Infor CloudSuite Business Configuration Guide for Infor Ming.le

CloudSuite Business 9.00.30

Publication Information

Release: Infor CloudSuite Business 9.00.x

Publication date: July 29, 2016

Contents

About this guide

This document describes the configuration and explains the information needed to add Infor CloudSuite Business as a solution in Infor Ming.le^{TM}. It also describes the integration processes that are required to send alerts from Infor CloudSuite Business to Infor Ming.le, and to share users and roles (authorization groups) between Infor CloudSuite Business and Infor Ming.le.

Intended audience

This guide is intended for system administrators or consultants who are responsible for implementing CloudSuite Business and Infor Ming.le in their organization. Your system administrators must have a working knowledge of these products:

- CloudSuite Business
- Infor Ming.le

Related documents

You can find the documents in the product documentation section of the Infor Xtreme Support portal, as described in “Contacting Infor” on page 3:

- *Infor Ming.le Installation and Configuration Guide for Active Directory* or *Infor Ming.le Installation and Configuration Guide for Active Directory Federation Services*
- *Infor Ming.le User Guide*
- *Infor Ming.le Administration Guide*
- *Infor CloudSuite Business Installation Guide*

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at http://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.

Requirements

For an **on-premises** installation of Infor Ming.le and CloudSuite Business, ensure that these requirements are met:

- If you plan to use Infor Federation Services (IFS) and Microsoft AD FS to allow access to CloudSuite Business and Infor Ming.le, follow the steps to install AD FS and IFS in the *Infor Ming.le Guide to Installation and Configuration for Active Directory Federation Services.*
- The CloudSuite Business Web client must be installed on a server. In order to access online help from CloudSuite Business in Infor Ming.le, the utility server where the help files reside must be installed on the same physical server as the Web client.
- If you are using IFS and AD FS with the CloudSuite Business Web Client, follow the steps to set up Web rendering with AD FS as described in the *Infor CloudSuite Business Installation Guide*.
- If you are using an older version of Infor Ming.le, SharePoint must be installed. You can install SharePoint in standalone mode, where you must create local users on the SharePoint server and grant them access. Or you can install SharePoint in farm mode, where users can use their existing domain names in Infor Ming.le and its sub-sites.

  Infor Ming.le must be installed on a SharePoint server, and all of its prerequisites must be met.
- If you allow the use of domain user names, and you want users to be automatically logged into CloudSuite Business and Infor Ming.le rather than having to fill in a login dialog each time, then:
  - Any CloudSuite Business users who plan to use Infor Ming.le must be set up as users in Active Directory with a domain\username, for example, **infor\bsmith**. See the Microsoft documentation on Active Directory for more information.
  - In Infor Ming.le/IFS, these users must be set up with access to the Infor applications.
  - In CloudSuite Business, one of these cases must be true:
    - SecurityUserMaster BODs must be sent from Infor Ming.le and consumed by CloudSuite Business as described in “Using BODs to share users and roles between CloudSuite Business and Infor Ming.le” on page 11.
    - In the Users form, the Workstation Domain/ID field for each user must contain the same user name (with *no domain name*) as in Active Directory, for example, **bsmith**.
- Download and install APAR 206780 for Infor CloudSuite. This APAR adds the Infor-SystemAdministrator group.
- The CloudSuite Business and Infor Ming.le servers must be able to communicate.

Overview

The CloudSuite Business Web client can run as an application inside the Infor Ming.le shell. Be aware that there are some differences between the CloudSuite Business Web client and the CloudSuite Business smart client. These differences are documented in the CloudSuite Business online help.

Configuring Infor Ming.le to work with your application

Use the information in this section to configure Infor Ming.le for use with the application.

Deploying the CloudSuite Business solution in Infor Ming.le

If you installed Infor Ming.le **on-premises**, follow the instructions in this section to deploy the application in Infor Ming.le. If you are running **in the Cloud**, skip this section; your Cloud Ops team performed this task.

Select the **Infor Ming.le-SyteLine Plug-in** option during the Infor Ming.le installation. This creates a CloudSuite Business sub-site, adds the application to the left pane in Infor Ming.le, and adds a CloudSuite Business icon to the masthead.

