



Infor CloudSuite Industrial Configuration Guide - Cloud Edition

Release 9.01.x

Important Notices

The material contained in this publication (including any supplementary information) constitutes and contains confidential and proprietary information of Infor.

By gaining access to the attached, you acknowledge and agree that the material (including any modification, translation or adaptation of the material) and all copyright, trade secrets and all other right, title and interest therein, are the sole property of Infor and that you shall not gain right, title or interest in the material (including any modification, translation or adaptation of the material) by virtue of your review thereof other than the non-exclusive right to use the material solely in connection with and the furtherance of your license and use of software made available to your company from Infor pursuant to a separate agreement, the terms of which separate agreement shall govern your use of this material and all supplemental related materials ("Purpose").

In addition, by accessing the enclosed material, you acknowledge and agree that you are required to maintain such material in strict confidence and that your use of such material is limited to the Purpose described above. Although Infor has taken due care to ensure that the material included in this publication is accurate and complete, Infor cannot warrant that the information contained in this publication is complete, does not contain typographical or other errors, or will meet your specific requirements. As such, Infor does not assume and hereby disclaims all liability, consequential or otherwise, for any loss or damage to any person or entity which is caused by or relates to errors or omissions in this publication (including any supplementary information), whether such errors or omissions result from negligence, accident or any other cause.

Without limitation, U.S. export control laws and other applicable export and import laws govern your use of this material and you will neither export or re-export, directly or indirectly, this material nor any related materials or supplemental information in violation of such laws, or use such materials for any purpose prohibited by such laws.

Trademark Acknowledgements

The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All rights reserved. All other company, product, trade or service names referenced may be registered trademarks or trademarks of their respective owners.

Publication Information

Release: Infor Cloudsuite Business (Industrial) 9.01.x

Publication Date: November 8, 2018

Document code: csbi_9.01.x_csbiclcg_cl_csind_en-us

Contents

About this guide	7
Intended audience.....	7
Contacting Infor.....	7
Chapter 1: Configuration checklist	8
Chapter 2: Configuration overview	11
About the CloudSuite.....	11
CloudSuite tenants.....	11
Integration with other products in the CloudSuite.....	12
Point to point integrations.....	12
BOD integrations.....	12
Concepts and definitions specific to this configuration.....	13
Tenant ID.....	13
Accounting entity.....	13
Location.....	13
Logical ID.....	14
Chapter 3: Getting started	15
Determining your ERP application sites.....	15
Determining the bootstrap administrator.....	15
Accessing your cloud environment (tenant).....	16
Verifying access to your applications.....	16
Chapter 4: Post provisioning steps	18
Setting roles for the Bootstrap Administrator.....	18
Configuring BODs for ERP connection points.....	19
Verifying BODs for the Infor Ming.le connection point.....	21
Verifying the security document flow between the ERP and Infor Ming.le.....	21
Configuring BODs for optional products in the CloudSuite.....	22

Adding BODS to the Infor CRM connection point.....	22
Configuring BODs for the Infor EAM connection point.....	23
Configuring BODs for the Infor Expense Management connection point.....	24
Setting up document flows between the ERP and optional BOD-enabled products in the CloudSuite.....	24
Creating the CSI > CRM > CSI document flow.....	25
Creating the CSI > EAM > CSI document flow.....	28
Creating the CSI > XM > CSI document flow.....	29
Configuring IDM.....	30
Tasks performed by the Infor Cloud team.....	30
Prerequisites for IDM integration.....	31
Disabling the Document Type filter.....	31
Adding the PDF document type.....	31
Activating the Related information context app.....	32
Verifying the IDM connection in the ERP.....	33
Activating the IDM workflows in the ERP.....	33
Verifying the configuration for workflows.....	34
Importing sample ION workflow content.....	35
Chapter 5: Configuring your web browser.....	37
Allowing popups for browsers.....	37
Avoiding multiple connections in a browser.....	37
Setting up compatibility for Internet Explorer browsers.....	37
Chapter 6: Configuring application access through Infor Ming.le.....	38
Configuring Single Sign On.....	38
Users and roles.....	38
How Infor Ming.le users and roles work with ERP users and groups.....	39
Configuring user access to the ERP through Infor Ming.le.....	39
Configuring users for separately licensed modules.....	42
Configuring additional system administrator access to all tenant applications through Infor Ming.le.....	43
Configuring additional system administrator access to the ERP through Infor Ming.le.....	43
Setting up additional roles or groups.....	44
Automatic login and selecting configurations.....	44
Verifying user access.....	45
Setting up distribution groups.....	45

Service accounts.....	45
Chapter 7: Configuring the ERP.....	46
Chapter 8: Verifying drillbacks to the ERP through Infor Ming.le.....	48
Available drillbacks.....	48
Loading the BODs that are used in drillbacks.....	49
Verifying a drillback.....	49
Chapter 9: Configuring applications to send and receive BODs in ION.....	51
Tasks performed by the Infor Cloud team.....	51
Tasks performed during Post Provisioning.....	52
How products connect to ION.....	52
Integrating to BOD-enabled applications that are not in the CloudSuite.....	52
Publishing BODs.....	53
Publishing initial data.....	53
BOD dependencies.....	54
Turning off BOD replication to reduce traffic.....	55
Verifying the ION configuration.....	56
Verifying that BODs are published.....	56
Verifying that ION receives data.....	56
Verifying the data flow between applications.....	57
Chapter 10: Configuring workflows and ION messages for the ERP.....	58
ION messages	58
About alerts sent from the ERP to Infor Ming.le.....	59
Configuring monitors for alerts.....	62
Configuring workflows for tasks and notifications.....	63
Chapter 11: Configuring context apps and utility apps that are used with the ERP.....	64
Understanding business context messages.....	64
Process default settings that allow context messages to be sent.....	65
Supported business context messages.....	65
Context and utility apps that work with the ERP.....	66
Enabling a context or utility app for the ERP.....	67
Authorizing users to display critical numbers in widgets or the Critical Numbers app.....	67
How critical numbers are displayed in the Critical Numbers app.....	68
Chapter 12: Verifying Homepages for the ERP.....	69

Verifying the homepage and widget content.....	69
Modifying permissions for standard pages.....	70
Chapter 13: Configuring and integrating other applications in the CloudSuite.....	71
Integrating with Infor CPQ.....	71
Integrating with Infor CRM.....	71
Integrating with Infor EAM.....	72
Integrating with Infor Expense Management.....	72
Integrating with Infor Factory Track.....	73
Integrating with Microsoft Office.....	73
Configuring add-in applications.....	73
Appendix A: Useful URLs.....	75
Appendix B: User and role BOD usage.....	78
BODs that send roles (authorization groups) from the ERP to Infor Ming.le.....	78
Person IDs.....	78
Person IDs in Infor Ming.le.....	79
Sending the Person ID from the ERP to Infor Ming.le.....	79
BODs that send user information from Infor Ming.le to the ERP.....	79
BODs that send user information from the ERP to Infor Ming.le.....	80
CloudSuite Portals users.....	81
Appendix C: Troubleshooting.....	82
Data is not flowing properly.....	82
BOD information needs to be purged.....	83
ERP help is not working.....	83
Appendix D: Business events that generate outbound BODs.....	84
Appendix E: Inbound BOD usage.....	93
Appendix F: BODs used in integrations with this application.....	95
Outbound BODs from the ERP to integrated applications.....	95
Inbound BODs to the ERP from integrated applications.....	98

About this guide

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

Intended audience

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

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://concierge.infor.com/> and create a support incident.

