



# Infor CloudSuite Business Solution Overview Cloud Edition

Release 9.00.30

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## About this guide

This document provides a high-level explanation of Infor CloudSuite™ Business and a summary of the products that are included in this CloudSuite. It also includes information about configuration, personalization, and integration options.

## Related documents

To access the documentation for this release, go to [docs.infor.com](https://docs.infor.com) and select the link for your CloudSuite.

## Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal.

If we update this document after the product release, we will post the new version on [docs.infor.com](https://docs.infor.com). We recommend that you check this website periodically for updated documentation.

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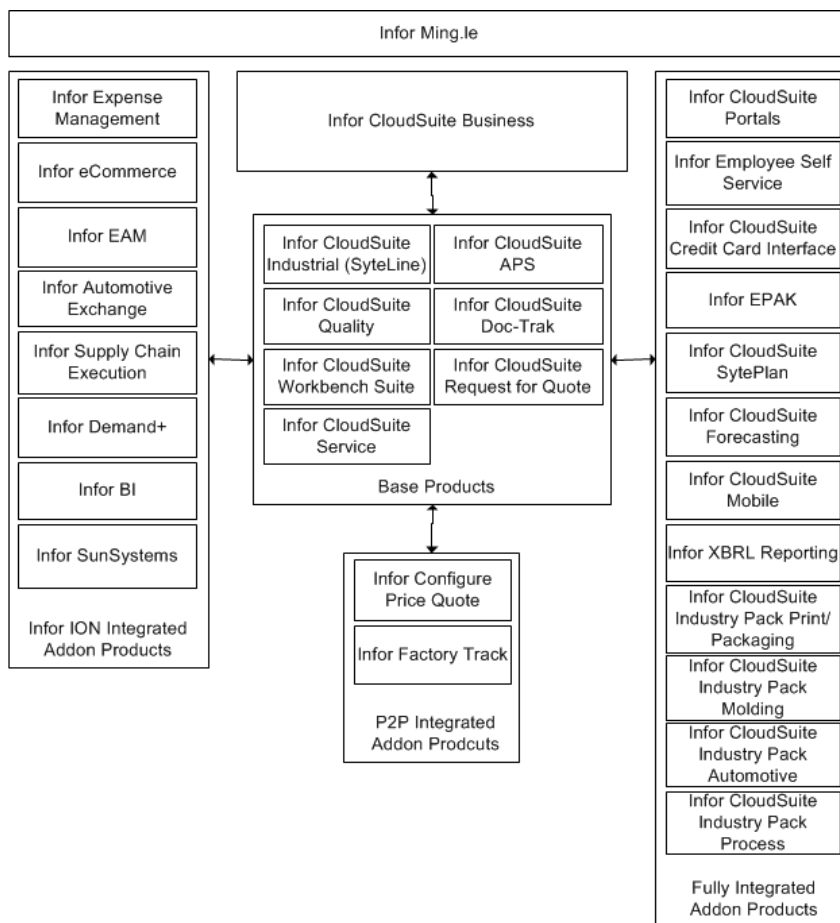
# Chapter 1 Infor CloudSuite overview

# 1

Infor CloudSuite Business is a solution that contains multiple products, including a base product and high-value applications. All of these applications are delivered in the cloud. This cloud-deployed suite addresses the unique business requirements in the manufacturing industry.

This CloudSuite is a single tenant and multi tenant solution, which is available through a subscription-based (SaaS) delivery model from Amazon Web Services (AWS).

This chart shows the relationship between the core CloudSuite application and each associated product:



For more information about the required versions of the products in this CloudSuite, see the release notes for this CloudSuite.



The base solution includes products that are used by most companies in the manufacturing industry and is offered by Infor as an integrated solution.

