



Infor CloudSuite Industrial Provisioning Guide

Release 9.01.x

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5/29 changes: Added note to "Provisioning Factory Track." Changed the column order for Ming.le and CSI connection point tables in "Setting up Single Sign On." Added references to "Verifying the IPF integration." Set APPLICATION PARTIAL to TRUE in "Provisioning CPQ." Removed real user name in "Provisioning CRM."

6/7 changes: Added CPQWB-User to CPQ roles and removed CPQ Configurator from list of apps in Ming.le App Menu, in in "Provisioning CPQ."

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About this guide

This guide includes the most current provisioning steps (recipe) for Infor CloudSuite Industrial.

Intended audience

This is intended for Infor Cloud team personnel, and Infor Consulting Services.

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.

Chapter 1 Tenant Provisioning

Provisioning customer/tenant metadata

When you get a notification of a new order, expect that it will take up to 24 hours for the new customer’s tenant to be created and synchronized to CloudSuite Portal (CSP).

After the customer tenant is available, you can build the tenant environments.

Provisioning Infor OS

- 1 In CloudSuite Portal, select the Customer record, and click **Provision Tenant** to open the Suite Provision Wizard.

Suite Provision Wizard

Customer: C U E INC.

Product/Suite:

Product/Suite Version:

Type:

Name:

Golden Tenant:

Demo Tenant:

Description:

Saas Order Id:

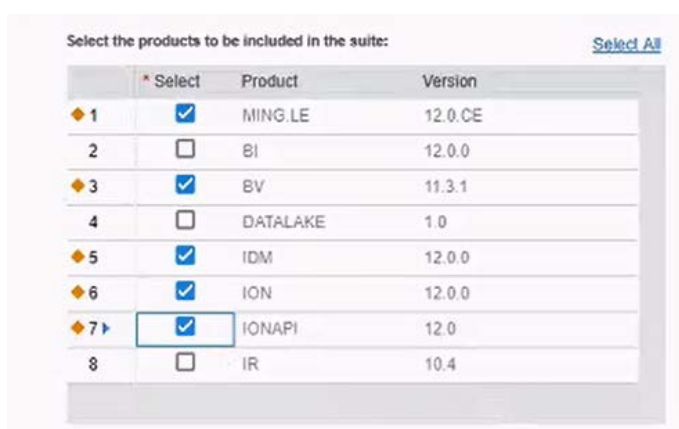
Select the products to be included in the suite: [Select All](#)

	* Select	Product	Version
1 ▶	<input type="checkbox"/>	MING LE	12.0 CE
2	<input type="checkbox"/>	BI	12.0.0
3	<input type="checkbox"/>	BV	11.3.1
4	<input type="checkbox"/>	DATALAKE	1.0
5	<input type="checkbox"/>	IDM	12.0.0
6	<input type="checkbox"/>	ION	12.0.0
7	<input type="checkbox"/>	IONAPI	12.0
8	<input type="checkbox"/>	IR	10.4

2 To provision Infor OS for the tenant, specify this information:

Field	Value
Product/Suite	TECHSTACK
Version	1.0
Type	Specify the appropriate tenant type, for example, Demo, Prod, Train or Dev.
Name	The name is generated based on the product and type.

3 In the grid, select the Infor OS products that you want to include. Select the products that are shown here. Do not select BI because it currently fails and must be provisioned separately.



4 Click **Next**.

5 In the **Ming.le Provisioning Parameters** page, specify the appropriate **Hosting Group** and default values are provided for the rest of the tenant parameters:

- For NA, specify INFOR-PRD-USEAST1
- For EMEA, specify INFOR-PRD-EUCENTRAL1
- For APAC, specify INFOR-PRD-NCR-APSOUTHEAST2

MING.LE Provisioning Parameters

Tenant Parameters

Hosting Group:*

Application Farm:*

Logical ID:

Web Context:

Web App URL:*

Description:

License:

Endpoints

DB API Endpoint:*

Tenant API Endpoint:*

Clone From Existing Customer Environment?

6 In the **Custom Properties** section, specify the appropriate **IONMingleServiceUrl**; accept the defaults for the other fields in this section.

- For NA: `https://ioncel2-private-ionce-infrastructure-04ionce.inforcloudsuite.com:443/pulseapi/PulseApi`
- For EMEA: `https://ioncel2-private-ionce-infrastructure-06ionce.eu1.inforcloudsuite.com/pulseapi/PulseApi`
- For APAC: `https://ioncel2-private-ionce-infrastructure-08ionce.se2.inforcloudsuite.com/pulseapi/PulseApi`

Custom Properties

TenantFeature:

Addtrusteddomain:

EnableServiceProvider:*

Enterpriseenabled:

Featureset:

ionConnectionType:

IONEnabled:

IONMingleServiceUrl:*

NumberOfServiceProviders:*

RemoveTrustedDomain:

UseCDN:*

- In the Tenant Admin Email section, specify the email address for the bootstrap user.

Admins
Tenant Admin Email(s):*

Cancel Previous Next Provision

- Click **Next**.
- Provisioning Parameters pages are displayed for the other Infor OS products that you selected. For the BV, IDM, and ION pages, just keep the defaults that are provided, and click **Next**.
- In the **IONAPI Provisioning Parameters** page, you must specify a **Web App URL** because a value is required. You can specify any URL here; it is not validated.

IONAPI Provisioning Parameters

Tenant Parameters

Hosting Group:* INFOR-PRD-USEAST1

Application Farm:* Mingle12_IONAPI_APPFarm_USEAST

Logical ID: lid://infor.ionapi.ionapi

Web Context:

Web App URL:* https://infor.com

Description:

License: Upload

Endpoints

DB API Endpoint:* ionapi06-Isnr

Tenant API Endpoint:* IONAPI-TenantProvisioning-EP

Clone From Existing Customer Environment?

Use Mingle Admins

- In the **Custom Properties** section at the bottom of that page, select `silver` in the **slalevel** field.



- Click **Provision** to provision all of the selected Infor OS products for the tenant.



As part of the automated provisioning, all of the Infor OS applications are “made aware” of each other (activated on each other’s **Apps** tab). For example, the ION CE environment’s App tab looks like this:

	Select	Application	Status	Last Action Status
1 ▶	<input type="checkbox"/>	MING.LE	ACTIVE	SUCCESS
2	<input type="checkbox"/>	IONAPI	NOT REGISTERED	
3	<input type="checkbox"/>	IDM	ACTIVE	SUCCESS

Provisioning CSI/CSB

- In CloudSuite Portal, click the New icon.
- Specify the **Hosting Group**, **Application Farm**, **Type**, and **Web App Endpoint (Web Context and URL)**, using these values. Ensure that you add the tenant ID to the end of the URL value.
 - For NA:
 - Hosting Group:** INFOR-PRD-NCR-USEAST1
 - Application Farm:** Select values based on the product type and version for the region. (Ensure that you set the CSB flag in the properties pane to 1 if you are provisioning CSB.)

- **Type:** Specify the type, for example Demo, Prod, or Train.
- **Web Context:** wswbclient
- **URL:** https://csi901.inforcloudsuite.com?tenant_config_group=<TenantID>
- For EMEA:
 - **Hosting Group:** INFOR-PRD-NCR-EUCENTRAL1
 - **Application Farm:** Select values based on the product type and version for the region. (Ensure that you set the CSB flag in the properties pane to 1 if you are provisioning CSB.)
 - **Type:** Specify the type, for example Demo, Prod, or Train.
 - **Web Context:** wswbclient
 - **URL:** https://csi901.eu1.inforcloudsuite.com?tenant_config_group=<TenantID>
- For APAC:
 - **Hosting Group:** INFOR-PRD-NCR-APSOUTHEAST2
 - **Application Farm:** Select values based on the product type and version for the region. (Ensure that you set the CSB flag in the properties pane to 1 if you are provisioning CSB.)
 - **Type:** Specify the type, for example Demo, Prod, or Train.
 - **Web Context:** wswbclient
 - **URL:** https://csi901.se2.inforcloudsuite.com?tenant_config_group=<TenantID>

Details Properties ION API End Point License Key Datasources MT Datasources Provision Apps Health History

Customer Name: ITSGDENA023 [Show Related](#)

Hosting Group: INFOR-PRD-NCR-USEAST1

Application Farm: CSI-901001-INFOR-PRD-NCR-USEAST1-Farm [Actions](#)

Product: CSI

Product Version: 9.01.00.1

Type: DEM

Tenant ID: ITSGDENA023_DEM

Logical ID: lid://infor.syteline.csi901_prod_useast3

Description:

SaaS Request:

Production: Yes

Active: Yes

Web App Endpoint

Web Context: wswbclient

URL: https://csi901.inforcloudsuite.com?tenant_config_group=ITSGDENA023_DEM [Go To](#)

New URL:

Username:

Password:

- On the **Properties** tab, set all applicable items and click **Save**. (For CSB make sure to set CSB to 1.) See the next steps for information about these fields.

- When provisioning a Demo, you must fill in the SITE1 and SITE_CUR1 fields as they are required. You can specify anything here, because these values are overwritten during the provisioning phase with the names of the sites from the seed database.

These are the Site Name and Currency values for Demo:

Product	SITE1 Property Value	SITE_CUR1 Property Value
CSI 9.01.00 Demo	N/A	N/A
CSI 9.01.00 non-Demo	<site name>	<currency value>
CSB 9.01.00 Demo	N/A	N/A
CSB 9.01.00 non-Demo	<site name>	<currency value>

- Include these Optional Properties Add-ons, as required for the customer:

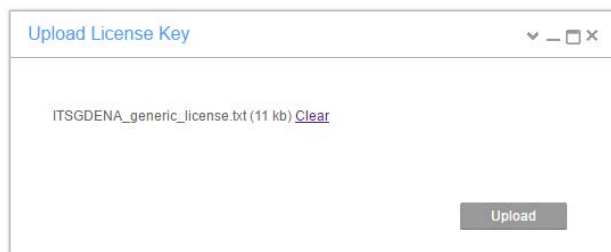
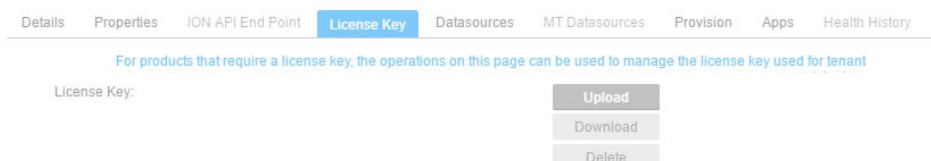
Note: Changing one of the optional properties from 1 to 0 (with the exception of APS) will not remove them from the tenant; there is no supported uninstall of one of these options.

- APS: 1 – configures APS module
- FORECASTING: 1 – installs and configures Forecasting add-on
- PMF: 1 – installs and configures Process Manufacturing add-on
- SYTEPLAN: 1 – installs and configures SytePlan add-on
- PendoAPIKey: value used by Pendo for content activation. The default Pendo API Key is de598aee-b772-458c-7710-ee6f91048296.
- LOCALIZATIONS: This includes a comma separated list of localizations that are certified and deployed for the CSI 9.01 MT cloud. There are no localizations at this time.

