



Infor SyteLine Configuration Guide for Infor ION

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Publication Information

Release: Infor SyteLine 9.00.10

Publication date: May 30, 2014

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About this guide

This guide provides implementation information for the integration between Infor SyteLine and Infor ION. This guide describes integration requirements and provides setup and configuration instructions. It also provides information about the business events or user actions that trigger the various business object documents (BODs) that are sent between SyteLine and ION.

Intended audience

This guide is intended for the system administrator who will configure the integration between SyteLine and ION. Before you read this guide, you must be familiar with the other guides listed in “Related Documents.”

Organization

This table shows the chapters of the guide:

Section	Description
Overview	Describes the business process and the integration model.
Requirements	Lists prerequisite applications and setup tasks.
Setting up SyteLine Setting up SyteLine in ION	Lists the tasks that must be done before information flows from one product to the other.
Business events that generate BODs	Describes the events or user actions that cause the applications to generate a business object document (BOD).
Inbound BODs	Lists the BODs to which SyteLine can subscribe.
Troubleshooting and maintenance	Describes errors that you could encounter during integration, and explains how to delete obsolete BODs.
Drillbacks	Lists available drillbacks used with certain BOD nouns.

Related documents

We recommend that you discuss the process and results of your planning decisions with Infor Consulting Services prior to implementation. Refer to the following guides for additional information.

Infor ION

Infor ION Installation Guide

Infor ION Connect Administration Guide

Infor Federation Services

Infor Federation Services Installation Guide

Infor Federation Services Administration Guide

Infor SyteLine

Infor SyteLine Installation Guide

Infor SyteLine Administration Guide

Contacting Infor

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

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

Messaging through BODs

Transactional and master data is passed between Infor SyteLine and other applications as business object documents (BODs) that are routed through Infor ION Connect, an enterprise messaging system that integrates Infor applications with each other and with outside applications.

This section explains details about the integration between SyteLine and other products through Infor ION.

Integration details

SyteLine creates BODs through replication. This process is described in the online help. The documents are stored in a table designated as the outbox. ION takes BODs from the source application's outbox and places them in the area that is designated as the inbox in the target application.

The integration includes one or more SyteLine instances and one or more BOD-enabled applications that are linked through ION Connect. For SyteLine, one instance is established for each site.

The mapping between SyteLine sites and the other application should be a reflection of the business relationship between the databases.

Required information for the integration

During the planning phase, you must provide this information:

- Name of the SyteLine application instance (logical ID) that is used to connect with Infor ION
- Tenant ID that is used to connect both applications to ION
- SyteLine sites that are used in the integration, and which site is the bootstrap site
- Enterprise organization structure (accounting entities) and the mapping of SyteLine sites to other BOD-enabled applications
- Message flow: which BODs flow in which direction?

Requirements

Install and configure the necessary hardware and software for these components:

- Infor Federation Services. See the Infor Federation Services Installation Guide.
- Infor ION Connect. See the Infor ION Installation Guide. The server where you install ION must be able to connect to the servers where you install SyteLine and other BOD-enabled applications.
- SyteLine 9.00.00 or above. See the Infor SyteLine Installation Guide.
- Infor has created sample ION integration flows and connection points for each available SyteLine integration in ION. These are stored as XML files on the Downloads section on the Infor Xtreme support site. Copy the appropriate file to the Infor\SyteLine\Integration\SyteLineBundle folder on the SyteLine utility server, replacing any existing version of the file.

Use the steps in this section to set up SyteLine so that it can generate BODs and place them in a message outbox where ION Connect can retrieve them.

Setting up a configuration that matches your local site

You must specify a configuration name that exactly matches the local site name. This configuration is required to replicate BODs. For example, if your local site name is oh, you must create a configuration named oh. If your configuration name already exactly matches your local site name, skip this step.

To set up a configuration that matches your local site:

- 1 On the SyteLine utility server, open the Configuration Manager utility and select the configuration you are currently using to access the local site.
- 2 Click **Copy**.
- 3 In the **Target Configuration** field, specify a configuration name that exactly matches the local site name, including the capitalization.
- 4 Click **OK**.
- 5 Stop and start all Infor services.

