Infor CloudSuite Business Configuration Guide for Infor ION*
- *Infor ION Installation Guide*
- *Infor ION Process Administration Guide*
- *Infor Federation Services Administration Guide*
- Infor Federation Services installation information. Infor Federation Services is installed with Infor Ming.le. See the appropriate installation guide for Infor Ming.le. If you plan to use Infor Federation Services without using other Infor Ming.le functionality, see the *Infor Ming.le Installation Guide for Standalone IFS*.

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at www.infor.com/inforxtreme.

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1 Overview

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This chapter provides an overview of the integration of Infor CloudSuite with ION Process.

Infor CloudSuite is defined as an Application Connection Point in ION Desk. The typical connection information for Infor CloudSuite, such as the host name, port number, schema name, user name and password, is specified in ION. See the *Infor CloudSuite Business Configuration Guide for Infor ION* for more information.

Logical IDs

Each Infor CloudSuite configuration is defined as a separate Application Connection Point, with its unique logical ID.

BODs sent by Infor CloudSuite contain the logical ID of the sender, as specified in ION.

Show verb versus Sync verb

ION's event monitoring and workflow content evaluates BODs with the Sync verb.

Chapter 2 Setup and configuration

2

This section describes how to install the Infor CloudSuite ION content. It also describes the customization process.

Requirements

This section includes the prerequisites for ION and for Infor CloudSuite.

Prerequisites for ION

To use the Infor CloudSuite ION content, these components of ION 11.0 or later must be installed, activated, and integrated:

- ION Connect
- ION Event Management
- ION Workflow
- ION Pulse (within Ming.le)

See the *ION Installation Guide*, the *ION Connect Administration Guide*, and the *ION Process Administration Guide* for more information.

Note: To use the Infor CloudSuite ION content, at least one document flow must be activated for the Infor CloudSuite connection point. The solution XMLs that are provided for specific integrations of other products with Infor CloudSuite contain a document flow with a single application for the Infor CloudSuite connection point. You can select multiple connection points in the document flow, if required. If a monitor or activation policy is activated, subscriptions are created for each active Infor CloudSuite connection point. See the *ION Process Administration Guide* for more information.

Prerequisites for Infor CloudSuite

See the *Infor CloudSuite Configuration Guide for Infor ION* for the list of Infor CloudSuite prerequisites.

Installing the content

To install the ION distribution groups, workflows, monitors, and activation policies:

1. Download the SL_ION_Content.zip file from the Infor Xtreme Support portal. You can find this file attached to solution 1440389. Extract the files and use them in the following steps.
2. In IFS, upload and assign the users and groups:
   - Select **Manage > Users** and upload all required users.
   - Navigate to **Manage Master data** and upload the SL-DistributionGroups.csv file.
   - Assign users to the distribution groups. The distribution groups to create are listed in the paragraph “Distribution of alerts.”
   - See the *Infor Federation Services Administration Guide* for more information on setting up distribution groups.
3. In ION Desk, import the monitors:
   - Select **Model > Event Management > Monitors**.
   - Click **Import** and select the SL-Monitors.xml file.
4. In ION Desk, import the activation policies:
   - Select **Model > Event Management > Activation Policies**.
   - Click **Import** and select the SL-ActivationPolicies.xml file.
5. In ION Desk, import the workflows:
   - Select **Model > Event Management > Workflows**.
   - Click **Import** and select the SL-Workflows.xml file.
6. Activate the monitors, workflows and activation policies.

List of content

This section lists the available content for the various releases of Infor CloudSuite and older versions of Infor SyteLine.

Monitors

S.No	Content ID	9.00.00 8.03.11 8.03.10 8.03.00 8.03.00 8.02.20	8.02.00	8.02.10	8.02.11	8.01.10	8.01.11	8.01.20
1	Customer return with high value	✓	✓	✓	✓	✓	✓	✓
2	Perform quantity adjustment with high qty	✓	✓	✓	✓	✓	✓	✓
3	Perform miscellaneous receipt or miscellaneous issue with high qty	✓	✓	✓	✓	✓	✓	✓
4	Invoice addition with high value	✓	✓	✓	✓	✗	✗	✗
5	Sales credit memo addition with high value	✓	✓	✓	✓	✗	✗	✗
6	Opportunity due	✓	✗	✓	✓	✗	✗	✗
7	Intimate when voucher Hold status changes	✓	✓	✓	✓	✓	✓	✓
8	Production order due	✓	✓	✓	✓	✗	✗	✗
9	Production order release	✓	✓	✓	✓	✗	✗	✗

