Infor CloudSuite Business Configuration Guide - Cloud Edition

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Contents

About this guide

This guide provides information for the configuration and implementation of Infor CloudSuite Business in a multi-tenant cloud environment.

Intended audience

This guide is intended for the system administrator, consultant, or business partner who configures CloudSuite Business for use with Infor Operating Service (OS) in the cloud.

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 this website. We recommend that you check this website periodically for updated documentation.

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

Configuration checklist

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Follow this checklist to complete the integration of the components in this CloudSuite:

Complete	Task	Reference
❑	Collect any documents listed in the Reference column from Infor Xtreme. These documents could provide helpful background during this configuration.	
❑	Understand the concepts behind ION and BODs.	*Infor ION Desk User Guide - Cloud Edition*
❑	Understand the applications that are included in the CloudSuite.	"Configuration overview" on page 13 *Infor CloudSuite Business Solution Overview - Cloud Edition*
❑	Perform the prerequisites to this configuration: • Determine the ERP site names. • Determine the bootstrap administrator. • Perform initial sign-in and verify that you can access applications and menu options.	"Getting started" on page 17
❑	Perform post provisioning steps. These tasks might be completed by Infor Consulting. • Configure BODs for optional application connection points. • Complete and activate document flows for optional application integrations with the ERP. • Activate IDM features for the ERP.	"Post provisioning steps" on page 21

Complete	Task	Reference
❑	Configure your web browser for Infor Ming.le: • Set up compatibility for Internet Explorer browsers • Turn off popup blockers	"Configuring your web browser" on page 39
❑	Configure user access and roles: • Configure user access to the ERP. • Configure additional system administration access to the ERP through Infor Ming.le. • Set up roles or groups for users. • Associate Infor Ming.le users and roles with users in other applications in the CloudSuite • Verify user access. • Optionally, set up distribution groups	"Configuring ERP access through Infor Ming.le" on page 41
❑	Configure CloudSuite Business: • Set up a logical file server. • Set report options. • Set up additional replication rules, if multi-site. • Set system parameters. • Set up master data.	"Configuring the ERP" on page 49 *Infor CloudSuite Business Multi-Site Planning Guide – Cloud Edition* *Infor CloudSuite Business Multi-Site Implementation Guide – Cloud Edition*
❑	Configure your CloudSuite applications and ION to send and receive BODs: • Understand the tasks that were already performed, either by the Infor Cloud team or during the Post Provisioning process. • Publish the initial data load. • Verify that the BODs are published by the ERP and received in ION.	"Configuring applications to send and receive BODs in ION" on page 51
❑	Optionally, configure workflows and ION messages for your application.	"Configuring workflows and ION messages for the ERP" on page 59
❑	Verify that drillbacks to your application are working.	"Verifying drillbacks to the ERP" on page 65
❑	Configure context and utility apps that are used with your application.	"Configuring context apps and utility apps that are used with the ERP" on page 69

Complete	Task	Reference
❑	Verify that homepages and widgets for your application are working for individual users.	"Verifying Homepages for the ERP" on page 75
❑	Verify the configuration of your application with Infor Document Management.	"Configuring Infor Document Management to work with the ERP" on page 79 *Infor Document Management Administration Guide - Cloud Edition*
❑	Configure BI and Analytics content for your application: • Configure access to BI. • Configure In-Context BI.	"Configuring BI and Analytics content for the ERP" on page 85 *Infor CloudSuite Business Analytics MT Cloud User Guide*
❑	Configure other optional applications in the CloudSuite to work with the ERP and with the components of Infor OS (ION, Infor Ming.le, Infor Document Management, or BI).	"Configuring and integrating optional applications in the CloudSuite" on page 87

Configuration overview

2

Before you complete the configuration tasks, you must understand what is provided in the CloudSuite and how the components of the CloudSuite communicate. You should also be familiar with a list of related concepts and definitions.

About the CloudSuite

See the *Infor CloudSuite Business Solution Overview - Cloud Edition* for information about the applications that are included or optional with this CloudSuite, and the applications that can be integrated with the CloudSuite.

Be aware that in the cloud, all of your sites are defined in a single database, and only named user licensing is allowed.

CloudSuite tenants

Each CloudSuite Business customer is set up with three tenants:

- Demo, which includes a CloudSuite Business application database that contains demo data and multiple demo sites
- Training, which includes a CloudSuite Business application database that contains only initialized data. The sites that you designed with the Infor Cloud team are included. This database is intended for training.
- Production, which includes a CloudSuite Business application database that contains only initialized data. The sites that you designed with the Infor Cloud team are included. This is the go-live database.

Each tenant has a separate application database, with separate logins and passwords. Nothing is shared between the databases. If you set up data in your Production database and then want to copy it to your Training database, or vice versa, you have two options:

- Use the **To Excel** option (on grid forms) to save data from a form to a spreadsheet and then import it into the same form in the other tenant.

- Ask the Infor Cloud team to refresh one tenant from the other tenant, which clears out the data in the other tenant and replaces it with the data from the first tenant. To request this, create an incident in Infor Xtreme.

Integration with other products in the CloudSuite

The CloudSuite Business ERP application uses different integration methods to communicate with other products in the suite.

Point to point integrations

Point to point integrations, for example with Infor Configure Price Quote (CPQ) or Factory Track, use direct database connections that are set up by the Infor Cloud team. You might need to configure additional parameters or master data in each of the applications to complete the integration. See the appropriate integration guides.

BOD integrations

An outbound operation typically begins when a user performs an action in CloudSuite Business that requires a data exchange with another ION-enabled application. A Business Object Document (BOD) XML message is generated by CloudSuite Business and placed in an area designated as the Cloud Suite Business message outbox. At scheduled intervals, ION connects to the outbox and retrieves the BODs from it.

In ION Desk, a connection point is set up for each application or site in the CloudSuite that can send or receive BODs. (If you add applications later, the Infor Cloud team adds connection points for them, as needed.) The connection point defines the information needed to connect to the application database. It also holds a list of all the BOD documents that the application can send or receive.

You define document flows between the connection points to represent the business flows between the applications. For example, the Infor Cloud team sets up a document flow between CloudSuite Business and Infor Ming.le to pass BODs that contain user and role information. Use the Modeler in ION Desk to define these document flows.

ION routes BODs according to the document flows between BOD-enabled applications. If a document flow is defined fromCloudSuite Business to another application for a particular BOD, then at specified intervals, ION places the outbound BOD from CloudSuite Business in the other application's designated message inbox. Products are responsible for validating and incorporating the data in inbound BODs according to their rules.

If a flow is defined from another application to CloudSuite Business, ION retrieves BODs from the sending application's message outbox and delivers them to CloudSuite Business's message inbox for processing. CloudSuite Business retrieves, validates, and processes the BODs.

Concepts and definitions specific to this configuration

You must understand the tenant, logical ID, accounting entity and location, and how they are defined in this application. Together, these terms determine where inbound BOD information is processed, or the outbound instance and location to which the BOD information should be associated.

Tenant ID

The tenant is a container for accounting entities and locations and is required in each BOD. The value of the tenant must be the same in all of the products that exchange BODs. Data is not shared or accessible between tenants.

The tenant ID is specified by the Infor Cloud team. You can view it in the Sites/Entities form. This value should not be changed.

Infor provides you with three tenants. See "About the CloudSuite" on page 13.

See the information about using tenants in the *Infor ION Desk User Guide - Cloud Edition*.

Accounting entity

An accounting entity usually represents a legal or business entity that owns its general ledger. Every transaction belongs to only one accounting entity. An accounting entity can also be defined as the owner of certain master data among the enterprise. CloudSuite Business is the system of record for accounting entities.

For CloudSuite Business, the site is used as the accounting entity.

Do not confuse this Infor definition of "accounting entity" with the CloudSuite Business definition of "entity," which is a type of site that is used only for financial consolidation.

Location

A location is the physical location that is associated with data or transactions. The location can be, for example, a warehouse, a manufacturing location, a project location, or an office. Locations are published in the Location BOD. A location is required for all transactional BODs and is usually the location from which a transaction or record is generated. CloudSuite Business is the system of record for locations.

Logical ID

The logical ID is a unique identifier used in the communication of data between the applications in the tenant's environment. Each instance of an application, for example, a site, is assigned one logical ID. In ION, the logical ID is used to properly route BODs. Infor Ming.le uses the logical ID to determine which application to start when you click a drillback.

This logical ID is defined in CloudSuite Business Sites/Entities form and should not be changed. For cloud applications, the logical ID is defined by the Infor Cloud team and is retrieved automatically when the application connection point is created in ION.

In Infor Ming.le, each application is assigned a logical ID. Infor Ming.le supports only one logical ID per application.

For more information, see the CloudSuite Business online help.

Getting started

3

Ensure that all of these requirements are met before you start the configuration.

Determining your ERP application site names

If you are configuring a system with multiple sites, you must provide Infor with the names and descriptions of all of the CloudSuite Business sites (also known as accounting entities) that you require.

Discuss your company's site requirements with the Infor Cloud team. See the Infor CloudSuite Business Multi-Site Planning Guide – Cloud Edition.

Be aware that in the cloud, all of your sites are defined in a single database, and only named user licensing is allowed.

Determining the bootstrap administrator

You must designate one person as the bootstrap administrator, who will perform the initial setup of the tenant for other users. Provide this person's email address to Infor.

The bootstrap administrator, who could be an Infor consultant, a business partner, or an administrator at your company, will receive an email from Infor with the initial URL to establish an Infor Ming.le user name and login. This person also receives the Application Access email with the URLs to the applications. The bootstrap administrator is the only person who can initially access the tenant.

Accessing your cloud environment (tenant)

1 After you register the bootstrap administrator's email address, Infor sends an email to the bootstrap administrator that asks to verify the Infor Ming.le account.

2 Click the link in the email.
3 3 Specify your first name, last name, title, email address, and a password.
4 Click **Create Account**.

Note: The link in the email expires in 48 hours. If you are past that time, please reset your password with these steps:

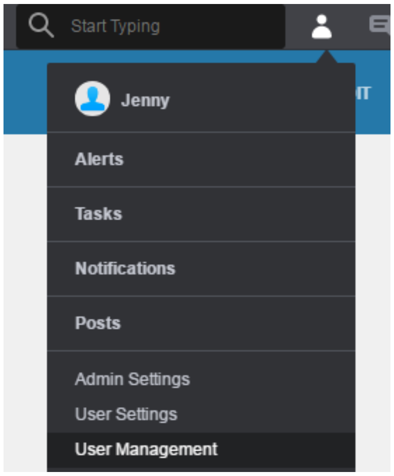
a Remove everything after the **Tenant ID** in the original URL that was sent in the registration email. For example, in https://mingle-portal.inforcloudsuite.com/ITSGENXXXA03/xxxxxxx/xxxxx, ITSGENXXXA03 is the tenant ID, so you would delete everything after that.
b Copy the remaining URL and paste it into a web browser. A login dialog box should be displayed.
c Click the Forgot Password link.
d Infor sends a new Infor Ming.le Activation email to you.
e After Infor processes your account information, Infor sends you a second email with the actual URL to sign in to your tenant.

Note: At this point, Infor provisioning is not yet complete. Do not sign into your tenant until you receive another "welcome" email from Infor that contains a list of useful URLs for your tenant.

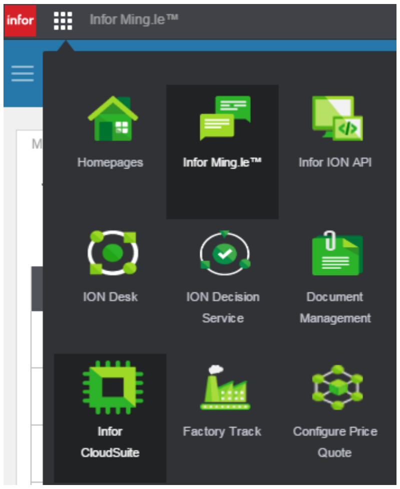
Verifying access to your applications

After you sign in to the Infor Ming.le portal for the first time, ensure that you have system administrator access to these applications in the cloud:

1 Under the User menu, verify that you can access the menu options **Admin Settings** and **User Management**.



2 Under the App menu, verify that you can access Infor CloudSuite Business and Infor Operating Service applications such as Infor Ming.le, ION Desk and Infor Document Management.



3 Verify that you can access any optional applications that you have licensed, such as Infor Factory Track or Infor Configure Price Quote.

4

Post provisioning steps

These are the initial steps that must be done after your tenant is provisioned by Infor.

If you engage Infor Consulting Services to perform post provisioning, they will perform the steps in this chapter for you.

Note: The Post Provisioning steps are often performed by the Bootstrap Administrator. At a minimum, the person performing these steps must have IONDeskAdmin, IONDeskSecurityAdmin, and IDM-Administrator roles assigned in Infor Ming.le, as well as the System Administrator group assigned in CloudSuite Business. See "Configuring user access to the ERP through Infor Ming.le" on page 42 for information about how to set up users and roles/groups.

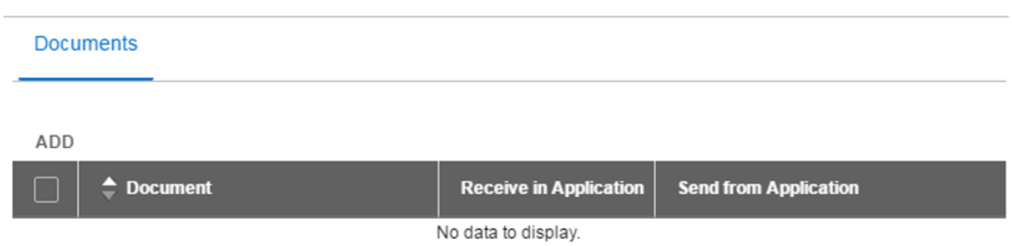
Configuring BODs for ERP connection points

Connection points provide the information that ION uses to connect to an application’s message inbox and outbox. At least one connection point is defined for each application instance that integrates to ION. If you have a multi-site system, one connection point is defined for each CloudSuite Business site.

Update the CloudSuite Business connection points to include the BODs that can be sent from, or received into, CloudSuite Business:

1 In ION Desk, select **Model > Connect > Connection Points**.

2 Select one of the predefined CloudSuite Business connection points. The **Documents** tab lists all documents (BODs) that can be sent or received by this application instance for any integration. For each document, the list must indicate whether the document can be sent, received, or both.



3 Click **Add** to set up a list of the documents that can be sent or received by this CloudSuite Business connection point (site).

ION uses this list to determine which BODs can be routed to or from the application when this connection point is used in document flows. However, a BOD can be published by CloudSuite Business to ION even if it is not listed in a connection point, as long as the BOD's outbound setup is configured properly on the Replication Document forms.

Note: One of your CloudSuite Business connection points will already have some BODs listed, because the Cloud team set it up for the Infor Ming.le document flow.

Add all of the documents listed here, or just add the documents for the integrations with products that you plan to use:

Document	Receive in application	Send from application	Used in integration with
Process.BillToPartyMaster	X		CRM
Process.ContactMaster	X		CRM
Process.CustomerPartyMaster	X		CRM
Process.PulseAlert		X	ION (for alerts)
Process.Quote	X		CRM
Process.Requisition	X		EAM
Process.SalesOrder	X		CRM
Process.SecurityUserMaster		X	Infor Ming.le
Process.ShipToPartyMaster	X		CRM
Sync.BillToPartyMaster		X	CRM
Sync.CodeDefinition		X	CRM, XM
Sync.ContactMaster		X	CRM
Sync.CurrencyExchangeRateMaster		X	XM
Sync.CustomerPartyMaster		X	CRM
Sync.CustomerReturn		X	CRM
Sync.EmployeeTimesheet	X		XM
Sync.ExpenseReport	X		XM
Sync.Invoice		X	CRM
Sync.ItemMaster		X	CRM
Sync.Location		X	CRM
Sync.PayFromPartyMaster		X	CRM
Sync.Person		X	CRM
Sync.Personnel		X	XM
Sync.ProductionOrder		X	XM

Document	Receive in application	Send from application	Used in integration with
Sync.ProjectMaster		X	XM
Sync.PurchaseOrder		X	EAM
Sync.Quote		X	CRM
Sync.ReceivableTransaction		X	CRM
Sync.ReceiveDelivery		X	EAM
Sync.RemittanceAdvice		X	XM
Sync.SalesOrder		X	CRM
Sync.SecurityRoleMaster		X	Infor Ming.le
Sync.SecurityUserMaster	X		Infor Ming.le
Sync.ServiceOrder		X	XM
Sync.Shipment		X	CRM
Sync.ShipToPartyMaster		X	CRM
Sync.SupplierPartyMaster		X	EAM

You might add other documents to the list later, for additional integrations.

4 Open each of the other predefined CloudSuite Business connection points. Add the BODs from step 3.

Verifying BODs for the Infor Ming.le connection point

The Infor Cloud team has already set up the Infor Ming.le connection point. Verify that it contains the correct documents.

1 In ION Desk, select **Model > Connect > Connection Points**.

2 Find and select the Infor Ming.le connection point. In its **Documents** tab, verify that these documents are listed:

Document	Receive in Application	Send from Application
Process.SecurityUserMaster	X	
Sync.SecurityRoleMaster	X	
Sync.SecurityUserMaster		X

Configuring BODs for optional products

Additional connection points for optional ION-enabled applications are set up by the Infor Cloud team in your CloudSuite, if your license includes them. The Infor Cloud team configures the other applications to work with ION.

You must set up the documents documents (BODs) that can be sent and received by each application connection point, and then set up document flows between CloudSuite Business and that application.

Configuring BODs for the Infor CRM connection point

1 If a CRM connection point exists in ION Desk, select the connection point.

2 In its **Documents** tab, click **+** and add these documents, if they don't already exist:

Document	Receive in Application	Send from Application
Process.BillToPartyMaster		X
Process.ContactMaster		X
Process.CustomerPartyMaster		X
Process.Quote		X
Process.SalesOrder		X
Process.ShipToPartyMaster		X
Sync.BillToPartyMaster	X	
Sync.CodeDefinition	X	
Sync.ContactMaster	X	
Sync.CustomerPartyMaster	X	
Sync.CustomerReturn	X	
Sync.Invoice	X	
Sync.ItemMaster	X	
Sync.Location	X	
Sync.PayFromPartyMaster	X	
Sync.Person	X	
Sync.Quote	X	
Sync.ReceivableTransaction	X	
Sync.SalesOrder	X	
Sync.Shipment	X	

Document	Receive in Application	Send from Application
Sync.ShipToPartyMaster	X	

Configuring BODs for the Infor EAM connection point

1 If an EAM connection point exists in ION Desk, select the connection point.

2 In its **Documents** tab, add these documents, if they don’t already exist:

Document	Receive in Application	Send from Application
Process.Requisition		X
Sync.PurchaseOrder	X	
Sync.ReceiveDelivery	X	
Sync.SupplierPartyMaster	X	

Configuring BODs for the Infor Expense Management connection point

1 If an Infor Expense Management connection point exists in ION Desk, select the connection point.

2 In its **Documents** tab, add these documents, if they don’t already exist:

Document	Receive in Application	Send from Application
Sync.CodeDefinition	X	
Sync.CurrencyExchangeRateMaster	X	
Sync.EmployeeTimesheet		X
Sync.ExpenseReport		X
Sync.Personnel	X	
Sync.ProductionOrder	X	
Sync.ProjectMaster	X	
Sync.RemittanceAdvice	X	
Sync.ServiceOrder	X	

Setting up document flows

Some document flows are already fully configured or partially configured by the Infor Cloud team. This section indicates any remaining ION Desk post provisioning steps that you need to perform.