This CloudSuite includes these base products:

- Infor CloudSuite Business (SyteLine)
- Infor CloudSuite Doc-Trak
- Infor CloudSuite Service
- Infor CloudSuite Workbench Suite
- Infor CloudSuite APS
- Infor CloudSuite Request for Quote
- Infor CloudSuite Quality

### Infor CloudSuite Business (SyteLine)

Infor CloudSuite Business (SyteLine) provides comprehensive functionality that addresses your business and operational challenges regardless of your process mode, from make-to-stock (MTS) to engineer-to-order (ETO). Workflows for these manufacturing methods can be tailored to your exact needs:

- Engineer-to-order (ETO)
- Make/configure-to-order (MTO/CTO)
- Make-to-stock (MTS)
- Repetitive
- Service management

Infor CloudSuite Business offers a highly flexible architecture with user-friendly navigation screens, allowing companies to easily capture, track, and access vast amounts of valuable data. Day-to-day operational processes can be managed with speed and efficiency, including shop floor planning and scheduling. Companies can use the solution's built-in scalability to add users, products, production sites, or warehouses to adapt to changing business needs. Infor CloudSuite Business is built and deployed on the Infor Mongoose Framework, which allows you to extend and adapt the application without compromising the upgrade path. Extending screens, adding your own screens, extending

the schema and creating your own tables, extending IDOs (business objects) and creating your own scenarios that are supported. This helps to significantly lower the total cost of ownership, since you can adapt the system to your business rather than adapting your business to the system.

## Infor CloudSuite Doc-Trak

Infor CloudSuite Doc-Trak links documents and other information directly to the point of use in Infor CloudSuite Business. When documents electronically follow the flow of the related data, customer documents stay connected to customer information, and order documents stay connected to the order. Workers on your shop floor will have complete, real-time information about all assigned work. Documentation processing happens in the background while you perform normal functions.

## Infor CloudSuite Service

Infor CloudSuite Service offers a flexible, easy to use way to manufacture, install, or service complex products. Streamline your entire service lifecycle by utilizing these features:

- Give your call center easy access to detailed data for fast response to inquiries and work order creation.
- Track and manage work orders for faster completion of service requests, more accurate billing, and greater customer satisfaction.
- Gain visibility into each technician's schedule, route, certification level, and experience so that you can match the right technician with the right job. You will also increase resolution rates and minimize nonessential trips back to the warehouse.
- Schedule preventative maintenance for internal assets in order to prevent unexpected downtimes, extend the lifecycle of equipment, and maximize warranty cost savings.
- Track and manage service level agreements with maximum efficiency. Visibility into the contract details, unit, and service history improves decision making and creates opportunities to up sell or extend service agreements.
- Manage product returns for repair, refurbishment, or shipment to a third party vendor.
- Gain access to complete historical data, including customer profile, unit description, contract status, and service history.
- Analyze data down to the detail level, thanks to integrated real-time data, total visibility, and accurate tracking. Flexible reporting aids in decision making, planning, and providing engineering with valuable information needed to adapt product or part designs.

## Infor CloudSuite Workbench Suite

Infor CloudSuite Workbench Suite gives users a home-base panel that consolidates several role-related screens, performance gauges, navigation shortcuts, process flow guides, and advanced search and report tools, all in one easy-access, power location.

Providing employees with real-time performance data empowers them to identify predictive trends, take preemptive actions, and respond quickly to critical issues pertaining to their role, department, or division.

Workbenches are tailored around specific company roles, from the C-level officer monitoring company-wide KPIs for long-range strategic planning, to the billing manager striving to expedite invoicing and maintain steady cash flow. Workbenches provide quick, timesaving access to data, increase productivity, provide valuable role-related feedback, and support each employee's problem-solving efforts.

Workbenches gives users colorful, highly visible gauges so that key performance indicators and influencers can be easily monitored as needed, whether it is minute-by-minute, hourly, daily, or weekly. The performance indicators are linked with the live, integrated CloudSuite Business database, rather than a static snapshot. These indicators provide right-click access to multiple layers of influencing specifics behind the numbers.

## Infor CloudSuite APS

Infor CloudSuite APS uses lean planning capabilities to focus on current customer demand. By synchronizing the flow of material and capacity, this solution provides seamless advanced planning capabilities that increase your on-time performance and throughput, while also reducing inventory and operating costs.