S.No	Content ID	9.00.00 8.03.11 8.03.10 8.03.00 8.03.00 8.02.20	8.02.00	8.02.10	8.02.11	8.01.10	8.01.11	8.01.20
10	Create PO with high value	✓	✓	✗	✗	✓	✓	✓
11	Receivable transaction due	✓	✓	✓	✓	✓	✓	✓
12	Receive PO with high value	✓	✓	✗	✗	✓	✓	✓
13	Sales order addition with high priority	✓	✓	✓	✓	✓	✓	✓
14	Shipment due	✓	✓	✓	✓	✓	✓	✓
15	Shipment shipped late	✓	✗	✗	✗	✗	✗	✗
16	Opportunity lost	✓	✗	✓	✓	✗	✗	✗
17	Post a payment with high value	✓	✓	✓	✓	✓	✓	✓
18	Production order complete	✓	✓	✓	✓	✗	✗	✗
19	Requisition conversion	✓	✓	✓	✓	✓	✓	✓
20	Requisition addition with high value	✓	✓	✓	✓	✓	✓	✓

Workflows

These workflows are shown as tasks in the ION activity desk, Pulse and Ming.le. No feedback is sent to Infor CloudSuite.

S.No	Content ID	9.00.00	8.03.11 8.03.10 8.03.00 8.02.20	8.02.00	8.02.10	8.02.11	8.01.10	8.01.11
1	Customer addition	✓	✓	✓	✓	✓	✓	✓
2	Opportunity won	✗	✓	✗	✓	✓	✗	✗
3	Generate voucher with high value	✓	✓	✓	✓	✓	✓	✓
4	Production order stopped	✓	✓	✓	✓	✓	✗	✗
5	Supplier addition	✓	✓	✓	✗	✗	✓	✓

Distribution of alerts and tasks

ION content includes monitors, activation policies and workflows. Monitors create alerts and workflow models create tasks. Alerts and tasks can be distributed to named users, distribution groups, or to persons defined in BODs. The standard Infor CloudSuite ION monitors and workflow models use distribution groups and persons defined in BODs.

Distribution groups are configured in IFS. You can change the distribution group without having to change monitors or workflow models. The distribution groups listed here are used in the standard Infor CloudSuite content and must be created by an administrative user in IFS.

S.No	Distribution Group Name
1	Finance
2	RMA
3	Accounts Payable
4	Inventory
5	Planning
6	Accounts Receivable

7	Collections
8	Sales Operations
9	Sales
10	Marketing
11	Operations
12	Purchasing
13	Manufacturing
14	Purchase Requisitions Approval
15	Shipping Department
16	Shop floor control

At least one user must be added to each distribution group.

The email address field of the IFS user is used to send emails.

Customizing Infor CloudSuite ION content

Use ION Desk to copy and adjust standard content. Updates do not overwrite imported content. If you import a monitor, workflow or activation policy that already exists, you are asked if you want to skip or copy. If you select **Skip**, the import does not take place. If you select **Copy**, the import takes place but the imported object is renamed and the existing object is preserved. To replace content, delete the standard content before importing a new Infor CloudSuite content pack.

Chapter 3 Monitors

3

This section describes monitors, which create alerts.

The naming convention used for standard monitors is "SL_<noun>_<event>," for example, SL_ Customer return with high value.

The tables in this section describe this information about each monitor: the version when the monitor was introduced, its purpose, the monitor name, the application document, conditions/rule, action, whether a workflow can be started from alert, the distribution and the drill back.

Customer return with high value

Information	Description
Purpose	Customer return of goods with high value
Monitor	SL – Customer return with high value
Application document	CustomerReturn
Conditions/rule	Status is Closed and ExtendedAmount is greater than 10000. (The Value of ExtendedAmount can be customized according to business.)
Action	Alert is raised when the RMA Order Verification Report is printed
Start Workflow	None
Distribution	RMA, Finance, Accounts Payable
Message	RMA [DocumentID] with the status [Status] exceeds 10000 [CurrencyID]: the header amount is [ExtendedAmount] [CurrencyID]