Verifying the security document flow between the ERP and Infor Ming.le

The Infor Cloud team has already set up a document flow between CloudSuite Business and Infor Ming.le to pass user account and role (group) information. Verify that the flow is activated and that it contains the correct connection points and documents.

1 In ION Desk, select **Model > Connect > Document Flows**.

2 Find the document flow **MingletoCSI** and verify that it is marked as **Active**.

3 Select the document flow to open it.

Note:

The CSI application box contains only one CloudSuite Business connection point (site). Because the sites are all in one database, basic user data is shared between all sites. However, if you want to ensure that updates to roles (groups) are also shared between all sites, you must set up a master site and shared user tables in CloudSuite Business. (See the *Infor CloudSuite Business Multi-Site Planning Guide – Cloud Edition*.) If you don't want to use a master site and shared user tables, then you must include all of the CloudSuite Business site connection points in this document flow

4 Select the document icon between Mingle1 and CSI and verify that it lists these documents:

- Sync.SecurityUserMaster

5 Select the document icon between CSI and Mingle_2 and verify that it lists these documents:

- Sync.SecurityRoleMaster
- Process.SecurityUserMaster

6 Make any needed corrections and save your changes.

Setting up document flows for optional BOD-enabled products in the CloudSuite

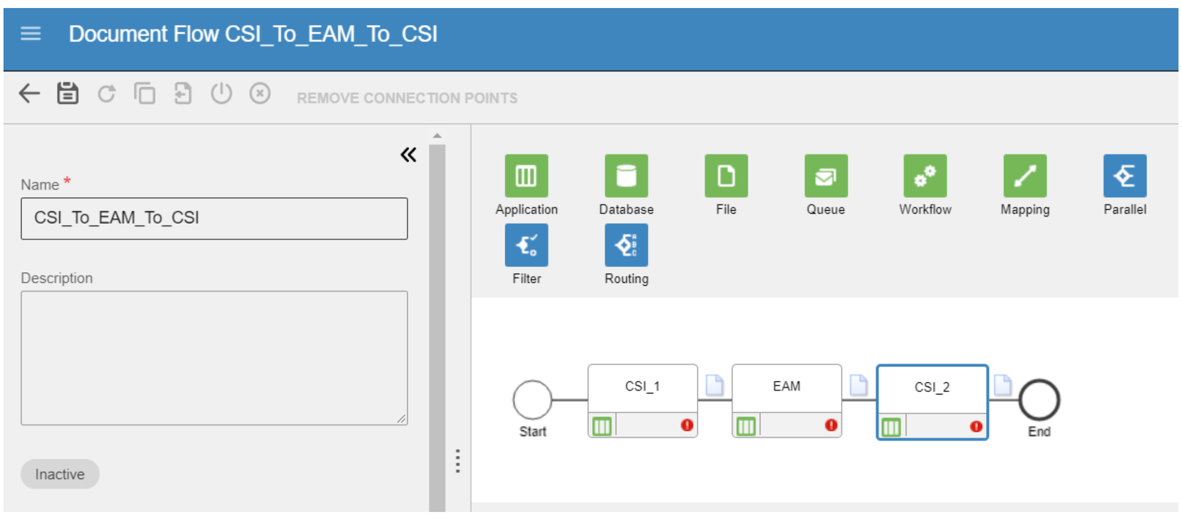
After the documents are associated with each of the connection points, set up the document flows in ION Desk between CloudSuite Business and the other application.

Note: The document flow is only one part of the integration setup. See the appropriate integration guide for the rest of the setup steps.

Creating the CSI > EAM > CSI document flow

Note: You must read the *Infor CloudSuite Business Integration for Infor EAM* to understand the integration and to follow any additional configuration steps in the applications, before you activate this document flow.

1. In ION Desk, select **Model > Connect > Document Flows**.
2. Create a document flow called CSI_To_EAM_To_CSI.

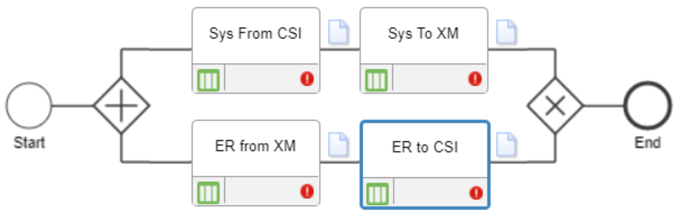


3. In the properties pane for each of the application boxes, click **Add** and add the appropriate connection points.
4. Click the document icon between **CSI_1** and **EAM** and include these documents:
   - Sync PurchaseOrder
   - Sync ReceiveDelivery
   - Sync SupplierPartyMaster
5. Click the document icon between **EAM** and **CSI_2** and include this document:
   - Process Requisition
6. Save the flow but do not activate it until you complete the steps in the integration guide.

Creating the CSI > XM > CSI document flow

Note: You must read the *Infor CloudSuite Business Integration for Infor Expense Management* to understand the integration and to follow any additional configuration steps in the applications, before you activate this document flow.

1. In ION Desk, select **Model > Connect > Document Flows**.
2. Create a document flow called CSI_XM_CSI.
3. Drag a parallel item into the document flow and add the four application boxes.

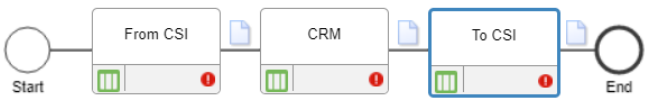


4. In the properties pane for each of the application boxes, click **Add** and add the appropriate connection points:
   - Associate the **Sys From CSI** and **ER to CSI** applications with the CloudSuite Business connection point(s).
   - Associate the **Sys To XM** and **ER from XM** applications with the Infor Expense Management (XM) connection point.
5. Save the document flow.
6. Click the document icon between **Sys From CSI** and **Sys To XM** and add these documents:
   - Sync CodeDefinition
   - Sync CurrencyExchangeRateMaster
   - Sync Personnel
   - Sync ProductionOrder
   - Sync ProjectMaster
   - Sync RemittanceAdvice
   - Sync ServiceOrder
7. Save the document flow.
8. Click the document icon between **ER From XM** and **ER To CSI** and add these documents:
   - Sync EmployeeTimesheet
   - Sync ExpenseReport
9. Save the flow but do not activate it until you complete the steps in the integration guide.

Creating the CSI > CRM > CSI document flow

Note: You must read the *Infor CloudSuite Business Integration for Infor CRM* to understand the integration and to follow any additional configuration steps in the applications, before you activate this document flow.

1. In ION Desk, select **Model > Connect > Document Flows**.
2. Create one document flow for each site that is connected to CRM. Name it CSI_*site*_CRM_CSI.



3. In the properties pane for each of the application boxes, click **Add** and add the appropriate connection points.
4. Click the document icon between **From CSI** and **CRM** and include these documents:
   - Sync BillToPartyMaster
   - Sync CodeDefinition
   - Sync ContactMaster
   - Sync CustomerPartyMaster
   - Sync CustomerReturn
   - Sync Invoice
   - Sync ItemMaster
   - Sync Location
   - Sync PayFromPartyMaster
   - Sync Person
   - Sync Quote
   - Sync ReceivableTransaction
   - Sync SalesOrder
   - Sync Shipment
   - Sync ShipToPartyMaster
5. Save the document flow.
6. Click the document icon between **CRM** and **To CSI** and include these documents:
   - Process BillToPartyMaster
   - Process ContactMaster
   - Process CustomerPartyMaster
   - Process Quote
   - Process SalesOrder
   - Process ShipToPartyMaster
7. Save the document flow.

8 If you plan to send CRM data to more than one CloudSuite Business site, follow these additional steps:

a Drag a Parallel object into the flow between **CRM** and **To CSI**. Add one line for each site.

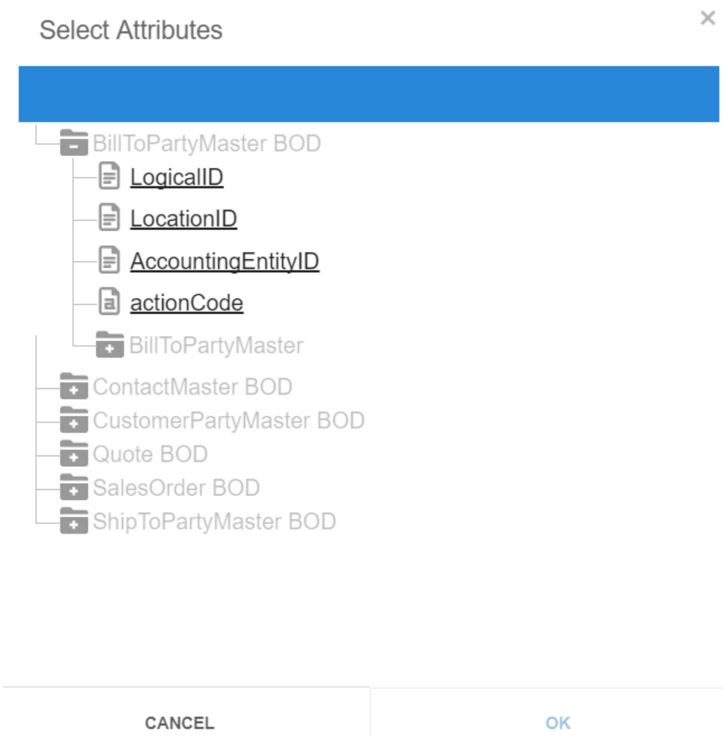
b Drag one application object for each site onto each line. Add the connection point for that site.

c Drag a Filter object on the first line. This filter directs inbound Process BOD documents from **CRM** to the appropriate CloudSuite Business accounting entity (site).

d In the Filter Properties area, specify a name for the filter that includes the site name and the BOD attribute, for example, **LAAcctEntity**.

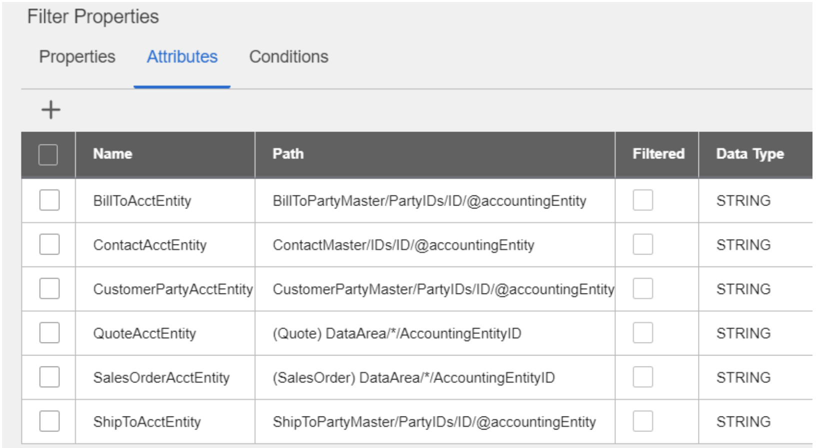
e Click the **Attributes** tab.

f Click **Add** and expand one of the BODs to select its AccountingEntityID attribute. Click **OK**.



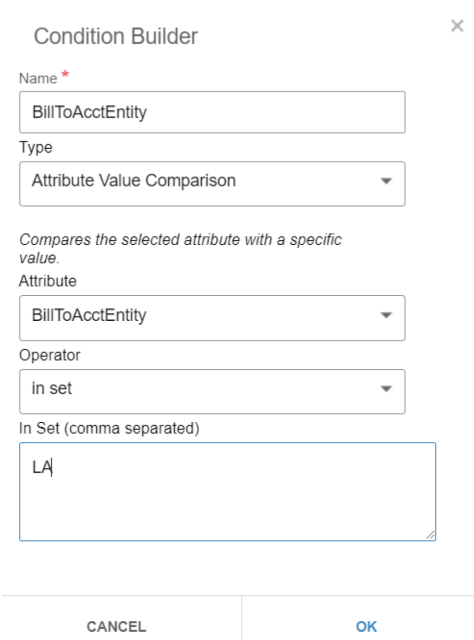
g Click in the **Name** column and change the attribute name to describe the BOD and attribute, for example,**BillToAcctEntity**. This will make it easier to link the attributes to the conditions.

Repeat steps f and g to create attributes for the other BODs in the list. The finished list of attributes should look like this example:



h In the **Conditions** tab of the filter, select a BOD in the **Document** field. For example, select BillToPartyMaster.

i Click **Add** and create a condition for the BOD attribute, which is used to filter BODs for the specific site.



Specify this information:

Name
For the condition name, specify the filter attribute that you created in the **Attributes** tab for the BOD. For example, for the BillToPartyMaster BOD, specify the **BillToAcctEntity** attribute.

Type
Set this to **Attribute Value Comparison**.

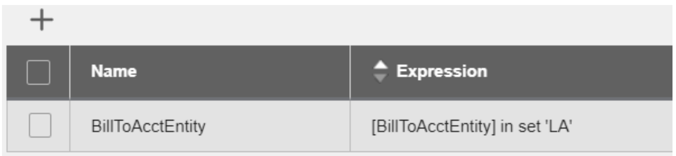
Attribute
Select the filter attribute, for example **BillToAcctEntity**.

Operator
Select **in set**.

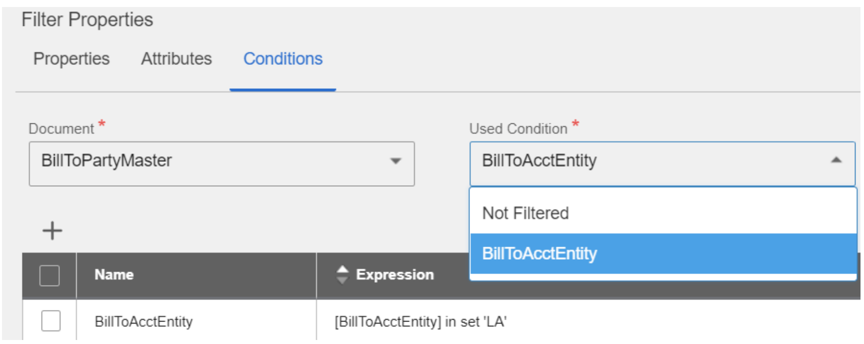
In Set
Specify the site name, for example, **LA**.

j Click **OK**.

The finished condition should look like this example:



k Select the same BOD in the **Document** field and select the matching condition in the **Used Condition** field. For example, select **BillToAcctEntity**.



l Save your changes to the filter.

m Copy the filter, place it on each of the branches, and then rename and edit the filter to apply to each site.

Delete any empty branches.

9 Save your changes.

Do not activate the document flow until you complete the steps in the integration guide.

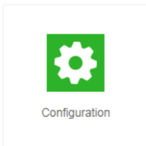
Configuring IDM

The Infor Cloud team imported the CloudSuite Business document types, Business Context Model, and Access Control List (ACL) into the Infor Document Management (IDM) application as part of the provisioning process.

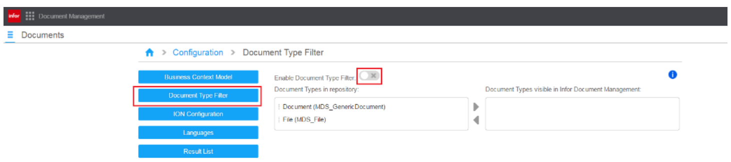
Disabling the Document Type filter

To ensure that all of the document types will be visible in IDM and the Related Information app:

1. In the Infor Document Management application, click the **Administration** menu.
2. Click **Configuration**.



3. Select **Document Type Filter** and disable the filter.

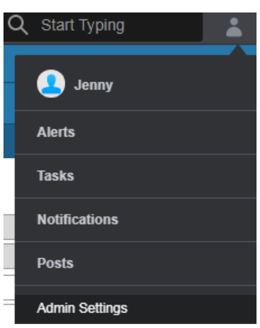


4. Save your changes.

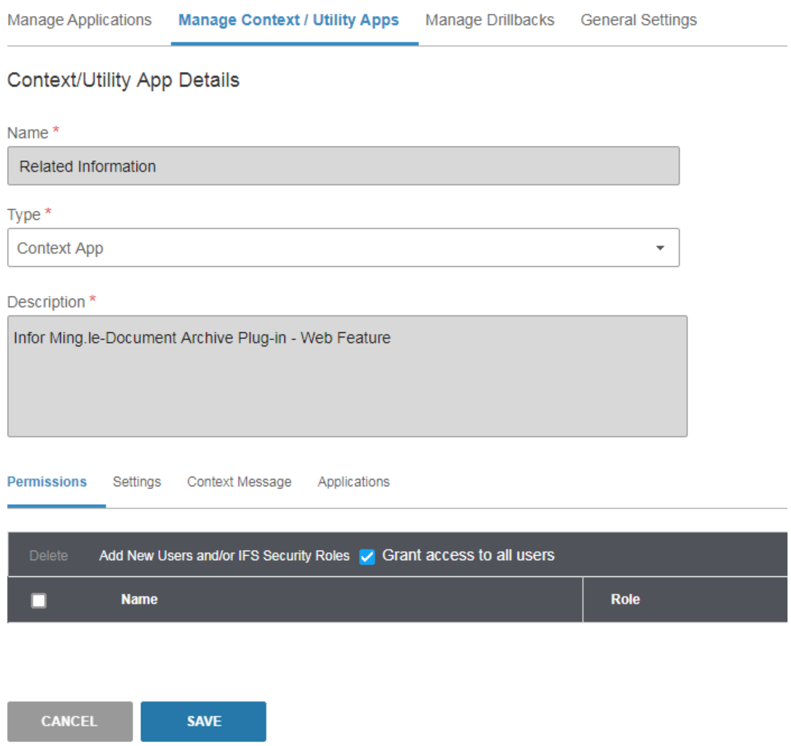
Activating the Related information context app

You must activate the Related information context app, so that it is displayed next to the CloudSuite Business form. This app shows documents from IDM that are related to the current CloudSuite Business record.