Provide this CloudSuite Business information when you run the Infor Ming.le configuration wizard, as described in the *Infor Ming.le Installation and Configuration Guide*:

Title

Specify **Infor Ming.le-SyteLine Plug-in** as the name of the deployed application

Site

Use the drop-down list to specify the SharePoint sub-site associated with CloudSuite Business. The completed path should look like this: **http://*server:port*/syteline** where *server* and *port* are the SharePoint server and port where Infor Ming.le is installed.

Logical ID

Specify the logical ID for the CloudSuite Business site associated with this instance of Infor Ming.le. The logical ID is in the format **lid://infor.syteline.*site***, where *site* is your CloudSuite Business site name, for example, oh. See the CloudSuite Business online help for more information about logical IDs.

Application version

Specify the version of CloudSuite Business, for example, **9.0**.

Host Name

Specify the name of the CloudSuite Business web/utility server. This host name is also used for drillbacks to the application and for accessing the online help and documents from the Documentation Help web part.

Note: The host name entered in Infor Ming.le must exactly match both the web server referenced in the Application URL specified in the Web rendering section of the CloudSuite Business Configuration Wizard and the host name specified on the server’s security certificate. The URL names are case-sensitive. Also, if you use a fully-qualified name, for example, ***server*.infor.com**, in one instance, you must use it for all instances.

Port

Specify the port used by the CloudSuite Business web/utility server. Typically this is **80** for HTTP, and **443** for HTTPS.

Context

Leave this field blank for CloudSuite Business.

Use HTTPS

Select this option if SSL is enabled for the CloudSuite Business user interface. If CloudSuite Business is using SSL, ensure that you entered the SSL-related port number in the Port field.

Default Tenant ID

Specify the tenant identification assigned to the application, if applicable. Leave this blank for CloudSuite Business.

Using web browsers

Use Internet Explorer or Firefox as your browser, because Chrome does not support Silverlight.

Avoiding multiple browser sessions/tabs per tenant

In a Cloud environment, you can only have one Infor Ming.le tenant session open at a time in the browser. You cannot open a session for a different tenant in another tab while the first session is still open.

Setting up compatibility for Internet Explorer versions

Note: Follow these steps only if you are using Internet Explorer as your browser and you are running Infor Ming.le on-premise.

Infor Ming.le uses Internet Explorer 8 browser settings, and CloudSuite Business runs only in IE 10 or 11. Therefore, before you can run CloudSuite Business in Infor Ming.le, the system administrator must set up IE 9 compatibility on the CloudSuite Business web server. Use these steps:

1. To open the Infor Ming.le Property Bag Configuration tool, select **Infor Ming.le > Infor Ming.le Property Bag Configuration** from your applications (programs) menu. Right-click and select **Run as Administrator**.
2. Sign in using the SPFarm account.
3. Select Infor Ming.le Sharepoint as your Web Application.
4. Select the site collection where you want to make this IE mode switch. This should be the server where Infor Ming.le is installed.
5. Click the New Property button next to the Site Collection field.

6 Specify **Infor_Core_BrowserCompatibilityMode_Enabled** in the **Property Name** field, and set the **Value** to **IE=Edge**.

7 Click **Submit**.

8 Use this full URL when you access Infor Ming.le:

http://*hostname*/SitePages/InforSuite.aspx or

https://*hostname*/SitePages/InforSuite.aspx

Downloading and Configuring the In-Context BI Content for Infor Ming.le

Follow this step only if you are using Infor Ming.le **on-premises**.

CloudSuite Business includes the ability to display In-Context BI metrics and reports in Infor Ming.le. In order to display the metrics and reports, download the **Infor SyteLine 9 InContext BI** option from the Download Center on Infor Xtreme. The downloaded .iso file contains a setup.exe file that should be run according to the instructions in "Configuring Infor ION BI for the Infor Ming.le In-Context BI context application" in the *Infor Ming.le Installation and Configuration Guide*.

For information about using the In-Context BI content with CloudSuite Business, see the *Infor CloudSuite Business User Guide for In-Context BI*.

Configuring user access (on-premises)

Use the steps in this section if Infor Ming.le and CloudSuite Industrial are installed on-premises.

Configuring CloudSuite Business application and user properties in Infor Federation Services

If you installed Infor Ming.le with IFS and Microsoft AD FS, see the *Infor Ming.le Administration Guide* to configure the CloudSuite Business application and the necessary user properties in the IFS application, so that users have the claim types that are required to access CloudSuite Business through Infor Ming.le.