## Infor CloudSuite Request for Quote

Infor CloudSuite Request for Quote enables users to shop purchase requests to all approved vendors or a predefined set. The solution provides a complete purchasing process workflow, from creating an RFQ Header to choosing a winning vendor. This solution streamlines the purchasing process, making it more efficient and effective for helping managers to make decisions that optimize the use of resources.

## Infor CloudSuite Quality

Infor CloudSuite Quality manages advanced quality activities across your entire organization, including quality incidents, change management, and responses to audit findings. The solution also creates a framework for building a culture of continuous improvement throughout your organization.

To extend your CloudSuite solution with more advanced capabilities, you can add these optional products:

- Infor Ming.le™
- Infor ION
- Infor Business Vault
- Infor Business Vault Base Data Store
- Infor Reporting
- Infor BI
- Infor CloudSuite Forecasting
- Infor CloudSuite Mobile Access
- Infor Factory Track
- Infor Configure Price Quote
- Infor CloudSuite Portals
- Infor Automotive Exchange
- Infor Credit Card Interface
- Infor CloudSuite SytePlan
- Infor Expense Management
- Infor eCommerce
- Infor EAM
- Infor CloudSuite Employee Self Service
- Infor Demand+
- Infor Supply Chain Execution
- Infor EPAK
- Infor CloudSuite Industry Pack Printing & Packaging
- Infor CloudSuite Industry Pack Molding
- Infor CloudSuite Industry Pack Automotive
- Infor CloudSuite Industry Pack Process
- Infor SunSystems
- Infor CloudSuite Business Tax System Interface

## Infor Ming.le

Infor Ming.le is a web-based application framework that provides a common user interface for Infor applications, third-party applications, and in-house developed applications integrated through Infor ION. It is a centralized platform for social collaboration, business process improvement, and contextual analytics.

Infor Ming.le provides drill-back capability so that users can navigate across the applications to track transactions, the transfer of data, and report updates. Additionally, Infor Ming.le provides an infrastructure for sharing content with context applications.

Infor Ming.le uses Infor Federation Services (IFS) for centralized authentication.

## Infor ION

Infor ION is a business process management platform that integrates applications, people, and business processes. The Infor ION platform converts data into the common language of standardized XML to enable disparate business systems such as Infor products, third-party applications, and in-house developed applications to share information.

Infor ION simplifies the connectivity and data sharing across the connected applications. It enables users to configure a routed infrastructure, set up workflows, design and activate business event monitors, and manage tasks and alerts.

## Infor Business Vault

Infor Business Vault is a software platform for data acquisition and enrichment. The business data repository contains one or many data stores populated by Business Vault software, and the data stores are available for searching data, running reports, and synchronizing data.

## Infor Business Vault Base Data Store

The Infor Business Vault Base Data Store is a reporting database for the Infor Business Vault.

## Infor Reporting

Infor Reporting is a reporting environment that provides platform and reporting content for relational reporting. Report content is provided for many applications.

Infor Reporting is integrated with Infor Ming.le, and the user interface provides navigation to view and work with report content. Infor Reporting includes templates that your professional report authors can use to build reports and provides components specific to your Infor business applications.

## Infor BI

Infor Business Intelligence (BI) supports all typical internal and external business intelligence requirements.

BI is the technical platform for these purposes:

- Standard reporting
- Flexible ad-hoc-analysis
- Dashboard
- Strategic planning, budgeting, and forecasting
- Scenario-analysis and predictive analytics
- Statutory and management consolidation

The BI solution suite is predominantly used where highly specific business needs must be fulfilled. Usually, the solution is based on a multidimensional OLAP approach.

## Infor CloudSuite Forecasting

Infor CloudSuite Forecasting maintains an efficient operation and healthy bottom line by implementing an automated and organized approach to forecasting. This approach ensures that you can determine that the right amounts of raw materials and components are at the right place and at the right time, in order to best meet customer demand. Forecasting integrates with your enterprise resource planning (ERP) system to help you quickly calculate more accurate forecasts and optimal safety-stock levels.