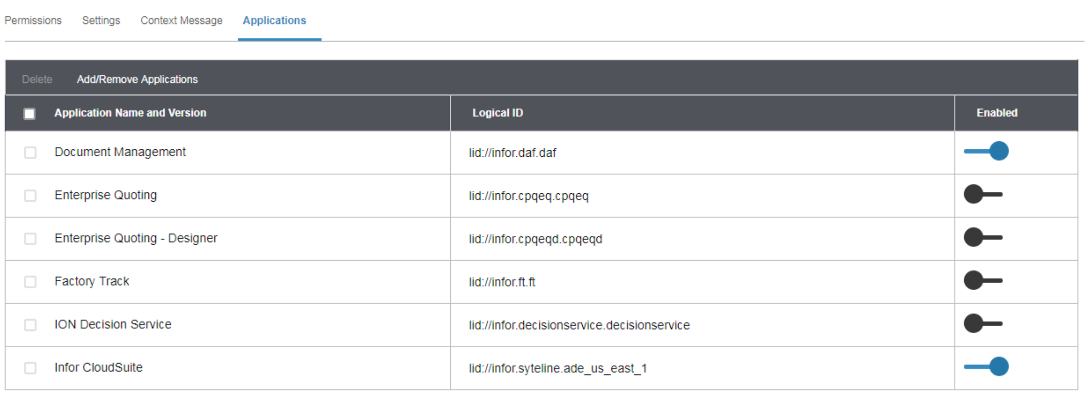
1. From the **User** Menu, select **Admin Settings.**



2. In the **Manage Context/Utility Apps** tab, select **Related Information**.
3. In the **Permissions** tab for that app, select **Grant access to all users** and click **Save**.



4 In the **Applications** tab, set **Document Management** and **Infor CloudSuite** to be **Enabled** for the Related information app.

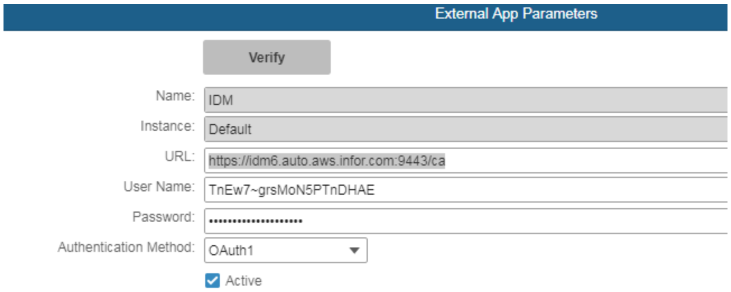


5 Click **Save**. In order to see the changes, you might need to sign out of the application and Infor Ming.le. Close your browser and reopen it.

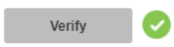
Verifying the IDM connection in the ERP

1 Open the CloudSuite Business app.

2 Select **Form > Open** and open the External App Parameters form. The connection information should already be entered by the Infor Cloud team.



3 Click **Verify**. A green check mark is displayed next to the button if the connection was successful.



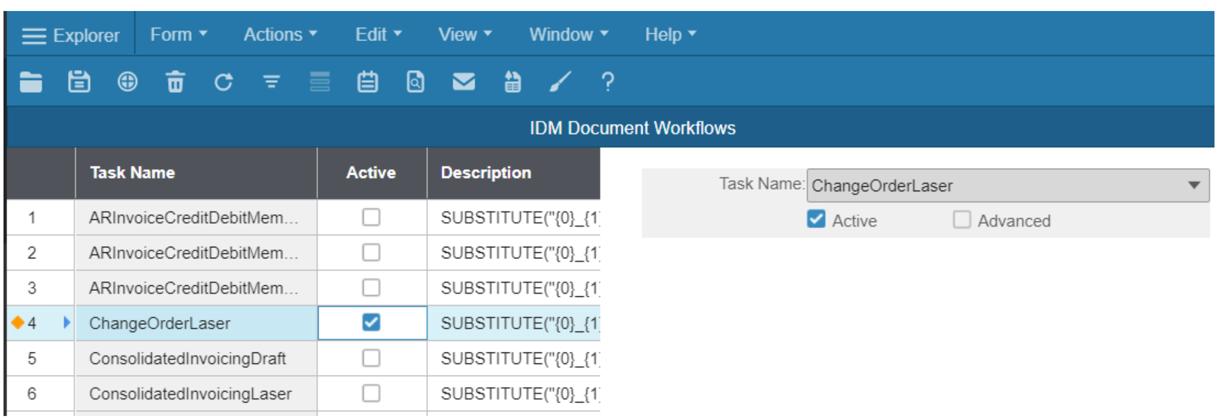
If the connection was not successful, a red X is displayed, and you should contact your Infor representative.

Activating the IDM workflows in the ERP

When CloudSuite Business users generate a document that has an active workflow, the document is sent to IDM. To activate the workflows:

1 In CloudSuite Business, open the IDM Document Workflows form.

2 Select **Active** for each predefined workflow if you want that type of document to be sent to IDM. Your choices should be based on business decisions for the company.



3 Save your changes.

Later, you could use the advanced features on this form, along with the Application Event System, to customize the integration. See the online help for assistance with the advanced fields.

Importing sample ION workflow content

Optionally, you can import some sample workflow content into ION Desk, to better understand how alerts, workflows, and activation policies are used for communication between ION and CloudSuite Business.

Note: These samples are not currently supported by Infor.

1 In the Infor Xtreme Support portal, search for solution **1440389**. Download the `SL_ION_Content.zip` file to a local folder. Unzip the file to extract a set of files that you will import into Infor Ming.le and ION Desk.

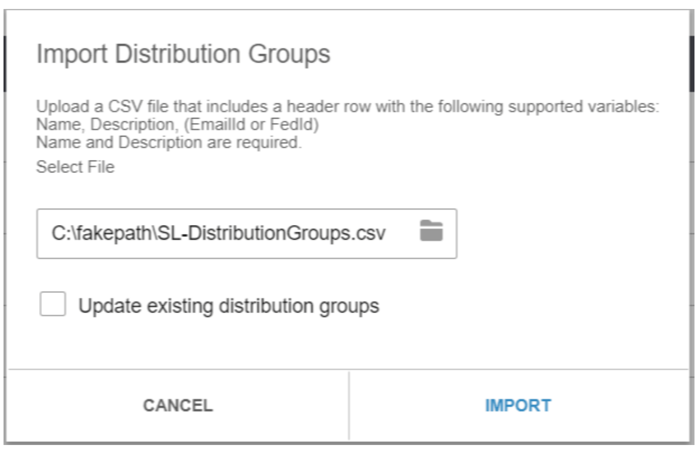
2 Open Infor Ming.le and import the distribution groups:

   a From the user menu, select **User Management.**

   b From the menu on the User Management page, select **Manage > Groups > Distribution Groups**.

   c Click the **Import** icon.

   d Browse to your local folder, select the `SL-DistributionGroups.csv` file, and click **Import**.



   e Verify that the log messages indicate that all rows were added successfully, and click **Close**.

   The new distribution groups are displayed on the Groups page.

3 Open ION Desk and import the sample monitors:

   a Select **Model > Monitors & Workflows > Monitors**.

   b Click the **Import** icon.

   c Browse to your local folder, select the `SL-Monitors.xml` file, and click **OK**.

   d Verify that the list shows successfully imported monitors and click **OK**.

4 In ION Desk, import the sample workflows. Select **Model > Monitors & Workflows > Workflows** and import `SL-Workflows.xml`.

5 In ION Desk, import the sample activation policies. Select **Model > Monitors & Workflows > Activation Policies** and import `SL-ActivationPolicies.xml`.

6 Activate each of the sample monitors, workflows, and activation policies by clicking the **Activate** button.

Configuring your web browser

5

Configure your browser for use with Infor Ming.le.

Allowing popups for browsers

Ensure that any browser that is used with CloudSuite Business allows pop-ups. If pop-ups are disabled, the help will not work properly.

Avoiding multiple connections in a browser

You can have as many configurations as you want in a single application or server instance.

However, you cannot have multiple concurrent connections to the same CloudSuite Business application server in a single browser, even using different configurations. The session connection attributes use the server name as the key and are not differentiated by configuration name.

Setting up compatibility for Internet Explorer browsers

Note: Follow these steps only if you are using Internet Explorer as your browser.

Some Infor Ming.le and CloudSuite Business versions of Internet Explorer might be incompatible. If so, a message is displayed to indicate that your browser is not supported. In that case, before you can run CloudSuite Business in Infor Ming.le, you must change your compatibility view settings in your browser.

1 In the browser, click **Tools > Compatibility View Settings**.

2 Clear the **Display intranet sites in compatibility view** option.

Configuring ERP access through Infor Ming.le

6

Users, roles, and person IDs are initially defined in Infor Ming.le and shared with all of the other applications that run through the Infor Ming.le portal. Roles and some user information can later be modified in CloudSuite Business.

Configuring Single Sign On

All applications within the CloudSuite are preconfigured to use Infor Ming.le/IFS to allow a single sign on. No additional configuration is needed.

If you want to integrate your existing on-site identity management (single sign on) system with this CloudSuite, contact Infor Consulting Services or your Infor provider.

Users and roles

Because Infor Ming.le is the system of record for users, you must set up users in Infor Ming.le. The users are then synchronized through BODs to other BOD-enabled applications in the Infor Ming.le portal. After the users are synchronized to your application, you can continue the user setup in your application.

You can perform these user management tasks in Infor Ming.le:

- Create users, including manual import of users
- Update users
- Delete or deactivate users
- Reset passwords
- Monitor recent user activity and mobile sessions
- Manage sessions

How Infor Ming.le users and roles work with ERP users and groups

When you create or update a user in Infor Ming.le, the information associated with that user is used to automatically set up some user information in CloudSuite Business. This association is handled through Sync SecurityUserMaster BODs that are passed through ION.

CloudSuite Business groups are mapped to security roles in Infor Ming.le. The list of available Cloud Suite Business groups must be updated and maintained in CloudSuite Business – not in Infor Ming.le - because the types of roles and the names of roles are dependent on the requirements of CloudSuite Business. After the groups are set up in CloudSuite Business, they are synchronized to Infor Ming.le through the Sync SecurityRoleMaster BOD, so that Infor Ming.le is aware of all possible roles. The ability of security roles to perform specific operations and access specific data is enforced by Cloud Suite Business, not Infor Ming.le.

Infor Ming.le provides a default Infor-SystemAdministrator role that allows for full access to all applications that are linked to Infor Ming.le. CloudSuite Business has an Infor-SystemAdministrator group or role that allows access to all CloudSuite Business screens. When a user who has the Infor-SystemAdministrator role inInfor Ming.le is synchronized to CloudSuite Business, that user automatically has access to all CloudSuite Business forms.

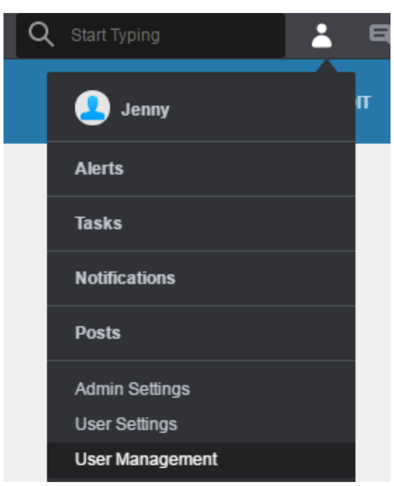
For more information about these BODs, see "User and role BOD usage" on page 95.

Configuring user access to the ERP through Infor Ming.le

Caution: The Infor Cloud team configures the initial Infor Ming.le system administration user and its roles, as well as several other required accounts. We recommend that you do not change the configuration of this initial system administrator or the other required accounts.

You must add other users in Infor Ming.le before they can access CloudSuite Business through Infor Ming.le.

1 From the Infor Ming.le User Menu, select **User Management**.



2 On the Users page, follow these general steps to add users. See the Infor Ming.le online help for more information.

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

b Clear the **Send Invitation** option so that you can send the invitation later, after you have completed the user setup.

c Save your changes.

d Click the details icon to view details for the user.

Note: The IFS Person ID will be used to synchronize personnel records with CloudSuite Business . It is generated automatically and should not be changed.

e In the **Security Roles** tab, assign the user to one or more roles, and click **Add & Close**.

In order for users to access CloudSuite Business through Infor Ming.le, they must be assigned at least one CloudSuite Business role.

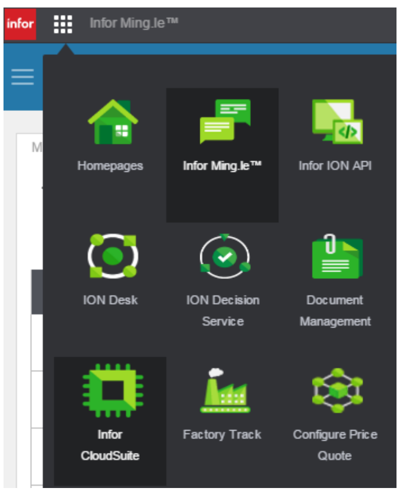
You might not see all of the application-specific roles that you need. If you do not see the roles you need, those roles can be added and assigned later from within CloudSuite Business

.

f Save your changes.

The information is sent through BODs to CloudSuite Business after you save your changes.

3 Open CloudSuite Business from the App Menu.



4 If prompted, select a configuration, which is linked to one of your CloudSuite Business sites. If you plan to use one site as a master site, select the configuration for the master site.

5 In CloudSuite Business, select **Form > Open** and open the Users form.

6 In the Users form, click the filter toolbar button to see all of the users who were defined in Infor Ming.le.

7 Update the information for each user to specify additional required or optional fields that are not shared with Infor Ming.le. See the CloudSuite Business online help for more information.

   a After you add your users in Infor Ming.le, verify that the user information has been sent through BODs to CloudSuite Business. This information should be shown in the CloudSuite Business Users form:

      - The user name (email address) that you set for each user in Infor Ming.le is shown in the **User Name** field.
      - The **IFS Person ID** that was set for each user in Infor Ming.le is shown in the **Workstation Domain/ID** field.

      These values should not be changed.

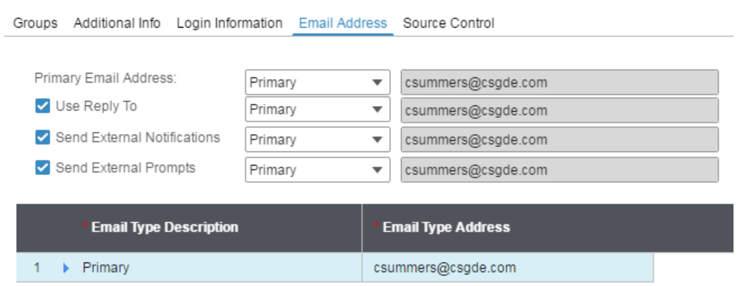
   b Assign the user's form editing permission level, PO requisition limit, and multi-site group authorization, as needed. See the online help.

   c Set the user's password for the CloudSuite Business web client or click once client.

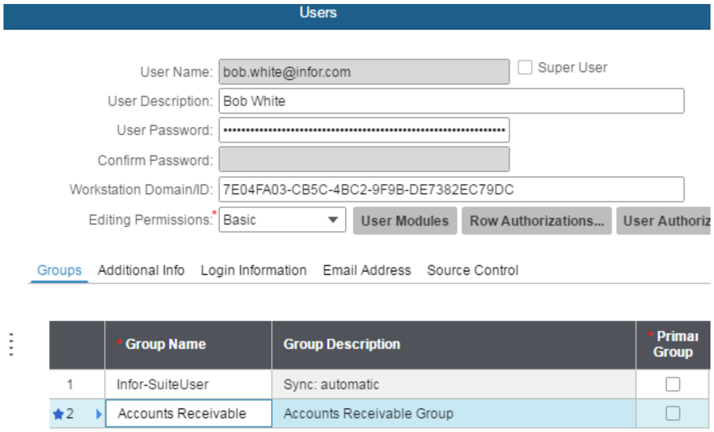
      (This is not the same password that is used to log into the Infor Ming.le portal. The Infor Ming.le portal password uses the IFS ID tied to the Workstation ID, so no additional user login is required to access the CloudSuite Business application in Infor Ming.le.)

      When users access CloudSuite Business through the web client or the click once client rather than through Infor Ming.le, they must know this password.

   d Ensure that the email address that you set for each user in Infor Ming.le is shown in the **Primary Email Address** on the Users form. This value should not be changed. We recommend setting these additional fields for the user:



   e In the **Groups** tab, click in the grid and select **Actions > New** to add a new row.



f Click in the **Group Name** field to view the list of groups. Add any groups to which this user should belong. If you were able to assign the groups as security roles for the user in Infor Ming.le, you will see them listed here. Otherwise, you can assign the additional groups here.

g Click **User Modules** and assign the appropriate license modules to the user.

By default, users who are originally created in Infor Ming.le and sent through BODs to CloudSuite Business are assigned a Transactional license in CloudSuite Business. This is handled through the **Admin License Module Name** setting in the Process Defaults form.

h Save your changes.

8 In Infor Ming.le User Management, select the user's record, and then select **Action > Resend Invitation**.

The user receives a notification with a link that provides user-specific access to Infor Ming.le and to CloudSuite Business.

Configuring additional system administrator access to all tenant applications through Infor Ming.le

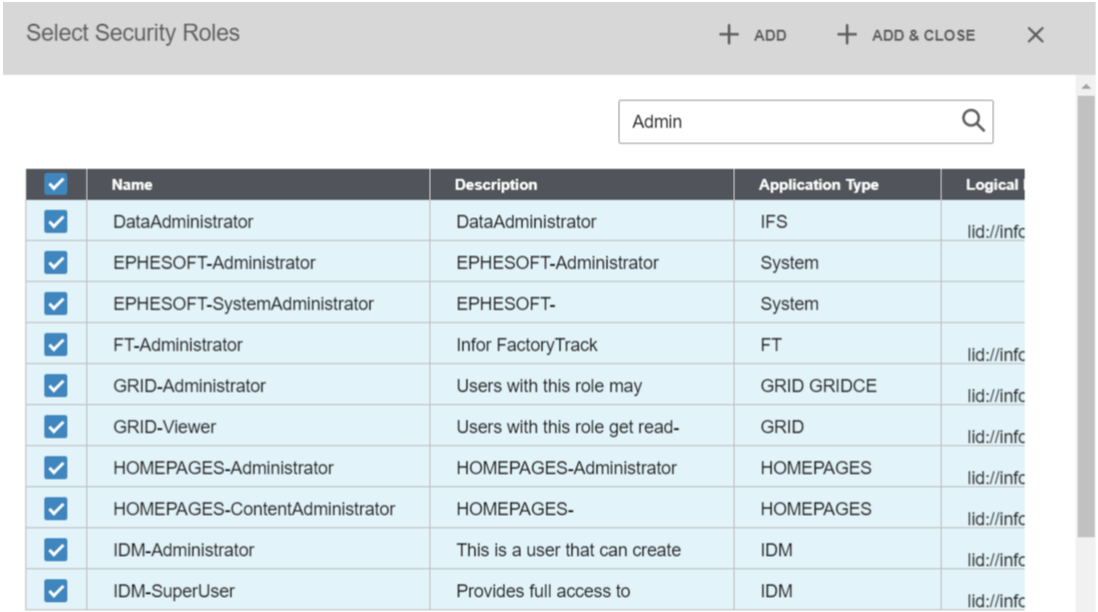
Note: The Infor Cloud team initially configures system administrator access for one user between Infor Ming.le and CloudSuite Business.