- **TRANSLATIONS:** Provide a comma separated list of locales that are certified and deployed for CSI 9.01 MT Cloud:

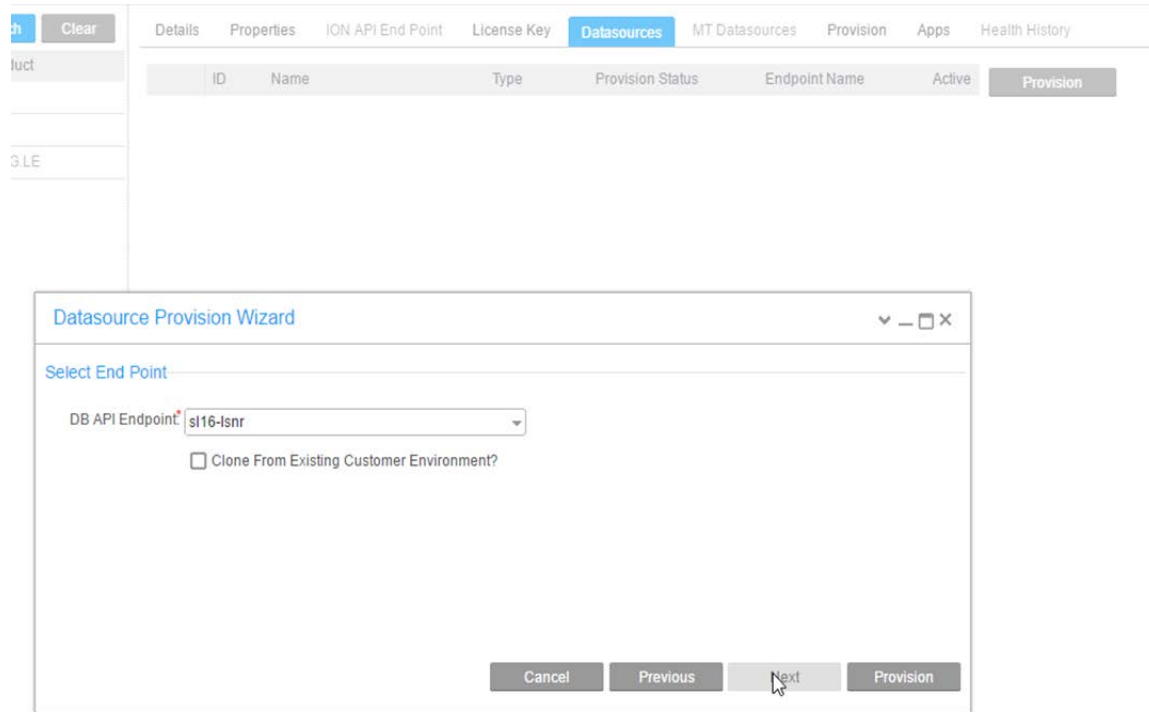
Translation	Value
Danish (Denmark)	da-DK
German (Germany)	de-DE
Finnish (Finland)	fi-FI
French (Canada)	fr-CA
French (France)	fr-FR
Japanese (Japan)	ja-JP
Norwegian (Norway)	nb-NO
Dutch (Netherlands)	nl-NL
Swedish (Sweden)	sv-SE
Thai (Thailand)	th-TH
Chinese (Simplified)	zh-CN

- To add the tenant-specific CSI/CSB license, click the **License Key** tab. Navigate to the license file to be used and click **Open**. A message indicates that the file is queued for upload. Click **Upload**.

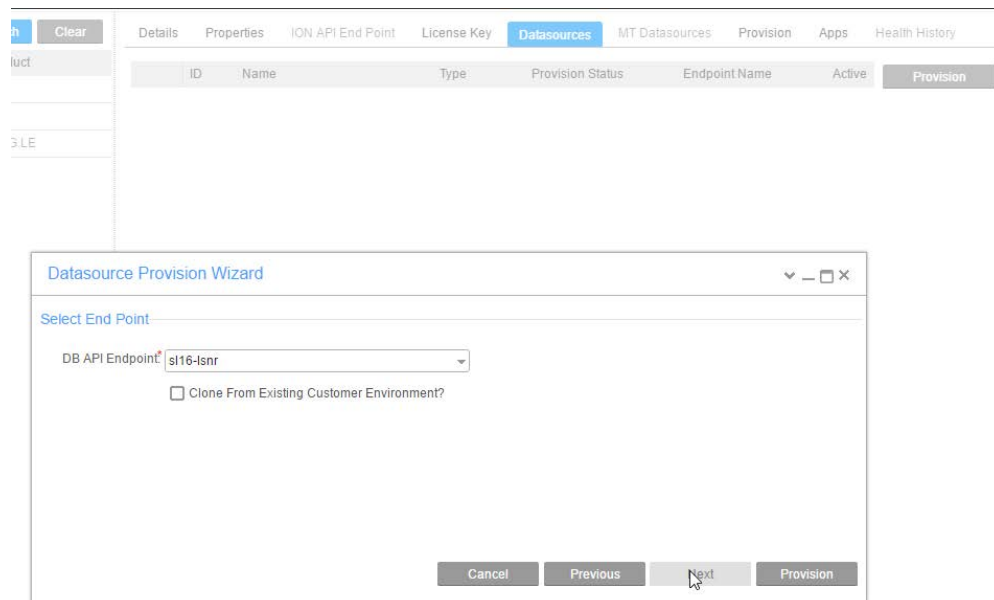


The file will be uploaded to an S3 bucket and available to be used during the provisioning process.

- On the Datasources tab, click **Provision** and select **Provision Predefined Tenant Datasources**.



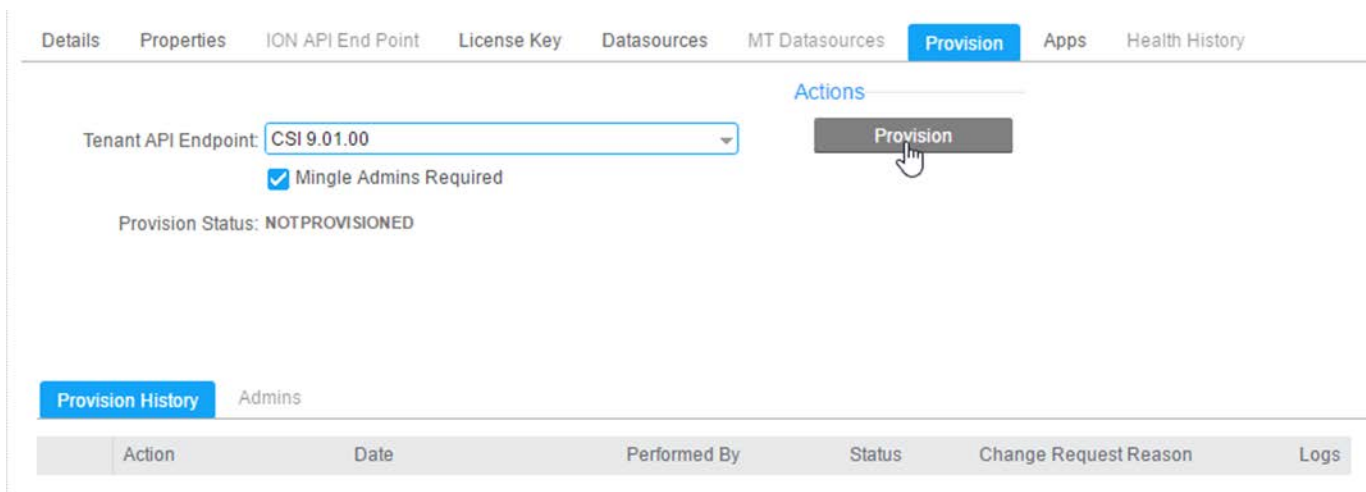
8 Select the API endpoint shown above and click **Provision**.



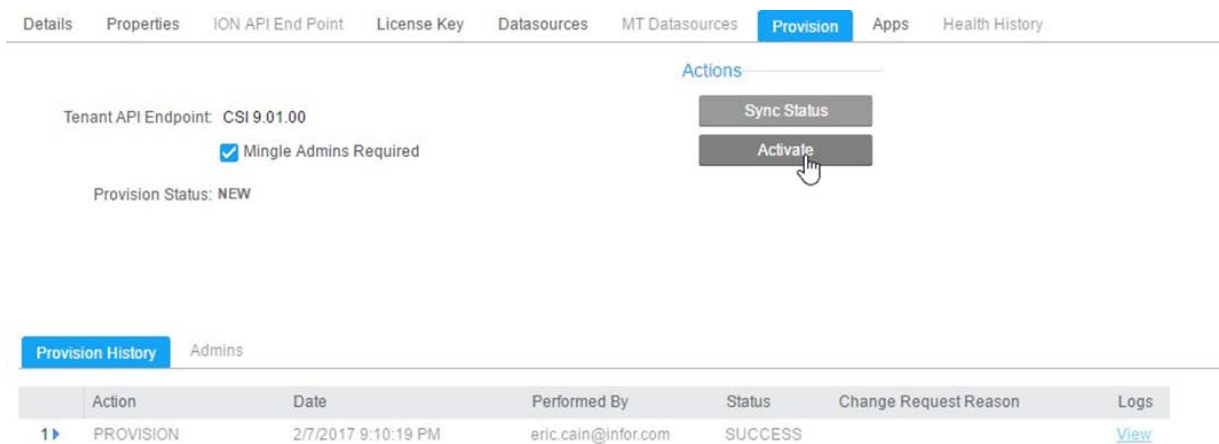
This step generates the CSI databases needed for this specific tenant: one application, one forms and one objects database. The **Provision Status** field should show **PROVISIONED** before you continue; you might need to refresh in order to see the new status.

9 In the **Provision** tab, select the Tenant API endpoint shown above and click **Provision**. After tenant provisioning is complete, a status of **NEW** should be displayed. If **ERROR** or **NOT PROVISIONED** is the status, then the history grid should show a failure. Review corresponding

log information to determine the specific error message. At this point, this CSI tenant has been provisioned but it's not available to be used by anyone.



10 Click **Activate**. The provisioning API performs the actions necessary to bring the CSI tenant online.



At this point, this CSI/CSB application has been provisioned but it has not been associated with Infor Ming.le; therefore, no tenant accounts can “see” the application. Also, CSI and ION will not be aware of each other until ION integration has been completed.

Provisioning Factory Track (FTK)

Note: Factory Track must be in the same SQL server farm as CSI for 9.01. If they are in different farms, the test connections will succeed, but the job list will not import (during the integration step), because it cannot stretch across two farms.

1 In CloudSuite Portal, click the New icon.

- 2 Specify the **Hosting Group**, **Application Farm**, **Type**, and **Web App Endpoint (Web Context and URL)**, using these values. Ensure that you add the tenant ID to the end of the URL value.
 - For NA:
 - **Hosting Group**: INFOR-PRD-NCR-USEAST1
 - **Application Farm**: Select values based on the product type and version for the region. Use 601001 is for Demo and 60100 for Prod.
 - **Type**: Specify the type, for example Demo, Prod, or Train.
 - **Web Context**: wswbclient
 - **URL**: `https://ft601.inforcloudsuite.com?tenant_config_group=<TenantID>`
 - For EMEA:
 - **Hosting Group**: INFOR-PRD-NCR-EUCENTRAL1
 - **Application Farm**: Select values based on the product type and version for the region. Use 601001 is for Demo and 60100 for Prod.
 - **Type**: Specify the type, for example Demo, Prod, or Train.
 - **Web Context**: wswbclient
 - **URL**: `https://ft601.eu1.inforcloudsuite.com?tenant_config_group=<TenantID>`
 - For APAC:
 - **Hosting Group**: INFOR-PRD-NCR-APSOUTHEAST2
 - **Application Farm**: Select values based on the product type and version for the region. Use 601001 is for Demo and 60100 for Prod.
 - **Type**: Specify the type, for example Demo, Prod, or Train.
 - **Web Context**: wswbclient
 - **URL**: `https://ft601.se2.inforcloudsuite.com?tenant_config_group=<TenantID>`

Details	Properties	ION API End Point	License Key	Datasources	MT Datasources	Provision	Apps	Health History
Customer Name: ITSGDENA023 Hosting Group: <input type="text" value="INFOR-PRD-NCR-USEAST1"/> Application Farm: <input type="text" value="FTK-601001-INFOR-PRD-NCR-USEAST1-Farm"/> Product: FTK Product Version: 6.01.00.1 Type: <input type="text" value="DEM"/> Tenant ID: ITSGDENA023_DEM Logical ID: <input type="text" value="lid://infor.ft.601_prod_useast3"/> Description: <input type="text"/> SaaS Request: <input type="text"/> Production: <input type="text" value="Yes"/> Active: <input type="text" value="Yes"/>								Show Related <input type="button" value="Jobs"/> Actions <input type="button" value="Upgrade"/> <input type="button" value="Clone"/> <input type="button" value="Update Application Farm"/>
Web App Endpoint								
Web Context: <input type="text" value="wswebclient"/> URL: <input type="text" value="https://ft601.inforcloudsuite.com?tenant_config_group=ITSGDENA023_DEM"/> Go To New URL: <input type="text"/> Username: <input type="text"/>								

- 3 In the **Properties** tab, The **SITE1** name should match the corresponding CSI SITE name. For the Demo environment, this should match one of the predefined demo sites. For a customer that is based in NA, select **DALS** because that site has USD based currency.