If we update this document after the product release, we will post the new version on the Infor Support Portal. To access documentation, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

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

Chapter 1: Configuration checklist

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

Complete	Task	Reference
<input type="checkbox"/>	Collect any documents listed in the Reference column from the Infor Support Portal site. These documents could provide helpful background during this configuration.	
<input type="checkbox"/>	Understand the concepts behind ION and BODs.	<i>Infor ION Desk User Guide - Cloud Edition</i>
<input type="checkbox"/>	Understand the applications that are included in the CloudSuite.	Configuration overview on page 11 <i>Infor CloudSuite Industrial Solution Overview - Cloud Edition</i>
<input type="checkbox"/>	Perform the prerequisites to this configuration: <ul style="list-style-type: none"> • Determine the ERP site names. • Determine the bootstrap administrator. • Perform initial sign-in and verify that you can access applications and menu options. 	Getting started on page 15
<input type="checkbox"/>	Perform post provisioning steps. These tasks might be completed by Infor Consulting. <ul style="list-style-type: none"> • Configure BODs for optional application connection points. • Complete and activate document flows for optional application integrations with the ERP. • Activate IDM features for the ERP. 	Post provisioning steps on page 18
<input type="checkbox"/>	Configure your web browser for Infor Ming.le: <ul style="list-style-type: none"> • Set up compatibility for Internet Explorer browsers • Turn off popup blockers 	Configuring your web browser on page 37

Complete	Task	Reference
❑	Configure user access and roles: <ul style="list-style-type: none"> • Configure user access to the ERP. • Configure additional system administration access to the ERP through Infor Ming.le. • Set up roles or groups for users. • Associate Infor Ming.le users and roles with users in other applications in the CloudSuite • Verify user access. • Optionally, set up distribution groups 	Configuring application access through Infor Ming.le on page 38
❑	Configure CloudSuite Industrial: <ul style="list-style-type: none"> • Set up a logical file server. • Set report options. • Set up additional replication rules, if multi-site. • Set system parameters. • Set up master data. 	Configuring the ERP on page 46 <i>Infor CloudSuite Industrial Multi-Site Planning Guide – Cloud Edition</i> <i>Infor CloudSuite Industrial Multi-Site Implementation Guide – Cloud Edition</i>
❑	Configure your CloudSuite applications and ION to send and receive BODs: <ul style="list-style-type: none"> • Understand the tasks that were already performed, either by the Infor Cloud team or during the Post Provisioning process. • Publish the initial data load. • Verify that the BODs are published by the ERP and received in ION. 	Configuring applications to send and receive BODs in ION on page 51
❑	Optionally, configure workflows and ION messages for your application.	Configuring workflows and ION messages for the ERP on page 58
❑	Verify that drillbacks to your application are working.	Verifying drillbacks to the ERP through Infor Ming.le on page 48
❑	Configure context and utility apps that are used with your application.	Configuring context apps and utility apps that are used with the ERP on page 64
❑	Verify that homepages and widgets for your application are working for individual users.	Verifying Homepages for the ERP on page 69
❑	Configure BI and Analytics content for your application: <ul style="list-style-type: none"> • Configure access to BI. • Configure In-Context BI. 	Configuring Birst and Analytics content for the ERP <i>Infor CloudSuite Industrial Analytics MT Cloud User Guide</i>

Complete	Task	Reference
<input type="checkbox"/>	Configure other optional applications in the CloudSuite to work with the ERP and with the components of Infor OS (ION, Infor Ming.le, Infor Document Management, or BI).	Configuring and integrating other applications in the CloudSuite on page 71

Chapter 2: Configuration overview

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

About the CloudSuite

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

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

CloudSuite tenants

Each CloudSuite Industrial customer is set up with three tenants:

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

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

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

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

Integration with other products in the CloudSuite

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

Point to point integrations

Point to point integrations, for example with Infor Configure Price Quote (CPQ) or Factory Track, use direct database connections that are set up by the Infor Cloud team.

You might need to configure additional parameters or master data in each of the applications to complete the integration. See the appropriate integration guides.

BOD integrations

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

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

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

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

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

Concepts and definitions specific to this configuration

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

Tenant ID

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

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

Infor provides you with three tenants. See [About the CloudSuite](#) on page 11.

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

Accounting entity

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

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

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

Location

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

Logical ID

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

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

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

For more information, see the CloudSuite Industrial online help.

Chapter 3: Getting started

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

Determining your ERP application sites

Every Demo environment is provisioned with the same set of named sites and entities.

If your production environment has multiple sites, generally you plan this in advance with your Infor representative. See the *Infor CloudSuite Industrial Multi-Site Planning Guide – Cloud Edition* for information about determining how many sites you need, what base currency each site will use, and strategies for naming the sites.

If you need to add more sites after provisioning is complete, you must log an incident in the Infor Support Portal and specify the site names and currencies of the additional sites that you require. (If Factory Track is included in the CloudSuite, you must also specify whether the new sites should be associated with Factory Track.)

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

Determining the bootstrap administrator

Your tenant is delivered with a bootstrap administrator already assigned. The bootstrap administrator performs the initial setup of the tenant, including setting up access for other users.

- Customers must designate one person as the bootstrap administrator, and provide this person's email address to your Infor representative as part of your planning process.
- For business partners, the bootstrap administrator is typically the person who placed the order for the tenant.

The bootstrap administrator, will receive an email from Infor with the initial URL to establish an Infor Ming.le user name and login. This person also receives the Application Access email with the URLs to the applications. The bootstrap administrator is the only person who can initially access the tenant.

Accessing your cloud environment (tenant)

- 1 After you register the bootstrap administrator's email address, Infor sends an email to the bootstrap administrator that asks to verify the Infor Ming.le account.
- 2 Click the link in the email.
- 3 Specify your first name, last name, title, email address, and a password.
- 4 Click **Create Account**.