1 From the Infor Ming.le User Menu, select **User Management**.

2 On the Users page, click the Detail icon for one of the users that you want to make an administrator.

3 In the **Security Roles** tab for that user, click **+** to add roles.

4 In the **Search** field, specify **Admin** to filter for all administration roles, and click the search icon.



5 Select the check box at the top of the column, to select all admin roles.
6 Click **Add & Close**.
7 Click **+** again and specify **Mingle** in the filter field. Add all displayed roles to this user.
8 Click **+** again and specify Homepage in the filter field. Add all displayed roles to this user.
9 Click the Save icon on the **Security Roles** tab to save the roles for this user.

Configuring additional system administrator access to the ERP through Infor Ming.le

Note: The Infor Cloud team initially configures system administrator access for one user between Infor Ming.le and CloudSuite Business.

1 In Infor Ming.le, add the Infor-SystemAdministrator role to the appropriate users.
  After you update the user information, a BOD is sent from Infor Ming.le to CloudSuite Business to synchronize the system administrator users with this role.
2 Assign additional system administration roles, either in Infor Ming.le or in the CloudSuite Business Users form, to the appropriate users.

Setting up additional roles or groups

Predefined security roles (groups) are used in both the CloudSuite Business application and Infor Ming.le. If you need to create security roles groups that are specific to your company for use with CloudSuite Business, follow these steps.

1 In CloudSuite Business, use the Groups form to create any additional groups (security roles) that you need in order to access specific forms, programs, and logical folders.

   Your updates to the list of groups/roles are then sent to Infor Ming.le through the Sync.SecurityRoleMaster BOD. The information from this BOD is used in Infor Ming.le to automatically create a matching security role.

2 Associate the security roles with users. This can be done in either Infor Ming.le or CloudSuite Business:

   - To associate security roles with users in Infor Ming.le:

     a Select **User Management**.

     b Select a user.

     c Click the Details icon.

     d In the **Security Roles** tab, click **+**.

     e Select the roles you want for the user, and click **Add & Close**.

     Infor Ming.le generates a Sync.SecurityUserMaster BOD for each user to which a role was added. It sends the BOD to all applications that run in the Infor Ming.le portal. CloudSuite Business uses the information from this BOD to associate the role or group with the CloudSuite Business user record.

   - To associate groups (roles) with users in CloudSuite Business, go to the Users form, filter for the user, and use the grid on the **Groups** tab to associate the user with the appropriate groups.

     CloudSuite Business generates a Process.SecurityUserMaster BOD which is sent to Infor Ming.le. Infor Ming.le then sends another BOD to all applications that run in the Infor Ming.le portal, to update the user records in all applications

     .

   Note: Do not manually create a security role in Infor Ming.le that does not exist in CloudSuite Business.

   If you delete a role in either CloudSuite Business or Infor Ming.le, you must also delete the corresponding role in the other application.

Automatic login and selecting configurations

When users first access CloudSuite Business through Infor Ming.le, they see a dialog box. Because of Single Sign On, the user ID and password are not requested; however, users must select a Cloud Suite Business configuration. The **Use Workstation Logon** option on this dialog box is hidden and is automatically selected for the user.

Subsequent logins depend on how the user signs in and out of the application and Infor Ming.le:

- If users sign out of the CloudSuite Business application before exiting Infor Ming.le, then the next time they open the CloudSuite Business application, they must select a configuration.
- If users close the browser without signing out, or exit Infor Ming.le without signing out of CloudSuite Business, then the next time they open the CloudSuite Business application, the previous

configuration is automatically selected and no dialog box is shown. To switch to a different configuration, the user can select **Form > New Sign In**.

Verifying user access

To verify that users were created properly and can access the appropriate forms in CloudSuite Business :

1. Log into Infor Ming.le portal as a user. The user must belong to a role that is defined as an administrator in both Infor Ming.le and CloudSuite Business.
2. From the App Menu, open CloudSuite Business.
3. If prompted, select the appropriate configuration and click **OK**. The application session is opened.
4. Open the Users form and verify this information for several users:
   - **User Name** matches the Email address in Infor Ming.le.
   - **Workstation Domain/ID** matches the IFS Person ID in Infor Ming.le.
   - Groups that you assigned to this user are set as roles in Infor Ming.le.
5. Sign out of the application and Infor Ming.le. Close the browser.
6. Log into Infor Ming.le and CloudSuite Business as a non-administrative user who has access.
7. Ensure that you can open any forms that the user has authorization to open, and that you cannot open any forms for which the user is not authorized. as a non-administrative user who has access to both

Setting up distribution groups

Optionally, you can set up distribution groups in Infor Ming.le for CloudSuite Business users who require access to ION in order to view or update information or to troubleshoot errors.

See the Infor Ming.le online help.

Service accounts

The Infor Ming.le Service Accounts page shows accounts that have been created to allow applications a resource owner grant to contact the Infor Authorization Service to obtain a token for use in making API requests.

7 Configuring the ERP

Configure the CloudSuite Business ERP application using these general steps.

Note: Consider using an Infor Implementation Accelerator to speed up your implementation. Implementation Accelerators provide overviews, key capabilities, definitions, and configuration of codes and parameters for specific business processes. For more information, contact your Infor representative.

This section assumes that you have already set up the users and groups (roles).

1 Open the CloudSuite Business application in the Infor Ming.le portal.

2 Set up a file server and logical folders.

See "Setting up a File Server for ERP in the Cloud" in the online help.

3 Set up the application to send reports by email to users.

On the Intranets form, click the filter button to show the predefined records.

In the CORP intranet record, select **Send Email Notification**. The Infor Cloud Team has already set up the required fields for SMTP, TaskMan and SSRS for the CORP intranet. These fields should not be changed.

4 Define report options.

You do not print a report directly from the application in the cloud. When you click **Print** or **Preview**, by default the report is displayed as a PDF in your browser, and you can save or print it from there.

In the Report Options form, the Infor Cloud team has already set default options for all users. Do not modify this default record, which has a blank **User** field value. However, you can add records for individual users or reports, and change some of the settings specifically for that user or report. For example, you can set **Email Notification** to **Yes** for some reports. You cannot specify a printer or a different **Output Directory**. See the online help for information about all of the options.

5 If your tenant has multiple sites:

- On the Sites/Entities form, set the **Time Zone** for each site. Do not change any of the other site information on this form.
- Use the *Multi-Site Planning Guide - Cloud Edition* and the *Multi-Site Implementation Guide - Cloud Edition* to set up replication between the sites and to configure the rest of the financial, parameter and master data for the application.

  Specify a master site for the intranet, in order to maintain customers, vendors, and items for all sites from the master site. You can optionally use the Intranet Shared User Tables form to share the Authorizations_mst, UserGroupMap_mst, and/or user_local_mst tables if you want to share users and group authorizations information between sites. Do not use the Intranet Shared Tables form; those tables are already shared because the sites are all in one database.

6 If your tenant has a single site, follow these steps, using the online help:
   - On the Sites/Entities form, set the **Time Zone**. Do not change any of the other site information on this form.
   - Set the invoice length on the Order Entry Parameters form.
   - Set up the chart of accounts and financial information.
   - Set up other parameter forms.
   - Set up master data such as customers, vendors, and items.

7 Set master data to standardized values.

   To ensure consistent master data between integrated applications, use the ISO standard values where applicable. You can map existing non-standard units of measure, currencies and countries to ISO values through these CloudSuite Business forms:
   - Currency Codes

     Note: ISO currency codes are required for some integrations. ISO currencies are not defined as part of an initialized database and must be set manually.
   - Countries
   - Unit of Measure

8 The values that you must configure in CloudSuite Business for integrations–for example, customer, vendor or item master records, or system parameters–often depend on the application with which CloudSuite Business will exchange information. For more information, see the appropriate application integration guide.

Configuring applications to send and receive BODs in ION

8

This section describes how integrations between this application and other applications use ION to send and receive BODs, and how to set up or modify document flows between applications. For details about a specific integration, see the appropriate integration guide.

Tasks performed by the Infor Cloud team

The Infor Cloud team has already set up CloudSuite Business so that it can generate BODs and place them in a message outbox where ION Connect can retrieve them. The team also set up the inbound message configuration, so that BODs sent to this application can process those messages.

The team pre-configured some initial replication rules, as well as logical IDs, tenants, and accounting entities (sites) in CloudSuite Business:

- The team set up a logical intranet called InforESB in CloudSuite Business. This intranet is used for ION communications. If the same tenant ID is used for all sites on this intranet, the Infor Cloud team specified in the Intranets form. The tenant ID specified for each site on the Sites/Entities form matches the tenant ID used in ION for other connecting products.
- On the Sites/Entities form in CloudSuite Business, the team set up a record for a logical "site" called InforBUS that is used for communication with ION, as well as records for the other sites in your system.
- On the Replication Rules form, the team set up replication rules for category ESB where each of your sites is the Source Site and the InforBUS site is the Target Site.

In ION Desk, the Infor Cloud team preconfigured some connection points and document flows:

- The team set up connection points for all CloudSuite Business sites, Infor Ming.le, Infor Document Management and provided the list of documents that can be sent and received by these connection points.
- If your CloudSuite includes Infor CRM, Infor EAM, or Infor Expense Management, the Cloud team set up connection points for these applications, and might (or might not) have set up the list of documents for those connection points.

- The team configured and activated a document flow between CloudSuite Business and Infor Ming.le to pass user account and role (group) information.
- The team set up and activated a Listener for Infor Ming.le, which automatically forwards all BODs for specified verbs to Infor Ming.le. It is used to view drillbacks from CloudSuite Business in Infor Ming.le. See the *Infor ION Desk User Guide - Cloud Edition* for information about message listeners.

Tasks performed during Post Provisioning

If your CloudSuite includes the optional CRM, EAM, or XM applications, the "Post provisioning steps" on page 21 completed and activated the document flows, and added any needed BODs to the connection points for these applications.

These tasks were performed by Infor Consulting Services, a Business Partner, or an administrator at your company.

How products connect to ION

The Infor Cloud team set up connection points in ION Desk for each of your Infor cloud applications (and CloudSuite Business sites) that use ION. You cannot modify these connection points, but you can add to the list of documents that can be sent or received by the connection point.

In an integration between two BOD-enabled products, document flows are set up to define the BODs that flow between the application connection points.

A connection point can be reused multiple times in one or more document flows. See the section on ION Connect Modeling in the *Infor ION Desk User Guide - Cloud Edition* for additional information about connection points and document flows.

If you remove from a connection point a document that is used in a document flow, an error is reported in the document flow messages pane.

Connection points are not activated separately. When you activate a document flow, the associated connection points are activated.

Integrating to BOD-enabled applications that are not in the CloudSuite

Documents and document flows for CloudSuite Business, Infor Ming.le, IDM, and optional applications in the CloudSuite (CRM, EAM and Infor Expense Management) were set up as part of the Infor Cloud team provisioning or the "Post provisioning steps" on page 21.

Optionally, if you want to send and receive BODs to or from another BOD-enabled application that is not part of the CloudSuite, follow these general steps. See the *Infor ION Desk User Guide - Cloud Edition* for detailed information.

Note: If you have an Infor consultant working with you, the consultant might handle these steps.

1. If an integration guide exists between the applications, refer to that guide instead of these steps.
2. Create a connection point for the other application. You must know the application connection information and have the appropriate utilities to connect to Infor ION from the other application if it is not in the Infor Cloud. If the other application is in the Infor Cloud, the Infor Cloud team must add the connection point for you.
3. In the **Documents** tab of the connection points, include the BODs that can flow to and from the applications.
   - See "Outbound BODs from the ERP to integrated applications" on page 113. Select **Send from Application** for each of these BODs.
   - See "Inbound BODs to the ERP from integrated applications" on page 116. Select **Receive in Application** for each of these BODs.
4. Optionally, you can also add custom document types. See the *Infor ION Desk User Guide - Cloud Edition*.
5. Define a new document flow that includes connection points for both CloudSuite Business and the other application.
6. Define the documents that flow between the applications, and the direction that they flow.
7. Save the document flow.
8. Activate the document flow.

Publishing BODs

This section provides a general description of how to publish, or generate, BODs from CloudSuite Business, and how to verify that data is flowing out of your application into ION.

For the steps to publish BODs for a specific integration, see the appropriate integration guide.

When you publish BODs in CloudSuite Business, they are placed in the Replication Document Outbox, where ION can retrieve them. The published BODs are then available to any application that subscribes to the BODs through ION. Products can subscribe to BODs either through a document flow or through a listener.

Publishing initial data

During normal processing, BODs are automatically generated (published) when a user makes a data change or completes a transaction. However, when you start a new integration with another application, you must manually publish BODs that pass the current set of data from your application to another application, so that the base systems are synchronized. The BODs are placed in the Replication Document Outbox, from which ION retrieves them and passes them to the other application.

To publish initial ERP master and transaction data into BODs that are placed in the Replication Document Outbox:

1. In CloudSuite Business, open the Replication Document Manual Request Utility.
2. Select **Initial Load** so that the data is processed as an insert, that is, as new data.
3. Select the BODs to include in the data load. The BODs you select are different for each integration. See the appropriate integration guide for the BODs to load.

   Note: If you select multiple process BODs at one time, the BODs are processed in alphabetical order. However, you must load certain BODs in a specific order,to prevent errors in the integration due to missing data. See "BOD dependencies" on page 54.

4. Click **Process** to process the selected BODs.
5. Continue to select and process BODs until all of the BODs are processed that are required for a specific integration.
6. Repeat this process at each CloudSuite Business site.

When you use this utility to publish BOD data, the current date is used for all Status/EffectiveDateTime elements.

After the initial data load, CloudSuite Business automatically publishes BODs whenever users change certain data or when certain transactions occur in CloudSuite Business. For a list of the events that generate BODs, see "Business events that generate outbound BODs" on page 101.

BOD dependencies

Be aware that you must load these BODs in this order to prevent errors in the integration due to missing data:

- CodeDefinition
- ItemMaster
- Location
- CustomerPartyMaster
- BillToPartyMaster
- ShipToPartyMaster
- SalesOrder
- Shipment
- Invoice

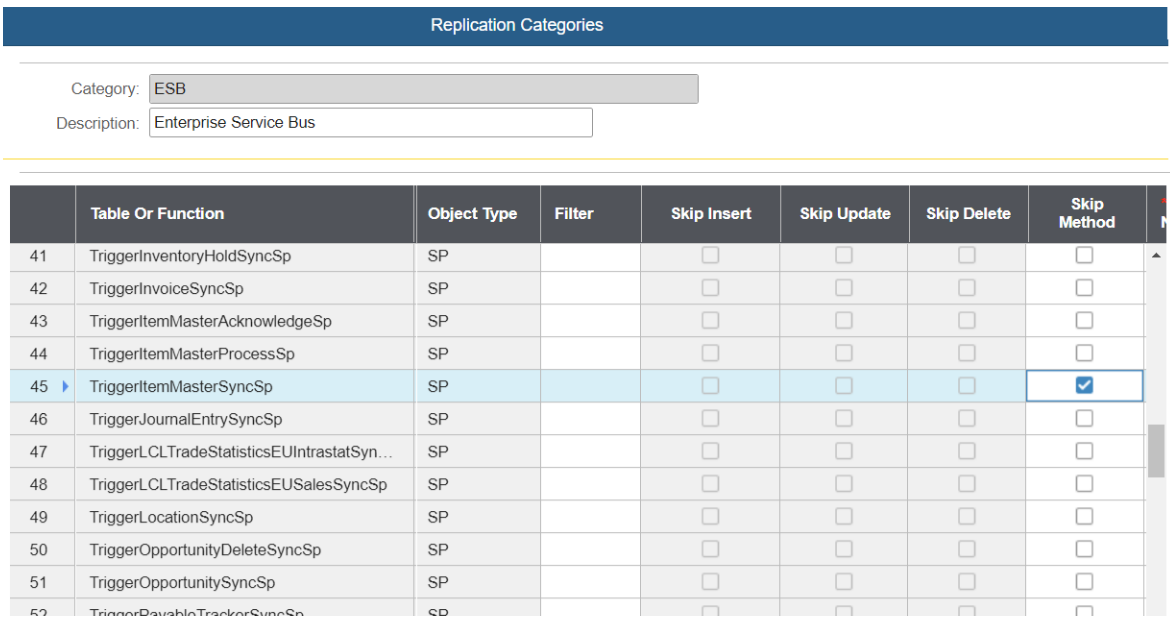
Turning off BOD replication to reduce traffic

CloudSuite Business can generate hundreds of BODs per day. By default, a BOD is generated whenever the BOD trigger occurs. For example, a BOD is generated every time a user creates a new customer order, or every time an invoice is created.

Unless you have integrations set up where other applications will receive the BODs, there is no need to generate most of the BODs. Use these steps to stop publishing all unnecessary BODs.

1. Open the Replication Categories form.
2. Specify **ESB** as the Category and click the filter.
3. To stop publishing a BOD, update its **Trigger*** record in the ESB replication category. Select the appropriate **Skip Method** check box.

   This example shows how to turn off the Sync.ItemMaster BOD:



Replication Categories

Category: ESB

Description: Enterprise Service Bus

	Table Or Function	Object Type	Filter	Skip Insert	Skip Update	Skip Delete	Skip Method
41	TriggerInventoryHoldSyncSp	SP		☐	☐	☐	☐
42	TriggerInvoiceSyncSp	SP		☐	☐	☐	☐
43	TriggerItemMasterAcknowledgeSp	SP		☐	☐	☐	☐
44	TriggerItemMasterProcessSp	SP		☐	☐	☐	☐
45	TriggerItemMasterSyncSp	SP		☐	☐	☐	☑
46	TriggerJournalEntrySyncSp	SP		☐	☐	☐	☐
47	TriggerLCLTradeStatisticsEUIntrastatSyn...	SP		☐	☐	☐	☐
48	TriggerLCLTradeStatisticsEUSalesSyncSp	SP		☐	☐	☐	☐
49	TriggerLocationSyncSp	SP		☐	☐	☐	☐
50	TriggerOpportunityDeleteSyncSp	SP		☐	☐	☐	☐
51	TriggerOpportunitySyncSp	SP		☐	☐	☐	☐

4. We suggest that you turn off all of the triggers except these:
   - FlushBusCacheForSiteSp
   - FlushBusParmsForSiteSp
   - SendEntireBodSp
   - TriggerBODConfirmSp
   - TriggerPulseNotificationSyncSp
   - TriggerSecurityPermissionMasterSyncSp
   - TriggerSecurityRoleMasterSyncSp
   - TriggerSecurityUserMasterAcknowledgeSp
   - TriggerSecurityUserMasterProcessSp
   - TriggerSecurityUserMasterSyncSp

Note: This list assumes that CloudSuite Business is only integrating with Infor Ming.le. If you are integrating with other applications via BODs, you must turn on the triggers for the required BODs when you integrate with the other applications. See the appropriate integration guide for the list of outbound BODs.

5 Save your changes.

Verifying the ION configuration

Use these tasks to verify that the connections are set up correctly.