Configuring the application and Infor Ming.le for Active Directory

Note: If you performed the Infor Ming.le installation in SharePoint **standalone** mode, skip this section and refer instead to the *Infor Ming.le Installation and Configuration Guide* for information about how to grant access to Infor application sub-sites in the SharePoint standalone mode.

Configuring Active Directory authentication

To allow users to access the Infor suite site, which includes Infor Ming.le and CloudSuite Business, you must first configure their accounts with rights that grant them access to the site in SharePoint. Infor Ming.le expects that upon sign-in, the user belongs to a predetermined security group in the Active Directory that is used by the domain.

For access to the Infor Ming.le and CloudSuite Business sites, all users must have their domain accounts associated with these predetermined Active Directory security groups:

Infor Application	Active Directory Security Group
Infor Ming.le	Infor
Infor CloudSuite Business	CloudSuite Business Users

You create these security groups in Active Directory, outside of SharePoint or Infor Ming.le. See the Microsoft documentation about Active Directory for information about how to configure user accounts with security groups. Also see the *Infor CloudSuite Business Installation Guide* for information about how to configure CloudSuite Business with Active Directory.

Configuring user access to the CloudSuite Business sub-site

After you create the required security groups in Active Directory, complete these steps to configure user access to the CloudSuite Business sub-site in SharePoint:

1. Sign into the Infor Ming.le site by using the site collection administrator account you defined in the Infor Ming.le installation. See the *Infor Ming.le Installation and Configuration Guide*.
2. Click the CloudSuite Business name in the Infor Ming.le left pane to access the CloudSuite Business sub-site.
3. Select **Site Actions > Site Permissions** and click **SyteLine**.
4. The list of groups may already have an entry for CloudSuite Business. If this entry is in the format *Domain_Name*\SyteLine Users, you can cancel this process and skip the rest of these steps. Otherwise, continue with the next step.
5. To add a CloudSuite Business user group, click **New**.
6. In the Grant Permissions dialog, specify **SyteLine Users**, which is the security group that is required for users to have access to the CloudSuite Business sub-site in SharePoint.
7. Click **Check Names** in the lower right corner of the text box. If the name is valid, it is updated to the *Domain_Name*\SyteLine Users format.

8 Click **OK**.

Configuring system administrator access to Infor CloudSuite

Infor Ming.le provides a default Infor-SystemAdministrator role that allows for full access to all products that are linked to Infor Ming.le. Infor CloudSuite has an Infor-SystemAdministrator group that allows access to all Infor CloudSuite forms.

Configuring CloudSuite Business automatic workstation login in Infor Ming.le

If you want Infor Ming.le users to automatically log in to CloudSuite Business when they access CloudSuite Business within Infor Ming.le, rather than filling in the CloudSuite Business login dialog, follow these steps:

1 On the Web Client screen in the CloudSuite Business Configuration Wizard, select **IIS Authentication** as the authentication type.

2 Set up IIS for Windows authentication, which then uses Active Directory to authenticate users. In IIS, enable Active Directory security.

3 Specify all CloudSuite Business users in your Active Directory domain.

4 In the CloudSuite Business Users form for each user, specify the active directory account in the Workstation Domain/ID field, in the form *domain*/*user*.

5 When users first access CloudSuite Business through Infor Ming.le, they will see the CloudSuite Business login dialog. On that dialog, they must select the configuration they want to use, and select **Use Workstation Logon**. From then on they are automatically logged into CloudSuite Business when they select CloudSuite Business from the left pane in Infor Ming.le.

Configuring user access (Cloud)

Use the steps in this section if you are using Infor Ming.le and CloudSuite Industrial in the Cloud.

Infor Ming.le user setup

Your Cloud Ops team provided a URL and an initial system administrator user login. Use those credentials to log in and perform these steps:

1 Click on your user name in the toolbar and select **User Management** from the menu.

2 Click **+** to add a new user.

3 Specify the user's first and last name and email address. The user will log into Infor Ming.le using this email address, and all notifications will be sent to this address.

4 Select **Send Invitation** if you want to send an invitation email to this user immediately after you create the user record. You can choose to send the invitation email later, if you want to wait until you set up other features.