Perform quantity adjustment or miscellaneous receipt with high quantity

Information	Description
Purpose	Perform quantity adjustment or miscellaneous receipt with high quantity
Monitor	SL – Perform Quantity Adjustment / Miscellaneous Receipt with high qty
Application document	InventoryAdjustment
Conditions/rule	Quantity is >=1000. (The quantity value can be customized according to business.)
Action	Alert is raised when Quantity Adjustment / Miscellaneous Receipt is performed with high quantity
Start Workflow	None
Distribution	Inventory, Planning
Message	Quantity more than 1000 [UM] is adjusted as Misc Receipt. Transaction No [TransNum] on Date [CreateDate] performed for Item [Item], Description [Description] ,Quanity [Quantity] [UM], ReasonCode [ReasonCode]

Perform quantity adjustment or miscellaneous issue with high quantity

Information	Description
Purpose	Perform quantity adjustment or miscellaneous issue with high quantity
Monitor	SL – Perform Quantity Adjustment / Miscellaneous Issue with high qty
Application document	InventoryAdjustment
Conditions/rule	Quantity is < = -1000. (The quantity value can be customized according to business.)
Action	Alert is raised when Quantity Adjustment / Miscellaneous Issue is performed with high quantity

Information	Description
Start Workflow	None
Distribution	Inventory, Planning
Message	Quantity more than 1000 [UM] is adjusted as Misc Issue. Transaction No [TransNum] on Date [CreateDate] performed for Item [Item], Description [Description] ,Quanity [Quantity] [UM], ReasonCode [ReasonCode]

Invoice addition with high value

Information	Description
Purpose	An invoice/debit memo for a customer is generated with a high value
Monitor	SL – Invoice addition with high value
Application document	Invoice
Conditions/rule	TotalAmount is greater than 10000 and status is Open. (The TotalAmount value can be customized according to business.)
Action	Alert is raised when sales invoice/debit memo Invoice Total Amount exceeds 10000
Start Workflow	None
Distribution	Accounts Receivable, collections, Finance
Message	Sales invoice / Debit Memo [Invoice] exceeds 10000 [Currency] : The Total Amount is [TotalAmount] [Currency]

Sales credit memo addition with high value

Information	Description
Purpose	A credit memo for a customer is generated with a high value
Monitor	SL – Sales credit memo addition with high value
Application document	Invoice
Conditions/rule	ExtendedAmount is less than or equal to -10000 and status is Open. (The ExtendedAmount value can be customized

Information	Description
	according to business.)
Action	Alert is raised when sales credit memo Extended Amount is less than or equal to -10000
Start Workflow	None
Distribution	Finance
Message	Sales Credit Memo [CreditMemo] exceeds 10000 [Currency] : The Total Amount is [TotalAmount] [Currency]

Opportunity Due

Information	Description
Purpose	Opportunity due is generated for less than 3 days away
Monitor	SL – Opportunity Due
Application document	Opportunity
Conditions/rule	DecisionDateTime is less than 3 days from today's date and StatusCode is Open. (The DecisionDateTime value can be customized according to business.)
Action	Alert is raised when opportunity due date is less than 3 days from the current date and opportunity status is Open.
Start Workflow	None
Distribution	Sales Operations, Sales, Marketing
Message	Opportunity [Opportunity] from Customer [CustomerID], [CustomerName] is due within 3 days on [DecisionDateTime] by Salesman [LeadSismanID],[SalesPersonName] & the Status is [StatusCode]

Intimate when Voucher Hold status changes

Information	Description
Purpose	Notification when voucher Hold status changes

Information	Description
Monitor	SL – Intimate when Voucher Hold Status changes
Application document	PayableTransaction
Conditions/rule	Voucher status is changed to Hold
Action	Notification when the voucher Status is changed to Hold
Start Workflow	None
Distribution	Operations, Purchasing, Finance
Message	Voucher document [DocumentID] for an Amount of [TotalAmount] [CurrencyID] has been put on Hold.