Note: Integration automation between FTK and CSI expects matching site names. For example, for a CSI site named 'US' is to integrate with FTK through automation, there must be a FTK 'US' site.

Details **Properties** ION API End Point License Key Datasources MT Datasources Provision Apps Health History

Save

Tenant Provision

CONFIGURATIONGROUPS:

CONFIGURATIONS:

ionConnectionType:

SITE1:

SITE10:

SITE11:

SITE12:

SITE13:

SITE2:

SITE3:

SITE4:

SITE5:

SITE6:

SITE7:

SITE8:

SITE9:

tenant_config_group:

TRANSLATIONS:

- 4 For Optional Properties Add-ons, in the **TRANSLATIONS** field, provide a comma separated list of locales that are certified and deployed for FTK 6.01 MT Cloud:

Translation	Value
German (Germany)	de-DE
Spanish (Mexico)	es-MX
French (Canada)	fr-CA
Japanese (Japan)	ja-JP
Dutch (Netherlands)	nl-NL
Swedish (Sweden)	sv-SE
Thai (Thailand)	th-TH
Chinese (Simplified)	zh-CN

- 5 To add the tenant-specific FTK license, click the **License Key** tab. Navigate to the license file to be used and click **Open**. A message indicates that the file is queued for upload. Click **Upload**.

Details Properties ION API End Point **License Key** Datasources MT Datasources Provision Apps Health History

For products that require a license key, the operations on this page can be used to manage the license key used for tenant

License Key:

Upload
Download
Delete

Upload License Key

ITSGDNA_FTK_generic_license.txt (7 kb) [Clear](#)

Upload

The file will be uploaded to an S3 bucket and available to be used during the provisioning process.

- On the **Datasources** tab, click **Provision** and select **Provision Predefined Tenant Datasources**. Select the API endpoint shown here and click **Provision**.

Clear

Details Properties ION API End Point License Key **Datasources** MT Datasources Provision Apps Health History

ID	Name	Type	Provision Status	Endpoint Name	Active	Provision

LE

Datasource Provision Wizard

Select End Point

DB API Endpoint:

Clone From Existing Customer Environment?

Cancel Previous Next Provision

This step generates the FTK databases needed for this specific tenant: one application, one forms and one objects database. The **Datasource** field should show **PROVISIONED** before you continue; you might need to refresh in order to see the new status.

Configuring multiple FTK sites

Factory Track does not support multiple sites in a single application database; therefore, a separate application database is required for each site. The above Datasource provisioning process using the **Predefined Tenant Datasource** option creates one application database, with one site. If additional sites are needed, perform these steps:

- 1 In CloudSuite Portal, in the **Properties** tab, add a new site name value under the next available **SITE*** custom field and click **Save**. Make a note of the field name, in this case, SITE2.
- 2 On the **Datasources** tab, click **Provision** and select **Provision Custom Tenant Datasources**. Select the API endpoint shown below, fill in the correct **Type** and **Template Name** and click **Provision**. This step generates one additional FTK application database to house the new site.

To add a Demo site, specify this information:

- **Type:** appdemo_SITE*
- **SITE*:** This value should match the custom field name you took note of earlier; in this case, SITE2. Select **Create From Template > Template Name:** FTAppDemo

To add a non-Demo site, specify this information:

- **Type:** app_SITE*
 - **SITE*:** This value should match the custom field name you took note of earlier; in this case, SITE2. Select **Create From Template > Template Name:** FTApp
- 3 In the **Provision** tab, select the API endpoint shown here and click **Provision**. After tenant provisioning is complete, a status of **NEW** should be displayed. If **ERROR** or **NOT PROVISIONED** is the status, then the history grid should show a failure. Review corresponding log information to determine the specific error message. At this point, this FTK tenant has been provisioned, but it is not available to be used by anyone.

Details Properties ION API End Point License Key Datasources MT Datasources **Provision** Apps Health History

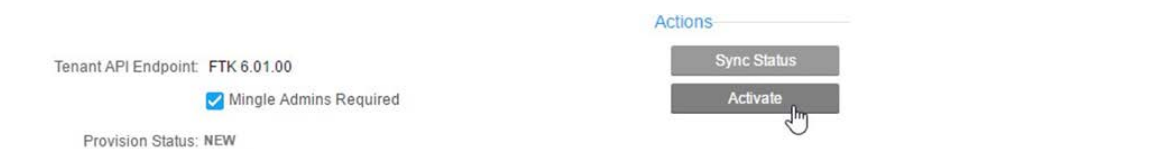
Tenant API Endpoint: Actions
 Mingle Admins Required Provision

Provision Status: NOTPROVISIONED

Provision History Admins

Action	Date	Performed By	Status	Change Request Reason	Logs
--------	------	--------------	--------	-----------------------	------

- 4 Click **Activate**. The provisioning API performs the actions necessary to bring the FTK tenant online.



Provision History Admins

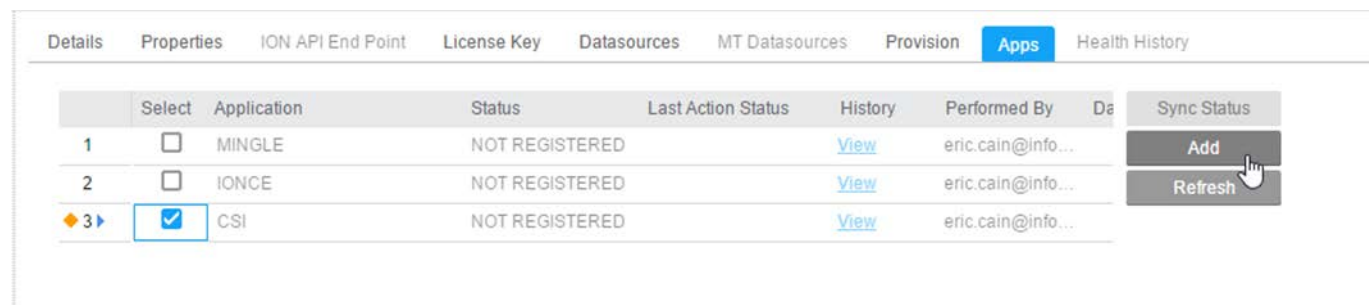
Action	Date	Performed By	Status	Change Request Reason	Logs
1 ▶ PROVISION	2/7/2017 9:19:47 PM	chad.zang@infor.com	SUCCESS		View

At this point, this FTK application has been provisioned but it has not been associated with Infor Ming.le; therefore, no tenant accounts can “see” the application.

Integrating CSI with Factory Track

Through automation, this step adds a connection to CSI in the Factory Track **Site Parameters** form. However, some manual configuration is required.

- 1 In the CloudSuite Portal, navigate to the **FTK** environment.
- 2 In the **Apps** tab, select the **CSI** application and click **Add**.



- 3 After the integration is successful, log into the Factory Track application and open the **Site Parameters** form.
- 4 For any Factory Track site name with a matching CSI site name, the **Site Parameters** form should be filled in with CSI specific tenant information.

The screenshot displays two main configuration panels. The top panel, titled "Site Parameters", includes fields for Site (DAL), Name (DAL), Description (DAL Site), ERP Type (Infor CloudSuite Industrial), and Default Menu Group Id (SLMain). The bottom panel, titled "Infor CloudSuite Industrial Data Views", includes fields for User Name (FTAutomation), Password, Configuration Name (CENTRAX_DEM_DALS), and URL. It also features a "Test Connection" button and a "Generate" button. A navigation bar at the top shows "Calendar Setup", "LN Communication", "Infor CloudSuite Industrial Communication", "M3 Communication", "Time Track", and "Colors".

Integrating CSI and FTK with Infor Ming.le

- 1 In the CloudSuite Portal, navigate to the Infor Ming.le environment.
- 2 In the **Apps** tab, select each application that you want to integrate with Infor Ming.le and click **Add**.

The screenshot shows the "Apps" tab in the Infor Ming.le interface. A table lists three applications: IONCE, FTK, and CSI. Each application is shown with a "Select" checkbox, "Application" name, "Status" (ACTIVE), "Last Action Status" (SUCCESS), "History" (with a "View" link), "Performed By" (eric.cain@info...), and "Sync Status" (with a "Refresh" button).

	Select	Application	Status	Last Action Status	History	Performed By	Da	Sync Status
1	<input type="checkbox"/>	IONCE	ACTIVE	SUCCESS	View	eric.cain@info...		<input type="button" value="Refresh"/>
2	<input type="checkbox"/>	FTK	ACTIVE	SUCCESS	View	eric.cain@info...		
3	<input type="checkbox"/>	CSI	ACTIVE	SUCCESS	View	eric.cain@info...		

The **Last Action Status** should display **SUCCESS**. If **Last Action Status** displays **FAILURE**, then click the View link in the **History** field for details on the actual error message.

- 3 After the integration step is successful, sign into Infor Ming.le and verify that the applications integrated with Infor Ming.le are included in the App Menu in the top left corner of the Infor Ming.le start page.

Verifying the CSI to Infor Ming.le integration

- 1 Sign into Infor Ming.le.

- 2 Select the **Infor CloudSuite** application (CSI/CSB) from the App Menu. You will see a list of the configurations that are available in the configuration group you specified during CSI provisioning.

If no configurations are in the dropdown list, then one of these problems occurred:

- The specified configuration group does not exist, or
- The CSI application was not activated (Status != Active).

If there are configurations, but they are incorrect, then the wrong configuration group was specified during provisioning.

- 3 Select a configuration and click **OK**. The CSI web client home page is displayed in the Infor Ming.le frame. No CSI sign in credentials are required, because SSO handles this for you.

Verifying the FTK to Infor Ming.le integration

- 1 Sign into Infor Ming.le.

- 2 Select the **Factory Track** application from the App Menu. You will see a list of the configurations that are available in the configuration group you specified during CSI provisioning.

If no configurations are in the dropdown list, then one of these problems occurred:

- The specified configuration group does not exist, or
- The FTK application was not activated (Status != Active).

If there are configurations, but they are incorrect, then the wrong configuration group was specified during provisioning.

- 3 Select a configuration and click **OK**. The Factory Track web client home page is displayed in the Infor Ming.le frame. No Factory Track sign in credentials are required, because SSO handles this for you.

Integrating CSI with ION

Through automation, this step adds a message listener and connection points for the applications.

- 1 In the CloudSuite Portal, select the ION environment.
- 2 In the **Apps** tab, select the applications that you want to integrate with ION and click **Add**.

Note: FTK is not currently integrated with ION.

Details	Properties	ION API End Point	License Key	Datasources	MT Datasources	Provision	Apps	Health History
	Select	Application	Status	Last Action Status	History	Performed By	Da	Sync Status
1 ▶	<input type="checkbox"/>	MINGLE	ACTIVE	SUCCESS	View	eric.cain@info...		<input type="button" value="Refresh"/>
2	<input type="checkbox"/>	FTK	NOT REGISTERED		View	eric.cain@info...		
3	<input type="checkbox"/>	CSI	ACTIVE	SUCCESS	View	eric.cain@info...		

The **Last Action Status** should display **success**. If **Last Action Status** displays **Failure**, then click the View link in the **History** field for details on the actual error message.