## Infor CloudSuite Mobile

Infor CloudSuite Mobile adds key functions to your mobile device for these user roles:

- Executives gain visibility into the health of the organization. They require a quick reference into key values for cash balance, today's bookings, today's shipments, and order backlogs. They can also link to Accounts Payable and Accounts Receivable details for all the pertinent information.
- Salespeople, while on the road, can enter new contact information, view sales orders, leads, opportunities and contacts. They can also receive alerts regarding critical customer information. Using the calendar, they can see any tasks that are needed to close opportunities.
- Production Managers can be notified of, and resolve, critical shop floor and production issues as they occur, even when away from their desk. Alerts can be sent in certain unexpected cases, such as when the material issues are more than required, or when the actual labor hour posting is more than planned. Using production calendar forms, planned production can be viewed for the day and into the future.
- Controllers view accounts payable, accounts receivable, account balances, inventory value, evaluate funds committed for purchases, and see today's bookings. Alerts can also be set to notify them of issues before they occur.
- IT can identify, and resolve, various issues to ensure a stable and responsive IT environment. There are a number of <sup>TM</sup>Microsoft Windows services and processes that are required for CloudSuite Business and other programs to function, such as TaskMan, Web Server, and Exchange Server.

## Infor Factory Track

Infor Factory Track is a comprehensive manufacturing, labor, and attendance operations and collection system. This application directly integrates to your ERP system, streaming up-to-date information directly to and from the shop floor. Factory Track comprises three fully-integrated modules:

- Infor Shop Floor
- Infor Time Track
- Infor Warehouse Mobility

## Infor Configure Price Quote

Infor Configure Price Quote (CPQ) enables the handling of configured products or services, and supports most types of user or application.

CPQ includes these features:

- A product, sales, pricing, and process configurator that integrates with your web, mobile, enterprise, desktop, and laptop systems. You can capture and share all the knowledge about your customizable products on any device.



- Product modeling, which makes selection and configuration of complex products intuitive and error-free. The rules, constraints, and associated data in product models are processed based on inputs from the user interface or other applications.
- Deployment of the configurator for a specific function or across all available applications and computing platforms.
- Selection, configuration, and pricing of products by your sales people and customers, while ensuring that only valid combinations of features, options, and dimensions are created, quoted, and ordered.

## Infor CloudSuite Portals

Infor CloudSuite Portals contains web applications you can use with your CloudSuite solution. They are publicly available web sites for your customers, vendors, and resellers, which provide browser-based access to relevant Infor CloudSuite data and functionality. Online ordering functionality is also provided.

Customer Portal provides a searchable product catalog and online shopping functionality. Customers can register online or they can be registered in the back office application. Business-to-business users can access web pages to review estimates, invoices, consigned inventory, and more. The portal also provides web pages for viewing company information, such as press releases, white papers, FAQs, and videos. Email messages can be sent to portal users, based on their actions on the portal.

Reseller Portal includes all of the same pages and functionality as the Customer Portal. Web pages are included for these tasks:

- Entering service orders and service order transactions
- Registering and managing customers
- Reviewing commissions due
- Placing orders, checking order status, and looking up order estimates

Vendor Portal provides web pages for vendors to review this information:

- Purchase orders
- Planned orders
- Consigned inventory
- Projected inventory
- On-time delivery percentages
- Approved and pending product price contracts

Vendors can submit new price break requests for existing contracts, enter interactions regarding a selected contract, and upload documents for contracts. Vendors can also view and respond to item price requests on the portal. Web pages for viewing company information, such as press releases, white papers, FAQs, and videos are also included.

## Infor Automotive Exchange

Infor Automotive Exchange is the automotive demand management solution for automotive suppliers. It extends and complements traditional ERP order-to-cash business processes, supports standard automotive business practices, and supports trading partner variations of standard business practices.