The invitation contains a URL that users can click to access Infor Ming.le and set their Infor Ming.le password. This password provides access to the Infor Ming.le web site; what the user can access inside Infor Ming.le is determined by the roles you set for the user.

5 Click the Save button.

6 In the list of users, click the arrow icon next to the user's name to further configure the user in Infor Ming.le.

7 In the **Security Roles** tab, select the **Ming.le Enterprise** role to allow access to Infor Ming.le.

8 Click **+** to add more roles:

- If this user is an administrator, filter for **Admin** and then select the appropriate roles. Usually this will include **Infor-SystemAdministrator**, which allows access to any form in CloudSuite Business.
- If this user is a regular user, select the appropriate roles. The default groups from CloudSuite Business are also listed as roles here. At a minimum, the user should be assigned to the **Standard Forms** role. which allows access to some basic CloudSuite Business forms.
- To specify what the user can do within Infor Ming.le, filter for **Mingle** and then select the appropriate roles.

See the *Infor Ming.le Administration Guide* for descriptions of the available Infor Ming.le roles. See the "System Authorizations" help topic in CloudSuite Business for a list of the forms or functions that are accessible to each CloudSuite Business group/role.

9 Click **Add** to add the roles to the list.

10 Select the roles to set for this user and click the Save icon in the **Security Roles** tab.

Note: The Save button in the header area only saves the information from the header area. The Save button in the tab area only saves the information from the tab area.

11 Click the **Additional Properties** tab to view the **IFS Person ID** and **User GUID** that are assigned to this user. This information is used to identify the user in BODs that share user information between Infor Ming.le and CloudSuite Business.

For more information about this, see "Using BODs to share users and roles between CloudSuite Business and Infor Ming.le" on page 11.

CloudSuite Business Setup

The roles that you set up for each user in Infor Ming.le are linked to the default authorization groups in CloudSuite Industrial. However, you should verify in CloudSuite Industrial that the groups are set up correctly for each user, and you can set up and assign additional groups in CloudSuite Industrial. You also must verify that all licenses are applied, and assign the appropriate licenses to each user within CloudSuite Industrial.

1 In Infor Ming.le, click the App Menu icon in the toolbar.
2 Select Infor CloudSuite.
3 Select the Infor CloudSuite configuration to log into.

   Because single sign-on is set up, no additional user name or password is required when you log into the application from Infor Ming.le.

4 Open the License Management form and ensure that the appropriate licenses are applied and the License Modules are displayed.

   If not, contact Infor Support.

5 Open the Users form and make sure the new user is listed.

   If not, verify in ION Desk that the appropriate BOD is being sent through a document flow from Infor Ming.le to Infor ION. See “Using BODs to share users and roles between CloudSuite Business and Infor Ming.le” on page 11. If you cannot verify this, contact Infor Support.

6 Verify this information on the Users form:
   - User Name matches the Email address (IFS Person ID) in Infor Ming.le.
   - Workstation Domain/ID matches the GUID in Infor Ming.le.
   - Roles you set in Infor Ming.le are set up as Groups for this user. You can change the user’s groups here.

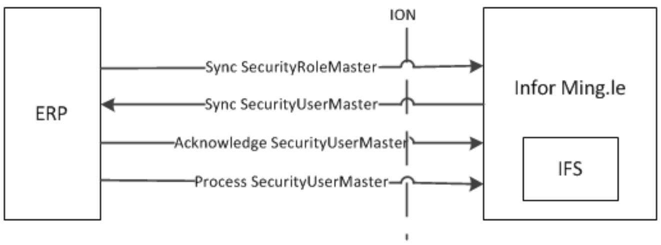
7 Click **User Modules** and set up the appropriate license modules for the user. At a minimum, all users must be assigned the SyteLineTrans license module.
8 Save your changes.
9 Ask the user to log into CloudSuite Business and use the User Information form to specify a new password.

   This password is used only to access the application outside of Infor Ming.le, for example to access the CloudSuite Business Excel Plug-in.

Using BODs to share users and roles between CloudSuite Business and Infor Ming.le

When you create or edit an authorization group in CloudSuite Business, a matching security role can be set up automatically in Infor Ming.le and IFS. Additionally, when you create a user in Infor Ming.le and IFS, the information associated with the user's Identity2 (GUID) can be used to automatically set up some user information in CloudSuite Business. This is handled through BODs that are passed through Infor ION.