Verifying that BODs are published

1. Use the information in "Business events that generate outbound BODs" on page 101 to determine what user actions generate certain BODs.
2. Perform those user actions in CloudSuite Business.

   For example, information from the Vendors form is replicated through the SyncSupplierPartyMaster BOD, so you could change the vendor address and save your change.
3. Check the Replication Document Outbox form in CloudSuite Business to see if a BOD was generated and marked as processed.

   In our example, the SyncSupplierPartyMaster BOD is generated.

   Depending on settings, the BODs might be removed immediately from the outbox after ION retrieves them. In that case, you can check ION Desk OneView to verify whether the BOD was sent and processed.
4. In ION Desk, review the messages by using ION Desk OneView or other ION Desk functions.

   If messages are not displayed in ION Desk, check the CloudSuite Business Replication Document Outbox form to see if the BODs were generated but not retrieved by ION.
5. If messages are not flowing, review the XML data for the BOD.

Verifying that ION receives data

To verify that ION is receiving BODs from CloudSuite Business, monitor these areas in ION Desk:

- Select **Manage > Connect > Active Connection Points** to show the message queue counts.
- Select **Manage > OneView** to show individual messages, if they are enabled.
- Select **Manage > Error BODs** to see if any errors were reported.

If you encounter problems, see "Data is not flowing properly" on page 99.

Verifying the data flow between applications

After you create and activate document flows to other applications, you can check the message inbox area of the other applications, to ensure that data is flowing between the systems. See the other application's documentation to determine how to find the message inbox.

Configuring workflows and ION messages for the ERP

9

You can configure workflows and ION messages for your application.

ION messages

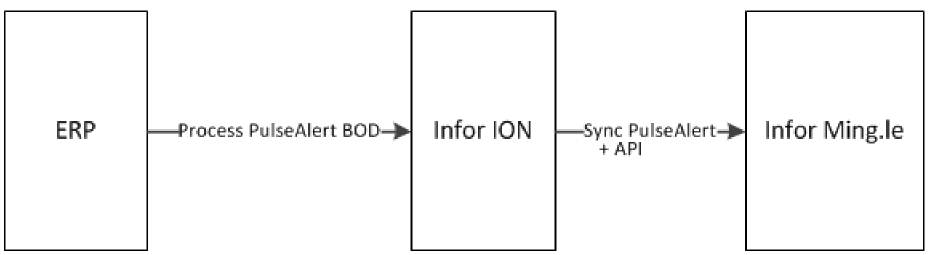
This table shows the types of ION messages:

Type	Description
Alert	In ION Event Management, you can monitor business events and create alerts when exceptions occur. BODs are published by applications when business events occur. Monitors are processes that run in the Event Management engine and evaluate these BODs by applying pre-defined business rules: comparison conditions, value change conditions, and document overdue timer based rules. When exceptions are detected, these are reported as alerts to the business users. The distribution list of alerts is included in the monitor definition. Users can receive alerts on their homepages or by email.
Task	A task is a workflow step that creates an entry in a user's task list. The workflow stops until the user has completed this task, and then the next step in the workflow begins.
Notification	A notification is a workflow step that creates a notification in the user's task list. The workflow continues after the notification is sent to a user. You can configure notifications to perform these actions: • Send a message to inform the user that a certain point in the workflow has been reached. • Optionally, include notes from previous steps. • Display workflow parameters and structures. A distribution list can be defined for notifications.

Type	Description
Alarm	The ION Alarms mobile application for Android devices is available to create monitors, called alarms. In ION Desk, the business administrator can create alarm templates. After the templates are activated, mobile users can use the templates to create alarms in the ION Alarms mobile application. The alarm creator can specify the distribution list for the resulting alert. See the *Infor ION Alarms Mobile Application User Guide*. The users receive the alert on their Infor Ming.le page, in the Infor Ming.le mobile application, or by email.

About alerts sent from the ERP to Infor Ming.le

CloudSuite Business can send PulseAlert BODs to ION that can be displayed as alerts in Infor Ming.le, as shown in this process flow:



A Process PulseAlert BOD is generated when a business event associated with one of these publications occurs in CloudSuite Business:

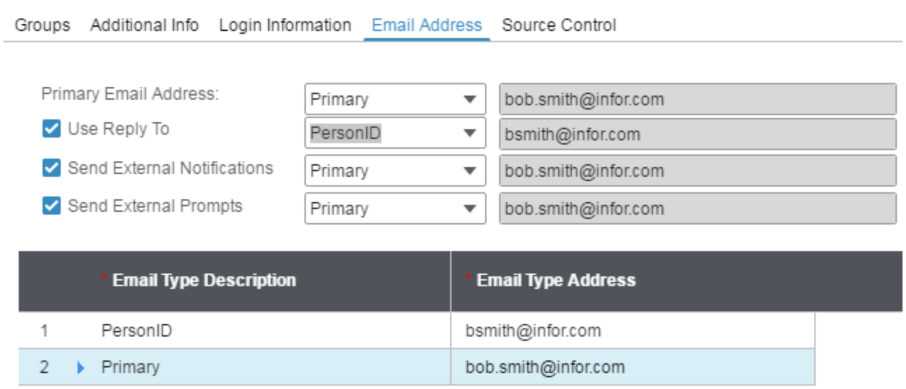
Publication	Description	Where defined
CustomerCreditHoldAlert	A customer was put on credit hold	Event: IdoOnItemUpdate, Seq 15
CustomerInteractionFollowUpAlert	A follow-up is needed to a customer interaction. Key Value 1 defines the customer number.	Event: CustomerInteractionFollowupAlert, Seq 1
CustomerOrderCreditHoldAlert	A customer order was put on credit hold	Event: IdoOnItemUpdate, Seq 16
CustomerShipmentAlert	An order was shipped to a customer (for specific orders/customers)	Event: IdoOnItemUpdate, Seq 17
DCShopFloorTransactionErrorAlert	A specified number of Data Collection shop floor transaction errors occurred. Key Value 1 defines how any errors must be	Trigger on dcsfc_mstIup

Publication	Description	Where defined
	generated before the user receives an alert	
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
LeadAssignedAlert	A lead is assigned to a salesperson	Event: IdoOnItemUpdate, Seq 19
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 18
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

Publication	Description	Where defined
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.

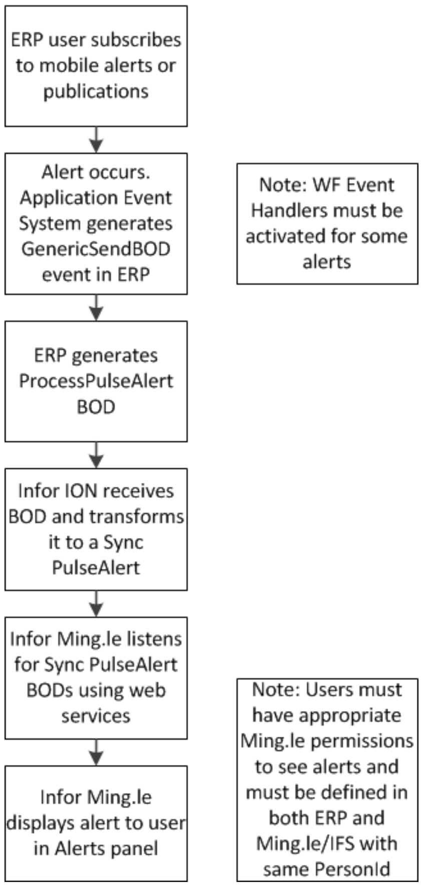
The email address that is used in the BOD is determined by the **Email Type Description** field on the Users form. If an address is specified where the **Email Type Description** is set to PersonID, then the email address that is associated with the PersonID type is used. If no PersonID type is found,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



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

ION attempts to match the email address from the BOD with a PersonID or primary email address that is defined for a user in 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:



Configuring monitors for alerts

1 Configure CloudSuite Business to send alerts.

a In the Process Defaults form, set **ION Pulse Interface** to **1**.

b For publications (alerts) that have associated event handler sequences, 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**.

See the list of publications and their associated event handler sequences in "About alerts sent from the ERP to Infor Ming.le" on page 60.

c CloudSuite Business users must subscribe to the appropriate publications (alerts) from the list above, through either the Mobile Alerts form or the Publication Subscribers form.

d 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.

See "Person IDs" on page 95.

2 Configure ION to process alerts from this application.

Ensure that the Process PulseAlert BOD is included in the list of BODs that can be sent from the CloudSuite Business connection point.

a In ION Desk, select **Model > Connect > Connection Points**.

b Select the Infor Ming.le connection point and add Process.PulseAlert in the **Documents** tab if it does not exist.

Through an internal API, ION passes the alert to Infor Ming.le as a Sync.PulseAlert BOD. See the *Infor ION Desk User Guide*.

3 Configure Infor Ming.le to display alerts for this application.

Set up Infor Ming.le users with the appropriate roles to access tasks and alerts. See information about configuring user access for tasks and alerts in the *Infor ION Desk User Guide*.

In addition, the value in the Infor Ming.le/IFS **Person ID** field must match the **Workstation/Domain ID** field for the same user in CloudSuite Business, and the**User Name** field in Infor Ming.le must match either 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 "User and role BOD usage" on page 95.

Configuring workflows for tasks and notifications

See the *Infor ION Desk User Guide* for detailed instructions on some of these steps.

1 Configure this application to send tasks and notifications.

2 Configure ION to process tasks and notifications from this application.

3 Configure Infor Ming.le to display tasks and notifications for this application.

Verifying drillbacks to the ERP

10

Infor Ming.le users can share screens and business data in some ION-enabled products that are integrated with CloudSuite Business. The screens and business data can include embedded drillback links to CloudSuite Business. If a screen or business data is associated with a BOD that was sent from CloudSuite Business, and the screen or data has an associated drillback link, then users can click the link to view the screen that has the supporting information for the source transactions.

For example, you might have a Homepage widget in Infor Ming.le that draws its data from the CustomerPartyMaster BOD in CloudSuite Business. If the user selects the drillback option from that widget, it opens the Customers form in CloudSuite Business.

A drillback link can be defined for each type of BOD noun, for example, SalesOrder or ItemMaster. The link is configured to open a specific CloudSuite Business screen for that noun. Not every BOD noun has an associated drillback view in CloudSuite Business.

Available drillbacks

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

BOD 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

BOD Noun	Drillback view	CloudSuite Business form
ReceiveDelivery	ReceiptView	MaterialTransactions
RemitToPartyMaster	RemitToPartyView	Vendors
Requisition	RequisitionView	PurchaseOrderRequisitions
SalesOrder	SalesOrderView	CustomerOrders
ShipFromPartyMaster	ShipFromPartyView	Vendors
Shipment	ShipmentView	MaterialTransactions
SupplierPartyMaster	SupplierView	Vendors

Loading the BODs that are used in drillbacks

In order to use these drillbacks, you must perform an initial load of the BODs listed in “Available drillbacks,” using the Replication Document Manual Request Utility in CloudSuite Business.

See "Publishing initial data" on page 53.

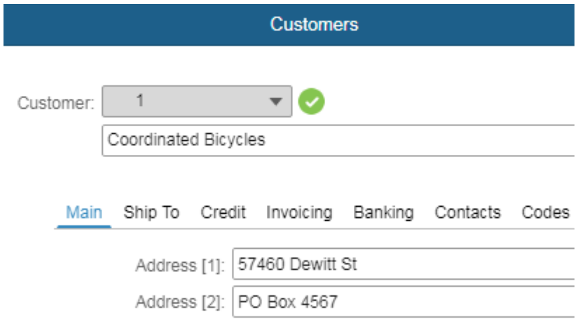
Verifying a drillback

Drillbacks are displayed in the Infor Ming.le user interface as links that open CloudSuite Business to a specific screen 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:

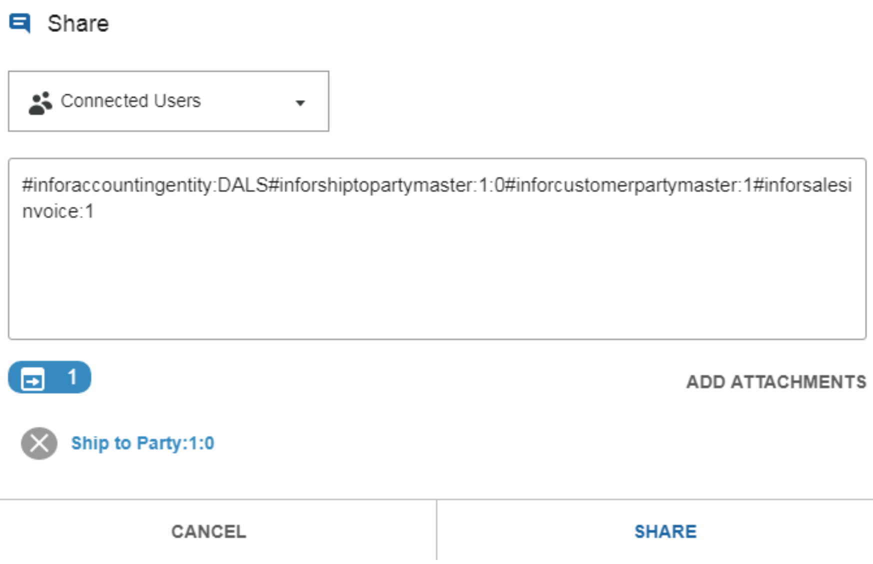
1. From the App menu, open CloudSuite Business.
2. Open a form that has a drillback, for example, Customers.

   Note: The user interface does not indicate whether a screen has a drillback. In order for a screen to have a drillback, a drillback must be configured and a business context message must also be sent. See "Available drillbacks" on page 65 and "Understanding business context messages" on page 69.
3. Display the information that you want to share, for example, the record for a particular customer.

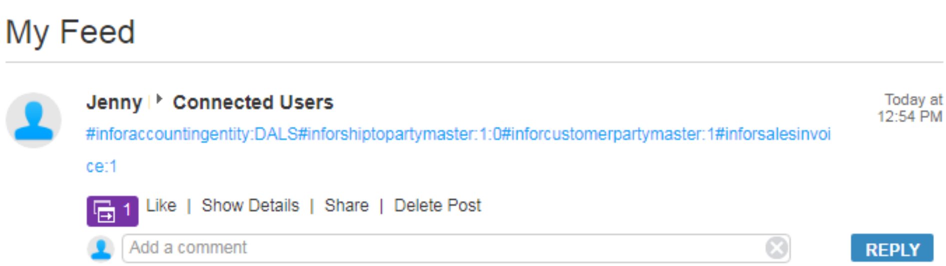


4 Click the Share icon on the Infor Ming.le screen.

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



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



Configuring context apps and utility apps that are used with the ERP

11

On the right side of the Infor Ming.le page is a collapsible panel that hosts a series of Infor Ming.le context and utility applications. These are mini applications that provide information at a glance.

Context apps subscribe to information published by the application frame and display relevant content only when it is available. The information in the applications is context-sensitive, which means that the values or content in the app depend on the current context (form or field) that is shown in the Cloud Suite Business application panel in Infor Ming.le.

Utility apps are lightweight applications that represent information unrelated to content in the application. They do not communicate with the application frame and, if activated, show only when the application is open.

Understanding business context messages

A business context message is a JSON message that is sent from a CloudSuite Business screen, 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, as well as for drillbacks.

Business context messages are used with these context-sensitive apps when a certain CloudSuite Business form is displayed:

- Determines the metrics and reports to display in the In-Context BI context app
- Determines which critical numbers to display in the Critical Numbers context app
- Determines which related files from IDM to display in the Related Information context app

For more information about the available in-context metrics and reports,critical numbers, or context-sensitive IDM documents, see the *Infor CloudSuite Business User Guide for Infor Operating Service*.

To find the business context message that is sent by a specific object, use the Context Viewer application. See the Infor Ming.le online help or user guide.

Process default settings that allow context messages to be sent

In CloudSuite Business, these options are set on the Process Defaults form:

- **Send Context Message on Form Focus** enables sending of business context messages for forms. Default is **0** (not sent), but it is automatically set to **1** for CloudSuite Business through initialized data. When set to **1**, the context message "screenId": "MGCore_*Formname*" is sent for all forms, where *Formname* is the form name, for example, “screenId”: “MGCore_UsersMaint”.

  Note: This process default is set to **1** so that CloudSuite Business context apps work in Infor Ming.le.

- **Optional Context Message Form Prefix** replaces the MGCore default prefix on all forms with a specified prefix. For CloudSuite Business, the prefix is set to CSI_. So, for example, the Customers form is sent as CSI_Customers.

Supported business context messages

Business context messages contain sets of contextual information called entities, which include information similar to that of Infor BODs. CloudSuite Business can pass information about multiple entities in one business context message.

When each CloudSuite Business form is displayed, a script runs that passes standard metadata in a JSON message. The standard metadata includes the screen ID of the form and the logical ID of the CloudSuite Business application. However, the message can contain additional context-sensitive metadata that is specific to the form and current record.

This example shows an inforBusinessContext context message that was sent from the Customers form:


```
{"type":"inforBusinessContext","data":{"screenId":"CSI_Customers",
"entities":[{"entityType":"InforAccountingEntity","id1":"DALS"},{"entity
Type":"InforShipToPartyMaster","id1":"4851","id2":"0","accounting
Entity":"DALS","drillbackURL":"?LogicalId=lid://infor.syteline.
dals&page=formonly&form=Customers(FILTER(CustNum%3D%27%20%20%20%20%
2013%27%20AND%20CustSeq%3D0)SETVARVALUES(InitialCommand%3DRefresh))",
"bodReference":{"noun":"BillToPartyMaster","documentId":"4851",
"accountingEntity":"DALS","logicalId":"lid://infor.syteline.dals"}},
{"entityType":"InforCustomerPartyMaster","id1":"4851","name":"Brand
Central Dept Store","accountingEntity":"DALS"}]}}
```


The message informs context apps that the Customers form is currently displaying a record for the Brand Central Dept Store, which has the customer ID 4851 and the Ship To address ID 0, in the accounting entity DALS. The message contains one or more business entities, or collections of information, associated with the current record. The entity information can include a relative URL that can be used to drill back into the application and display the form and record. It also can include a BOD reference that maps from the current entity in the user interface to a corresponding BOD noun.

Any context apps that are associated with CloudSuite Business receive all of the information in this message. Each context app searches its data to determine whether it has contextual information to display that is related to information in this message.

For example, the In-Context BI (ICBI) context app uses the screen ID of CSI_Customers and the customer ID 4851 to determine that it should display an Accounts Receivable Aging report for Brand Central Dept Store. The Related Information context app uses the entity type, or context, and its parameters from the message to determine if there are any documents related to that context in its database. If so, the documents are listed in the app and can be opened. If you drag and drop files into the Related Information app pane while this form and record are displayed in CloudSuite Business, the files are automatically linked in Infor Document Management to each of the entity types (contexts) listed in the context message.

Context and utility apps that work with the ERP

These standard context and utility apps are available for use with CloudSuite Business. For information about how to use the standard apps, see the Infor Ming.le online help or user guide.