## Infor CloudSuite Credit Card Interface

Use the Infor Credit Card Interface to bill a customer's credit card through a third-party credit card processing service and to accept credit cards for payment. The credit card is authorized for validity when an order is placed, but it is not charged until the invoice is generated. The interface communicates with a gateway provider that in turn communicates with a credit card processing company such as Visa or Mastercard. To preserve security, this application does not store any credit card information; it only stores a transaction number or token that links to the gateway provider's application.

See the *Credit Card Implementation Guide* for a list of supported gateway options.

## Infor CloudSuite SytePlan

The collection of workbenches, queries, graphs, and reports in Infor CloudSuite SytePlan can streamline your sales and operations planning process. It also makes planning an integral part of Infor CloudSuite Business.

SytePlan enhances your ability to perform these tasks:

- Develop a top-down plan for sales and margin in dollars and units, by product group, customer type, and salesperson for single or multiple locations.
- Integrate your multi-dimensional sales plan with your material planning and demand forecasting process.
- Compare plans to forecasts, shipments, backlog, or WIP, and identify supply issues.
- Project sales and inventory through month-end.
- Analyze rough-cut capacity needs, on-time performance, and inventory turns.
- Track changes in your forecast over time and compare that to actual sales.
- Analyze margin by customer, salesperson, product, or territory.
- Create workforce, headcount, and labor force plans.
- Organize and assign the tasks required to implement your S&OP process.

## Infor Expense Management

Infor Expense Management is a modular application that provides a single, fully automated system for managing travel and entertainment expenses, employee-initiated purchases, employee time capture, reporting, and auditing. Expense Management includes these tasks:

- Create and manage expense reports by using a mobile device. Reviewers can open expense reports and attach supporting documents when they receive email alerts, without logging into the application.
- Create approval processes to verify travel compliance before the purchase is made. Attach travel plans to expense reports and compare planned and actual expenses.
- Track and allocate employee purchases that are made immediately, and consequently often bypass requisition and order processes. Eliminate duplicate data entry and automate validation, to ensure that requests are accurate, complete, and charged correctly.
- Create and manage timesheets.
- Import cost center or project-related budget figures into Expense Management to monitor accruals against budgets.

## Infor e-Commerce

Infor e-Commerce collaborates with your overall IT environment and uses information stored in your business system, allowing you to adapt to efficiently process requirements.

e-Commerce provides up-to-date product information, specifications, cost, alternate product availability, and order tracking—all through a self-service, internet-based entry point. It gives you more direct interfacing time with customers, and it can have a strong impact on the productivity and profitability levels of your sales force. You can use e-Commerce to manage complex trading channels with a highly mixed customer base or to offer a range of catalogs and an assortment of products.

## Infor EAM

Infor EAM is a configurable asset management solution.

EAM enables you to improve capital asset management in ways that increase reliability, enhance predictive maintenance, ensure regulatory compliance, reduce energy usage, and support sustainability initiatives.

EAM provides you with flexibility to focus on the specialized industry requirements that can turn your company's asset management into a competitive advantage.

You can use EAM to perform these tasks:

- **Maintenance**  
Schedule preventive maintenance and assign resources.
- **Uptime**  
Determine where and why your capital assets might fail, and plan alternatives.
- **Reliability and risk management**  
Predict equipment reliability problems to prevent them from happening.
- **Inventory and warranty**  
Reduce inventory and purchasing costs, and collect on warranty-related claims.
- **Strategic planning**  
Manage your assets to meet corporate performance goals.

## Infor CloudSuite Employee Self Service

Infor CloudSuite Employee Self Service enables employees to perform these Human Resources tasks online:

- Manage time-off requests and approvals and update personal and payroll information with employee and manager self-service features. Employees can also view their paystubs and work calendar.
- Provide managers with access to key human resource data, such as performance reviews, organization charts, and educational background.
- Ensure that information is more accurate, complete, and up to date.
- Provide direct access to payroll data, and seamless integration with Infor's financial management solutions. You will also be able to streamline the way you manage hours, pay, deductions, and direct deposits.