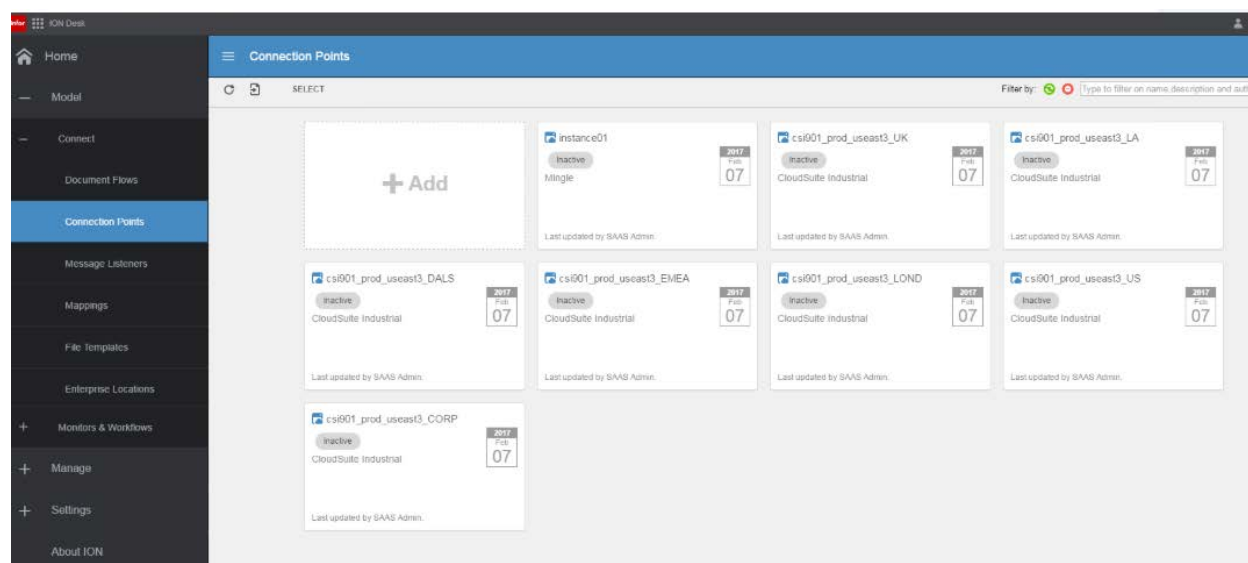
Verifying CSI/CSB integration with ION

Successful integration with ION creates the ION connection points for the application within ION Desk.

- 1 Sign into Infor Ming.le.
- 2 Select the ION Desk application from the App Menu.
- 3 To see application connection points, select **Model > Connect > Connection Points**.

There should be a connection point for each site in the tenant. Depending on the provisioned environment, the list of sites/connection points can be very different.

- In a non-demo CSI/CSB environment, there is one connection point for each site that was provided during tenant provisioning.
- In a CSI Demo environment, there are 7 Connection Points, one for each CSI demo database site: CORP, DAL5, EMEA, LA, LOND, UK and US
- In a CSB Demo environment, there are 4 connection points, one for each CSB demo database site: GENB1, GENB2, GENBCORP & GENBEMEA.



Integrating CSI with IDM

To integrate Infor Document Management (IDM) with CSI, both CSI and IDM must know about the other application.

Adding the IDM app to CSI

Through automation, the IDM connection information is added to the CSI External App Parameters form during this step.

- 1 In the CloudSuite Portal, select the CSI environment.
- 2 In the **Apps** tab, select the IDM application and from the dropdown menu, click **Add**.
- 3 To verify that integration was successful, open CSI in Infor Ming.le.
- 4 Select **Form > Open > External App Parameters**.
- 5 Click **Verify** on the IDM connection record. It should return a Green Checkmark if a successful connection is made or a Red X if the connection was not successful.

Adding the CSI app to IDM

Through automation, the CloudSuite Industrial document types, Business Context Model, and Access Control List (ACL) are imported into the Infor Document Management (IDM) application during this step.

- 1 In the CloudSuite Portal, select the IDM environment.
- 2 In the **Apps** tab, select the CSI application and from the dropdown menu, click **Add**.
- 3 To verify that the integration was successful, open the Document Management app in Infor Ming.le.
- 4 Select Configuration from the hamburger menu icon.
- 5 Select the Document Types option.
- 6 Confirm that these CSI document types are listed:
 - CS_PurchaseOrder
 - CS_SalesInvoice
 - CS_ServiceInvoice
 - CS_SupplierInvoice

Setting up Single Sign On account creation through the Infor Ming.le listener and connection point

Tenant account management is controlled by Infor Ming.le User Management. The accounts created within Infor Ming.le must provide SSO capabilities across all associated applications. To provide this capability, you must manually configure and activate application listeners and connection points within ION.

Activating the Infor Ming.le Message Listener

Note: This step is on the “to-do” list for future automation by the Tech Stack team.

- 1 In ION Desk, select **Model > Connect > Message Listeners**.
- 2 Click the Ming.le Listener.

The screenshot shows the configuration page for a Message Listener named 'MINGLE'. The 'Name' and 'Description' fields are both set to 'MINGLE'. On the right side, under the 'Documents' tab, three checkboxes are checked: 'Sync', 'Process', and 'Confirm'. The interface also includes a power icon and other control icons at the top.

- 3 Select the Sync, Process and Confirm documents to enable them.
- 4 Save your changes.
- 5 Activate the listener by clicking the Power icon.

Setting up the Infor Ming.le connection point with security documents

Note: This step is on the “to-do” list for automation by the Tech Stack team.

- 1 In ION Desk, select **Model > Connect > Connection Points**.
- 2 Click the Infor Ming.le connection point (instance01) and select the **Documents** tab.
- 3 Add these documents and configure the send/receive as shown:

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

- 4 Save your changes.

Setting up CSI connection points with security documents

Note: This step is on the “to-do” list for automation by the Tech Stack team.

Each of the application’s connection points must be set up to send and receive the appropriate security BODs in order for new and modified Infor Ming.le accounts to be created and synchronized in the associated applications. For example, if a new account is created in Infor Ming.le, a BOD is created and sent to ION. ION routes the data to the application based on the document flow. After the application receives the BOD, it performs the ‘sync’ action at the application so the user can be created or be ‘present’ in the application. This process ensures that SSO can occur for the new user.

This table shows the necessary documents and send/receive settings. You must configure the same documents in the same direction for each site. For example, in the demo database, the UK, LA, DALS, EMEA, LOND, US, and CORP sites should have these document settings.

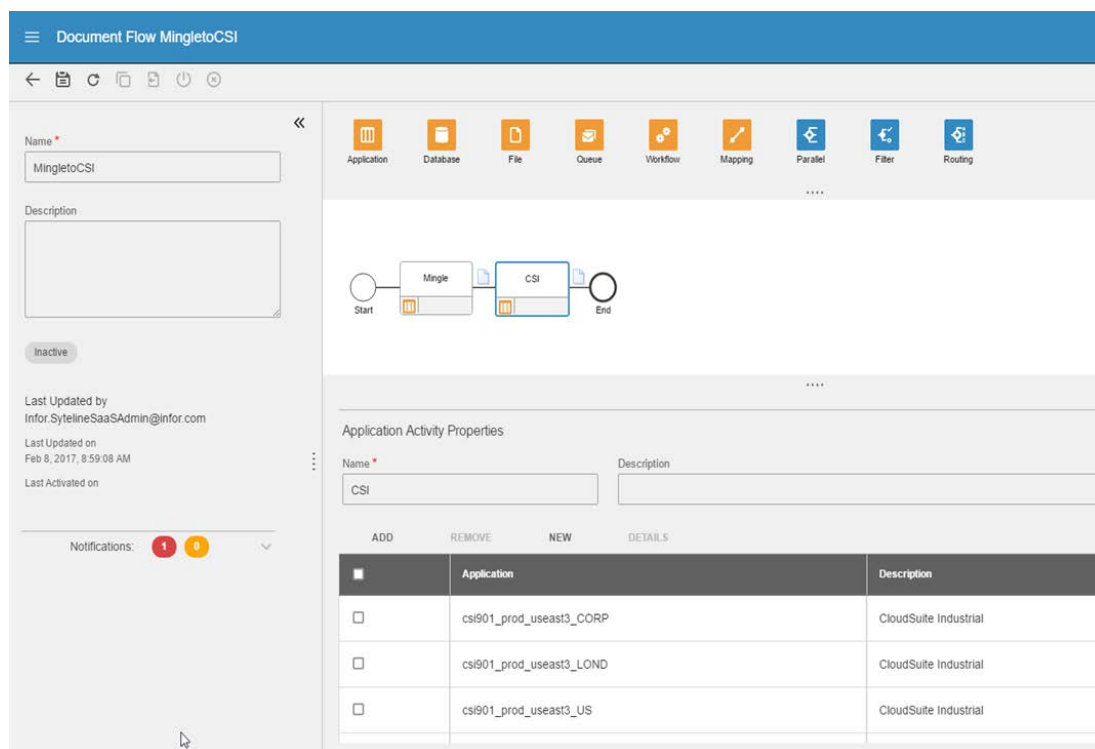
Document	Send From Application	Receive in Application
Process.SecurityUserMaster	X	
Sync.SecurityRoleMaster	X	
Sync.SecurityUserMaster		X

Creating the security document flow between Infor Ming.le and CSI

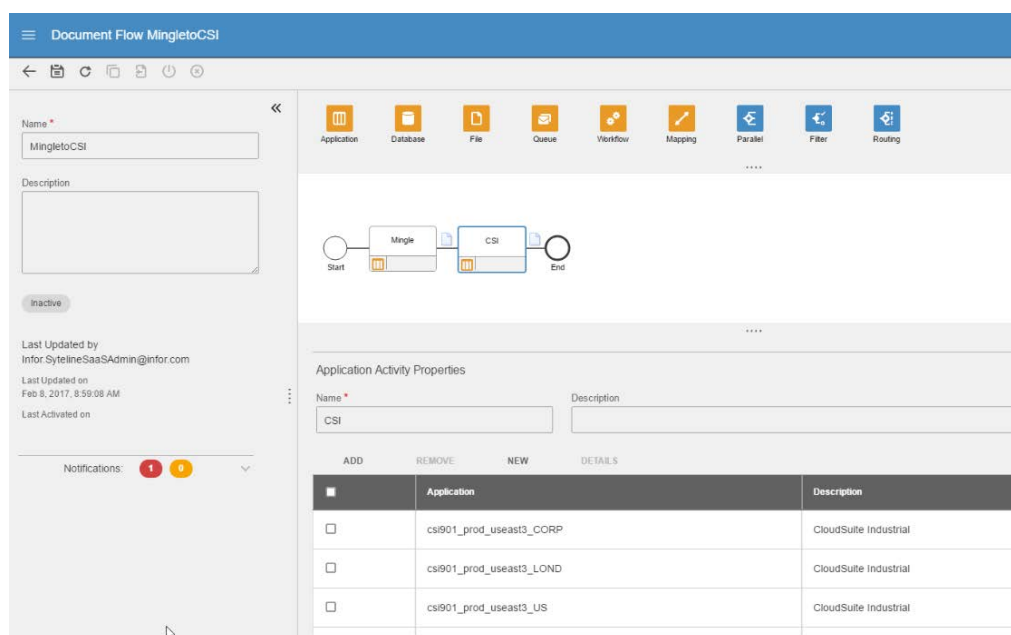
Note: This step is on the “to-do” list for automation by the Tech Stack team.

A document flow is needed to move BODs between Infor Ming.le and the application.

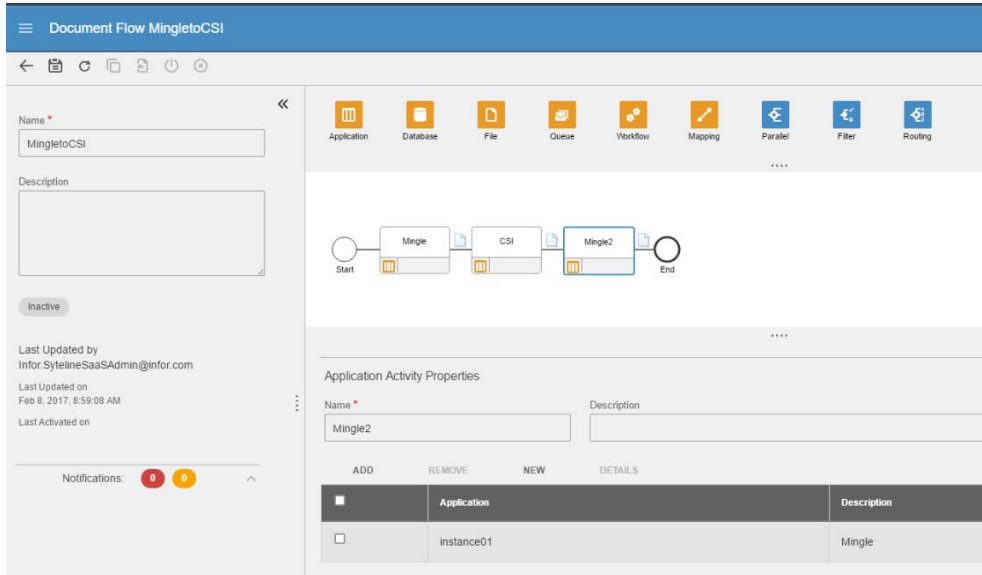
- 1 In ION Desk, select **Model > Connect > Document Flows**.
- 2 Click **Add** and name the document flow **MingleToCSI**.
- 3 Drag the **Application** icon to the document flow creation area and drop it on the line between the start and end points.
- 4 Name this application box **Mingle** and add the Infor Ming.le connection point to this application.
- 5 Save your changes.