Setting up the logical ID and BOD replication

To set up the logical ID and BOD replication in SyteLine:

- 1 If multiple sites on a SyteLine intranet will send or receive BODs, make sure that replication is set up between the sites as specified in the *Infor SyteLine Multi-Site Implementation Guide*. The sites must be replicating the **Site Admin** category to each other. On the Sites/Entities form of the bootstrap site, verify that all of the sites are linked.
- 2 On the SyteLine utility server, specify the bootstrap configurations on the **Replication** tab of the Service Configuration Manager utility:

- In the **Replicator – Configuration** field, specify a configuration that is the collection site for all outbound messages from sites on the intranet. This site's Replication Document Outbox form will collect outbound BODs for all sites on the intranet.
- In the **Inbound Bus – Configuration** field, specify a configuration that is the collection site for all inbound messages from sites on the intranet. This site's Replication Document Inbox form will collect inbound BODs for all sites on the intranet.

These two configurations can point to the same site database if the inbound and outbound collection of BODs is performed at the same site.

Note: After you perform steps 3 – 6 on one site, the information is replicated to the other linked sites.

- 3 On the Intranets form, to create a new intranet for Infor ION (bus), specify these values:

Intranet

Specify the name to identify the intranet, for example, **InforBUS**.

Description

Specify an appropriate description, for example, Infor ION connection.

External

Select this check box.

Transport

In this field on the General tab, specify **ESB**.

- 4 On the Intranets form, select the intranet *used by your SyteLine site* and specify the tenant ID.

Tenant ID

To use the same tenant ID for all sites on this intranet, specify it here. You can also leave it blank here and specify the tenant ID on the local site records, or leave that field blank to use the default tenant ID value of **infor**. If you are using this application in the Infor Cloud, the Infor Cloud administrator will assign a tenant ID. Otherwise, you can use the default value. The tenant ID can be a maximum of 22 characters and must match the tenant ID used in ION for other connecting applications. For more information about how the tenant ID is used with ION, see the *ION Connect Administration Guide*.

- 5 On the Sites/Entities form, create a logical "site" for Infor ION:

Site

Specify a name to identify this site as your ION site, for example: **InforBUS**.

Site Name and Description

Specify an appropriate site name and description.

Type

Specify **Site**.

Intranet Name

Select the intranet you created in step 3.

From Site

On the **Site User Map** tab, specify the local site, for example, **oh**.

User Name

Specify the user ID used to send replication documents to the SyteLine outbox for ION to retrieve. This user must already be set up on the SyteLine **Users** form at the local site. We recommend that you specify the `repl_user` here, if it is defined. Otherwise, specify a user with Full User editing permissions. Also, the SyteLineAutomation license module must be assigned to the user that you specify here.

- 6 On the Sites/Entities form, configure the local site, for example, **oh**, to generate or receive business object documents (BODs).
 - a Specify the **Message Bus Logical ID** for the site. This identifies the SyteLine site to ION. Specify it as **infor.syteLine.site** where **syteLine** is the application type, and **site** is the name of the local site, for example **infor.syteLine.oh**. The logical ID must be all lowercase.

Note: The logical ID entered here must match the application type and name defined in ION Connect for this SyteLine site.
 - b Optionally, specify a **Tenant ID** for the local site. If no tenant ID is specified here or on the **Intranets** form, the default tenant ID value is **infor**.
- 7 At each site that is sending or receiving BODs, including the bootstrap site, open the Replication Rules form and create a new rule. Specify this information.

Source Site

Specify the local site that you configured in Step 6.

Target Site

Specify the ION site you created in Step 5.

Category

Specify ESB.

Interval Type

Specify any option except Transactional.

- 8 At each site that is sending or receiving BODs, on the Replication Management form click **Regenerate Replication Triggers**.

Using ION in a SyteLine multi-site environment

SyteLine maintains one inbox for multiple sites. When each incoming BOD is placed in a central inbox that is located in the bootstrap site, the SyteLine Inbound Bus Service opens the BOD and applies it to the proper site, based on the ToLogicalID.