## Infor Demand+

Infor Demand+ enhances your forecasting process by delivering innovative technology and methods. With Demand+, you can perform these tasks:

- Increase productivity with its easy, intuitive user experience design that supports instant decision making
- Gain insight with performance dashboards
- Ensure completion of key activities
- Support the integrated supply chain business process

- Improve visibility and speed information flow across your organization

## Infor Supply Chain Execution

Infor Supply Chain Execution combines transportation management, warehouse management, labor management, and 3PL billing into a single application on a unified database to reduce the complexity of warehouse and logistics management and to clarify daily decision making. Supply Chain Execution allows you to:

- Avoid costly blind spots that result from treating warehouse and transportation management separately
- Eliminate expediting charges with the optimization features of Supply Chain Execution
- Optimize the distribution of work and measure the performance of your workforce
- Estimate logistical costs fully, and create value-added services such as kitting, and bill for those services quickly and accurately
- Prove the value of what you do with extensive, advanced reporting all built on a single database

## Infor EPAK

Infor Enterprise Performance Accelerator Kit (EPAK) provides the tools, processes, and training required for employees to learn and comply with new business processes. EPAK's core components are end-user training and application simulations, which can be used in every phase of an implementation or upgrade application cycle.

EPAK is used during these phases:

- Pre-implementation
  - To evaluate functionality, conduct user acceptance testing, perform business process reviews, and submit approvals in a consistent format
- Implementation
  - To provide tools for instructor-led and web-based training, and for usage tracking and user acceptance training
- Post-implementation
  - To deliver job aids, product assistance, simulations, application coaching, and usage tracking

The EPAK solution provides a single platform for all process and software evaluation documents, and tools to increase employee productivity. It contributes to a successful deployment of an implementation or upgrade, and decreases the time to achieve return on investment.

## Infor CloudSuite Industry Pack Printing & Packaging

Infor CloudSuite Industry Pack Printing & Packaging provides a comprehensive ERP solution with specific functionality for printing and packaging, enabling you to streamline how you manage the entire printing and packaging lifecycle. Through a clearer view of your entire business, you can more easily determine current efficiency, as well as opportunities for new efficiencies and organic business growth. With CloudSuite Printing & Packaging, you can perform these tasks:

- Better quote new jobs so you win the business at a profit.
- Keep your people, equipment, and material resources aligned with demand.
- Minimize inventory costs without risking shortages.
- Make sure configured orders are accurate and feasible for production.
- Adapt quickly to new threats and new opportunities.

## Infor CloudSuite Industry Pack Molding

With the comprehensive manufacturing ERP capabilities of the Infor CloudSuite Industry Pack Molding, you can better manage production in these ways:

- Define, manage, and maintain individual tools or groups of tools to achieve optimal availability and productivity, which can include carriers, fixtures, cavities, and other tooling items.
- Reduce resource conflicts to get the best throughput for all jobs when a group of jobs share at least one operation.
- Create co-jobs that share tooling, which can have an impact on the costing information used for quoting a job.
- Designate alternate resources, materials, or labor to achieve the best overall production plan.

## Infor CloudSuite Industry Pack Automotive

Infor CloudSuite Industry Pack Automotive includes the tools you need to streamline how you manage your contracts, billing, and more. With functions that are specifically tailored to the unique requirements of the automotive industry, you can perform these tasks:

- Retroactive billing, which you can use to manage previously filled invoices and orders that are considered complete but need to be invoiced in relation to a new pricing agreement. You can also take action on late shipments where invoice adjustments are made on invoiced products.
- Document the risk and the resulting outcome of FMEA to help ensure that a procedure implemented to reduce risk is not removed due to undue circumstance.
- Maintain and coordinate compliance with the unique requirements of quality programs, including new product development, internal/external audits, internal/external certification, APQP plans, and production part approval processes (PPAPs).

- Match a payment to an invoice during accounts receivable (AR) payment distribution, for situations when a customer does not reference their invoice when making a payment.
- Create and manage contractual agreements with your customers and vendors.
- Manage containers in accordance with automotive industry requirements by defining physical dimension and capacity and recording certain codes and markings necessary for compliance with specific provisions of ISO 6346.
- Use time-of-day stamps to when fulfilling multiple daily shipments of a particular part to avoid errors.
- Utilize overall equipment effectiveness (OEE) to track your production resources by getting you get real-time insight into on-the-job operations and resource group load profile–scheduler forms.