- Alerts
- Context Viewer
- Paparazzi
- Posts
- Tasks

These application-specific context apps are also available:

- Critical Number context app

  Critical numbers are key performance indicators, or KPIs, that are specific to CloudSuite Business data and transactions. Users must be authorized to view critical numbers, which are associated with certain CloudSuite Business forms. See "Authorizing users to display critical numbers in widgets or the Critical Numbers app" on page 72.

- In-context BI for CloudSuite context app

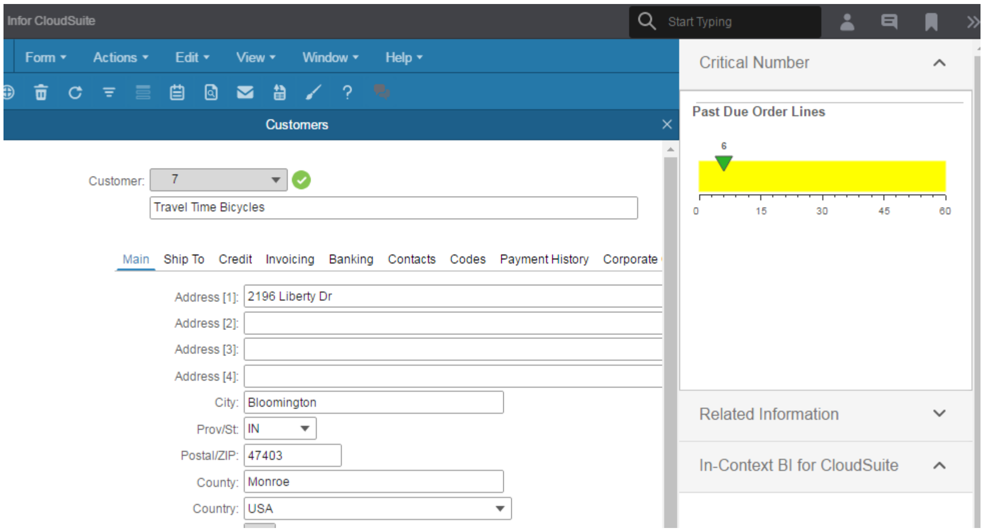
  Use this app to view business critical metrics and reports in an adjacent pane while certain forms are displayed. For example, when you are viewing a customer record on the Customers form, you can see metrics specific to that customer.

- Related Information

  This app can display context-sensitive files that are stored in Infor Document Management but that are associated with specific CloudSuite records. You can set up workflows in CloudSuite Business to handle this. See "Configuring Infor Document Management to work with the ERP" on page 79.

For information about how to use the application-specific apps, see the *Infor CloudSuite Business User Guide for Infor Operating Service*.

All of the apps are initially disabled. When the apps are enabled for CloudSuite Business, their content is displayed in small app panes to the right of your application.



Enabling a context or utility app for the ERP

To enable one or more of the context or utility apps to work with CloudSuite Business:

1. From the User Menu, select **Admin Settings**.
2. In the **Manage Applications** tab, double-click to select your application.
3. In the **Manage Context/Utility Apps** tab, select the app that you want to enable.
4. in the **Permissions** tab for that app, either select **Grant access to all users** or click **Add new users and/or IFS security roles** to specify certain users or roles in CloudSuite Business that can access this context app.
5. In the **Applications** tab for that app, select your application and enable it for the app.
6. Save your changes.

In order to see the changes, you might need to sign out of the application and Infor Ming.le. Close your browser and reopen it.

Authorizing users to display critical numbers in widgets or the Critical Numbers app

To enable users to view and select critical numbers for display in widgets, home pages or the Critical Numbers context app, you must set up the appropriate authorizations in CloudSuite Business.

1. Enable the Critical Numbers context app as described in "Enabling a context or utility app for the ERP" on page 72
2. In CloudSuite Business, open the Critical Number Users form.
3. Select a user record.

4 On the **Categories** tab, specify user authorizations for a critical number category, or on the **Permissions** tab, specify user authorizations for specific critical numbers.
5 Save your changes.
6 Ask the user to log out of CloudSuite Business and then log in again, so the changes can take effect.
7 Verify that users can view critical numbers that they are authorized to view in the Critical Numbers context app.

How critical numbers are displayed in the Critical Numbers app

When the user opens a CloudSuite Business form in the Infor Ming.le portal, the form sends a JSON inforBusinessContext message that includes its entity type. The entity type is the BOD sent when the content of the form is update. For example, the Customers form has the entity type InforCustomerPartyMaster.

These actions are taken when the business context message is received:

- Check the entity type in the business context message and find the related category of forms.
- Determine which critical numbers (if any) the user has selected within that category on the User Critical Number Selection form.
- Determine how many instances of the Critical Number app the user has created in Infor OS.
- Load the selected critical numbers into multiple instances of the Display Critical Number form. Each instance is displayed in a Critical Number pane.

The sequence of the critical number determines which critical numbers are shown. For example, if the user selected five critical numbers for a category, but only added three instances of the Critical Number app, then only the first three (sequential) critical numbers are displayed.

Verifying Homepages for the ERP

12

Homepages are a flexible and configurable way to present information and activities to users. Administrators can build pages for various groups of users, roles, departments, or business functions. You can select from the library of available Infor widgets or build your own.

The predefined Homepages and widgets for CloudSuite Business were imported automatically when the application was added to Infor Ming.le.

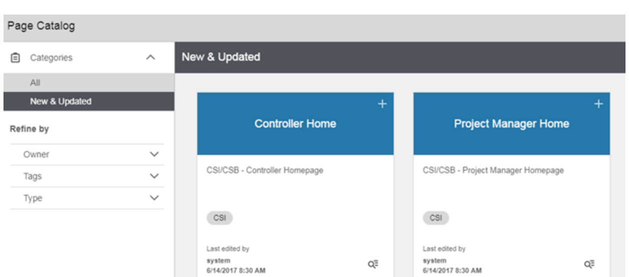
In this section, you will verify that they are working for your users.

For general Homepages administration tasks, see the Infor Ming.le online help.

For information about using the homepages and widgets, see the *Infor CloudSuite Business User Guide for Infor Operating Service.*

Verifying the homepage and widget content

1. Log into Infor Ming.le as a non-administrative user who has access to both Infor Ming.le and Cloud Suite Business.
2. Open the Homepages application.
3. Add a Homepage:
   a. Click **Create New Page**.
   b. Specify a title and description for the page and click **Create**.
   c. Click the ellipsis (**...**) button and select **Page Catalog**.
   d. Select one of the predefined Homepages and click **Add Page**.
   You must be authorized in CloudSuite Business to open that "home page" form.



These are the groups/roles associated with each home page:

Homepage name	Security role/group
Buyer Home	Purchasing
Controller Home	Mobile Controller
Customer Service Home	Order Entry
Executive Home	Mobile Executive
Inventory Control Home	Inventory
Production Planner Home	Shop Floor Control
Project Manager Home	Projects
Salesperson Home	Order Entry

e Close the catalog to view your new Homepage.

4 Add a widget:

a Click the ellipsis (**…**) button and select **Widget Catalog**.

b Select **Categories > Application**.

c In the **Refine By** filter, select **Infor CloudSuite**. You should see the CloudSuite Industrial widget.

d Click **+** (Add Widget).

e Close the catalog to view your new widget.

f Configure the widget.

5 Add a critical numbers widget, and configure it. Ensure that you can view critical numbers that you are authorized to view in this widget.

You must be authorized in CloudSuite Business to view the critical numbers.

6 Drill down to CloudSuite Business forms from the appropriate widgets.

Modifying permissions for standard pages

The CloudSuite Business Home pages are included in the Standard Pages tab.

If you want only a specific group of users to access the standard page, you can restrict the standard page to a security role in Infor Ming.le.

To view or change the permissions that are assigned to a page:

1 Open the Homepages application.

2 Click the ellipses (…) button and select **Advanced > Administration**.

3 On the **Standard Pages** tab, select the home page you want to edit.

4 Select **Actions > Edit Permissions**.

Note: Permissions can be set at the group, role or user level.

Configuring Infor Document Management to work with the ERP

13

Infor Document Management (IDM) and CloudSuite Business are integrated through these methods:

- ION API (REST-enabled)
- Context Business Messages

CloudSuite Business delivers application-specific document models for use with IDM.

About the IDM integration

Some reports and documents that are generated in CloudSuite Business can be automatically sent to Infor Document Management (IDM) for storage. You can then view the documents in IDM or in the context of a CloudSuite Business form, through the Related Information context app. You can search the IDM repository for documents by filename, originating user, and date. You can also search for some documents using other meaningful attributes such as purchase order number or invoice number, if those attributes are set up for the document type in IDM.

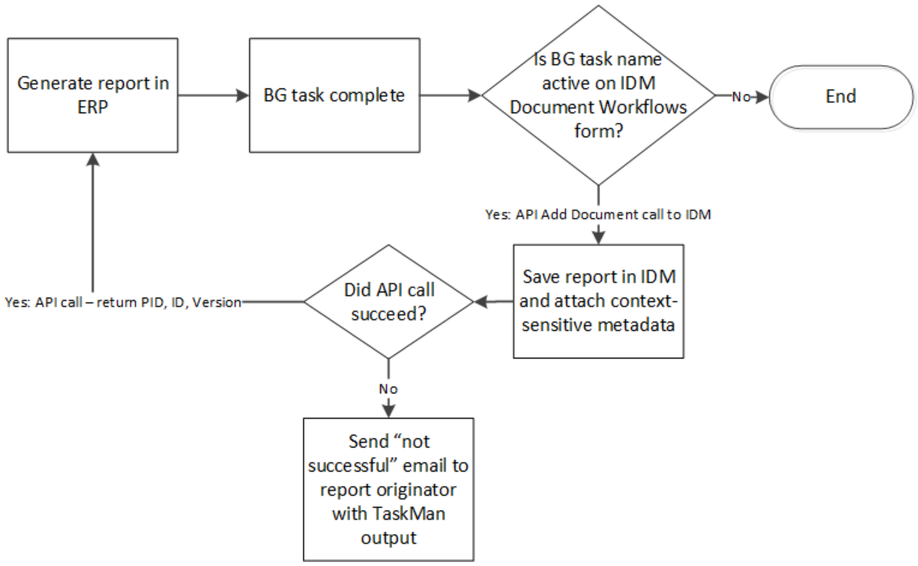
This integration uses CloudSuite Business document workflows, APIs that transmit the data from Cloud Suite Business to IDM, and a business context model, document types, and an access control list that are imported into IDM.

Initially, only CloudSuite Business invoice and purchase order reports have predefined document workflows. You can customize the integration to include additional document workflows, or to modify the existing workflows.

These attribute values are assigned as metadata that accompanies the documents, and can be used for filtering within IDM:

- For an invoice, the metadata includes the invoice number, the number of the customer being invoiced, and the number of the customer order associated with the invoice.
- For a purchase order, the metadata includes the PO number and the number of the vendor to whom the PO is assigned.

The API integration has this high-level flow:



In the case of failure, a notification is sent to the email address that is assigned on the CloudSuite Business Users form to the user who originated the report. The PDF file that could not be stored in IDM is included as an attachment in the email.

Tasks performed by the Infor Cloud team

The Infor Cloud team performed these tasks related to IDM:

- In CloudSuite Business, the Infor Cloud team set up the IDM connection information on the External App Parameters form
- In IDM, the team imported these CloudSuite Business-specific objects:
  - The predefined document types CS_SalesInvoice, CS_ServiceInvoice, CS_PurchaseOrder, and CS_SupplierInvoice
  - A predefined Business Context Model (BCM) for each document type. The BCM is used to map the document type to the entity type. It also maps the web container ID variables that are sent in JSON messages from the CloudSuite Business forms. For example, for the CS_SalesOrder document type, the CustNum value is always stored in {id1}, even if the form's JSON message sent CustNum as the second or third variable. See the information about business context models in the *Infor Document ManagementAdministration Guide - Cloud Edition*.
  - An Access Control List (ACL) that defines the IFS security roles that can access each document type.

Tasks performed during Post Provisioning

During Post Provisioning, Infor Consulting Services, the Business Partner, or a system administrator performed these IDM configuration tasks:

- In IDM, disable the Document Type filter.
- In Infor Ming.le, activate the Related information context app.
- In CloudSuite Business, verify the predefined IDM connection information.
- In CloudSuite Business, activate the IDM workflows.

For more information, see "Configuring IDM" on page 32.

IDM-related forms in the ERP

The IDM connection information is preset on the External App Parameters form. You should not change these settings.

The API call to IDM impersonates the user who is actually creating the documents in CloudSuite Businessl. CloudSuite Business users are matched to IDM users through the Infor Ming.le (IFS) GUID value, which is shown in the **Workstation/Domain ID** field of the Users form.

Look at the IDM Document Workflows form to understand which document workflows are predefined. The predefined workflows are activated as part of the Post Provisioning steps. However, you can deactivate any workflows that you do not plan to use.

Later, you could use the advanced features on this form, along with the Application Event System, to customize the integration. See the online help for assistance with the advanced fields.

Document types and their assigned attributes

This table shows the predefined CloudSuite Business document types in IDM, the entity name associated with the document type, and the attributes that can be used to search and filter within each document type.

Because a service invoice is a type of sales invoice, it uses the InforSalesInvoice entity name. However, the context is slightly different: service invoices have the SRO number attribute, while sales invoices have the customer order number attribute.

If you add attributes to a document type, be aware that the attribute ID in IDM must exactly match the IDO property name that is sent from CloudSuite Business. This is true for CS_PurchaseOrder, CS_SalesInvoice, and CS_ServiceInvoice. However, for CS_SupplierInvoice, the attribute ID and IDO property name need not match. If the optional attributes are included for a supplier invoice, CloudSuite Business can use them.

Document type	Entity name	Additional attribute IDs *
CS_PurchaseOrder	InforPurchaseOrder	PoNum, VendNum
CS_SalesInvoice	InforSalesInvoice	InvNum, CustNum, CoNum
CS_ServiceInvoice	InforSalesInvoice	CustNum, SroNum

Document type	Entity name	Additional attribute IDs *
CS_SupplierInvoice	InforSalesInvoice	PoNumber, VendorNumber, In voiceNumber (Optional: Invoice Date, VendorOrder, Freight, Misc Charges)

* These attributes are common to all document types, so are not listed in the table: Description, AccountingEntity, BOD Reference Accounting Entity, BOD Reference Document ID, BOD Reference Noun, BOD Reference Revision ID, EntityType, and Location.

Document types and their assigned roles

This table shows the predefined CloudSuite Business document types, the ACL that is used with each document type, and the IFS roles that are assigned to each document type. The IFS roles are synchronized with CloudSuite Business and IDM through BODs. See "User and role BOD usage" on page 95.

If you are not using the standard CloudSuite Business groups, you will need to modify this list in IDM.

Access to read, update or delete the documents in IDM is only allowed for users who belong to at least one of these roles (groups). You can modify the ACL list in IDM.

Document type	ACL name	Security roles	Permissions
CS_PurchaseOrder	InforPurchaseOrder	Accounts Payable, Purchase Reqs, Purchasing, Purchasing Costs	Read, Update, Create, CheckIn, CheckOut
CS_SalesInvoice	InforSalesInvoice	Accounts Receivable, Field Service, Order Entry, Order Entry Invoicing Reprint, Projects, Service	Read, Update, Create, CheckIn, CheckOut
CS_ServiceInvoice	InforSalesInvoice	Accounts Receivable, Field Service, Service	Read, Update, Create, CheckIn, CheckOut
CS_SupplierInvoice	SyteLineVoucher	Accounts Payable	Read, Update, Create, CheckIn, CheckOut

Verifying the configuration for workflows

After the configuration is set up in all applications, use these steps to generate a document in Cloud Suite Business and verify that the document is available, with the appropriate attributes, in IDM.

Currently the invoice and purchase order reports are predefined for this process, but we will just verify the PO report.

1. In CloudSuite Business, open the Purchase Order Report form and print a purchase order.
2. Open the IDM Workflow Logs form and verify that a record exists for the new PO.

   See the online help for an explanation of the fields on this form.
3. In the Infor Document Management application, verify that you can find and preview the document using these options:

   Document Type
   Specify **CS_PurchaseOrder**.

   Select Attribute
   Verify that these attributes are in the list: **PO Number** and **Vendor Number**. Select **PO Number**.

   Operation
   Select **Like**.

   Value
   Specify the PO number. Use the % wildcard character to allow for leading and trailing spaces.
4. In CloudSuite Business, open the Vendors form.
5. Select the vendor associated with the purchase order number that you printed.

   In the Related Information context app, the document should be displayed automatically. The default entity type is **All**, which displays any document that matches the current record.
6. Verify that you can preview the purchase order.

Troubleshooting:

- If a document cannot be inserted into IDM, an error message is sent to the user who generated the document in CloudSuite Business. The user can then attempt to manually attach the document into IDM, using the appropriate document type and attributes. However, if the error occurred because the user does not have the appropriate role assigned in IDM, then the user cannot insert the document into IDM. In that case, you must ensure that the ACL in IDM has the appropriate roles assigned to the document type, and that the user is a member of one of those roles in CloudSuite Business and Infor Ming.le (IFS).
- If a user prints a range of purchase orders or invoices, the documents will be generated either in one PDF or in individual PDFs, depending on how the user's Document Profile is set up in Cloud Suite Business. If all of the documents are in a single PDF, the PDF is attached in IDM to the first record in the range. We recommend that users set their Document Profiles to generate individual PDFs for a range of documents.

Other document management options

In addition to the features of the IDM application, there are document management features built into CloudSuite Business. The CloudSuite Business built-in feature can associate documents with IDO rows and IDOs. There might be times when you need to use these features instead of, or in combination with, the IDM features.

See the CloudSuite Business help topic about working with document (file) attachments.

Configuring BI and Analytics content for the ERP

14

To configure BI and Analytics content for the ERP, you must complete these tasks:

- Configure access to BI.
- Configure In-Context BI content.
- Configure BI Dashboards.
- Configure BI widgets and homepages.
- Configure BI reports.

See the Infor BI documentation for information about performing the steps in the last three bullets.

Configuring access to BI

In order to use Analytics features such as In-Context BI or Analytics widgets and homepages in Infor Ming.le, you must set up roles and permissions in both Infor Ming.le and Analytics.

Setting up roles and permissions in Analytics

See the *Infor CloudSuite Business Analytics MT Cloud User Guide* and the Infor BI documentation.

Setting up roles and permissions for Analytics products in Infor Ming.le

See the Infor Ming.le online help or user guide for information about how to set up roles and associate them with an application.

Configuring In-Context BI content

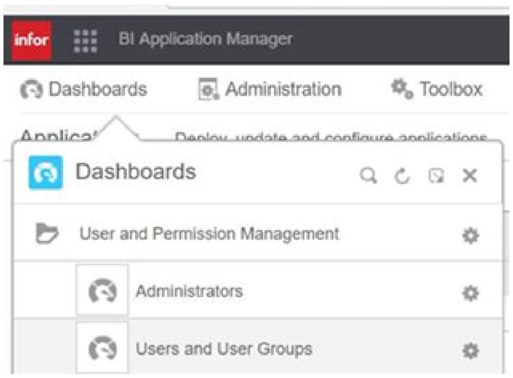
You can display CloudSuite Business In-Context BI metrics and reports in Infor Ming.le. To display the metrics and reports with the appropriate forms:

1 Enable the In-Context BI for CloudSuite Business context app and set up authorizations for it.
See "Enabling a context or utility app for the ERP" on page 72.