These BODs are sent back and forth between CloudSuite Business and Infor Ming.le if a document flow and connection points are set up in ION Connect:



Download and import the sample sl_to_from_mingle.xml file into ION Desk and modify the connection points:

- Update the CloudSuite Business connection point as described in the *Infor CloudSuite Configuration Guide for Infor ION*.
- Update the Infor Ming.le connection point to match the connection point that was included in the document flow that is described in “Importing the Infor ION Document Flow to Infor Ming.le Enterprise” in the *Infor Ming.le Installation and Configuration Guide for ActiveDirectory Federation Services*.

Sending authorization groups from CloudSuite Business to Infor Ming.le

When you create or edit an authorization group in the Groups form, a Sync SecurityRoleMaster BOD is generated. The information from this BOD is used in Infor Ming.le to automatically create a matching security role.

If you create a security role in Infor Ming.le that does not exist in CloudSuite Business, you must manually create a matching authorization group in CloudSuite Business. Also, if you delete an authorization group or role in either product, you must also delete the group or role in the other product.

Sending user information from Infor Ming.le to CloudSuite Business

You can set up a user in Infor Ming.le and IFS. When you do this, a Sync SecurityUserMaster BOD is sent from Infor Ming.le that contains the user name, Workstation Login, creation date, status, description, email address, and the roles (groups) to which the user is assigned.

When CloudSuite Business receives the Sync SecurityUserMaster BOD, these actions occur:

- For a new user that does not exist in CloudSuite Business:
  - A new user record is added
  - The group authorizations for that user are added.
  - A primary email type description is added that contains the user’s email address.
  - The user’s Given Name and Surname values from Infor Ming.le/IFS are combined into the CloudSuite Business **User Description** field, separated by a space.
- For an existing user in CloudSuite Business, if the existing user ID has not changed:
  - The existing user group authorizations are deleted.

- The user status, user descriptions, primary email address, and user group authorizations are updated.
- For an existing user in CloudSuite Business, if the existing user ID has changed:
  - The record for the user with the matching Workstation Login is set to a status of disabled, and the Workstation Login for the user is cleared.
  - A new user record is created, copying the user information from the disabled record. Any existing user group authorizations in CloudSuite Business are deleted, and then the groups from the BOD are added. The status, email, and description are updated if they have changed.
- A Sync SecurityUserMasterAcknowledge BOD is sent back to Infor Ming.le.

Sending user information from CloudSuite Business to Infor Ming.le

When any of this information is manually added or updated in CloudSuite Business for a user, a Process SecurityUserMaster BOD is published by CloudSuite Business:

- User login status
- User Description: A value is required in this field if you are passing user information from CloudSuite Business to Infor Ming.le/IFS through the Process SecurityUserMaster BOD. The field must contain values separated by a space. The first value becomes the Given Name in Infor Ming.le/IFS. Everything after the space becomes the Surname in Infor Ming.le/IFS. For example, if the CloudSuite Business **User Description** is **Tom Van Winkle**, **Tom** is the Given Name and **Van Winkle** is the Surname in Infor Ming.le/IFS.
- Workstation login
- Primary email address: A value is required in this field if you are passing user information from CloudSuite Business to Infor Ming.le/IFS through the Process SecurityUserMaster BOD.
- Group authorizations

(However, if the user information was changed in CloudSuite Business because of an incoming Sync SecurityUserMaster BOD from Infor Ming.le, the Process SecurityUserMaster BOD is not published.)

Configuring application drillbacks

To allow Infor Ming.le users to launch applicable forms with CloudSuite Business directly from an Infor Ming.le object, an XML document must be imported to create the mapping from the object type to the appropriate CloudSuite Business form. Follow these steps to import a predefined list of drillbacks:

1. Log on to Infor Ming.le as the Infor Ming.le administrator.
2. Click the **Admin** link near your profile picture.
3. On the Admin page, click **Manage Drillbacks**.
4. Click **Choose File**.

5 Locate the SyteLineMingleDrillbackViewData.xml file. This file can be downloaded from the Infor Product Download Center.

6 Click **Open** and **OK**.

7 Click **Upload Drill Back XML** to complete the process.

Note: The document flow between CloudSuite Business and Infor Ming.le must be activated in Infor ION.