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

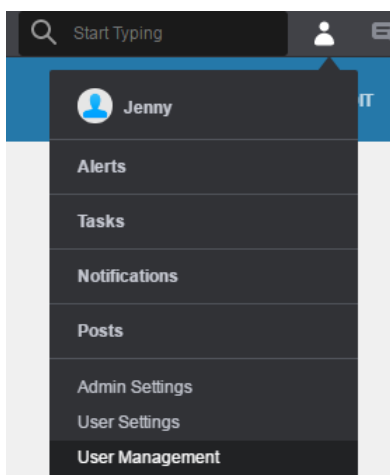
- a Remove everything after the **Tenant ID** in the original URL that was sent in the registration email. For example, in <https://mingle-portal.inforcloudsuite.com/ITSGENXXXA03/xxxxxxx/xxxxx>, ITSGENXXXA03 is the tenant ID, so you would delete everything after that.
- b Copy the remaining URL and paste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

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

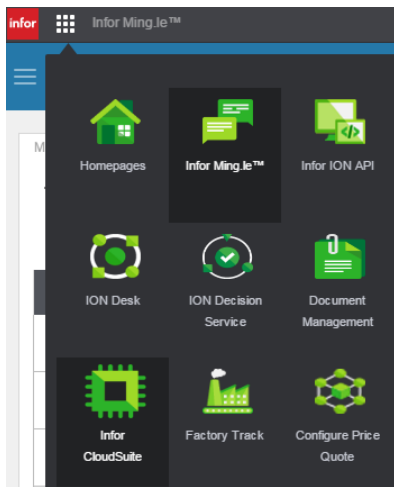
Verifying access to your applications

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

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



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



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

Chapter 4: Post provisioning steps

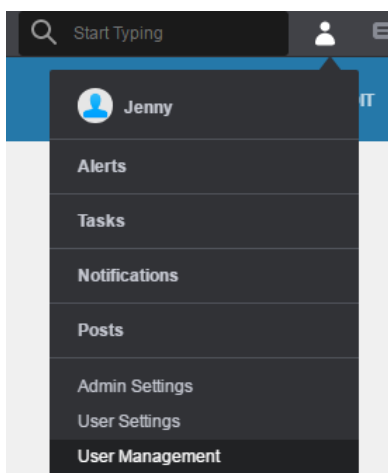
These are the initial steps that must be done after your tenant is provisioned by Infor.

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

Setting roles for the Bootstrap Administrator

The Post Provisioning steps are often performed by the Bootstrap Administrator. At a minimum, the person performing these steps must have IONDeskAdmin, IONDeskSecurityAdmin, and IDM-Administrator roles assigned in Infor Ming.le, as well as the System Administrator group assigned in CloudSuite Industrial.

- 1 To associate these security roles with the Bootstrap Administrator in Infor Ming.le:
 - a Log into the tenant using the credentials that were provided to you.
 - b From the Infor Ming.le User Menu, select **User Management**.



- 2 Select the bootstrap administrator's account.
- 3 Click the Details icon.
- 4 In the **Security Roles** tab, verify that the bootstrap administrator is assigned to the IONDeskAdmin, IONDeskSecurityAdmin, and IDM-Administrator roles, as well as the System Administration role (SYTELINE application type).

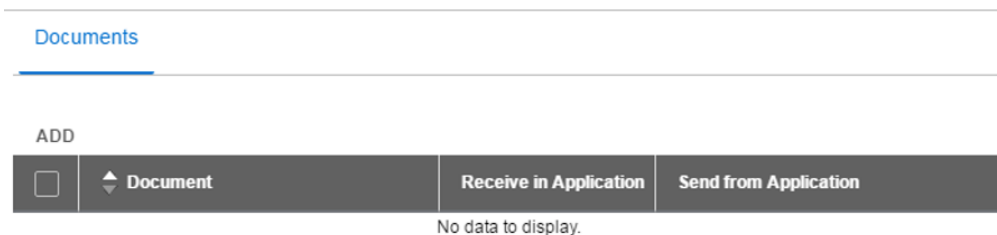
- 5 If any of these roles are not yet assigned for that user, click **+** and select the roles. Then click **Add & Close**.
- 6 Click the save button to save your changes.

Configuring BODs for ERP connection points

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

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

- 1 In ION Desk, select **Connect > Connection Points**.
- 2 Select one of the predefined CloudSuite Industrial connection points. The **Documents** tab lists all documents (BODs) that can be sent or received by this application instance for any integration. For each document, the list must indicate whether the document can be sent, received, or both.



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

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

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

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

Document	Receive in application	Send from application	Used in integration with
Process.BillToPartyMaster	X		CRM
Process.ContactMaster	X		CRM
Process.CustomerPartyMaster	X		CRM
Process.PulseAlert		X	ION (for alerts)

Document	Receive in application	Send from application	Used in integration with
Process.Quote	X		CRM
Process.Requisition	X		EAM
Process.SalesOrder	X		CRM
Process.SecurityUserMaster		X	Infor Ming.le
Process.ShipToPartyMaster	X		CRM
Sync.BillToPartyMaster		X	CRM
Sync.CodeDefinition		X	CRM, XM
Sync.ContactMaster		X	CRM
Sync.CurrencyExchangeRateMaster		X	XM
Sync.CustomerPartyMaster		X	CRM
Sync.CustomerReturn		X	CRM
Sync.EmployeeTimesheet	X		XM
Sync.ExpenseReport	X		XM
Sync.Invoice		X	CRM
Sync.ItemMaster		X	CRM
Sync.Location		X	CRM
Sync.PayFromPartyMaster		X	CRM
Sync.Person		X	CRM
Sync.Personnel		X	XM
Sync.ProductionOrder		X	XM
Sync.ProjectMaster		X	XM
Sync.PurchaseOrder		X	EAM
Sync.Quote		X	CRM
Sync.ReceivableTransaction		X	CRM
Sync.ReceiveDelivery		X	EAM
Sync.RemittanceAdvice		X	XM
Sync.SalesOrder		X	CRM
Sync.SecurityRoleMaster		X	Infor Ming.le
Sync.SecurityUserMaster	X		Infor Ming.le
Sync.ServiceOrder		X	XM

Document	Receive in application	Send from application	Used in integration with
Sync.Shipment		X	CRM
Sync.ShipToPartyMaster		X	CRM
Sync.SupplierPartyMaster		X	EAM

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

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

Verifying BODs for the Infor Ming.le connection point

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

- 1 In ION Desk, select **Connect > Connection Points**.
- 2 Find and select the Infor Ming.le connection point. In its **Documents** tab, verify that these documents are listed:

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

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

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

- 1 In ION Desk, select **Connect > Document Flows**.
- 2 Find the document flow **MingletoCSI** and verify that it is marked as **Active**.
- 3 Select the document flow to open it.

**Note:**

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

- 4 Select the document icon between Mingle1 and CSI and verify that it lists these documents:
 - Sync.SecurityUserMaster
- 5 Select the document icon between CSI and Mingle_2 and verify that it lists these documents:
 - Sync.SecurityRoleMaster
 - Process.SecurityUserMaster
- 6 Make any needed corrections and save your changes.