- 6 Again, drag the **Application** icon to the document flow creation area and drop it on the line between the Mingle application box and the end point. Name this application box **CSI**.
- 7 Add all of the CSI connection points to this application box.
- 8 Save your changes.



- 9 Again, drag the **Application** icon to the document flow creation area and drop it on the line between the CSI application and the end point. Name this application box **Mingle2**.
- 10 Add the Infor Mingle connection point to this application box.
- 11 Save your changes.



- 12 Click the document icon between the first Mingle application box and the CSI box.



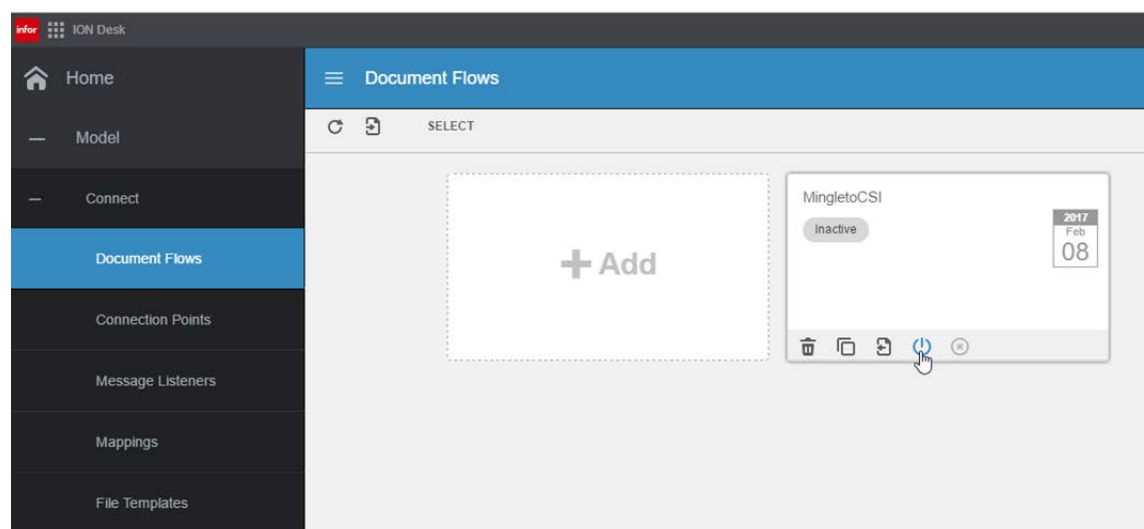
- 13 Under Documents, click the Add button and add this security document:

Document	Verb
SecurityUserMaster	Sync

- 14 Save your changes.
- 15 Click the document icon between the CSI box and the Mingle2 box.
- 16 Under Documents, click the Add button and add these security documents:

Document	Verb
SecurityRoleMaster	Sync
SecurityUserMaster	Process

- 17 Save your changes.
- 18 Navigate back to **Model > Connect > Document Flows**.
- 19 Click the Power icon on the document flow to activate it.



Setting up a Single Sign-On admin account for FactoryTrack

Note: At this time, FactoryTrack does not have an integration to ION due to issues surrounding automated connection points and the current one-application-database-to-one-site architecture not being supported by ION. Also, manually created connection points don't support connecting MT applications as it would expose MT cloud connection information and architecture.

Until this issue is resolved, accounts created in Infor Ming.le are not routed to FactoryTrack for creation by use of BODs. Instead, Infor Ming.le accounts must be manually linked to FactoryTrack accounts.

To manually link the Infor Ming.le administration account to a FactoryTrack administration account:

- 1 Log into the tenant.
- 2 In Infor Ming.le, display the **User Management** page.
- 3 Create an Infor Ming.le account using the existing process.
Note the IFS Person ID (email address) and IFS User GUID.
- 4 Open the Factory Track application from the App Menu.
- 5 Select the appropriate configuration
- 6 To open the Users form select **Form > Open > UsersMaint.**
- 7 Create a user account with the same user name as in Step 4; using the email address as the user name
- 8 Specify the GUID from Step 4 into the **Workstation Domain/ID** field.

- 9 Set required license modules for the user.
- 10 Set required group authorizations for the user.
- 11 Save the user account information.

The GUID is the glue between the Infor Ming.le and FactoryTrack accounts that allows SSO/SLO to function correctly.

Other Factory Track user accounts can be set up later.

Provisioning IPF

This step assumes that CSI is already provisioned and licensed including IPF.

- 1 In the CloudSuite Portal customer record, click the New (+) icon to add a new environment.
- 2 In the **Details** tab, specify this information:

- Application Farm: Select the appropriate IPF 4.1.x.x Application Farm to provision. The Application Farm is tied to the DeploymentId parameter used in the Faro deployment.
- Product: IPF
- Version: 4.1.x.x
- Logical id: lid://infor.ipf.{FaroDeploymentId}
- URL: `https://Customer-EnvironmentType-CSI.{FaroDeploymentId}.ipf.awsdev.infor.com`

Note: You must manually change the default "AddedProduct" to **CSI** here. The URL will have the correct values for *Customer* and *EnvironmentType* substituted in by the CloudSuite Portal. The *{FaroDeploymentId}* is inherited from the Application Farm URL value.

- Web Context: /start/ipf/pm

Details Properties ION API End Point License Key Datasources MT Datasources Provision Apps Health History

Customer Name: QACCSI006

Hosting Group: **AWS-ADE-US-EAST**

Application Farm: **IPF-AWS-ADE-US-EAST-QA-Farm**

Product: IPF

Product Version: 4.1.x.x

Type: DEM This Environment is not locked

Tenant ID: QACCSI006_DEM

Logical ID: **lid://infor.ipf.qa**

Logical ID Aliases:

Description:

Saas Order Id:

Production: **No**

Try and Buy Tenant: No

Golden Tenant:

Demo Tenant:

Active: **Yes**

Web App Endpoint

Web Context: **/start/ipf/pm**

URL: **https://QACCSI006-DEM-CSI.qa.ipf.awsdev.infor.com** [Go To](#)

New URL:

Show Related

Jobs

App Farm

Actions

Upgrade

Lock

Clone

Update Application Farm

Copy

Refresh

- 3 Click **Save**.
- 4 In the **Datasource** tab, provision a **Predefined Datasource**.
- 5 After that is successful, go to the **Provision** tab and provision the tenant.

Adding the IPF app to CSI

- 1 In the CloudSuite Portal, select the CSI environment.
- 2 In the **Apps** tab, select the IPF application and from the dropdown menu, click **Add**.

Successful integration means the IPF tenant information was sent to the CSI's tenant management system (TMS). Specifically, TMS needs to hold the notification URL and OAuth key and secret to be able to call back to IPF.

Adding the CSI app to IPF

- 1 In the CloudSuite Portal, select the IPF environment.

- 2 In the **Apps** tab, select the CSI application and from the dropdown menu, click **Add**.

Successful integration means the CSI tenant information was sent to IPF. Specifically, IPF needs to know the URL and account information to establish a connection to the IDO Request Service for this tenant.

Verifying the CSI – IPF integration

- 1 In Infor Ming.le, open the CloudSuite Industrial app and follow these steps:
 - a Sign in to a configuration that is not an entity.
 - b Create a new CSI user.
 - c Add the new user to the "Portal Admin" group.
 - d Add a Portals license to the user.
- 2 On a Windows computer, follow these steps:
 - a Start a Chrome or IE browser.
 - b Go to `https://Customer-EnvironmentType-csi.{FaroDeploymentId}.ipf.awsdev.infor.com/start/ipf/pm`
 - c Sign in with the newly created CSI user.
 - d If necessary, follow the directions to install the Launcher.
 - e The Portal Manager UI should start.

For information about setting up the portals, see the *Infor CloudSuite Industrial Portals Installation Guide* and *Infor CloudSuite Industrial Portals Administration Guide – Cloud Edition*.

Provisioning BI apps

The BI apps must be provisioned after CSI. When you get an order for BI, you need to ensure that all of these products are provisioned: BI, BV (optionally done as part of the Infor OS provisioning step), ICBICSI, BISSBICSI, and BICSI.

Contact Petr Novacek for questions about BI provisioning.

- 1 In the CloudSuite Portal customer record, click the New (+) icon.
- 2 Create the BI environment. In the **Details** tab, specify the **Hosting Group**, **Application Farm**, **Type**, **Logical ID**, and **Web App Endpoint URL**, as indicated below. See <https://wiki.infor.com/confluence/display/IBI/BI+MT+Environments> for the available farms in different environments.

[Details](#) | [Properties](#) | [ION API End Point](#) | [License Key](#) | [Datasources](#) | [MT Datasources](#) | [Provision](#) | [Apps](#) | [Health History](#)

Customer Name: QACCSI004
 Hosting Group: **AWS-AUTC-US-EAST**
 Application Farm: **BI-Auto-Integ**
 Product: BI
 Product Version: 12.0.0
 Type: DEM
 Tenant ID: QACCSI004 DEM
 Logical ID: **lid:/infor.bice.bice**
 Logical ID Aliases:
 Description:
 SaaS Order Id:
 Production: **No**
 Try and Buy Tenant: **No**
 Active: **Yes**

[Show Related](#)
[Jobs](#)
[App Farm](#)
[Actions](#)
[Upgrade](#)
[Unlock](#)
[Clone](#)
[Update Application Farm](#)

[Web App Endpoint](#)
 Web Context:
 URL: **https://bi-integ.auto.aws.infor.com** [Go To](#)
 New URL:
 Username:
 Password:

- 3 Save your changes.
- 4 In the **Datasources** tab, click **Provision** and provision the BI datasources in the standard way.

Tenant Provisioning

The screenshot displays the 'Databases' tab in the Infor CloudSuite Industrial Provisioning Guide. On the left, a table lists various environments with their names, provision statuses, and products. The 'GACCS004_BI_DEM' environment is highlighted. On the right, the 'Datasource Provision Wizard' dialog is open, showing the 'Provision Predefined Tenant Datasources' option selected. The 'Next' button is highlighted in red.

Environment Name	Provision Status	Product
1 GACCS004_ICBICSI_DEM	NOTPROVISIONED	ICBICSI
2 GACCS004_BISSBICSI_DEM	NOTPROVISIONED	BISSBICSI
3 GACCS004_BICSI_DEM	NOTPROVISIONED	BICSI
4 GACCS004_BV_DEM	ACTIVE	BV
5 GACCS004_XM_DEM	ACTIVE	Infor XM
6 GACCS004_BI_DEM	ACTIVE	BI
7 GACCS004_CPO_DEM	DELETED	CPO
8 GACCS004_FTK_DEM	ACTIVE	FTK
9 GACCS004_CSI_DEM	ACTIVE	CSI
10 GACCS004_EAM_DEM	ACTIVE	EAM
11 GACCS004_IDM_DEM	ACTIVE	IDM
12 GACCS004_IONCE_DEM	ACTIVE	IONCE
13 GACCS004_IONAPI_DEM	ACTIVE	IONAPI
14 GACCS004_MING.LE_DEM	ACTIVE	MING.LE

Datasource Provision Wizard

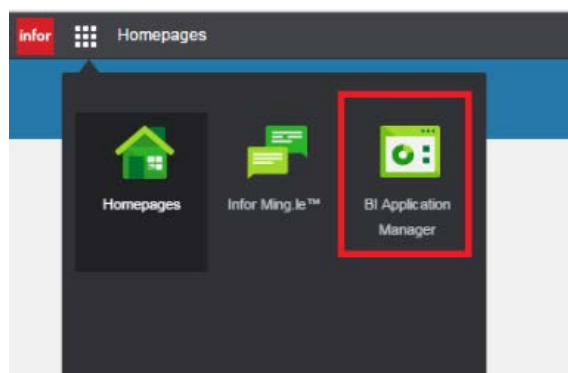
Provision Predefined Tenant Datasources
 Provision Custom Tenant Datasources

Buttons: Cancel, Previous, **Next**, Provision

- 5 After tenant provisioning is complete, a status of **SUCCESS** should be displayed. If **ERROR** or **NOT PROVISIONED** is the status, then the history grid should show a failure. Review the corresponding log information to determine the specific error message.
- 6 Add the BI app to the Infor Ming.le environment: select the Infor Ming.le environment for the tenant, go to the **Apps** tab, select **BI** and click **Add**.