Available drillbacks

"Drillback" refers to the ability to launch a CloudSuite Business form in Infor Ming.le from a link based on the document ID for the relevant BOD. A link is defined by a "view" for each type of BOD noun - for example, SalesOrder, or ItemMaster - and is then configured to launch a specific CloudSuite Business form for that noun. Not all nouns have a drillback view available.

This table lists the views that are currently available and the CloudSuite Business form that is launched:

Noun	Drillback View	CloudSuite Business Form
BillToPartyMaster	BillToPartyView	Customers
ContactMaster	ContactMasterView	CustomerSalesContactCrossReferences
CustomerPartyMaster	CustomerView	Customers
CustomerReturn	CustomerReturnView	RMAs
InventoryAdjustment	AdjustmentOrderView	MaterialTransactions
ItemMaster	ItemView	Items
PayFromPartyMaster	PayFromPartyView	Customers
Person	EmployeeView	Salespersons
PurchaseOrder	PurchaseOrderView	PurchaseOrders
Quote	QuoteView	Estimates
ReceiveDelivery	ReceiptView	MaterialTransactions
RemitToPartyMaster	RemitToPartyView	Vendors
Requisition	RequisitionView	PurchaseOrderRequisitions
SalesOrder	SalesOrderView	CustomerOrders
ShipFromPartyMaster	ShipFromPartyView	Vendors

Noun	Drillback View	CloudSuite Business Form
Shipment	ShipmentView	MaterialTransactions
SupplierPartyMaster	SupplierView	Vendors

Loading the BODs for drillbacks

In order to use these drillbacks, an initial load of the BODs listed in the table above must be performed, using the Replication Document Manual Request Utility in CloudSuite Business. For more information, see the *Infor CloudSuite Business Configuration Guide for Infor ION*.

Verifying the configuration

Use these steps to verify the configuration:

Running CloudSuite Business from Infor Ming.le

1 Sign into Infor Ming.le as a user.

2 Use the assigned icon to open the CloudSuite Business application.

3 From the root site of your Infor Ming.le site collection, select **CloudSuite Business** from the navigation panel.

4 Click **Connect**. The CloudSuite Business session opens.

5 Log in using your CloudSuite Business login and password.

You can also use the assigned icon to open the CloudSuite Business session.

Verifying a drillback

Drillbacks are displayed in the Infor Ming.le user interface as links that open CloudSuite Business to a specific form filtered for specific results. For example, an Infor Ming.le search result, alert, or share can include a link to the form with a reference to specific CloudSuite Business data.

To verify that the drillbacks are working:

1 Sign into Infor Ming.le as a user and run the CloudSuite Business application.

2 Open a form that allows a drillback, for example, Customers.

Note: For a form to allow drillback, the drillback must be configured as described in “Configuring application drillbacks” on page 13 and the form must be sending a business context message as described in “Understanding business context messages.” The user interface does not indicate which forms allow you to share a drillback.

3 Click the Share icon in the upper right part of the Infor Ming.le screen.

4 On the Share overlay, verify that the drillback icon is displayed, add a comment and click **Share**.

5 In the Infor Ming.le feed, find the message that contains the drillback icon and click the drillback to verify that it is working.

Understanding business context messages

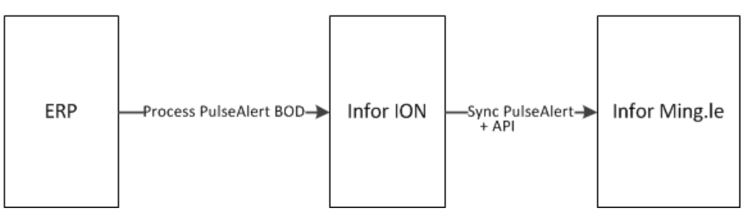
A business context message is a JSON message that is sent from a CloudSuite Business form, field, or other user interface object for the purpose of establishing the current context. These messages can be used for many contextual purposes within Infor Ming.le.

CloudSuite Business uses business context messages to determine the metrics and reports to display in the Infor Ming.le In-Context BI application when a certain CloudSuite Business form is displayed. For more information about the available metrics and reports, see the *Infor CloudSuite Business User Guide for In-Context BI*.