However, ION cannot manage multiple ToLogicalIDs placed into the same inbox. ION needs to associate a separate ToLogicalID with each inbox.

To get around this limitation, SyteLine can populate the UserArea of the BOD with the ToLogicalID and the FromLogicalID. To set this up, add a process default called "Logical IDs aliased in BOD" to the Process Defaults form and set its default value to 1. After this is set, all BODs exported from SyteLine include this information after the Data Area:

```
<UserArea>
  <Property>
    <NameValue name="ToLogicalId" type="StringType">lid://default</NameValue>
  </Property>
  <Property>
    <NameValue name="FromLogicalId" type="StringType">infor.syteLine.oh</NameValue>
  </Property>
</UserArea>
```

Also, when the Inbound Bus Service picks up BODs from the inbox, the service looks in the User Area for a ToLogicalID. If a value is found, the service applies the BOD against the site associated with the ToLogicalID found in the User Area. Otherwise, the BOD is applied against the site associated with the ToLogicalID in the BOD Header, which is likely the bootstrap site.

Setting up information that will flow to the other application

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

Verifying BOD replication

To verify that replication is set up properly:

- 1 On the SyteLine utility server, stop and start the Replication and Replication Queue Listener services.
- 2 In SyteLine, open a form whose information is being replicated to ION. For example, the Vendors form information might be replicated.
- 3 Change a value and save the record. For example, you could change the vendor address.
- 4 Check the Replication Document Outbox form to see if a BOD was generated and marked as processed. In our example, the SyncSupplierPartyMaster BOD is generated.

Generating the initial load of SyteLine BOD data for other systems

During normal processing, BODs are generated when a user makes a data change or completes a transaction. However, when you start a new integration with another product, you must manually generate BODs that pass the current set of SyteLine data to the other application, so that the base systems are synchronized. Use the Replication Document Manual Request Utility at each SyteLine site to generate a set of BODs that contain this baseline data. The BODs are placed in the Replication Document Outbox form, from which Infor ION retrieves them and passes them to the other application.

When you use this utility to publish BOD data, the current date is used for all Status/EffectiveDateTime elements. See the SyteLine online help for more information about the Replication Document Manual Request utility.

To perform an initial load of SyteLine data into BODs that are placed in the Replication Document Outbox:

- 1 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. If you select multiple Process BODs at one time, the BODs are processed in alphabetical order. However, 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

- 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 this integration.
- 6 Repeat this process at each site.

After the initial data load, SyteLine sends BOD updates when users change certain data or when certain transactions occur in SyteLine. For a list of the events that generate BODs, see “SyteLine business events that generate BODs” on page 19.

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

This section describes how to use Infor ION to import the SyteLine solution, configure the connection information for the SyteLine application, and activate the solution.

You must also configure the connection points for each application that will pass data to and from SyteLine through ION.

For additional information about using ION, see the *Infor ION Connect Administration Guide*.

About the SyteLine connection point

If you have integrated other products with SyteLine through ION, you probably already have a connection point for your SyteLine site(s) in ION. You can reuse this connection point for other ION integrations. However, you must make sure that the Documents tab for this connection point is set up to send and receive ALL appropriate documents for all integrations.

If you do not yet have a SyteLine connection point for your site, revise the sample “OH” connection point in the sample integration described below to create one.

Importing and updating the sample integration document

Infor has created XML files that include a sample ION document flow and connection points for each available ION integration. To import one of these files into ION:

- 1 Log into Infor ION Desk.
- 2 Select **Model > Connect > Document Flows**.
- 3 Click **Import**. A dialog box is displayed where you can locate and select an XML file.
- 4 Select the appropriate XML file to import. In the “Requirements” section on page 8, you were instructed to download the file to the Infor\SyteLine\Integration\SyteLineBundle folder on the SyteLine utility server.
- 5 Click **Open**. This imports two sample connection points and a sample document flow.
- 6 In the Result dialog, click **OK**.
- 7 Replace or update the sample connection points in the sample document flow:

- a On the Document Flows page, select the sample document flow that you want to update, and click **Details**.
- b On the Document Flow Modeler page, select the box labeled **Activity 1 (OH)**, which represents a SyteLine site (connection point) in the document flow. This connection point sends documents to the connection point for the application to which you are integrating.
- c If you have already defined a connection point for your SyteLine site, **replace** the sample connection points in the flow with your SyteLine connection point:
 - In the Application Task pane, click **Add** and select the SyteLine connection point you have already defined.