Configuring BODs for optional products in the CloudSuite

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

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

Adding BODS to the Infor CRM connection point

If CRM is included in the CloudSuite, the CRM connection point was set up in Configuring BODs for the Infor CRM integration with Infor Ming.le, and some BODs were added for integration with Infor Ming.le. You must add more BODs for the integration between CRM and Infor CloudSuite Industrial.

- 1 If a CRM connection point exists in ION Desk, select the connection point.
- 2 In the CRM connection point's **Documents** tab, click **+** and add these documents for the integration with CloudSuite Industrial:

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

Configuring BODs for the Infor EAM connection point

- 1 If an EAM connection point exists in ION Desk, select the connection point.
- 2 In its **Documents** tab, add these documents, if they don't already exist:

Document	Receive in Application	Send from Application
Process.Requisition		X

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

Configuring BODs for the Infor Expense Management connection point

- 1 If an Infor Expense Management connection point exists in ION Desk, select the connection point.
- 2 In its **Documents** tab, add these documents, if they don't already exist:

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

Setting up document flows between the ERP and optional BOD-enabled products in the CloudSuite

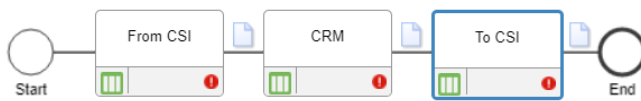
After the documents are associated with each of the connection points, set up or complete the document flows in ION Desk between CloudSuite Industrial and the other application.

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

Creating the CSI > CRM > CSI document flow

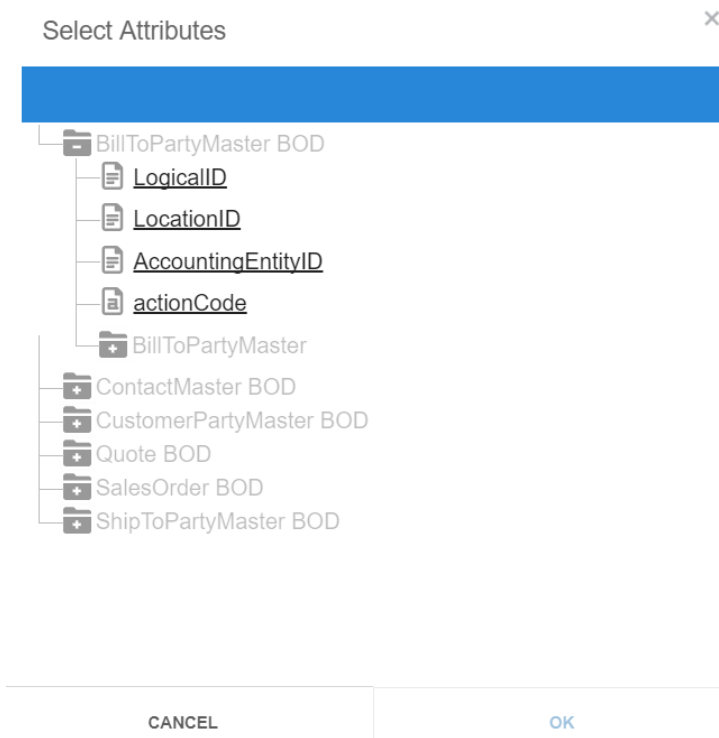
Note: You must read the *Infor CloudSuite Industrial Integration for Infor CRM* to understand the integration and to follow any additional configuration steps in the applications, before you activate this document flow.

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



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

- 8 If you plan to send CRM data to more than one CloudSuite Industrial site, follow these additional steps:
- Drag a Parallel object into the flow between **CRM** and **To CSI**. Add one line for each site.
 - Drag one application object for each site onto each line. Add the connection point for that site.
 - Drag a Filter object on the first line. This filter directs inbound Process BOD documents from **CRM** to the appropriate CloudSuite Industrial accounting entity (site).
 - In the Filter Properties area, specify a name for the filter that includes the site name and the BOD attribute, for example, **LAAcctEntity**.
 - Click the **Attributes** tab.
 - Click **Add** and expand one of the BODs to select its AccountingEntityID attribute. Click **OK**.



- Click in the **Name** column and change the attribute name to describe the BOD and attribute, for example, **BillToAcctEntity**. This will make it easier to link the attributes to the conditions. Repeat steps f and g to create attributes for the other BODs in the list. The finished list of attributes should look like this example:

Filter Properties

Properties **Attributes** Conditions

+

<input type="checkbox"/>	Name	Path	Filtered	Data Type
<input type="checkbox"/>	BillToAcctEntity	BillToPartyMaster/PartyIDs/ID/@accountingEntity	<input type="checkbox"/>	STRING
<input type="checkbox"/>	ContactAcctEntity	ContactMaster/IDs/ID/@accountingEntity	<input type="checkbox"/>	STRING
<input type="checkbox"/>	CustomerPartyAcctEntity	CustomerPartyMaster/PartyIDs/ID/@accountingEntity	<input type="checkbox"/>	STRING
<input type="checkbox"/>	QuoteAcctEntity	(Quote) DataArea*/AccountingEntityID	<input type="checkbox"/>	STRING
<input type="checkbox"/>	SalesOrderAcctEntity	(SalesOrder) DataArea*/AccountingEntityID	<input type="checkbox"/>	STRING
<input type="checkbox"/>	ShipToAcctEntity	ShipToPartyMaster/PartyIDs/ID/@accountingEntity	<input type="checkbox"/>	STRING

- h In the **Conditions** tab of the filter, select a BOD in the **Document** field. For example, select **BillToPartyMaster**.
- i Click **Add** and create a condition for the BOD attribute, which is used to filter BODs for the specific site.

Condition Builder ×

Name *

Type

Compares the selected attribute with a specific value.

Attribute

Operator

In Set (comma separated)

Specify this information:

Name

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

Type

Set this to **Attribute Value Comparison**.

Attribute

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

Operator

Select **in set**.

In Set

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

j Click **OK**.

The finished condition should look like this example:

<input type="checkbox"/>	Name	Expression
<input type="checkbox"/>	BillToAcctEntity	[BillToAcctEntity] in set 'LA'

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

Filter Properties

Properties Attributes **Conditions**

Document *

Used Condition *

+

<input type="checkbox"/>	Name	Expression
<input type="checkbox"/>	BillToAcctEntity	[BillToAcctEntity] in set 'LA'

l Save your changes to the filter.

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

Delete any empty branches.