To find the business context message that is sent by a specific object, use the Infor Ming.le Context Viewer web part.

Displaying alerts from CloudSuite Business in Infor Ming.le

Infor CloudSuite can send PulseAlert BODs to Infor ION that can be displayed as alerts in Infor Ming.le.



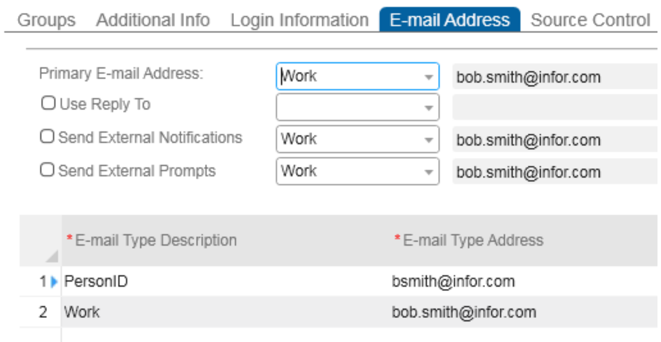
A Process PulseAlert BOD is generated when an event associated with one of these publications occurs in Infor CloudSuite:

Publication	Description	Where Defined
CustomerCreditHoldAlert	A customer was put on credit hold	Event: IdoOnItemUpdate, Seq 16
CustomerInteractionFollowUpAlert	A follow-up is needed to a customer interaction. Key Value 1 defines the customer number.	Event: CustomerInteractionFollowupAlert, Seq 1
CustomerOrderCreditHoldAlert	A customer order was put on credit hold	Event: IdoOnItemUpdate, Seq 11
CustomerShipmentAlert	An order was shipped to a customer (for specific orders/ customers)	Event: IdoOnItemUpdate, Seq 12
DCShopFloorTransactionErrorAlert	A specified number of Data Collection shop floor transaction errors occurred. Key Value 1 defines how many errors must be generated before the user receives an alert	Trigger on dcsfc_mstIup
JobMaterialCostAlert	The quantity issued against a job is more than required and the total material cost (actual) of the job exceeds the required cost by a certain percent (tolerance) set by the user	Trigger on jobmatl_mstIup
JobOperationHoursAlert	Labor hours for a job were more than estimated	Trigger on jobroute_mstIup
JobOverProductionAlert	The completed quantity of a job is greater than the released quantity	Trigger on job_mstIup
JobProjectedLateForCustomerAlert	A job is projected to be late for a specified customer. Key Value 1 is the customer number.	Trigger on job_sch_mstIup
LateOrderShippingAlert	At least one open order line for a customer has a due date prior to the current date. Key Value 1 is the customer number	Event: LateOrderShippingAlert, Seq 1

Publication	Description	Where Defined
LeadAssignedAlert	A lead is assigned to a salesperson	Event: IdoOnItemUpdate, Seq 14
LockedUserAlert	A user is locked out	Trigger on UserNamesIup
OpportunityDueAlert	An opportunity is due	Event: OpportunityDueAlert, Seq 1
OverBudgetAlert	The specified account's actual amount is above budget for the current fiscal period. Key Value 1 is the account number, and Key Value 2 is the percentage over budget that triggers an alert	Event: OverBudgetAlert, Seq 1
ProjectedLateShipAlert	An order line is projected to ship late. Key Value 1 is the customer number.	Event: IdoOnItemUpdate, Seq 13
ProspectInteractionFollowUpAlert	A follow-up is needed with a prospect. Key Value 1 is the prospect ID.	Event: ProspectInteractionFollowUpAlert, Seq 1
ScheduledMaintenanceAddedAlert	A scheduled maintenance task is added for a resource. This alert is used only with the Molding Industry Pack.	Trigger on MO_resource_maint_mstIup
ScheduledMaintenanceAlert	A scheduled maintenance task has been changed from Planned to Scheduled for a resource. This alert is used only with the Molding Industry Pack.	Event: ResourceMaintenanceScheduleUpdateStatus, Seq 1
TransactionAmountAlert	The amount of a transaction for a specified account is over the specified amount. Key Value 1 is the account number. Key Value 2 is the amount to which transactions should be limited.	Event: TransactionAmountAlert, Seq 1

CloudSuite Business users can subscribe to the appropriate publications. Then, when an alert occurs and a BOD is generated, the email addresses for all subscribers are included in the BOD.