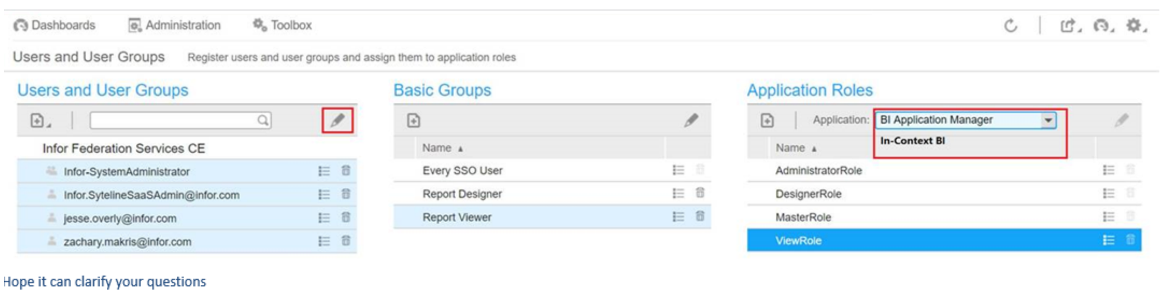
2 In Analytics, add all CloudSuite Business users, as defined in Infor Ming.le (IFS), to the ReportViewer group:

   a From Infor Ming.le, open the BI Application Manager.

   b Click **Dashboards** and select **User and Permission Management > User and User Groups**.



   c If the In-Context BI context app has been enabled, it is listed in the **Application** field. Select **In-Context BI** and select **ViewRole**.



   d Click the edit icon on the left to select the users or user groups who should have view permissions for In-Context BI.

For information about using In-Context BI content for your application within Infor Ming.le, see the *Infor CloudSuite Business User Guide for Infor Operating Service*.

Configuring and integrating optional applications in the CloudSuite

15

You must configure some optional products in the CloudSuite to work with the components of Infor OS (ION, Infor Ming.le, Infor Document Management, or BI).

Some products also require additional integration steps to work with the ERP.

Integrating with Infor CPQ

If Infor Configure Price Quote (Infor CPQ, formerly known as Product Configuration Management) is included in the CloudSuite, the Infor Cloud team adds the application to Infor Ming.le and configures the point-to-point connection to the ERP.

1 To complete the integration between the ERP and Infor CPQ, see these documents:

- Setting Up a Configuration Interface for an Item or Job” in the ERP online help
- *Infor SyteLine Integration Guide for Infor Product Configuration Management*

2 Verify that the Inventory Parameters form within the ERP has been properly configured and a connection between the ERP and Infor CPQ has been established:

a In CloudSuite Business, open the Inventory Parameters form.

b In the **Product Configuration** tab, click **Initialize Configurator**. A success message should be displayed.

Integrating with Infor CRM

Infor CRM is currently a hybrid integration; that is, CRM is either installed on-premises or in a single tenant cloud, and then communicates with ION through the Enterprise Connector.

1 To install the Enterprise Connector and set up the CRM connection point for ION in the Cloud, see these guides:

- *Infor CRM Back Office Extension Configuration Guide for Infor ION*
- *Infor CRM Implementation Guide*

2 If Infor CRM is included in the CloudSuite, you, Infor Consulting, or the business partner configure the BODs and document flow during Post Provisioning. See these sections:

- "Configuring BODs for the Infor CRM connection point" on page 24
- "Creating the CSI > CRM > CSI document flow" on page 29

3 To complete the integration between CRM and the ERP, see the *Infor CloudSuite Business Integration Guide for Infor CRM - Cloud Edition*.

Integrating with Infor EAM

1 If EAM is included in the CloudSuite, you, Infor Consulting, or the business partner must configure the BODs and document flow during Post Provisioning. See these sections:

- "Configuring BODs for the Infor EAM connection point" on page 25
- "Creating the CSI > EAM > CSI document flow" on page 27

2 To set up additional EAM configuration with Infor Ming.le and ION, see these guides:

- *Infor EAM Configuration Guide for Infor Ming.le*: See the sections on loading EAM in-context BI content and importing EAM drillbacks. Other sections are mainly intended for the on-premises version.
- *Infor EAM Configuration Guide for Infor ION*: See the sections on Configuring Databridge Partners, Configuring EAM, Sending the initial data load, and Infor EAM BOD dependencies. Other sections are mainly intended for the on-premises version.

3 To complete the integration between EAM and the ERP, see the*Infor CloudSuite Business Integration Guide for Infor EAM – Cloud Edition*.

Integrating with Infor Expense Management

1 If Infor Expense Management is included in the CloudSuite, you, Infor Consulting, or the business partner must configure the BODs and document flow during Post Provisioning. See these sections:

- "Configuring BODs for the Infor Expense Management connection point" on page 25
- "Creating the CSI > XM > CSI document flow" on page 28

2 To set up additional Infor XM configuration with Infor Ming.le and ION, see these guides:

- *Infor Expense Management Configuration Guide for Infor ION*
- *Infor Expense Managementt Configuration Guide for Infor Ming.le*

3 To complete the integration between Infor XM and the ERP, see the *Infor CloudSuite Business Integration Guide for Infor Expense Management – Cloud Edition*.

Integrating with Infor Factory Track

If Infor Factory Track is included in the CloudSuite, the Infor Ming.le connection and the point-to-point connection to CloudSuite Business are configured by the Infor Cloud team.

1. Because Infor Ming.le is the system of record for users, you must set up users for each CloudSuite application in Infor Ming.le. Factory Track does not yet use BODs to coordinate user accounts with the accounts that are created in Infor Ming.le. Instead, you must manually link an Infor Ming.le account to a user in that application:
   a. In the Infor Ming.le Portal, open the User Management page.
   b. Create an Infor Ming.le user account.

      Note the Email address and IFS Person ID (GUID). The GUID is the link between the Infor Ming.le and Factory Track accounts that allows SSO/SLO to function correctly.
   c. In the Infor Ming.le Portal, open the Factory Track application.
   d. If needed, select the appropriate configuration
   e. Open the Users form.
   f. Create a user account with the same user name (email address) that was used in step b.
   g. Save your changes.
   h. Add the IFS Person ID from step b into the **Workstation Domain/ID** field.
   i. Set the required license modules for the user.
   j. Set the required groups (roles) for the user.
   k. Save your changes.
2. To complete the integration between Factory Track and CloudSuite Business, see the *Infor Factory Track for SL Implementation Guide*.

Integrating with Microsoft Office

Before using the integrated Office features with CloudSuite Business, users must download the plug-ins for Excel, Word, and Projects from the Infor Xtreme Download Center to their local devices. The Trust setting must be enabled for Excel.

See the *Infor CloudSuite Business MicrosoftOffice Integration User Guide*.

Configuring add-in applications

Add-in applications are built into the ERP application. However, some of the add-ins require additional configuration. See these documents:

Add-in module	Reference
APS	Help topic: “APS: Initial Setup Steps”
Automotive Industry Pack	Automotive Industry Pack help topics and user guide
Credit Card Interface module	*Infor CloudSuite Business Credit Card Interface Configuration Guide* Help topic: “Setting Up the Credit Card Interface”
Employee Self Service	Help topic: “Configuring Employee Self Service”
Forecasting	*Infor CloudSuite Business Forecasting User Guide*
Mobile	Help topic: “Setting Up Mobile Access”
Molding Industry Pack	Molding Industry Pack help topics and user guide
Portals	*Infor CloudSuite Business Portal Administration Guide - Cloud Edition*
Printing Industry Pack	Printing Industry Pack help topics and user guide
Process Industry Pack	Process user guide
Quality (QCS)	QCS help topics and user guide
Service	Help topic: “Setting up Service Parameters”
SytePlan	*Infor CloudSuite Business SytePlan Implementation and User Guide*
Tax System Interface	*Infor CloudSuite Business Tax System Interface Configuration Guide* Help topic: “Setting Up a Tax Interface”

Useful URLs

A

The Infor Cloud team provided you with working URLs to the products in your CloudSuite. These examples are provided for your convenience.

Standard URLs

Infor Ming.le Web:

https://<*Mingle_Prod_Domain*>/<*TenantID*>

Example: https://mingle-portal.inforcloudsuite.com/TENANT_Dem

Web Client:

https://<*App_Prod_Domain*>/WSWebClientM/default.aspx?ConfigGroup=<*ConfigGroupName*>

Example: https://csi901.inforcloudsuite.com/WSWebClientM/default.aspx?ConfigGroup=TENANT_Dem

Mobile Client:

https://<*App_Prod_Domain*>/WSWebClientM/mobile.aspx?ConfigGroup=<*ConfigGroupName*>&page=formonly

Example: https://csi901.inforcloudsuite.com/WSWebClientM/mobile.aspx?ConfigGroup=TENANT_Dem &page=formonly

IDO Web Service Connection:

https://<*App_Prod_Domain*>/IDORequestService/IDOWebService.asmx?ConfigGroup=<*ConfigGroupName*>

Example: https://csi901.inforcloudsuite.com/IDORequestService/IDOWebService.asmx?ConfigGroup=TENANT_Dem

ERP specific URLs

Click Once Client:

https://<*ERP_Prod_Domain*>/slclientdeploy/syteline.application?ConfigGroup=<*ConfigGroupName*>

Example: https://csi901.inforcloudsuite.com/slclientdeploy/syteline.application?configgroup=TENANT_Dem

Production Tax Interface Web Service:

https://<*ERP_Prod_Domain*>/TaxIntegrationService/SSSAvataxSvc.asmx?ConfigGroup=<*ConfigGroupName*>

Example: https://csi901.inforcloudsuite.com/TaxIntegrationService/SSSAvataxSvc.asmx?ConfigGroup=TENANT_Dem

Development Tax Interface Web Service:

https://<*ERP_Prod_Domain*>/TaxIntegrationServiceDev/SSSAvataxSvc.asmx?ConfigGroup=<*ConfigGroupName*>

Example: https://csi901.inforcloudsuite.com/TaxIntegrationServiceDev/SSSAvataxSvc.asmx?ConfigGroup=TENANT_Dem

Credit Card Interface Web Service:

https://<*ERP_Prod_Domain*>/CreditCardIntegrationService/

Example: https://csi901.inforcloudsuite.com/CreditCardIntegrationService/

Employee Self Service:

https://<*ERP_Prod_Domain*>/WSWebClientM/default.aspx?page=FormOnly&notitile=1&ConfigGroup=<*TENANTID*>&form=EmployeeSelfServiceHome.ess

Example: https://csi901.inforcloudsuite.com/WSWebClientM/default.aspx?page=FormOnly&notitile=1&ConfigGroup=TENANT_Dem&form=EmployeeSelfServiceHome.ess

Online Service Mobile:

https://<*CSI Prod Domain*>/WSWebClientM/default.aspx?page=FormOnly&notitile=1&ConfigGroup=<*TENANTID*>&form=HomePage_Service.mobi

Example: https://csi901.inforcloudsuite.com/WSWebClientM/default.aspx?page=FormOnly&notitile=1&ConfigGroup=TENANT_DEM&form=HomePage_Service.mobi

Factory Track standard URLs

Click Once Client:

https://<*FTK_Prod_Domain*>/clientdeploy/factorytrack.application?ConfigGroup=<*ConfigGroupName*>

Example: https://ft601.inforcloudsuite.com/clientdeploy/factorytrack.application?ConfigGroup=TENANT_Dem

Light Client:

https://<*FTK_Prod_Domain*>/WSWebClientM/Default.aspx?page=light&form=ICWMMainMenu.mobi&ConfigGroup=<*ConfigGroupName*>

Example: `https://ft601.inforcloudsuite.com/WSWebClientM/Default.aspx?page=light&form=ICWMMainMenu.mobi&ConfigGroup=TENANT_Dem`

Shop Floor URL:

https://<*FTK_Prod_Domain*>/WSWebClientM/Default.aspx?page=formonly&form=ICSLWorkCenterNavigationHome.ts&&ConfigGroup=<*ConfigGroupName*>

Example: `https://ft601.inforcloudsuite.com/WSWebClientM/Default.aspx?page=formonly&form=ICSLWorkCenterNavigationHome.ts&&ConfigGroup=TENANT_Dem`

Warehouse Mobility URL:

https://<*FTK_Prod_Domain*>/WSWebClientM/Mobile.aspx?page=light&form=ICWMMainMenu.mobi&&ConfigGroup=<*ConfigGroupName*>

Example: `https://ft601.inforcloudsuite.com/WSWebClientM/Mobile.aspx?page=light&form=ICWMMainMenu.mobi&&ConfigGroup=TENANT_Dem`

User and role BOD usage

B

This appendix provides detailed information about how the security BODs are used between Cloud Suite Business and Infor Ming.le.

BODs that send roles (authorization groups) from the ERP to Infor Ming.le

Some roles from CloudSuite Business are preconfigured in Infor Ming.le when the application is added in Infor Ming.le.

When you create or edit an authorization group in CloudSuite Business, a Sync.SecurityRoleMaster BOD is generated. This BOD is defined at the tenant level. 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 group in CloudSuite Business. Remember that CloudSuite Business is the system of record for roles/groups.

If you delete a role in either CloudSuite Business or Infor Ming.le, you must also delete the group or role in the other application.

Person IDs

Any CloudSuite Business users who plan to use Infor Ming.le or other Infor OS components must be set up as users in Infor Ming.le, and the user's Person ID must be synchronized between Infor Ming.le and CloudSuite Business.

Person IDs in Infor Ming.le

The user details page in Infor Ming.le includes an ERP Person ID tab. The ERP Person ID tab is populated if CloudSuite Business publishes the Sync Person BOD. The ERP Person ID is used as the identifier of the user in the ERP application, and allows you to link the Infor Ming.le user to the ERP application user. The ERP Person ID tab shows all ERP person IDs that are associated with this Infor Ming.le user.

The IFS Person ID is used as the user identifier in ION, which then links the Infor Ming.le user with the ION BODs. By default, the IFS Person ID is set to the User Principal Name (UPN) of the user. UPN is an AD FS concept.

The IFS Globally Unique Identifier (GUID) is the same as the UPN.

Sending the Person ID from the ERP to Infor Ming.le

When certain information is manually added or updated in CloudSuite Business for a user, a Process.SecurityUserMaster BOD is published by CloudSuite Business.

The **Workstation/Domain ID** field on the Users form in CloudSuite Business contains the Person ID for a user. This value should not be changed. It is possible to update this value in CloudSuite Business and then manually publish the Process.SecurityUserMaster BOD to Infor Ming.le; however, Infor Ming.le is the system of record for user information, so you should only maintain the Person ID value In Infor Ming.le.

BODs that send user information from Infor Ming.le to the ERP

When you add a user in the Infor Ming.le portal, a SecurityUserMaster BOD is sent through ION to your application at the specified intervals, where a matching user record is created or updated. This BOD contains the user name, login, creation date, status, description, email address, and the roles, or groups, to which the user is assigned.

When CloudSuite Business receives the BOD, these actions occur:

- For a new user that does not exist in CloudSuite Business:
  - A new user record is added.
  - The **Workstation Domain/ID** field is populated with a row pointer value that should not be changed.
  - 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 First Name and Last Name values from Infor Ming.le are combined into the Cloud Suite 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.
  - The **Workstation Domain/ID** field is populated with a row pointer value that should not be changed.
  - 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.
  - An Acknowledge SecurityUserMaster BOD is sent back to Infor Ming.le.

BODs that send user information from the ERP 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 through the Process SecurityUserMaster BOD. The field must contain values separated by a space. The first value becomes the **First Name** in Infor Ming.le. Everything after the space becomes the **Last Name** in Infor Ming.le. For example, if the CloudSuite Business User Description is Tom Van Winkle, Tom is the First Name and Van Winkle is the Last Name in Infor Ming.le.
- Workstation login
- Primary email address: A value is required in this field if you are passing user information from Cloud Suite Business to Infor Ming.le 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.

CloudSuite Portals users

If a new user is created in CloudSuite Business based on a request from the CloudSuite vendor or customer portals, the BOD is not sent to Infor Ming.le.

Troubleshooting

C

This section describes actions that you can perform to solve Infor OS integration issues.

Data is not flowing properly

Cause: A problem is preventing the flow of BOD data to ION.

Solution: After you complete the configuration setup, if BOD data is not flowing to ION, use ION OneView to identify the problem.

ION OneView can be found under the **Manage** menu in ION Desk. You can perform these actions in ION OneView:

- Track business documents from a single consolidated view; search for documents using different search criteria.
- View all ION components that were triggered by the incoming document: Connection Points; document flow filters and content-based routing; mappings; ION engines for example, Monitor, Workflow, and Pulse; monitors; activation policies and workflows.
- View more details about these ION components:
  - Detailed properties for each ION component
  - List of events that were logged by each ION component while processing the message
  - Drilldown views that are used to display the appropriate management pages for the selected ION component
  - Visibility and correlation of the different messages sent or generated:
  - Original BOD messages that triggered the whole list of components displayed; Confirm BOD messages that were generated due to any error while processing the Original BOD message. Mapped/Updated BOD messages that were created during the processing of the Original BOD message
  - View content of BOD messages. This information is only available to authorized users, based on the roles and permissions that are configured.

For more information, see the section on ION OneView in the *Infor ION Desk User Guide - Cloud Edition*.

To avoid business discrepancies between this application and integrated applications, correct any errors as soon possible.

BOD information needs to be purged

Information from every inbound BOD, including sequencing information, is collected in a table in the CloudSuite Business application. This data constantly builds up and, over time, could cause performance issues. For this reason, system administrators should periodically use the Purge BOD Information form to purge information from that table. You can set up a background task to perform this function automatically

You can also use the Replication Document Inbox/Outbox Purge Utility to clear out older BODs from the Replication Document Inbox and Replication Document Outbox.

ERP help is not working

Verify that the user’s web browser has popup blockers turned off. Clear the browser cache, restart Infor Ming.le and try again.

Business events that generate outbound BODs

D

This table shows the events, which are user actions in CloudSuite Business that generate an outbound BOD from CloudSuite Business:

Verb	Noun	User action to generate the BOD
Process	AccountingBookDefinition	Run the Replication Document Manual Request Utility with AccountingBookDefinition selected. This should be done once per site.
Sync	AccountingChart	Run the Replication Document Manual Request Utility with AccountingChart selected. This should be done once per site, after the Chart of Accounts is set up at the site.
Sync	AccountingEntity	Run the Replication Document Manual Request Utility with AccountingEntity selected. This should be done once per site, after the tenant ID is set up at the site.
Process	AdvanceShipNotice	Ship the order, either manually with the Transfer Order Ship form, or automatically in response to a received Sync Shipment BOD.
Acknowledge	BillofMaterials	Acknowledge the receipt of a BillofMaterials from an external application.
Sync	BillofMaterials	Indicate that changes have been made in the application after receipt of a Process BillofMaterials from an external application
Acknowledge	BillToPartyMaster	Acknowledge the receipt of a BillToPartyMaster from an external application.
Sync	BillToPartyMaster	Change any information on the Customers form. Change any information on the Ship Tos form.