Note: Verify that your existing SyteLine connection point is sending and receiving all the documents that are required for this integration. See the lists of documents in “SyteLine business events that generate BODs” on page 19 and “Inbound BODs” on page 29. To verify this, select the connection point, click **Details** and open each of the documents on the Documents tab.

- In the Application Task pane, select the sample connection point (**OH**) and click **Remove**.
- Change the description of your connection point to describe it, for example, **SyteLine MI site**.

OR If you have NOT already defined a SyteLine connection point, **update** the sample connection information to define your SyteLine application connection:

- In the Application Task pane, select the application name (**OH**) and click **Details**.
- On the Application Connection Point page, update and/or verify these connection properties:

Name: Change the name of this application to match your SyteLine site name, so you can easily identify your site in the flow.

Logical ID Type: This value must be **syteline**.

Type: This connector type must be **Infor Application**.

Logical ID: This value is automatically generated based on the logical ID type and the application name you specified. This must match the Message BUS logical ID you specified on page 11.

Tenant: This tenant value must match the Tenant value you specify for the application to which you are integrating. This value defaults to infor.

- Specify information about the connection to your SyteLine application database.

Database Type: Specify **SQLSERVER**.

Advanced/URL: Select **Advanced** and specify the connection URL in this format: **jdbc:jtds:sqlserver://hostname:port/database** where *hostname:port* is the SyteLine application database server name and port, and *database* is the application database name.

Connection: Specify the SQL user name and password that ION will use to log into the SQL SyteLine application database to retrieve replication documents from the inbox. This user must have db_datareader and db_datawriter permission for the database.

Polling: set **Delete Processed Messages** to **true** if you want to immediately delete BODs from the Replication Document Outbox after ION processes them.

Set the value to **false** if you want the processed BODs to remain in the outbox for the number of minutes specified in the Outbox Cleaner Expire Time field (under **Advanced>Cleanup**).

- Click **Test** to verify the connection.
 - Click **OK**.
- d Save your changes and go back one level to the Document Flow Modeler page.
 - e Select the box labeled **Activity 3**, which represents the same SyteLine connection point; however, in this case it is *receiving* documents from the application to which you are integrating.
 - f The information for Activity 3 should be automatically updated from the sample (OH) connection point to the connection point you specified for Activity 1. If it was not automatically updated, repeat steps c – d for this connection point.
 - g Replace the Activity 2 connection point in the solution with information appropriate for the other application to which SyteLine will connect through ION. The other application's integration guide to ION should provide that information.
 - h On the Document Flow Modeler page, just for your information, select the document icons shown *between* the connection points in the flow. In each case, the Documents pane displays a list of the BODs that are sent between SyteLine and the other application. The lists should not need to be changed.
 - i Save the flow.
- 8 Repeat Step 7 for each of the sample document flows you plan to use.
 - 9 Go to the Connection Points page and delete the sample connection point **OH**.

Activating the flow

To activate your solution in ION Desk:

- 1 On the Document Flows page, select the document flow between SyteLine and the other application.
- 2 Click **Activate**. A message is displayed:
 - If you receive a success message, click **OK**. Your changes are effective immediately.
 - If you receive an error message, the model cannot be activated. Refer to the *Infor ION Connect Administration Guide* for assistance with activation errors.
 - If you receive a warning message, the model is still activated.

Note: If you encounter problems during this setup, stop and restart the ION service.

Testing the integration

To verify the integration has been set up successfully, create appropriate transactions in each application and ensure that the expected data is available in the other application.

If multiple sites are sending BODs, verify that the expected data is available from all sites in the other application.