Production order due

Information	Description
Purpose	Production order created with a due date of tomorrow
Monitor	SL – Production order due
Application document	ProductionOrder
Conditions/rule	Job order status is Released and DueDateTime is 1+today date. (The DueDateTime value can be customized according to business.)
Action	Notification when the job order is 1 day before DueDateTime.
Start Workflow	None
Distribution	Shop Floor Control, Planning, Manufacturing
Message	Production order [JobNum] for Item [Item] is due on [DueDateTime]

Production order release

Information	Description
Purpose	Production order to be released 1 day before the forecast date
Monitor	SL – Production order release

Information	Description
Application document	ProductionOrder
Conditions/rule	ForecastStartDateTime is tomorrow and status is Firm
Action	Notify when the job order is 1 day before ForecastStartDateTime
Start Workflow	None
Distribution	Shop Floor Control, Planning, Operations, Manufacturing
Message	Production order [JobNum] StartDate is [ForecastStartDateTime], Please see to it the Order is Released

Create PO with high value

Information	Description
Purpose	Purchase order created with high value
Monitor	SL – Create PO with high value
Application document	PurchaseOrder
Conditions/rule	ExtendedAmount is greater than 10000 and the status is Planned Open or Unapproved or Pending. (The ExtendedAmount value can be customized according to business.) Note: Pending status is applicable for version 8.02.00
Action	Purchase order is printed with an ExtendedAmount greater than 10000 and the status is Open, Unapproved or Pending.
Start Workflow	None
Distribution	Purchasing, Finance
Message	Purchase Order [PoNum] Order Date [OrderDate] for Vendor [VendNum] ,[VendorName] has exceeded 10000 [currencyID] and the Total Amount is [TotalAmount] [currencyID]

Receivable transaction due

Information	Description
Purpose	Invoice for customer is due in 3 days
Monitor	SL – Receivable transaction due
Application document	ReceivableTransaction
Conditions/rule	Date is 3 days before DueDate and ExtendedAmount is greater than 10000 and status is Open. (The ExtendedAmount value and the number of days before DueDate can be customized according to business.)
Action	Invoice for customer is due in 3 days and ExtendedAmount is greater than 10000
Start Workflow	None
Distribution	Accounts Receivable, Collections, Operations
Message	Invoice [InvNum] from Customer [Customer],[Name] is due in 3 days, for amount [ExtendedAmount] [currencyID]. The Due Date is [DueDate]

Receive PO with high value

Information	Description
Purpose	Receive a PO with high value quantity greater than 10000
Monitor	SL – Receive PO with high value
Application document	ReceiveDelivery
Conditions/rule	Quantity has exceeded the receiving quantity of 10000 and status is Received. (The quantity received value can be customized according to business.)
Action	Receive the PO
Start Workflow	None
Distribution	Operations
Message	Item [ID] received from Vendor [VendName] towards the PO[RefNum] - Line [LineNumber] exceeds 10000[UM]. The Received Qty is [Quantity] [UM]

Sales order addition with high value

Information	Description
Purpose	Customer order price exceeds high value
Monitor	SL – Sales order addition with high value
Application document	SalesOrder
Conditions/rule	Customer order status is Open or Ordered and Total Price is >10000. (The TotalPrice value can be customized according to business.) Note: The status Ordered is applicable for version 8.02.00.
Action	Print the Customer Order Verification Report
Start Workflow	None
Distribution	Planning
Message	New Customer Order [CoNum] Created for Customer [CustNum] that exceeds 10000 [currencyID], The Total Amount is [TotalPrice][currencyID]

Shipment due

Information	Description
Purpose	Customer order is not yet shipped and is due in 3 days
Monitor	SL – Shipment Due
Application document	SalesOrder
Conditions/rule	Status is Open or Ordered and DueDate is 3 days after current date. (The number of days after DueDate can be customized according to business.) Note: The status Ordered is applicable for version 8.02.00
Action	Print the Customer Order Verification Report
Start Workflow	None
Distribution	Operations, Shipping Department
Message	Shipment for Customer Order [CoNum] is due within 3 days

Shipment shipped late

Information	Description
Purpose	Customer order is shipped late
Monitor	SL – Shipment Shipped Late
Application document	Shipment
Conditions/rule	ShippedDate is greater than ScheduledShipDateTime + 3 days and status is Shipped. (The number of days for the ShippedDate beyond ScheduledShipDateTime can be customized according to business.)
Action	When Shipment is done
Start Workflow	None
Distribution	Operations
Message	Shipment for Customer Order [CoNum], Line [LineNo], Release [RelNo] is shipped late by 3 or more Days

Opportunity lost

Information	Description
Purpose	Alert is triggered when an opportunity is lost
Monitor	SL – Opportunity Lost
Application document	Opportunity
Conditions/rule	[StatusCode] is ‘Lost
Action	Alert is created when an opportunity status is set to Lost
Start Workflow	None
Distribution	Operations, Sales
Message	Opportunity [Opportunity] is Lost with Customer [Customer], [CustomerName]