## Infor CloudSuite Industry Pack Process

Infor CloudSuite Industry Pack Process utilizes lot and serial traceability, inventory location management, integrated quality management, and advanced planning and scheduling to perform these specialized manufacturing tasks:

- Create bills for a product batch that is then used to fill multiple container sizes.
- Take advantage of the ultimate manufacturing process flexibility and bring together independently managed material formulations and operational routings into a manufacturing specification.
- See all the jobs that were created per the manufacturing specifications, including the formulation job and the multiple fill jobs for various packaging sizes.
- Fully trace lots affected by a recall all the way back to the raw material vendor and forward to all the customers that received those lots.

## Infor SunSystems

Infor SunSystems provides real-time financial, operational, and reporting analysis. SunSystems includes these features:

- Real-time reporting
- Intelligent transactions
- In-context business intelligence
- Enterprise Data Management
- Unified ledgers
- Localized reporting
- Complex allocations
- IFRS and GAAP reporting

- Multi-site subsidiaries
- Social-enabled collaboration

## Infor CloudSuite Business Tax System Interface

The Tax System Interface is used by customers who require external taxing software to handle the computing of sales tax. Currently the Tax System Interface supports the following products:

- Vertex Sales Tax Q Series version 4.1
- Taxware Sales/Use Tax System version 3.30
- Taxware Enterprise
- Avalara AvaTax

The Tax System interface is installed as an optional module and separately licensed in Infor CloudSuite Business.



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## Chapter 4 Extending the CloudSuite solution

# 4

This section gives you an overview of the options that are available to configure and personalize this CloudSuite, to extend the business functionality, and to modify reports. Detailed instructions are provided in these documents, available on Infor Xtreme:

- *Infor Mongoose IDO Development Guide*
- *Infor Mongoose Integrating IDOs with External Applications*
- *Infor Mongoose Guide to the Application Event System*
- *Infor Mongoose Creating and Customizing Reports*

### Extensibility tool overview

Infor CloudSuite Business modules and applications are built on Infor Mongoose. You use this tool to configure and personalize this CloudSuite.

This table provides an overview of the ways in which this CloudSuite can be extended:

Feature	Audience
Extend any portion of any screen, including adding new tabs, fields, validation logic, and enablement logic. Embed controls written in any web technology.	Customer administrator
Define actions that are triggered when a business object that an order, or item, is added, deleted, or modified.	Customer administrator
Create new relationships to other IDOs in the base application, add new calculated fields and new tables, then publish their properties on the IDO.	Customer administrator
Create completely new functionality (new tables, IDOs, screens) in the base application.	Customer administrator
Add workflow, automation, and other process-level changes without writing code.	Customer administrator

Feature	Audience
Create forms for use as standalone web pages, including for mobile devices	Customer administrator
Personalize the screens and display options	End-user

## Configuration options

Infor CloudSuite Business includes these configuration options through Infor Mongoose:

- Define module parameters for each major module to establish defaults, or enable specific functionality. For example, in the Accounts Receivable module, you can specify a system-wide customer prefix, default surcharge factor, or default minimum finance charge.
- Meet regulatory compliance issues for each country where you have operations through the use of localizations.
- Set the work station logon as default login.
- Select the language to use.

There is no administrative impact to other tenants, with regard to functionality, stability, and performance. Configuration does not impact upgrading to new application releases, and can be performed through the web client or a smart client. There are no activities required by the Infor Cloud team to upgrade Configurations. Data that is associated with configurations are retained during an upgrade.

## Personalization options

You can use the Infor Mongoose framework to personalize the application in these ways:

- Enable configurations for the automotive, printing and packaging, molding and forming, and processing industries.
- Use My Folder to create a custom list of forms.
- Set the number of rows to be retrieved by a query or a list.
- Resize all forms, and decide if your user preferences are automatically saved.
- Show or hide the menu bar, diagnostics, tool bar and status bar.
- Show or hide each column, and change its sequence.
- Drag columns on On workbench forms to change the sequence.