Note: Before starting the verification, ensure that these applications and service are running:

- Infor SyteLine
- The other BOD-enabled application
- IONService

Chapter 4 SyteLine business events that generate BODs

4

This list describes the events (user actions) that generate a BOD from SyteLine:

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.)
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	<ul style="list-style-type: none"> * Add or update a resource on the Resources form (creates a BOD for each shift line) * Add or update a Resource Group, or change the elements of a group (creates a BOD for each shift line that is affected) * Add or update a shift calendar in Scheduling Shifts * Update a Shift Exception (creates a BOD for the affected resource with WORKFG (Work) set to Y if the resource is free or N (Down Time) if the resource is busy. * Update a resource schedule (creates a BOD for the affected resource and resource group, indicating that the resource is busy) * Add a holiday (creates a BOD indicating that 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
Acknowledge	CodeDefinition	Acknowledge the receipt of a CodeDefinition from an external application

Verb	Noun	User action to generate the BOD
Sync	CodeDefinition	<ul style="list-style-type: none"> * Add or update a Billing Term * Add a Certification/License * Add a Commodity Code * Add a Customer Type * Add an Education Major * 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 Position * Add a Price Code * Add a Product 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 Experience <p>BODS for some other codes, such as language IDs and cost methods, are automatically generated when the Replication Document Manual Request Utility is run.</p>
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

Verb	Noun	User action to generate the BOD
Sync	Contract	<ul style="list-style-type: none"> * 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
Sync	CustomerReturn	<ul style="list-style-type: none"> * Print the RMA Order Verification Report * Change the status of an RMA
Sync	FinancialCalendar	<ul style="list-style-type: none"> * Change any information on the Accounting Periods form * Run the change Reports To Entity utility
Sync	InventoryAdjustment	<ul style="list-style-type: none"> * Perform Quantity Adjustment * Perform Miscellaneous Receipt or Miscellaneous Issue * Perform Cycle Count Posting - one BOD is generated for each combination of item, warehouse, 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	<ul style="list-style-type: none"> * Run the Cycle Count Posting utility * Run the Physical Inventory Posting utility <p>One InventoryCount BOD is sent for each item/warehouse combination</p>

Verb	Noun	User action to generate the BOD
Sync	Invoice	<ul style="list-style-type: none"> * Print and post an invoice through the Consolidated Invoicing form * Post an invoice through the Invoice Posting (A/R) form <p>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.</p>
Sync	ItemMaster	<ul style="list-style-type: none"> * 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	Location	<ul style="list-style-type: none"> * Create a new Warehouse * Update General Parameters form (creates a Location BOD with the site as the location)
Sync	Opportunity	<ul style="list-style-type: none"> * Create or update a record on the Opportunities, Customer Orders, or Opportunity Tasks form
Sync	PayableTransaction	<ul style="list-style-type: none"> * 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 from the A/P Posted Transactions Detail form
Acknowledge	PayFromPartyMaster	Acknowledge the receipt of a PayFromPartyMaster from an external application
Sync	PayFromPartyMaster	<ul style="list-style-type: none"> * Change any information on the Customers form * Change any information on the Ship Tos form

Verb	Noun	User action to generate the BOD
Sync	Person	<ul style="list-style-type: none"> * 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	<ul style="list-style-type: none"> * 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	<ul style="list-style-type: none"> * 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. <p>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.</p>
Sync	PurchaseOrder	<ul style="list-style-type: none"> * Print the Purchase Order Report * Print the Builder Purchase Order Report * Change the Purchase Order status to Complete * Print a Change Order Report

Verb	Noun	User action to generate the BOD
Sync	Quote	* Change the Estimate status to Quoted
Sync	ReceivableTransaction	<p>* Generate an invoice for customers with an 'Open Item' balance method. The status is set as Open.</p> <p>* Generate a debit memo/finance charge for customers with an 'Open Item' balance method. The status is set as Open.</p> <p>* Make a payment and apply it to an invoice for customers with an 'Open Items' balance method. The status changes to Paid.</p> <p>* Generate a credit memo and attach it to an invoice for customers with an 'Open Item' balance method. This changes the status to Paid.</p> <p>(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 under an invoice number '0' with a status of Unapplied Cash.)□</p> <p>* 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.</p>
Sync	ReceiveDelivery	<p>* 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</p> <p>* Run the Multi-Site Quantity Move utility</p>
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	<p>* Add or update Vendor information</p> <p>* Update the vendor's address information</p> <p>* Update Bank Address information</p>