9 Save your changes.

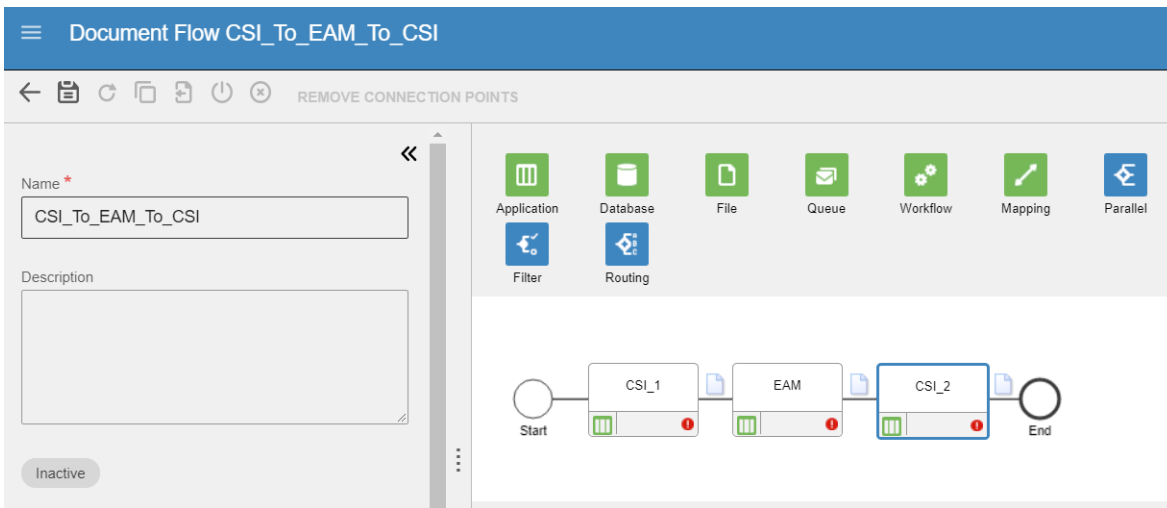
Do not activate the document flow until you complete the steps in the integration guide.

Creating the CSI > EAM > CSI document flow

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

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

2 Create a document flow called **CSI_To_EAM_To_CSI**.

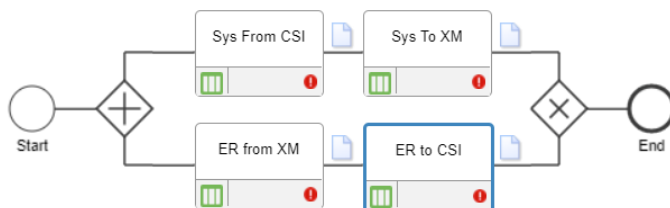


- 3 In the properties pane for each of the application boxes, click **Add** and add the appropriate connection points.
- 4 Click the document icon between **CSI_1** and **EAM** and include these documents:
 - Sync PurchaseOrder
 - Sync ReceiveDelivery
 - Sync SupplierPartyMaster
- 5 Click the document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

Creating the CSI > XM > CSI document flow

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

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



- 4 In the properties pane for each of the application boxes, click **Add** and add the appropriate connection points:

- Associate the **Sys From CSI** and **ER to CSI** applications with the CloudSuite Industrial connection point(s).
 - Associate the **Sys To XM** and **ER from XM** applications with the Infor Expense Management (XM) connection point.
- 5 Save the document flow.
 - 6 Click the document icon between **Sys From CSI** and **Sys To XM** and add these documents:
 - Sync CodeDefinition
 - Sync CurrencyExchangeRateMaster
 - Sync Personnel
 - Sync ProductionOrder
 - Sync ProjectMaster
 - Sync RemittanceAdvice
 - Sync ServiceOrder
 - 7 Save the document flow.
 - 8 Click the document icon between **ER From XM** and **ER To CSI** and add these documents:
 - Sync EmployeeTimesheet
 - Sync ExpenseReport
 - 9 Save the flow but do not activate it until you complete the steps in the integration guide.

Configuring IDM

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

Tasks performed by the Infor Cloud team

The Infor Cloud team performed these tasks related to IDM:

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

- An Access Control List (ACL) that defines the IFS security roles that can access each document type.

Prerequisites for IDM integration

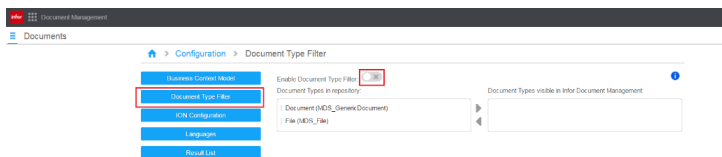
Before you start integrating IDM with CloudSuite Industrial, ensure that these prerequisites are met:

- On the CloudSuite Industrial **Document Types** form, ensure that you have defined a **Document Type** of **PDF** with the pdf extension.
- On the **Event Handlers** form, verify that an event handler called **BGTaskComplete** is defined and active.

Disabling the Document Type filter

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

- 1 In the Infor Document Management app, click the ellipses (...) and select **Control Center**. click the menu.
- 2 Select **Administration > Configuration**.
- 3 Click **Document Type Filter** and disable the filter.



- 4 Save your changes.

Adding the PDF document type

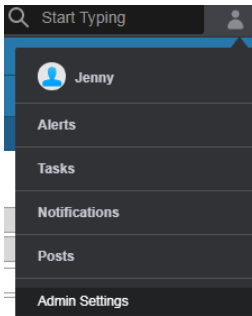
In the Infor Document Management application, add a document type called **PDF**. This is required for the integration with the CloudSuite Industrial application event system.

- 1 Navigate to **Control Center > Administration > Document Type**.
- 2 Click **New Document Type**.
- 3 Use the wizard to create a PDF document type.
Do not assign a group to the document type.

Activating the Related information context app

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

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



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

Manage Applications **Manage Context / Utility Apps** Manage Drillbacks General Settings

Context/Utility App Details

Name *

Type *

Description *

Permissions Settings Context Message Applications

Delete Add New Users and/or IFS Security Roles Grant access to all users

Name	Role

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

Permissions Settings Context Message **Applications**

Delete Add/Remove Applications			
<input type="checkbox"/>	Application Name and Version	Logical ID	Enabled
<input type="checkbox"/>	Document Management	lid://infor.daf.daf	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Enterprise Quoting	lid://infor.cppeq.cppeq	<input type="checkbox"/>
<input type="checkbox"/>	Enterprise Quoting - Designer	lid://infor.cpqed.cpqed	<input type="checkbox"/>
<input type="checkbox"/>	Factory Track	lid://infor.ft.ft	<input type="checkbox"/>
<input type="checkbox"/>	ION Decision Service	lid://infor.decisionservice.decisionservice	<input type="checkbox"/>
<input type="checkbox"/>	Infor CloudSuite	lid://infor.syteline.ade_us_east_1	<input checked="" type="checkbox"/>

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

Verifying the IDM connection in the ERP

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

External App Parameters

Name:

Instance:

URL:

User Name:

Password:

Authentication Method:

Active

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

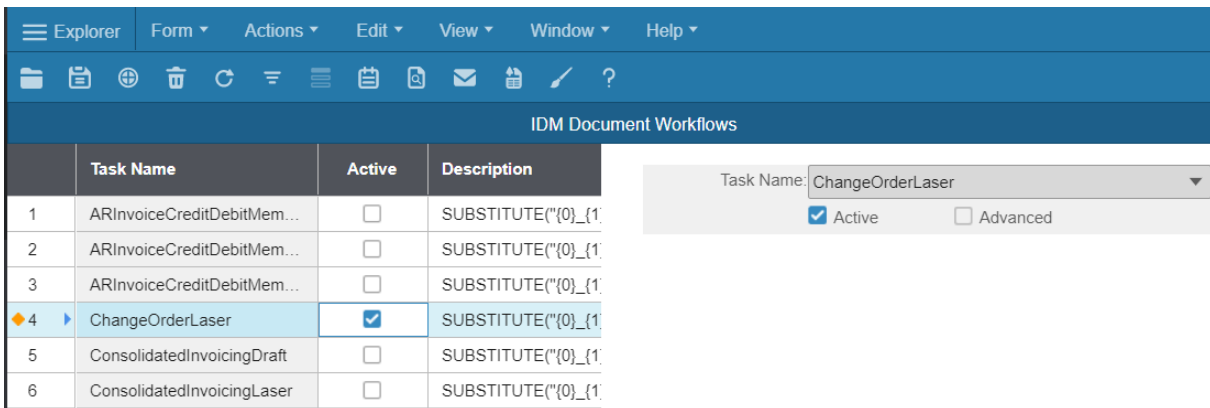


If the connection was not successful, a red X is displayed, and you should contact your Infor representative.

Activating the IDM workflows in the ERP

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

- 1 In CloudSuite Industrial, open the **IDM Document Workflows** form.
- 2 Select **Active** for each predefined workflow if you want that type of document to be sent to IDM. Your choices should be based on business decisions for the company.



Note: For every workflow that you activate, verify that its Background Task has the **Output Format** set to **PDF** in the **Report Options** form.

3 Save your changes.

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

Verifying the configuration for workflows

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

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

- 1 In CloudSuite Industrial, open the **Purchase Order Report** form and print a purchase order.
- 2 Open the **IDM Workflow Logs** form and verify that a record exists for the new PO.
See the online help for an explanation of the fields on this form.
- 3 In the Infor Document Management application, verify that you can find and preview the document using these options:

Document Type

Specify **CS_PurchaseOrder**.

Select Attribute

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

Operation

Select **Like**.

Value

Specify the PO number. Use the % wildcard character to allow for leading and trailing spaces.

- 4 In CloudSuite Industrial, open the **Vendors** form.
- 5 Select the vendor associated with the purchase order number that you printed.

In the Related Information context app, the document should be displayed automatically. The default entity type is **A11**, which displays any document that matches the current record.

6 Verify that you can preview the purchase order.

Troubleshooting:

- When you first try to generate a report that sends a document from CloudSuite Industrial to IDM, if the document does not appear in IDM, check for the following:
 - Verify that the prerequisites were completed. See [Verifying the configuration for workflows](#) on page 34.
 - Verify that the document is activated on the **IDM Document Workflows** form. See [Activating the IDM workflows in the ERP](#) on page 33.
 - Verify that the IDM connection set up properly on the **External App Parameters** form.
 - After you generate one of the reports that sends a document to IDM, open the **Background Task History** form and ensure that the background task has completed successfully. Also, verify that the name of the task in the **Background Task History** form matches the task name that is defined on the **IDM Document Workflows** form.
 - Open the **Event Queue** form to see if there are entries for **BGTaskComplete**.
 - If there are entries, and the **Times Attempted** value is 0, then contact Infor and ask them to ensure that the Infor Framework Event Service is running and monitoring your configuration.
 - If there are entries, but the **Times Attempted** value is less than 0, then check the **Event Status** or **Event Handler Status** forms for a failure message related to the **BGTaskComplete** event.
- If a document cannot be inserted into IDM, an error message is sent to the user who generated the document in CloudSuite Industrial. The user can then attempt to manually attach the document into IDM, using the appropriate document type and attributes. However, if the error occurred because the user does not have the appropriate role assigned in IDM, then the user cannot insert the document into IDM. In that case, you must ensure that the ACL in IDM has the appropriate roles assigned to the document type, and that the user is a member of one of those roles in CloudSuite Industrial and Infor Ming.le (IFS).
- If a user prints a range of purchase orders or invoices, the documents will be generated either in one PDF or in individual PDFs, depending on how the user's **Document Profile** is set up in CloudSuite Industrial. If all of the documents are in a single PDF, the PDF is attached in IDM to the first record in the range. We recommend that users set their Document Profiles to generate individual PDFs for a range of documents.

Importing sample ION workflow content

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

Note: These samples are not currently supported by Infor.

- 1 On the Infor Support Portal site, search for solution **1440389**. Download the `SL_ION_Content.zip` file to a local folder. Unzip the file to extract a set of files that you will import into Infor Ming.le and ION Desk.
- 2 Open Infor Ming.le and import the distribution groups:

- a From the user menu, select **User Management**.
- b From the menu on the **User Management** page, select **Manage > Groups > Distribution Groups**.
- c Click the **Import** icon.




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

Import Distribution Groups

Upload a CSV file that includes a header row with the following supported variables:
Name, Description, (EmailId or FedId)
Name and Description are required.

Select File

C:\fakepath\SL-DistributionGroups.csv 

Update existing distribution groups

CANCEL IMPORT

- e Verify that the log messages indicate that all rows were added successfully, and click **Close**.
The new distribution groups are displayed on the **Groups** page.
- 3 Open ION Desk and import the sample monitors:
 - a Select **Monitors & Workflows > Monitors**.
 - b Click the **Import** icon.
 - c Browse to your local folder, select the `SL-Monitors.xml` file, and click **OK**.
 - d Verify that the list shows successfully imported monitors and click **OK**.
 - 4 In ION Desk, import the sample workflows. Select **Monitors & Workflows > Workflows** and import `SL-Workflows.xml`.
 - 5 In ION Desk, import the sample activation policies. Select **Monitors & Workflows > Activation Policies** and import `SL-ActivationPolicies.xml`.
 - 6 Activate each of the sample monitors, workflows, and activation policies by clicking the **Activate** button.

Chapter 5: Configuring your web browser

Configure your browser for use with Infor Ming.le.

Allowing popups for browsers

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

Avoiding multiple connections in a browser

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

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

Setting up compatibility for Internet Explorer browsers

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

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

- 1 In the browser, click **Tools > Compatibility View Settings**.
- 2 Clear the **Display intranet sites in compatibility view** option.