Verb	Noun	User action to generate the BOD
Sync	Calendar	Add or update a shift calendar in Scheduling Shifts. Add a holiday. This creates a BOD that indicates all resources are busy on that day.
Sync	CarrierRoute	Select the Physically Shipped check box on the Special tab of the Delivery Orders form.
Sync	ChartOfAccounts	Create or update an account record in the Chart of Accounts form. Statistical and allocation accounts are not included.
Acknowledge	CodeDefinition	Acknowledge the receipt of a CodeDefinition from an external application
Sync	CodeDefinition	* Add an Education Major * Add an External Expense Type * Add an Indirect Labor Code * Add an Inventory Adjustment Reason Code * Add or update an ISO U/M on the Unit of Measure Codes form * Add an Item Category * Add an Obsolete Slow Moving Reason Code * Add an Opportunity Source * Add an Opportunity Stage * Add a Payment Type * Add a Position * Add a Price Code * Add a Product Code * Add a Project Cost Code * Add a Province/State * Add a Shift ID on the Scheduling Shifts form * Add a Ship Via Code * Add a Skill * Add a Tax Code of type Exempt * Add a Tax Jurisdiction * Add a Territory * Add a Training Course * Add a unit code on the Unit Code 1 - 4 forms * Add a Work Code * Add a Work Experience

Verb	Noun	User action to generate the BOD
		BODS for some other codes, such as language IDs and cost methods, are automatically generated when the Replication Document Manual Request Utility is run.
Process	ConstrainedResource	Insert or modify a Shift ID (creates a BOD for associated resources)
Acknowledge	ContactMaster	Acknowledge the receipt of a ContactMaster from an external application
Sync	ContactMaster	* Add or change a Contact * Create a Customer Sales Contact Cross-Reference
Sync	Contract	* Add or update Customer Order header * Add or update Customer Order Blanket Line
Sync	CreditTransfer	Create a Bank Reconciliations record for a vendor payment, employee payment, or customer payment
Sync	CurrencyExchangeRateMaster	Add or update a Currency Rate
Acknowledge	CustomerPartyMaster	Acknowledge the receipt of a CustomerPartyMaster from an external application
Sync	CustomerPartyMaster	* Change any information on the Customers form, Ship Tos form, or Customer Sales Contact Cross References form * Add a prospect on the Prospects form to send this BOD with a status of “Pending”
Sync	CustomerReturn	* Print the RMA Order Verification Report * Change the status of an RMA
Sync	DebitTransfer	Post a direct debit transaction from a customer on the A/R Direct Debit Posting form.
Acknowledge	ExpenseReport	Acknowledge the receipt of an expense report.
Sync	FinancialCalendar	* Change any information on the Accounting Periods form * Run the change Reports To Entity utility
Sync	InventoryAdjustment	* Perform Quantity Adjustment * Perform Miscellaneous Receipt or Miscellaneous Issue * Perform Cycle Count Posting - one BOD is generated for each combination of item, warehouse,

Verb	Noun	User action to generate the BOD
		and location where the quantity on hand has changed * Perform Physical Inventory Posting - one BOD is generated for each combination of item, warehouse, and location where the quantity on hand has changed
Sync	InventoryCount	* Run the Cycle Count Posting utility * Run the Physical Inventory Posting utility One InventoryCount BOD is sent for each item/warehouse combination
Sync	Invoice	* Print and post an invoice through the Consolidated Invoicing form * Post an invoice through the Invoice Posting (A/R) form Note: The Invoice BOD publishes one line for every order line included in the Invoice. When Line Summarization is turned on in Consolidated Invoicing, the summary invoice lines are not published; instead, each customer order line will be published as a line in the Invoice BOD.
Acknowledge	ItemMaster	Acknowledge the receipt of a Process ItemMaster from an external application.
Sync	ItemMaster	* Create a new item on the Items form * Make a change to these fields on the Items form: Item, Description, ABC Code, Commodity, Cost Method, Material Status, Reason, Backflush, Last Change, U/M, Unit Cost, S/N Track, Lot Track, Source, Order Minimum, Order Maximum, Alternate Item * Add or change an item description on the Multi-Lingual Items form
Sync	LCLTradeStatistics	* Print EU Sales List Report * Print SSD Transaction Listing Report
Sync	Location	* Create a new Warehouse * Update General Parameters form (creates a Location BOD with the site as the location)
Sync	Opportunity	* Create or update a record on the Opportunities, Customer Orders, or Opportunity Tasks form

Verb	Noun	User action to generate the BOD
Sync	PayableTracker	* Post a voucher or an Adjustment through the A/P Voucher Posting form * Post a payment from any of these forms: A/P Check Printing/Posting, A/P Draft Printing/Posting, A/P EFT Posting, A/P Wire Posting
Sync	PayableTransaction	* Post a voucher through the A/P Voucher Posting form * Post a payment from any of these forms: A/P Check Printing/Posting, A/P Draft Printing/Posting, A/P EFT Posting, A/P Wire Posting * Set or release a Hold status on a voucher
Acknowledge	PayFromPartyMaster	Acknowledge the receipt of a PayFromPartyMaster from an external application
Sync	PayFromPartyMaster	* Change any information on the Customers form * Change any information on the Ship Tos form
Sync	Person	* Add or update information about a salesperson or sales manager on the Salespersons form * Update information related to a salesperson on the Employees form (for employee sales people) or Vendors form (for outside sales people)
Sync	Personnel	* Add or update information on these forms: Employee, Employee Skills, Employee Cert/License, Employee Education, Employee Training Courses, Employee Work Experience, or Employee Position
Acknowledge	PlanningSchedule	Acknowledge the receipt of a Planning Schedule from an external application.
Acknowledge	ProductionOrder	Acknowledge the receipt of a ProductionOrder from an external application
Sync	ProductionOrder	* Applied filters on the Background Task generate this BOD for a firm job that is scheduled for the first time. This does not apply to jobs that have just been processed by the TriggerProductionOrderBGSyncSp Background task. You can add subsequent filters to reduce the number of BODs triggered by this task. Without filtering, after every scheduling or planning function a significant number of BODs could be created. * Change the status of a job or production schedule. * Change the Qty Released of a job or production schedule when the status is Released.

Verb	Noun	User action to generate the BOD
		Notes: Creating a job generates this BOD, but changes to a firm job do not generate this BOD. This BOD must be included in an initial load of ProductionOrder data.
Sync	ProjectMaster	Create a Project or change the project status.
Process	PulseAlert	One or more of these publications is triggered by a system event: CustomerCreditHoldAlert; CustomerInteractionFollowupAlert CustomerOrderCreditHoldAlert; CustomerShipmentAlert; DCShopFloorTransactionErrorAlert; JobMaterialCostAlert; JobOperationHoursAlert; JobOverProductionAlert; JobProjectedLateForCustomerAlert; LateOrderShippingAlert;LeadAssignedAlert; LockedUserAlert; OpportunityDueAlert; OverBudgetAlert; ProjectedLateShipAlert; ProspectInteractionFollowupAlert; ScheduledMaintenanceAddedAlert; ScheduledMaintenanceAlert; TransactionAmountAlert
Sync	PurchaseOrder	* Print the Purchase Order Report * Print a Change Order Report
Acknowledge	Quote	* Print the Purchase Order Report * Print the Builder Purchase Order Report * Change the Purchase Order status to Complete * Print a Change Order Report
Sync	Quote	Acknowledge the receipt of a Quote from an external application.
Sync	ReceivableTracker	Change the Estimate status to Quoted
Sync	ReceivableTransaction	* Generate an invoice for customers with an 'Open Item' balance method. The status is set as Open. * Generate a debit memo/finance charge for customers with an 'Open Item' balance method. The status is set as Open. * Make a payment and apply it to an invoice for customers with an 'Open Items' balance method. The status changes to Paid. * Generate a credit memo and attach it to an invoice for customers with an 'Open Item' balance method. This changes the status to Paid. (For bullet points 2, 3, and 4: If all or part of the debit memo/finance charge, payment, or credit memo is left unapplied, a second BOD is generated. Similar transactions are grouped and shown

Verb	Noun	User action to generate the BOD
		under an invoice number '0' with a status of Unapplied Cash.)* Create an invoice, payment, credit memo, debit memo or finance charge transaction for a customer with a 'Balance Forward' balance method. The system maintains one balance under invoice number '0'. Its status is set as follows: for a debit balance, the status is set as Paid; for a credit balance, the status is set as UnappliedCash.
Sync	ReceiveDelivery	* Perform material transactions that add inventory tied to these types of orders: Project, Job, Customer Order (with a negative quantity), Purchase Order, RMA, Production Order or Transfer Order that cause a material transaction to occur * Run the Multi-Site Quantity Move utility
Sync	RemittanceAdvice	* Post a payment from any of these forms: A/P Check Printing/Posting, A/P Draft Printing/Posting, A/P EFT Posting, A/P Wire Posting, or Print/Post Payroll Checks
Sync	RemitToPartyMaster	* Add or update Vendor information * Update the vendor's address information * Update Bank Address information
Acknowledge	Requisition	Acknowledge receipt of a Requisition from an external application
Sync	Requisition	* Print the requisition on either the Purchase Requisition Report or the PO Requisition Report forms * Convert a requisition to a purchase order * Convert additional items on an existing requisition (in this case, another BOD is created, replacing the original BOD)
Acknowledge	SalesOrder	Acknowledge the receipt of a SalesOrder from an external application
Sync	SalesOrder	* Print the Customer Order Verification Report * Change order header status to Completed
Sync	SecurityPermissionMaster	Add, delete or change the objects that a group or user can access.
Sync	SecurityRoleMaster	Add or delete a Group Authorization or change the group description.
Acknowledge	SecurityUserMaster	Acknowledge the receipt of a SecurityUserMaster from an external application.

Verb	Noun	User action to generate the BOD
Process	SecurityUserMaster	Add or change the user status, user description or workstation login.
Sync	ServiceOrder	Add or update Service Order or Service Order Operations or Lines.
Sync	ShipFromPartyMaster	* Add or update Vendor information * Update the vendor's address information * Update Bank Address information
Process	Shipment	* For customer orders or lines that are assigned to the local site and that are assigned to an external controlled warehouse, print the Order Verification Report. * For transfer orders or lines where the Ship From site is the local site and the Ship From warehouse is an external controlled warehouse, print the Transfer Order Report.
Sync	Shipment	* Perform material transactions that remove inventory tied to these types of orders: Project, Job, Customer Order, Purchase Order (with a negative quantity), RMA, Production Order or Transfer Order * Run the Multi-Site Quantity Move utility
Acknowledge	ShipmentSchedule	Acknowledge the receipt of a ShipmentSchedule from an external application
Acknowledge	ShipToPartyMaster	Acknowledge the receipt of a ShipToPartyMaster from an external application
Sync	ShipToPartyMaster	* Change any information on the Customers form, Ship Tos form, or Customer Sales Contact Cross References form
Sync	SourceSystemGLMovement	* Run the Change Reports To Entity utility * Run the Copy Balances to Budgets utility * Modify Chart of Accounts Budget and Plan information * Run the Rebalance Ledger Period Totals utility * Run Ledger Posting for Journals * Run the Mass Journal Posting utility
Sync	SourceSystemJournalEntry	* Post journal entries to a ledger
Sync	SupplierPartyMaster	* Add or update Vendor information * Update the vendor's address information * Update Bank Address information

Verb	Noun	User action to generate the BOD
Sync	Transfer	* Perform a Transfer Order Ship * Perform a Transfer Order Receive * Perform a Combined Transfer Order Ship/Re-ceive
Sync	WorkCenter	Add a Work Center

Inbound BOD usage

E

This table shows the incoming BODs that CloudSuite Business can accept. It also indicates, when possible, what area of CloudSuite Business shows the processed inbound data.

Verb	Noun	Destination of processed data in Cloud Suite Business
Load	BankStatement	Bank Statements form, and A/P automatic payments generated
Process	BillOfMaterials	Engineering Workbench, Current Operations, Engineering Board
Process	BillToPartyMaster	Customers form and related forms
Sync	CaptureDocument	tmp_voucher_builder table
Process	ChartOfAccounts	chart table
Process	CodeDefinition	Depends on type of code
Process	ContactMaster	Contacts form and related forms
Process	CurrencyExchangeRateMaster	currate table
Process	CustomerPartyMaster	Customers form and related forms
Sync	EmployeeTimesheet	Service order transactions, attendance, project Labor transactions, unposted job transactions (Indirect, Run or Setup)
Sync	ExpenseReport	prtrx table
Sync	InventoryAdjustment	Miscellaneous Receipt and Miscellaneous Issue forms
Sync	InventoryCount	Miscellaneous Receipt and Miscellaneous Issue forms
Process	ItemMaster	Items form and related forms
Process	PayableTransaction	Updates Vendor Paid YTD, Paid Fiscal YTD and Last Paid Date
Sync	PlanningSchedule	coitem table (blanket items)

Verb	Noun	Destination of processed data in Cloud Suite Business
Process	ProductionOrder	job table
Process	Quote	Estimates form and related forms
Acknowledge	PulseAlert	N/A
Process	ReceivableTransaction	Updates Customer Posted Balance
Sync	ReceiveDelivery	If Type=”Transfer” and Status=”Received” create transfer order receipt. If Type=”Purchase Order” and Status=”Re-ceived”create PO receipt If Type=“Customer Return” create RMA receipt If Type=“Sales Order” create negative CO receipt.
Process	Requisition	preq table
Process	SalesOrder	Customer Orders form and related forms
Sync	SecurityUserMaster	coitem or trnitem table (depending on record type), last_external_ship-ment_doc_id
Acnowledge	Shipment	If Type=“Transfer” and Status=”Shipped” create Transfer Order Shipment If Type=“Purchase Order” create Pur-chase Order Return If Type=“Sales Order” and Sta-tus=”Shipped” create Customer Order Shipment
Sync	Shipment	coitem or trnitem table (depending on record type), last_external_ship-ment_doc_id
Sync	ShipmentSchedule	coitem table (blanket items)
Process	ShipToPartyMaster	Customer Ship Tos form and related forms

BODs used in integrations with this application

F

This section contains the list of BODs that are available for integrations with CloudSuite Business.

Outbound BODs from the ERP to integrated applications

This table shows the BODs that are available with CloudSuite Business. Where the application is blank, the BOD is not currently used by interfacing applications, but the BOD is generated by CloudSuite Business and is available to be processed through ION and any application that is set up to receive it.

Verb	Noun	To applications
Sync	AccountingChart	d/EPM
Sync	AccountingEntity	d/EPM
Process	AdvanceShipNotice	SCE Warehouse Management
Acknowledge	BillOfMaterials	PLM Accelerate
Acknowledge	BillToPartyMaster	Infor Back Office Connect
Sync	BillToPartyMaster	CPQ/EQ CRM e-Commerce Infor Back Office Connect SCE Warehouse Management
Sync	ChartOfAccounts	d/EPM
Sync	CodeDefinition	CPQ/EQ CRM d/EPM

Verb	Noun	To applications
		EAM Expense Management Infor Back Office Connect PLM Accelerate
Sync	ContactMaster	CRM Infor Back Office Connect
	CurrencyExchangeRateMaster Sync	CPQ/EQ Expense Management
Process	CustomerPartyMaster	Infor Back Office Connect
Sync	CustomerPartyMaster	CPQ/EQ CRM e-Commerce Infor Back Office Connect PLM Accelerate SCE Warehouse Management
Sync	CustomerReturn	CRM Infor Back Office Connect
Sync	Invoice	CRM e-Commerce Infor Back Office Connect
Acknowledge	ItemMaster	PLM Accelerate
Sync	ItemMaster	CPQ/EQ CRM e-Commerce Infor Back Office Connect PLM Accelerate SCE Warehouse Management
Sync	Location	CRM e-Commerce Infor Back Office Connect
Acknowledge	PayFromPartyMaster	Infor Back Office Connect
Sync	PayFromPartyMaster	CRM Infor Back Office Connect
Sync	Person	CRM

Verb	Noun	To applications
Sync	Personnel	Expense Management
Sync	ProductionOrder	Expense Management
Sync	ProjectMaster	Expense Management
Process	PulseAlert	Infor Ming.le
Sync	PurchaseOrder	EAM SCE Warehouse Management
Sync	Quote	CRM Infor Back Office Connect
Sync	ReceivableTransaction	CRM Infor Back Office Connect
Sync	ReceiveDelivery	EAM
Sync	RemittanceAdvice	Expense Management
Acknowledge	Requisition	EAM
Sync	SalesOrder	CRM e-Commerce Infor Back Office Connect
Sync	SecurityRoleMaster	Infor Ming.le
Process	SecurityUserMaster	Infor Ming.le
Sync	ServiceOrder	Expense Management
Sync	ShipFromPartyMaster	SCE Warehouse Management
Process	Shipment	SCE Warehouse Management
Sync	Shipment	CRM e-Commerce Infor Back Office Connect
Sync	ShipToPartyMaster	CPQ/EQ CRM e-Commerce Infor Back Office Connect SCE Warehouse Management
Sync	SourceSystemGLMovement	d/EPM
Sync	SourceSystemJournalEntry	d/EPM
Sync	SupplierPartyMaster	EAM PLM Accelerate

Verb	Noun	To applications
		SCE Warehouse Management
Sync	WorkCenter	PLM Accelerate

Inbound BODs to the ERP from integrated applications

This table shows the BODs that can be received and processed by CloudSuite Business. Where the application is blank, the BOD is not currently used by integrating applications.

Verb	Noun	From applications
Process	BillOfMaterials	PLM Accelerate
Process	BillToPartyMaster	CRM Infor Back Office Connect
Process	CodeDefinition	Infor Back Office Connect
Process	ContactMaster	CRM Infor Back Office Connect
Process	CustomerPartyMaster	CRM Infor Back Office Connect
Sync	EmployeeTimesheet	Expense Management
Sync	ExpenseReport	Expense Management
Sync	InventoryAdjustment	SCE Warehouse Management
Sync	InventoryCount	SCE Warehouse Management
Process	ItemMaster	PLM Accelerate
Acknowledge	PulseAlert	Infor Ming.le
Process	Quote	CRM CPQ/EQ
Sync	ReceiveDelivery	SCE Warehouse Management
Process	Requisition	EAM
Process	SalesOrder	CPQ/EQ CRM e-Commerce
Sync	SecurityUserMaster	Infor Ming.le
Acknowledge	Shipment	SCE Warehouse Management

Verb	Noun	From applications
Sync	Shipment	SCE Warehouse Management
Process	ShipToPartyMaster	CRM Infor Back Office Connect