Verb	Noun	User action to generate the BOD
Acknowledge	Requisition	Acknowledge receipt of a requisition – system generates the BOD, no user action
Sync	Requisition	<ul style="list-style-type: none"> * 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
Sync	ShipFromPartyMaster	<ul style="list-style-type: none"> * Add or update Vendor information * Update the vendor's address information * Update Bank Address information
Sync	Shipment	<ul style="list-style-type: none"> * 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	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	<ul style="list-style-type: none"> * 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

Verb	Noun	User action to generate the BOD
Sync	SupplierPartyMaster	<ul style="list-style-type: none"> * Add or update Vendor information * Update the vendor's address information * Update Bank Address information
Sync	Transfer	<ul style="list-style-type: none"> * Perform a Transfer Order Ship * Perform a Transfer Order Receive * Perform a Combined Transfer Order Ship/Receive

Chapter 5 Inbound BODs

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This list describes the BODs to which SyteLine can subscribe:

Verb	Noun
Process	BillToPartyMaster
Process	CodeDefinition
Process	ContactMaster
Process	CustomerPartyMaster
Sync	ExpenseReport
Process	PayFromPartyMaster
Sync	PlanningSchedule
Process	ProductionOrder
Process	Requisition
Process	SalesOrder
Sync	ShipmentSchedule
Process	ShipToPartyMaster

Receiving a timeout error in the Replication Document Manual Request Utility

If you receive either of the following errors during generation of BODs through the Replication Document Manual Request utility, then transactions are taking longer to run than the timeout values set in SyteLine or other related applications and services.

- Exception from load collection: Error processing an IDO request (Protocol=Http, URL=http://jokerswild/IDORequestService/RequestService.aspx): The remote server returned an error: (500) Internal Server Error.
- The transaction has aborted. Transaction Timeout

For a list of timeout values that can be reset, see the chapter on improving performance in the *Infor SyteLine System Administration Guide*.

Data is not flowing properly between the systems

From the Infor ION Desk, select **Manage >Connectivity**. In that module, you can view:

- A deployment viewer that indicates message statuses
- A queue viewer that displays all the message queues from all the ION-enabled applications
- A list of error BODs
- A routing viewer that allows interactive searches to analyze the routing configurations

For more information, see the *Infor ION Connect Administration Guide*.

Deleting obsolete BODs

BODs in the SyteLine Replication Document Outbox (COR_OUTBOX_xxx tables) are removed by Infor ION. ION Desk application polling properties control the removal of these BOD messages:

- If **Delete Processed Messages** is set to **true**, messages are deleted immediately after they are successfully processed by the ION Runtime.
- If **Delete Processed Messages** is set to **false**, messages are deleted if they are older than the number of hours specified in **Outbox Cleaner Expire Time** and they have either been successfully sent or they do not have any assigned routes. The ION Runtime checks for expired messages when it is started, and then checks every hour.

By default, the second option is used. By not deleting the messages immediately, ION can monitor the outbox table and report the number of processed and unprocessed messages.

ION does not remove messages from the SyteLine Replication Document Inbox (COR_INBOX_XXX) tables. If the inbox size becomes a problem, you can manually delete the records from the inbox table with a SQL Server script.

Chapter 7 Drillbacks

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“Drillback” refers to the ability to launch a SyteLine form in Infor Ming.le from a link based on the document ID for the relevant BOD. A link is defined by a “view” for each type of BOD noun (Sales Order, Item Master, etc.) and is then configured to launch a specific SyteLine form for that noun. Not all nouns have a drillback view available. See the *Infor SyteLine Integration Guide for Infor Ming.le* for instructions to set up drillbacks to SyteLine in Ming.le.

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

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