Chapter 6: Configuring application access through Infor Ming.le

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

Configuring Single Sign On

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

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

Users and roles

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

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

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

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

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

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

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

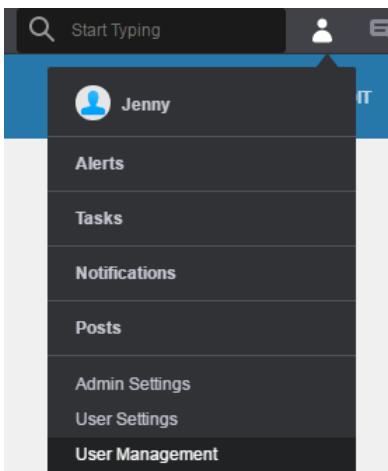
For more information about these BODs, see [User and role BOD usage](#) on page 78.


Configuring user access to the ERP through Infor Ming.le

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

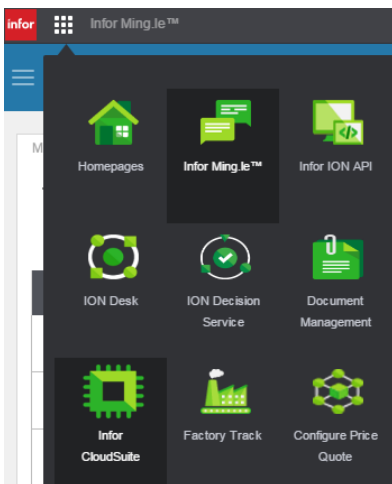
You must add other users in Infor Ming.le before they can access CloudSuite Industrial through Infor Ming.le.

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




- 2 On the **Users** page, follow these general steps to add users. See the Infor Ming.le online help for more information.
 - a Click **+** to add a user.
 - b Clear the **Send Invitation** option so that you can send the invitation later, after you have completed the user setup.
 - c Save your changes.
 - d Click the details icon  to view details for the user.

Note: The IFS Person ID will be used to synchronize personnel records with CloudSuite Industrial. It is generated automatically and should not be changed.
 - e In the **Security Roles** tab, assign the user to one or more roles, and click **Add & Close**.
 In order for users to access CloudSuite Industrial through Infor Ming.le, they must be assigned at least one CloudSuite Industrial role.
 You might not see all of the application-specific roles that you need. If you do not see the roles you need, those roles can be added and assigned later from within CloudSuite Industrial.
 - f Save your changes.
 The information is sent through BODs to CloudSuite Industrial after you save your changes.
- 3 Open CloudSuite Industrial from the App Menu.



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



- 5 In CloudSuite Industrial, select **Form > Open** and open the **Users** form.
- 6 In the **Users** form, click the filter toolbar button  to see all of the users who were defined in Infor Ming.le.

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

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

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

These values should not be changed.

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

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

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

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

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

Groups Additional Info Login Information **Email Address** Source Control

Primary Email Address: Primary csummers@csgde.com

Use Reply To Primary csummers@csgde.com

Send External Notifications Primary csummers@csgde.com

Send External Prompts Primary csummers@csgde.com

Email Type Description	Email Type Address
1 Primary	csummers@csgde.com

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

Users

User Name: bob.white@infor.com Super User

User Description: Bob White

User Password:

Confirm Password:

Workstation Domain/ID: 7E04FA03-CB5C-4BC2-9F9B-DE7382EC79DC

Editing Permissions: Basic **User Modules** Row Authorizations... User Authorizations...

Groups Additional Info Login Information **Email Address** Source Control

	Group Name	Group Description	Primary Group
1	Infor-SuiteUser	Sync: automatic	<input type="checkbox"/>
★ 2	Accounts Receivable	Accounts Receivable Group	<input type="checkbox"/>

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

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

Note: Some modules such as Service and QCS are separately licensed. See [Configuring users for separately licensed modules](#) on page 42.
 - h Save your changes.
- 8** In Infor Ming.le User Management, select the user's record, and then select **Action > Resend Invitation**.
- The user receives a notification with a link that provides user-specific access to Infor Ming.le and to CloudSuite Industrial.

Configuring users for separately licensed modules

If your product includes separately licensed modules such as Quality Control (QCS), Service, or Tax Interface, follow these steps to ensure that users have access to those modules.

- 1** Log into CloudSuite Industrial.
- 2** In the **Optional Modules** form, ensure that **Enabled** is selected for the modules for which you have purchased licenses.
- 3** In the **Users** form, click the filter button on the toolbar to show all defined users.
- 4** In the grid on the left, select a user who needs licensing for an optional module.
- 5** Click **User Modules** to display the license modules assigned to the current user.
- 6** To add a license for the user, click the Create button on the toolbar.
- 7** In the **Module Name** field, select a license module for the user, for example, **ServiceManagement** for the Service module or **QualityControlSolution** for the QCS module.

Required: For business partners in a demo environment, your administrative user must be licensed for these modules:

 - QualityControlSolution
 - ServiceManagement
 - TaxInterface
- 8** Click the Create toolbar button again to add another license module for the user, and repeat until all licenses for that user are added.
- 9** Save your changes.
- 10** Repeat these steps for any other users that must be licensed for the optional modules.

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

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

- 1 From the Infor Ming.le User Menu, select **User Management**.
- 2 On the **Users** page, click the Detail icon for one of the users that you want to make an administrator.
- 3 In the **Security Roles** tab for that user, click **+** to add roles.
- 4 In the **Search** field, specify **Admin** to filter for all administration roles, and click the search icon.

<input checked="" type="checkbox"/>	Name	Description	Application Type	Logical
<input checked="" type="checkbox"/>	DataAdministrator	DataAdministrator	IFS	lid://infc
<input checked="" type="checkbox"/>	EPHESOFT-Administrator	EPHESOFT-Administrator	System	
<input checked="" type="checkbox"/>	EPHESOFT-SystemAdministrator	EPHESOFT-	System	
<input checked="" type="checkbox"/>	FT-Administrator	Infor FactoryTrack	FT	lid://infc
<input checked="" type="checkbox"/>	GRID-Administrator	Users with this role may	GRID GRIDCE	lid://infc
<input checked="" type="checkbox"/>	GRID-Viewer	Users with this role get read-	GRID	lid://infc
<input checked="" type="checkbox"/>	HOMEPAGES-Administrator	HOMEPAGES-Administrator	HOMEPAGES	lid://infc
<input checked="" type="checkbox"/>	HOMEPAGES-ContentAdministrator	HOMEPAGES-	HOMEPAGES	lid://infc
<input checked="" type="checkbox"/>	IDM-Administrator	This is a user that can create	IDM	lid://infc
<input checked="" type="checkbox"/>	IDM-SuperUser	Provides full access to	IDM	lid://infc

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

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

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

- 1 In Infor Ming.le, add the Infor-SystemAdministrator role to the appropriate users.
After you update the user information, a BOD is sent from Infor Ming.le to CloudSuite Industrial to synchronize the system administrator users with this role.

- 2 Assign additional system administration roles, either in Infor Ming.le or in the CloudSuite Industrial **Users** form, to the appropriate users.

Setting up additional roles or groups

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

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

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

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

- To associate security roles with users in Infor Ming.le:
 - a Select **User Management**.
 - b Select a user.
 - c Click the Details icon.
 - d In the **Security Roles** tab, click +.
 - e Select the roles you want for the user, and click **Add & Close**.