There is no impact to other tenants with regard to functionality, stability and performance. User personalizations do not impact upgrades to new application release. However, the personalizations might be impacted by the upgrade, for example, when screens have been redesigned. There are no

activities required by the Infor Cloud team to upgrade User Personalizations. All data associated with user personalizations are retained during an upgrade.

Customer administrators can use the Infor Mongoose framework to personalize the application in these ways:

- Change the default values, layout, visibility, enabled, mandatory state, label text (including translations), colors of fields on screens at a user, group, or site level.
- Create named/re-usable filters for use in common queries, and change the default filtering for screens.
- Extend the client side and server side logic of the application, typically without writing code, although you can also add code used in client and server processing.
- Add new fields, or add entire new tables, IDOs, and screens.
- Embed HTML5 controls in the screens, and embed screens you create in on-premise web pages.

There is no impact to other tenants with regard functionality, stability and performance. Customer administration personalizations does not impact upgrade to new application release. However, the personalizations might be impacted by the upgrade, for example, when screens have been redesigned. To minimize risk of conflicting customer administration personalizations, best practices have been defined by Infor Development. There are no activities required by the Infor Cloud team to upgrade customer administration personalizations. All data associated with customer administration personalizations are included in the upgrade.

## Extending business functionality

Infor CloudSuite Industrial offers the ability to integrate with more products than are supported by Infor.

Integration scenario	Methods
From external applications to CloudSuite Business	Synchronous from external applications, by SOAP Webservice, REST Service, .NET Class, documented XML schema. Asynchronous from external applications, by ION or IDO Request XML over HTTP.
From CloudSuite Business to external applications	Synchronous, by adding .Net code as an IDO extension class, and a call from CloudSuite to external application web services. Asynchronous, by ION or IDO Request XML over HTTP.
User Interface	Infor Ming.le provides UI-level integration with other applications hosted in Infor Ming.le. Any Mongoose form can be hosted in other web pages with the correct URL. Mongoose forms can host other web content in several ways.

## Report modifications

Custom reports can be modified using these methods:

- Use data views to create ad hoc reports, and the application includes tools to build or modify data views.
- Modify critical numbers graphs, which show on the Home forms, to alter the type of graph, and the data parameters.
- Use Microsoft Excel to exported or import data. You can format data as needed.
- Use the Microsoft Excel Financial Report Writer Add-in to create financial reports such as Profit and Loss and Balance Sheets. Standard report templates are provided with the product.

This CloudSuite supports these types of integrations:

- Standard integrations
- Integrations with other products

### Standard integrations

These products are installed with Infor CloudSuite Business and are fully integrated.

- Infor Cloudsuite APS
- Infor Cloudsuite Quality
- Infor Cloudsuite Doc-Trak
- Infor Cloudsuite Request for Quote
- Infor Cloudsuite Workbench Suite
- Infor Cloudsuite Service

### Integrations with other products

These products are fully integrated upon installation and require no configuration steps:

- Infor CloudSuite Forecasting
- Infor SytePlan
- Infor CloudSuite Credit Card Module
- Infor CloudSuite Mobile
- Infor XBRL Reporting
- Infor CloudSuite Portals
- Infor CloudSuite Employee Self Service
- Infor CloudSuite Industry Pack Printing & Packaging
- Infor CloudSuite Industry Pack Molding

- Infor CloudSuite Industry Pack Automotive
- Infor CloudSuite Industry Pack Process

These products integrate with this CloudSuite through Infor ION:

- Infor BI
- Infor Expense Management
- Infor eCommerce
- Infor EAM
- Infor Automotive Exchange
- Infor Demand+
- Infor Supply Chain Execution
- Infor SunSystems

These products integrate with this CloudSuite through a point-to-point method:

- Infor Configure Price Quote
- Infor Factory Track
- Infor EPAK
- CAD Link
- Microsoft Office
- UPS and FedEx