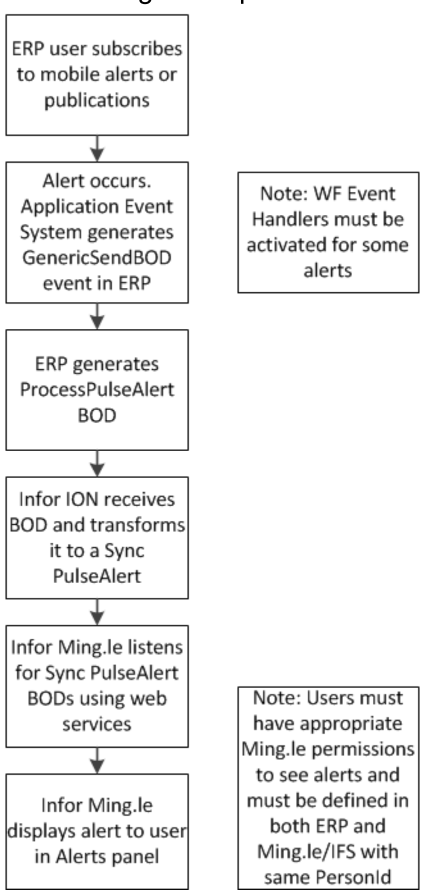
The email address that is used in the BOD is determined by the **Email Type Description** field on the Users form. If an address is specified where the **Email Type Description** is set to **PersonID**, then the email address associated with the **PersonID** type is used. If no **PersonID** type is found, then the address in the **Primary Email Address** field is used:



If neither of these areas are populated, then a BOD is not sent.

Infor ION attempts to match the email address from the BOD with a PersonID or primary email address that is defined for a user in IFS and Infor Ming.le, so that it can pass along the alert. If a matching address is found, and if the user has the appropriate Infor Ming.le permissions, the alert is displayed on the user's Alerts panel in Infor Ming.le.

This is the general process flow:



Setting up CloudSuite Business to send alerts

Use these steps to set up CloudSuite Business to send alerts:

- For publications that have associated event handler sequences in the table above, activate the sequences so that the BOD will be sent when the events fire. In the Workflow Event Handler Activation form, select the appropriate event and sequence, and select **Active for this Site**.
- CloudSuite Business users must subscribe to the appropriate publications from the list in the table above, through either the Mobile Alerts form or the Publication Subscribers form.
- Set up CloudSuite Business users with either a PersonID email address or a primary email address, or both. In the **Email Addresses** tab on the Users form, add a record to the grid where **Email Type Description** is set to **PersonID** and an email address is assigned. You can optionally set the **Primary Email Address** to another email address for the user.

Setting up Infor ION to process alerts from CloudSuite Business

To set up your CloudSuite Business connection point in ION, see the *Infor CloudSuite Business Configuration Guide for Infor ION*. Make sure that you include the ProcessPulseAlert BOD in the connection point's **Documents** tab as a document that can be sent from the site.

Note: ION Pulse is not an application for which you can create a connection point. Therefore the configuration differs from a normal configuration. Normally, a document flow is created from A to B where you select the documents to be sent. This selection can be a subset of the documents sent by connection point A and received by connection point B. In case of ION Pulse, there is no document flow that includes Pulse. If an application connection point that can publish ProcessPulseAlert is used in at least one active document flow in ION Connect, the BOD is delivered directly to IONPulse.

ION passes the alert to Infor Ming.le using an internal API and as a Sync.PulseAlert BOD.

For more information, see the *Infor ION Technical Reference Guide*.

Setting up Infor Ming.le to display CloudSuite Business alerts

The system administrator must set up Infor Ming.le users with the appropriate roles to access tasks and alerts. See the section on configuring user access to tasks and alerts in the *Infor Ming.le Installation and Configuration Guide for Active Directory Federation Services*.

In addition, the value in the Infor Ming.le and IFS **Person** field must match the PersonId email address or Primary email address for the same user in CloudSuite Business. This is handled automatically if you set up users first in Infor Ming.le/IFS and then use SecurityUserMaster BODs to populate the user records in CloudSuite Business, as described in "Using BODs to share users and roles between CloudSuite Business and Infor Ming.le" on page 11.