Verifying the BI to Infor Ming.le integration

Sign in to Infor Ming.le, open the App Menu, and verify that BI Application Manager is listed. Click the icon to open BI Administration, which lists the available applications in BI. There should be at least one, BI Application Manager.



Provisioning additional BI applications

These additional environments are required in order for CSI Analytics and CSI In-Context BI to work. Infor Ming.le, BV, BI and CSI must already be provisioned before you perform this task.

App name	Description	Farm
ICBICSI	In-Context BI for CSI	ICBICSI-9100-AWS-AUTO-US-EAST-Farm
BICSI	CSI Analytics	BICSI-9100-AWS-AUTO-US-EAST-Farm
BISSBICSI	BI Self-Service widgets for CSI Homepages	BISSBICSI-9100-AWS-AUTO-US-EAST-Farm

- 1 In the CloudSuite Portal customer tenant, click the New (+) icon and add the **BICSI** environment.
- 2 In the **Details** tab, specify the Farm from the table above, and use the same URL as was used in the main BI environment.
- 3 In the **Properties** tab, **Custom Fields** section, include these values:
 - Suite: BICSI
 - Version: v9.1.0.0_02
- 4 In the **Datasources** tab, provision the only data source defined for BICSI.
- 5 In the **Provision** tab, provision the tenant.
- 6 In the CloudSuite Portal customer tenant, click the New (+) icon and add the **BISSBICSI** environment.
- 7 In the **Details** tab, specify the Farm from the table above, and use the same URL as was used in the main BI environment.

Note: This product does not support data source or tenant provisioning.

- 8 In the CloudSuite Portal customer tenant, click the New (+) icon and add the **ICBICSI** environment.
- 9 In the **Details** tab, specify the Farm from the table above, and use the same URL as was used in the main BI environment.
Note: This product does not support data source or tenant provisioning.
- 10 Register these apps in the BI environment Apps tab:
 - BICSI
 - BISSBICSI
 - ICBICSI
- 11 Register BICSI in the Infor Ming.le environment Apps tab.

Verifying the additional BI applications

- 1 Sign in to Infor Ming.le, open the App Menu, and verify that the BI Business Analytics icon is available. Clicking the icon to open the BI web UI with the BI Business Analytics welcome page.
- 2 Verify that the BI Business Analytics and BI Self-Service widgets are available in the Infor Ming.le Homepages within Business Intelligence group.
- 3 Verify that the In-context BI for CloudSuite Industrial context application is available in Info Ming.le for CSI.

Provisioning CPQ and CPQ Workbench

This task is performed by the CPQ CloudOps team. Contact Tim Dunham for details about CPQ.

Provisioning CPQ Workbench

- 1 In the CloudSuite Portal customer record, click the New (+) icon to add an environment.
- 2 Add the CPQWB environment. In the **Details** tab, specify this environment information:
 - Hostname: Specify the appropriate host, for example, INFOR-PRD-USEAST1
 - Application Farm: Specify the appropriate host, for example, CPQWB-USE1-Farm
 - Product: CPQWB
 - Version: 1.0
 - Logical id: lid://infor.cpqwb.cpqwb

- Production: No
- Active: Yes

URL: <https://cpqwb.inforcloudsuite.com>

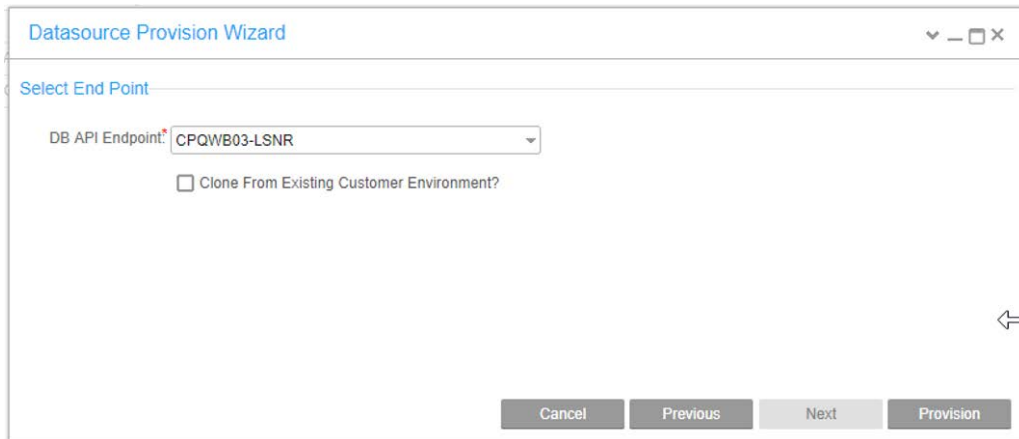
[Details](#) | [Properties](#) | [ION API End Point](#) | [License Key](#) | [Datasources](#) | [MT Datasources](#) | [Provision](#) | [Apps](#) | [Health History](#)

Customer Name: SLSGDENA012 [Show Related](#)
 Hosting Group:
 Application Farm:
 Product: CPQWB **Actions**
 Product Version: 1.0
 Type:
 Tenant ID: SLSGDENA012_DEM
 Logical ID:
 Logical ID Aliases:
 Description:
 Saas Order Id:
 Production:
 Try and Buy Tenant: No
 Golden Tenant:
 Demo Tenant:
 Active:

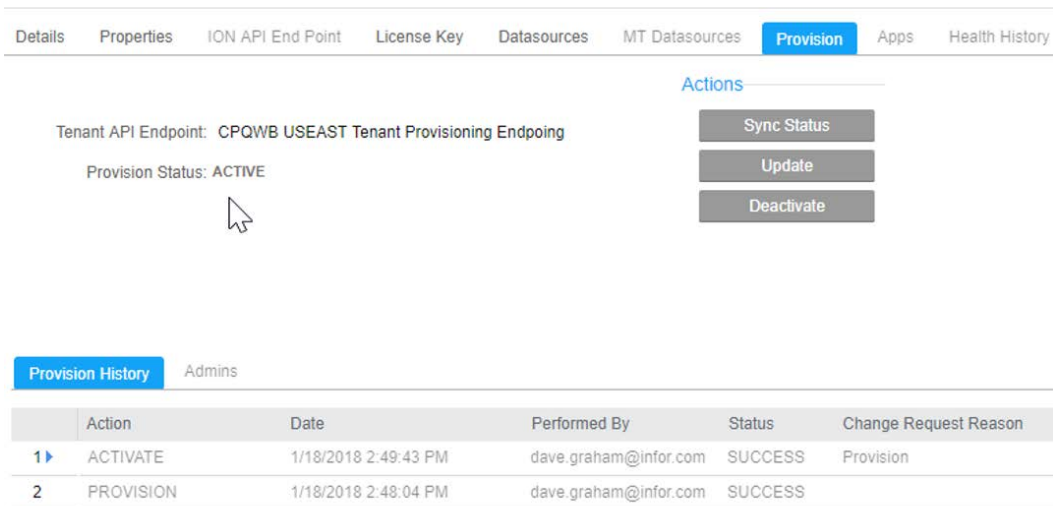
Web App Endpoint

Web Context:
 URL: [Go To](#)
 New URL:

- 3 In the **Datasources** tab, click **Provision**.
- 4 Select **Provision Predefined Tenant Datasources** and click **Next**.
- 5 Specify the DB API endpoint, for example, CPQWB03-LSNR and click **Provision**.



- 6 Datasource provisioning is complete when the status is set to PROVISIONED.
- 7 In the **Provision** tab, select the endpoint, for example, CPQWB USEAST and click **Provision**.



After tenant provisioning is complete, a status of **SUCCESS** should be displayed. If **ERROR** or **NOT PROVISIONED** is the status, then the history grid should show a failure. Review the corresponding log information to determine the specific error message.

- 8 Activate the tenant.
- 9 In the CloudSuite Portal's Ming.le environment, **Apps** tab, add CPQWB.

Provisioning CPQ

- 1 In the CloudSuite Portal customer record, click the New (+) icon to add an environment.
- 2 Add the CPQ environment. In the **Details** tab, specify this environment information:
 - Product: CPQ

- Version: 8.1
- Logical id: lid://infor.cpq.cpq
- URL: Tenant Url for Infor Ming.le integration, for example:
 - https://cfgtst.cpq.awsdev.infor.com
 - https://cfgax1.cpq.awsdev.infor.com

The screenshot displays a web interface for tenant provisioning. At the top, there is a navigation bar with tabs: Details (selected), Properties, ION API End Point, License Key, Datasources, MT Datasources, Provision, Apps, and Health History. Below the navigation bar, the 'Details' tab is active, showing a form with the following fields and values:

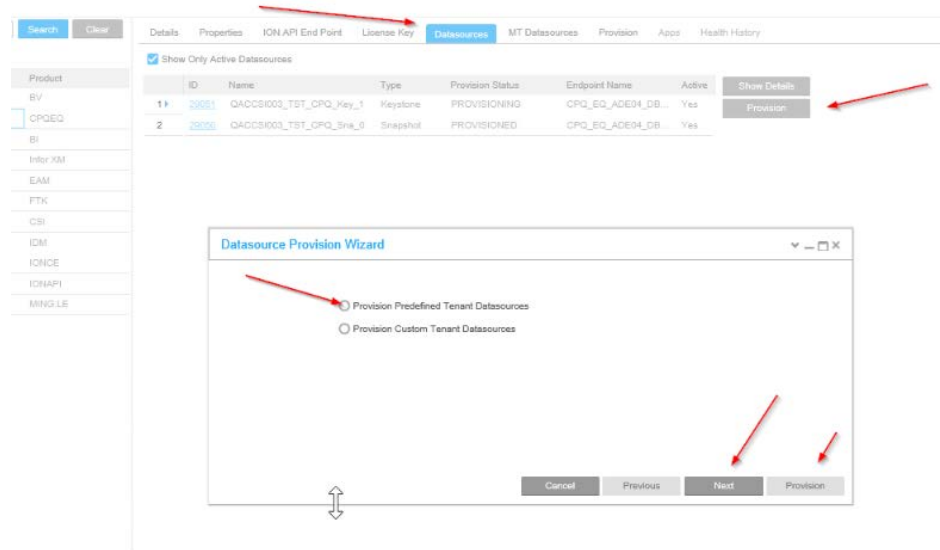
- Customer Name: QACCSI004
- Hosting Group: AWS-ADE-US-EAST (highlighted with a red box)
- Application Farm: CPQCFG-81-ADE-Farm-PRD (highlighted with a red box)
- Product: CPQ
- Product Version: 8.1
- Type: DEM
- Tenant ID: QACCSI004_DEM
- Logical ID: lid://infor.cpq.cpq (highlighted with a red box)
- Logical ID Aliases: (empty field)
- Description: (empty field)
- Saas Order Id: (empty field)
- Production: No (dropdown menu)
- Try and Buy Tenant: No
- Active: Yes (dropdown menu)

On the right side of the form, there are two sections:

- Show Related:** Contains buttons for 'Jobs' and 'App Farm'.
- Actions:** Contains buttons for 'Upgrade', 'Unlock', 'Clone', and 'Update Application Farm'.