Post a payment with high value

Information	Description
Purpose	Post a payment of high value
Monitor	SL – Post a payment with high value
Application document	PayableTransaction
Conditions/rule	TotalBaseAmount is greater than 10000 and status is Paid. (The TotalBaseAmount value can be customized according to business.)
Action	Alert is created when a PO TotalBaseAmount is greater than 10000 and status is Paid
Start Workflow	None
Distribution	Accounts Payable, Finance
Message	Voucher [Voucher] for Vendor [VendNum] exceeds 10000 [currencyID] and is Paid. The Total Amount is [TotalBaseAmount][currencyID]

Production order complete

Information	Description
Purpose	Alert is created when the job order is completed
Monitor	SL – Production order Complete
Application document	ProductionOrder
Conditions/rule	Status is Complete
Action	Alert is created when the status is Complete
Start Workflow	None
Distribution	Operations, Planning
Message	Job [JobNum] is Completed

Requisition conversion

Information	Description
Purpose	Alert is created when the requisition is converted to a PO
Monitor	Requisition Conversion
Application document	Requisition
Conditions/rule	Status is Converted or Closed Note: The status Closed is applicable in version 8.02.00
Action	When Requisition is converted to PO
Start Workflow	None
Distribution	Purchasing
Message	Requisition [ReqNum] is converted to Purchase Order

Requisition addition with high value

Information	Description
Purpose	Purchase requisition cost exceeds 10000
Monitor	Requisition addition with high value
Application document	Requisition
Conditions/rule	ReqCost is greater than or equal to 10000. (The ReqCost value can be customized according to business.)
Action	Print the requisition with either the Purchase Requisition Report or the PO Requisition Report forms, or convert a requisition to a purchase order
Start Workflow	None
Distribution	Purchasing, Purchase Requisition Approval
Message	Requisition [ReqNum] exceeding 10000[currencyID] is added or updated by [RequesterName] on [ReqDate]. Requisition Amount is [ReqCost] [currencyID]

Chapter 4 Workflow models

4

This section describes activation policies and workflow models.

An activation policy describes the conditions that BODs must meet and the workflow model that is started or canceled. Workflow models describe when to create tasks and to whom the tasks should be distributed.

The naming convention used for standard activation policies and standard workflow models is SL_<noun>_<event>. For example: SL_Opportunity_Won

By default, activation policies and workflow models have the same name.

Activation policies can start or cancel workflows. Activation policies that cancel a workflow get the postfix "_Cancel." For example, " SL_Requisition_Addition_With_High_Value _Cancel."

Do not use the prefix SL for customized, standard content or customer-defined content.

The tables in this section describe information about each workflow: when the workflow and activation policy was introduced, the purpose, workflow and activation policy name, application document, conditions/rule, action, distribution and drill back.

SL – Customer addition

Information	Description
Purpose	New customer added to master
Workflow	New customer addition to master
Application document	CustomerPartyMaster
Conditions/rule	The workflow is started when a new customer is added. Note: The SyncCustomerPartyMaster BOD is not created when a Customer is added in SL 8.02.20, SL 8.03.00, SL 8.02.00, SL 8.02.10, SL 8.02.11, SL 8.01.10, SL 8.01.11 and SL 8.01.20. The BOD verb is Process. To change the BOD verb to Sync, see “Changing the BOD verb from Process to Sync” on page 31.

Information	Description
Action	The workflow is started when a new customer is added.
Distribution	Operations
Message	New Customer [CustNum] has been added. Please verify

SL – Opportunity won

Information	Description
Purpose	Workflow triggered when an opportunity is won
Workflow	SL – Opportunity Won
Application document	Opportunity
Conditions/rule	Workflow is started when the opportunity status is set to Won
Action	The workflow is started when an opportunity status is set to Won.
Distribution	Operations
Message	Opportunity [Opportunity] is Won with the Customer [Customer], [CustomerName]. Please verify

SL – Generate voucher with high value

Information	Description
Purpose	Post a voucher with high value
Workflow	SL – Generate voucher with high value
Application document	PayableTransaction
Conditions/rule	TotalBaseAmount is greater than 10000 and status is Vouchered. (The TotalBaseAmount value can be customized according to business.)
Action	The workflow is started when a voucher TotalBaseAmount is greater than 10000 and the status is Vouchered.
Distribution	Finance
Message	Voucher[Voucher] for the Vendor [VendNum] exceeds 10000