Below the main form, there is a section for 'Web App Endpoint' with a 'Web Context' field and a 'URL' field containing 'https://cfgprd.cpq.awsdev.infor.com' (highlighted with a red box). A red arrow points from the 'URL' field to the 'Production' dropdown menu. A 'Go To' link is visible next to the URL field.

- 3 Save your changes.
- 4 In the **Properties** tab, specify this information:
 - APPLICATION_PARTIAL: TRUE
 - LICENSE_2D_DESIGN_AUTOMATION_ENABLED: FALSE
 - LICENSE_CONTRACT_LIFECYCLE_MANAGEMENT_ENABLED: TRUE (If CLM integration is needed)
 - OUTPUT_MAXOPTIONLENGTH: 300
- 5 In the **Datasources** tab, click **Provision**.



6 Select **Provision Predefined Tenant Datasources** and click **Next**.

7 Specify the endpoint and click **Provision**.

8 Datasource provisioning is complete when the status is set to PROVISIONED.

9 In the **Provision** tab, select the endpoint, and click **Provision**.

After tenant provisioning is complete, a status of **SUCCESS** should be displayed. If **ERROR** or **NOT PROVISIONED** is the status, then the history grid should show a failure. Review the corresponding log information to determine the specific error message.

10 Activate the tenant.

Verifying the CPQ and CPQWB integration to Infor Ming.le

1 In the CloudSuite Portal's Ming.le environment, **Apps** tab, add CPQ.

2 To verify the integration with Infor Ming.le, sign into Infor Ming.le as the bootstrap administrator and perform these steps:

- Verify that the CPQ Workbench and CPQ Configurator applications are listed in the Infor Ming.le App Menu. You might need to sign out and back in before the apps are displayed.
- Open User Management and verify that these roles have been added:
 - CPQ-User
 - CPQ-Designer
 - CPQWB-User

Adding the CPQWB app to CSI

- 1 In the CloudSuite Portal, select the CSI environment.
- 2 In the **Apps** tab, select the CPQWB application, and from the dropdown menu, click **Add**.

Adding the CPQ app to CSI

Through automation, the CPQ connection information is added to the CSI Inventory Parameters form during this step.

- 1 In the CloudSuite Portal, select the CSI environment.
- 2 In the **Apps** tab, select the CPQ application, and from the dropdown menu, click **Add**.

Provisioning EAM

This task is performed by the EAM CloudOps team. During this step, these automated tasks are performed:

- Enable the Databridge partner
- Set the connection information for the shared ION I/O box
- Activate the partner record with partner code * (asterisk)
- Activate the INFOR-ONRAMP partner.

Contact Mahesh Ganesh for details about EAM.

- 1 In the CloudSuite Portal customer record, click the New (+) icon and add the EAM environment.
- 2 In the **Tenant Paramers** area, specify this information:
 - Choose appropriate Hosting Group (name: INFOR-PRD-USEAST1)
 - Choose appropriate Application Farm (name: eamprduseast1)
 - The logical ID & Web App URL will automatically populate with the correct ID & URL

Suite Provision Wizard

EAM Provisioning Parameters

Tenant Parameters

Hosting Group:

Application Farm:

Logical ID:

Web Context:

Web App URL:

Description:

License:

Endpoints

DB API Endpoint:

Tenant API Endpoint:

Clone From Existing Customer Environment?

Use Ming.le Admins

Custom Properties

Tenant Provision

ALLOWREFRESH:

Application Type:

Custom Work:

DEFLANG:

DOCSTORAGE:

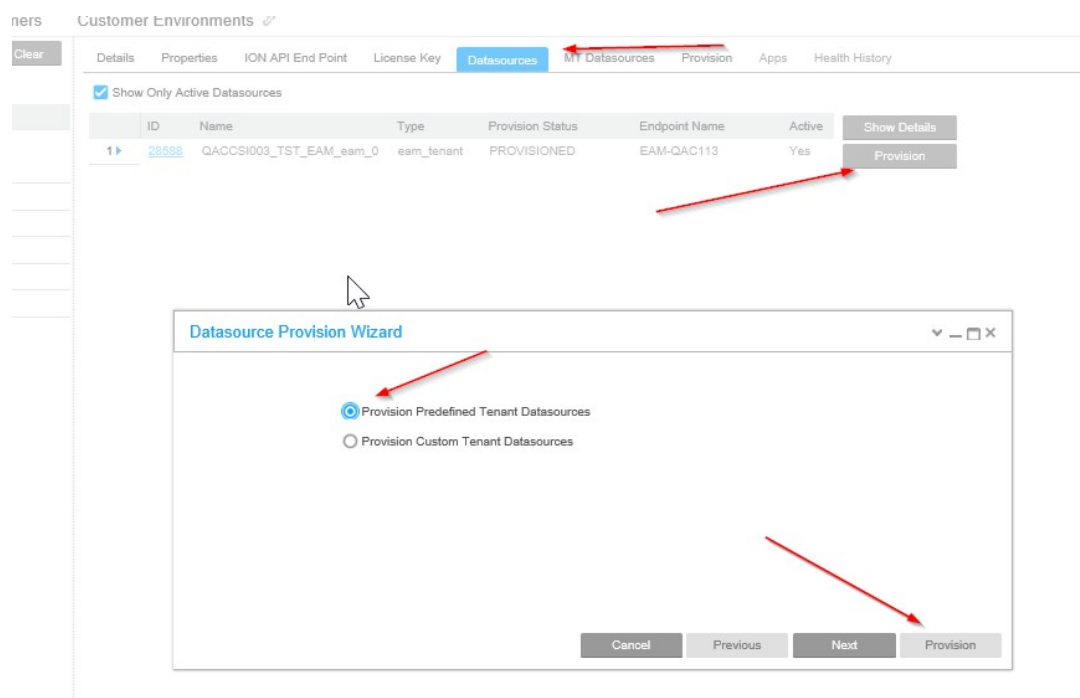
3 In the Endpoints area, specify this information:

- Choose the appropriate DB API Endpoint
 - Pay careful attention to SB (Single-byte) or MB (Multi-byte)
 - Remember: Non-PRD tenants (i.e. _DEM, _AX1, _TRN, and _TST environments) go into eamtrnXX instances.
 - Remember: Only _PRD tenants go into eamprdXX instances.
- Select **Use Ming.le Admins** only if Infor Ming.le is being used with this tenant

4 In the **Custom Properties** area, specify this information:

- Allow Refresh: For TRN, set to **Yes**, For PRD, set to **No**
- Language, Key information, Positions, Pricetype, etc, comes from the completed activation form and from the KMS keys linked in the SPT order.
- SSO: Set to YES.
- IDMENABLED: Set to YES.
- DBGENABLED: Set to YES.

- 5 Save your changes.
- 6 In the **Datasources** tab, click **Provision**.



- 7 Select **Provision Predefined Tenant Datasources** and click **Next**.
- 8 Specify the endpoint and click **Provision**.
- 9 Datasource provisioning is complete when the status is set to **PROVISIONED**.
- 10 In the **Provision** tab, select the endpoint, and click **Provision**.

After tenant provisioning is complete, a status of **SUCCESS** should be displayed. If **ERROR** or **NOT PROVISIONED** is the status, then the history grid should show a failure. Review the corresponding log information to determine the specific error message.

- 11 In the CloudSuite Portal, register EAM in the **Apps** tab for the Infor Ming.le environment.
- 12 Register EAM in the **Apps** tab for both the IONCE and IONAPI environment.
- 13 Register IONCE, IONAPI, and Ming.le in the **Apps** tab for the EAM environment.
- 14 Optionally, if you are using EAM with IDM, register EAM in the **Apps** tab for the IDM environment.

Provisioning XM

This task is performed by the XM CloudOps team. Contact Mike Smith for details about XM.

Tenant Provisioning

- 1 In the CloudSuite Portal customer record, click the New (+) icon to add a new environment.
- 2 In the **Details** tab, specify the Hosting Group, Application Farm, Type, and Logical ID.

Details Properties ION API End Point License Key Datasources MT Datasources Provision Apps Health History

Customer Name: QACCSI006 [Show Related](#)

Hosting Group: **AWS-AUTO-US-EAST** [Jobs](#)

Application Farm: **XM-AUTO-FARM** [App Farm](#)

Product: Infor XM

Product Version: 10.1

Type: DEM This Environment is not locked

Tenant ID: QACCSI006_DEM

Logical ID:

Logical ID Aliases:

Description:

Saas Order Id:

Production:

Try and Buy Tenant: No

Golden Tenant:

Demo Tenant:

Active:

Web App Endpoint

Web Context:

URL: [Go To](#)

New URL:

Username:

Password:

Actions

[Upgrade](#)

[Lock](#)

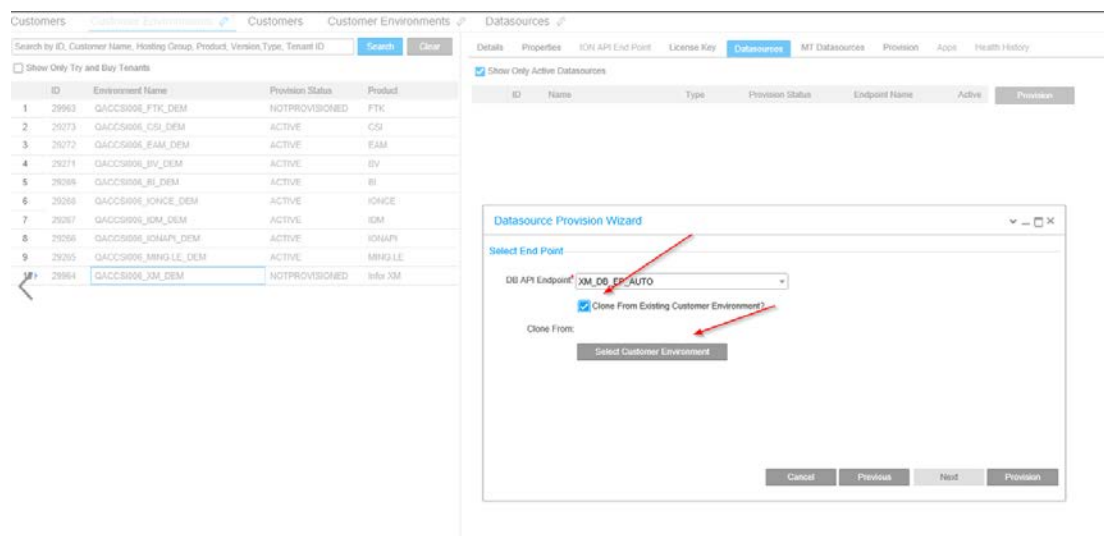
[Clone](#)

[Update Application Farm](#)

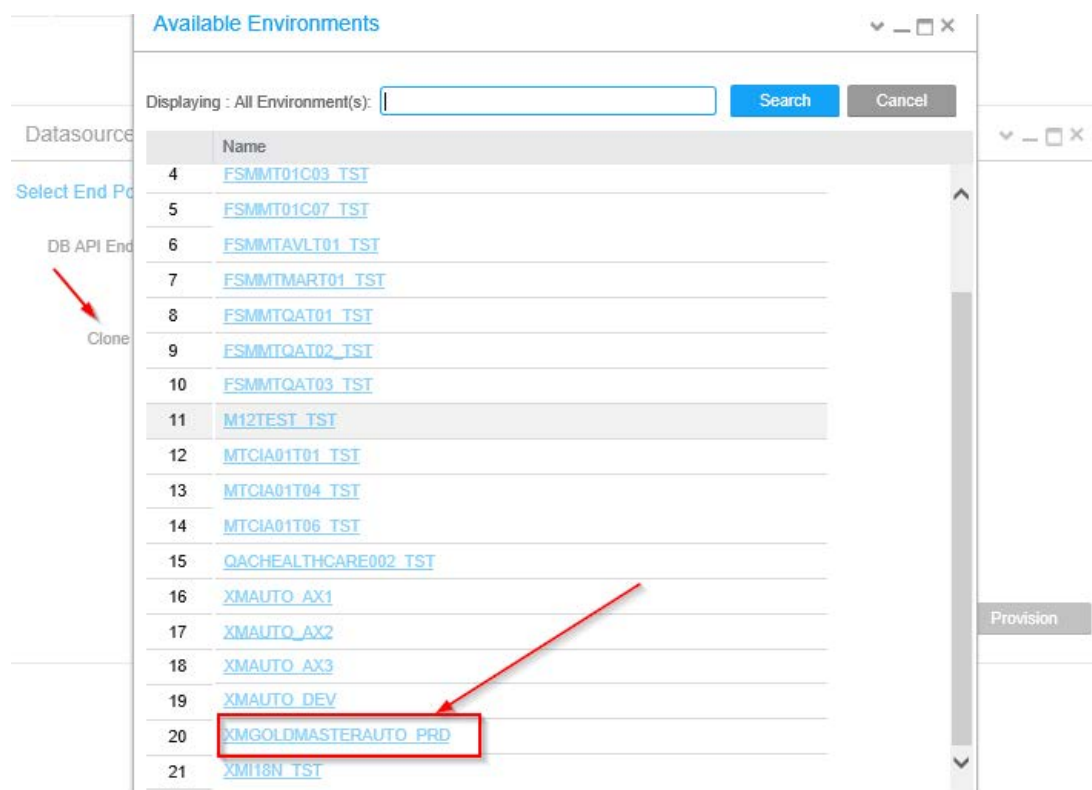
[Copy](#)

[Refresh](#)

- 3 Save your changes.
- 4 In the **Datasources** tab, click **Provision**.



5 Select the **Clone** option and select the environment.



6 Specify the endpoint and click **Provision**.

7 Datasource provisioning is complete when the status is set to PROVISIONED.

8 In the **Provision** tab, select the endpoint, and click **Provision**.

After tenant provisioning is complete, a status of **SUCCESS** should be displayed. If **ERROR** or **NOT PROVISIONED** is the status, then the history grid should show a failure. Review the corresponding log information to determine the specific error message.

- 9 Add the XM tenant on the Infor Ming.le environment's **App** tab.
- 10 Add the XM tenant on the ION CE environment's **App** tab.

Provisioning CRM in Single Tenant environment

This task is performed by the CRM CloudOps team. Contact Paul McClintock for details about CRM.

Prerequisites:

- AWS tools configured on your system along with infor-quc STS enabled (to be able run aws command)
- CRM team must provide required credentials for configuration
- AMI shared with QAC account (115642804634) for Infor CRM Cloud (ST) (current One Box: ami-8bc120f1 for CRM Release 8.3.0.9)
- CRM AMI contains BOD pack bundles for Integrations, CRM setup with SQL server and IIS
- Unique Route 53 A record within *.icrmdev.infor.com domain.
- Ask Matthew Buechel to add a unique record for your instance if not yet available

1 Deploy CRM using these commands on the CRM server:

- `aws ec2 run-instances --image-id ami-8bc120f1 --count 1 --instance-type m3.large --key-name QAC --security-group-ids sg-168c7d67 --associate-public-ip-address`

where --image-id is the latest AMI for Infor CRM and the rest of the parameters can be left as they are.

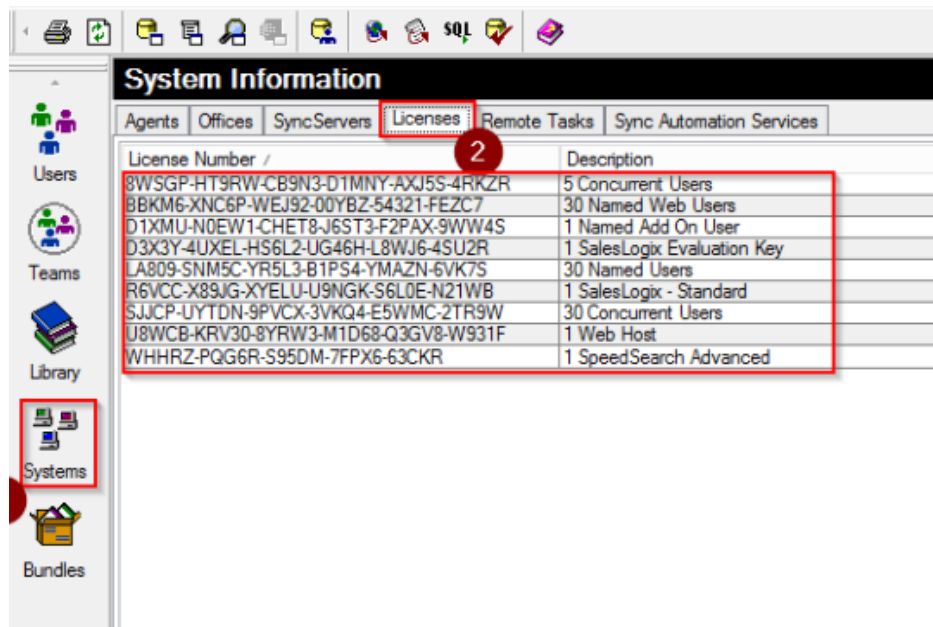
- `aws ec2 create-tags --resources i-00a0812bcaa6e9adc --tags Key=Name,Value=CRM-QACCSI001-ST Key=Billing "Owner,Value=email-address Key=End" "User,Value=CSI" "QA" "Staff Key=Environment" "Owner,Value=email-address Key=Schedule,Value=24x7 Key=Usage,Value=QA`

where:

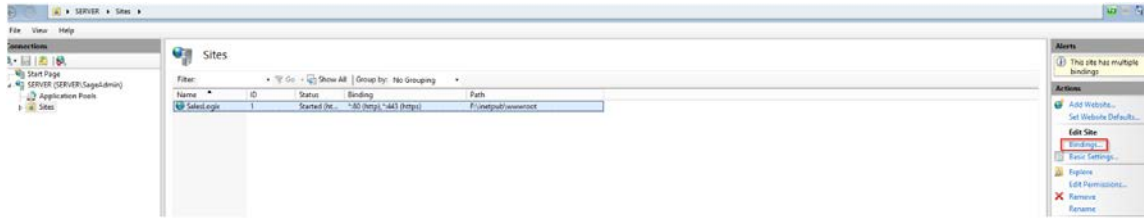
- --resources should have the value of "InstanceId" from the output of the previous command
- Key=Name,Value=CRM-QACCSI001-ST is the name of the created instance and applies to your particular case
- "User,Value=CSI" indicates your product/environment
- The rest of the parameters can be left as they are.

2 Configure CRM licensing:

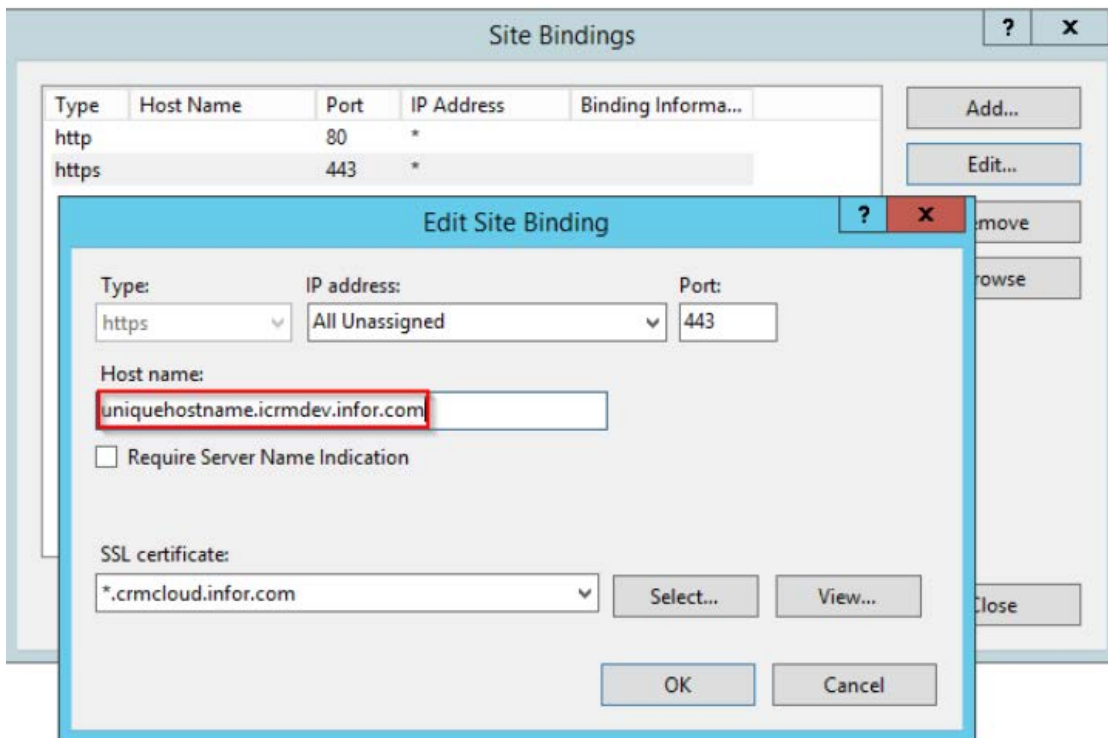
- a Log in to the newly created Infor CRM instance IOBOX via RDP. (The Public IP was provided in the output of the `ec2 run-instances` command, and can be checked in the AWS console). Use the login and password that were provided to you by the CRM team.
- b Open the Saleslogix Administrator application and log in using the provided credentials.
- c Click **Systems** and click the **Licenses** tab to verify that all licenses are active.



- d If licenses are obsolete, contact the CRM team.
 - e To activate a new license, right-click on the Licenses window and choose **Add license**.
 - f Paste **Evaluation** into the **Customer ID** field, add the new license text, and click **Next**.
 - g Click **Finish**.
 - h Repeat these steps for all of the listed licenses.
 - i Restart the CRM server and related services, if necessary.
- ## 3 Configure IIS:
- a Log in to the newly created Infor CRM instance IOBOX via RDP. (The Public IP was provided in the output of the `ec2 run-instances` command, and can be checked in the AWS console). Use the login and password that were provided to you by the CRM team.
 - b Open IIS manager and select Sites. Select **SalesLogix** and select **Bindings** from the menu on the right.



- c Select https and click **Edit**.
- d Specify your unique Host Name (the one requested as Route 53 A record within *.icrmdev.infor.com domain) and click **OK**.



- e If the SSL certificate in the Edit Site Binding window is provisioned for another domain, then the certificate for *.icrmdev.infor.com must be imported and configured. The icrmdev.pfx certificate file, along with the password is provided by the CRM team.

CloudSuite completion

A completed CloudSuite Industrial tenant environment list might look something like this:

Customer Environments ^x Application Farms Customers Customers Cust

visualk Search Clear

Show Only Try and Buy Tenants

	ID	Environment Name	Provision Status	Product
1	38030	VISUALK_CPQ_DEM	ACTIVE	CPQ
2	38002	VISUALK_IPF_DEM	ACTIVE	IPF
3	37994	VISUALK_FTK_DEM	ACTIVE	FTK
4	37992	VISUALK_ICBICSI_DEM	NOTPROVISIONED	ICBICSI
5	37991	VISUALK_BISSBICSI_DEM	NOTPROVISIONED	BISSBICSI
6	37990	VISUALK_BICSI_DEM	NOTPROVISIONED	BICSI
7	37989	VISUALK_BV_DEM	ACTIVE	BV
8	37988	VISUALK_BI_DEM	ACTIVE	BI
9	37952	VISUALK_CSI_DEM	ACTIVE	CSI
10	37904	VISUALK_IR_DEM	ACTIVE	IR
11	37903	VISUALK_XM_DEM	ACTIVE	XM
12	37260	VISUALK_EAM_DEM	ACTIVE	EAM
13	37258	VISUALK_IDM_DEM	ACTIVE	IDM
14	37257	VISUALK_IONAPI_DEM	ACTIVE	IONAPI
15	37256	VISUALK_IONCE_DEM	ACTIVE	ION
16	37254	VISUALK_MING.LE_DEM	ACTIVE	MING.LE

Standard URLs

See the *Infor CloudSuite Industrial Configuration Guide* appendix for this list.