	[currencyID]. The Status is Vouchered & the Total Amount is [TotalBaseAmount]. Please Verify

SL – Production order stopped

Information	Description
Purpose	Notify when the job order is stopped
Workflow	SL – Production order stopped
Application document	ProductionOrder
Conditions/rule	Job order status is Stopped
Action	The workflow is started when the job order status is set to Stopped.
Distribution	Shop Floor Control, Manufacturing, Operations, Planning
Message	Job [JobNum] is Stopped. Please verify

SL – Supplier addition

Information	Description
Purpose	New supplier added to master
Workflow	New Supplier addition to master
Application document	SupplierPartyMaster
Conditions/rule	The workflow is started when a new supplier is added. Note: The SyncSupplierPartyMaster BOD is not created when a supplier is added in SL 8.02.00, SL 8.01.10, SL 8.01.11 and SL 8.01.20. The BOD verb is Process. To change the BOD verb to Sync, see “Changing the BOD verb from Process to Sync” on page 31.
Action	The workflow is started when a new supplier is added.
Distribution	Purchasing
Message	Vendor [VendNum] [Name] is newly added. Please verify

Appendix A Changing the BOD verb from Process to Sync

A

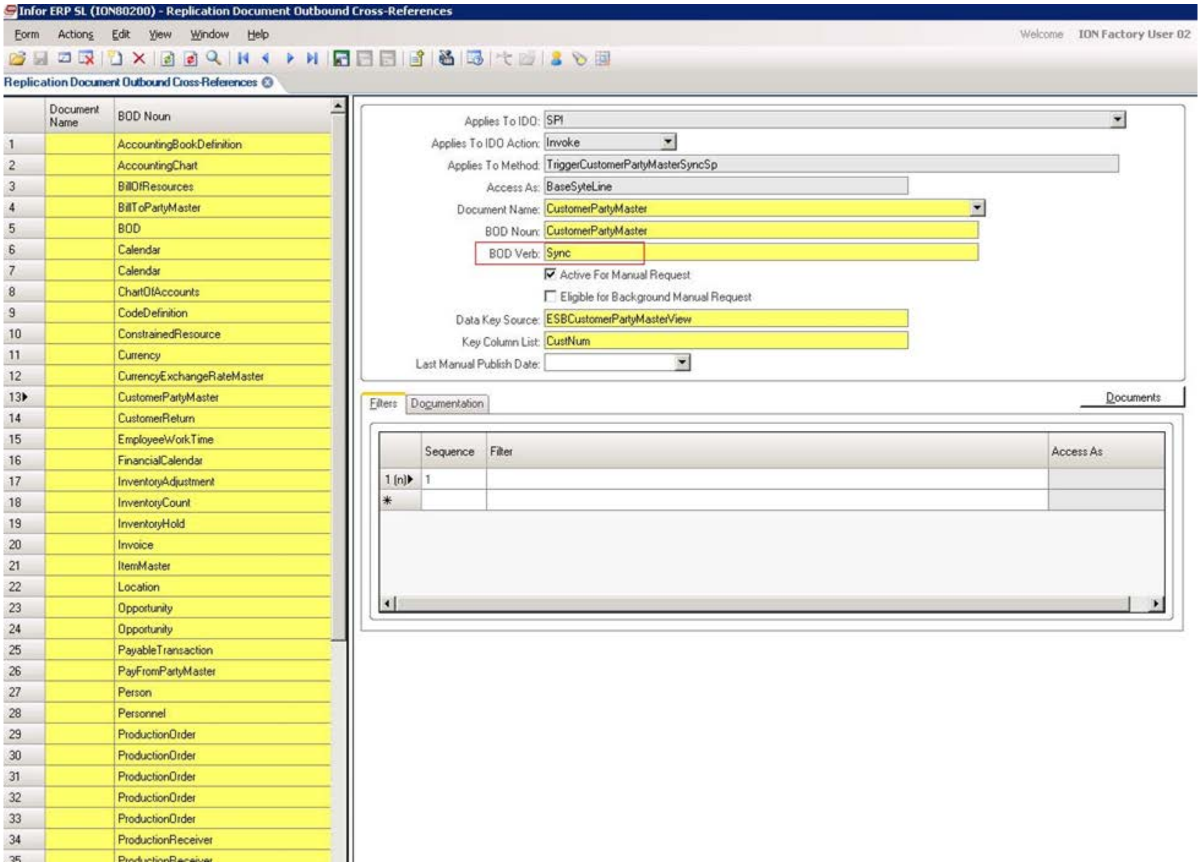
To change the BOD verb from Process to Sync:

1 Log in to the Infor CloudSuite application.

2 Open the Replication Document Outbound Cross References form.

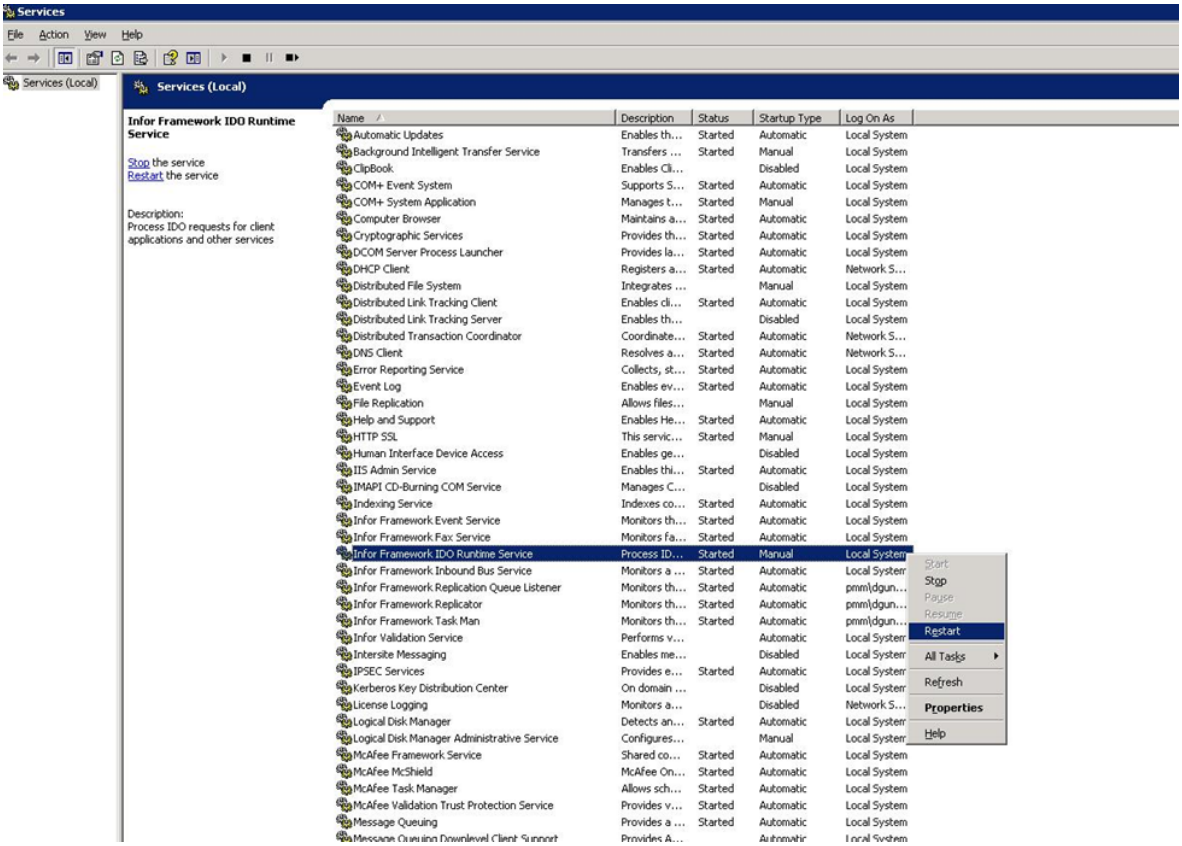
3 Select the BOD noun CustomerPartyMaster and change the BOD verb from Process to Sync. Save your changes.

4 Select the BOD noun SupplierPartyMaster and change the BOD verb from Process to Sync. Save your changes.



5 On the server, select **Start > Run**, specify **Services.msc** and click **OK**.

6 Select **Infor Framework IDO Runtime Service**, right-click on it, and select **Restart** to restart the service.



7 In Infor CloudSuite, create a new customer in the Customers form.

8 Open the Replication Document Outbox form and verify that a SyncCustomerPartyMaster BOD is generated.

9 Create a supplier in the Vendors form.

10 Open the Replication Document Outbox form and verify that a SyncSupplierPartyMaster BOD is generated.