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

- To associate groups (roles) with users in CloudSuite Industrial, go to the **Users** form, filter for the user, and use the grid on the **Groups** tab to associate the user with the appropriate groups. CloudSuite Industrial generates a Process.SecurityUserMaster BOD which is sent to Infor Ming.le. Infor Ming.le then sends another BOD to all applications that run in the Infor Ming.le portal, to update the user records in all applications.

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

Automatic login and selecting configurations

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

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

- If users sign out of the CloudSuite Industrial application before exiting Infor Ming.le, then the next time they open the CloudSuite Industrial application, they must select a configuration.
- If users close the browser without signing out, or exit Infor Ming.le without signing out of CloudSuite Industrial, then the next time they open the CloudSuite Industrial application, the previous configuration is automatically selected and no dialog box is shown. To switch to a different configuration, the user can select **Form > New Sign In**.

Verifying user access

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

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

Setting up distribution groups

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

See the Infor Ming.le online help.

Service accounts

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

Chapter 7: Configuring the ERP

Configure the CloudSuite Industrial ERP application using these general steps.

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

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

- 1 Open the CloudSuite Industrial application in the Infor Ming.le portal.
- 2 Set up a file server and logical folders.
See “Setting up a File Server for ERP in the Cloud” in the online help.

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

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

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

- 4 Define report options.

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

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

- 5 If your tenant has multiple sites:

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

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

- 6 If your tenant has a single site, follow these steps, using the online help:

- On the **Sites/Entities** form, set the **Time Zone**. Do not change any of the other site information on this form.
- Set the invoice length on the **Order Entry Parameters** form.
- Set up the chart of accounts and financial information.
- Set up other parameter forms.
- Set up master data such as customers, vendors, and items.

7 Set master data to standardized values.

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

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

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

Chapter 8: Verifying drillbacks to the ERP through Infor Ming.le

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

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

Other types of drillbacks

Other types of drillbacks can be performed using linked forms or JSON context messages. For example, you might have a Homepage widget that draws its customer data from CloudSuite Industrial. If the user drills back from that widget, the linked **Customers** form opens in CloudSuite Industrial. This chapter does not apply to those types of drillbacks.

Available drillbacks

An Infor Ming.le search result, alert, or share can include a link to the form with a reference to specific CloudSuite Industrial data. This type of drillback is displayed in the Infor Ming.le user interface as a link that opens CloudSuite Industrial to a specific form filtered for specific results.

This table lists the views that are currently available for this feature, and the CloudSuite Industrial form that is launched:

BOD Noun	Drillback view	CloudSuite Industrial form
BillToPartyMaster	BillToPartyView	Customers
ContactMaster	ContactMasterView	CustomerSalesContactCrossReferences
CustomerPartyMaster	CustomerView	Customers
CustomerReturn	CustomerReturnView	RMAs

BOD Noun	Drillback view	CloudSuite Industrial form
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

Loading the BODs that are used in drillbacks

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

See [Publishing initial data](#) on page 53.

Verifying a drillback

To verify that the drillbacks are working for shared links in Infor Ming.le:

- 1 From the App menu, open CloudSuite Industrial.
- 2 Open a form that has a drillback, for example, **Customers**.
Note: The user interface does not indicate whether a screen has a drillback. In order for a screen to have a drillback, a drillback must be configured and a business context message must also be sent. See [Available drillbacks](#) on page 48 and [Understanding business context messages](#) on page 64.
- 3 Display the information that you want to share, for example, the record for a particular customer.

Customers

Customer:

[Main](#) [Ship To](#) [Credit](#) [Invoicing](#) [Banking](#) [Contacts](#) [Codes](#)

Address [1]:

Address [2]:

- 4 Click the Share icon on the Infor Ming.le screen. If prompted, click **Share to Feed**.
- 5 On the Share overlay, verify that the drillback icon is displayed, add a comment, and click **Share**.

Share

Connected Users

1 ADD ATTACHMENTS

Ship to Party:1:0

CANCEL **SHARE**

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

My Feed

Jenny | **Connected Users** Today at 12:54 PM

[#inforaccountingentity:DALS#inforshiptopartymaster:1:0#inforcustomerpartymaster:1#inforsalesinvoice:1](#)

1 Like | [Show Details](#) | [Share](#) | [Delete Post](#)

REPLY

Chapter 9: Configuring applications to send and receive BODs in ION

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

Tasks performed by the Infor Cloud team

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

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

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

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

- The team set up connection points for all CloudSuite Industrial sites, Infor Ming.le, Infor Document Management and provided the list of documents that can be sent and received by these connection points.
- If your CloudSuite includes Infor CRM, Infor EAM, or Infor Expense Management, the Cloud team set up connection points for these applications, and might (or might not) have set up the list of documents for those connection points.
- The team configured and activated a document flow between CloudSuite Industrial and Infor Ming.le to pass user account and role (group) information.

- The team set up and activated a Listener for Infor Ming.le, which automatically forwards all BODs for specified verbs to Infor Ming.le. It is used to view drillbacks from CloudSuite Industrial in Infor Ming.le. See the *Infor ION Desk User Guide - Cloud Edition* for information about message listeners.

Tasks performed during Post Provisioning

If your CloudSuite includes certain optional applications such as CRM or EAM, the [Post provisioning steps](#) on page 18 completed and activated the document flows, and added any needed BODs to the connection points for these applications.

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

If you make a change to a preconfigured connection point or document flow, and later you want to see how it was originally configured, see [Verifying ION Desk provisioned settings](#).

How products connect to ION

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

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

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

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

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

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

Documents and document flows for CloudSuite Industrial, Infor Ming.le, IDM, and some optional applications in the CloudSuite (such as CRM or EAM) were set up as part of the Infor Cloud team provisioning or the [Post provisioning steps](#) on page 18.

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

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

- 1 If an integration guide exists between the applications, refer to that guide instead of these steps.
- 2 Create a connection point for the other application. You must know the application connection information and have the appropriate utilities to connect to Infor ION from the other application if it is not in the Infor Cloud. If the other application is in the Infor Cloud, the Infor Cloud team must add the connection point for you.
- 3 In the **Documents** tab of the connection points, include the BODs that can flow to and from the applications.
 - See [Outbound BODs from the ERP to integrated applications](#) on page 95. Select **Send from Application** for each of these BODs.
 - See [Inbound BODs to the ERP from integrated applications](#) on page 98. Select **Receive in Application** for each of these BODs.
- 4 Optionally, you can also add custom document types. See the *Infor ION Desk User Guide - Cloud Edition*.
- 5 Define a new document flow that includes connection points for both CloudSuite Industrial and the other application.
- 6 Define the documents that flow between the applications, and the direction that they flow.
- 7 Save the document flow.
- 8 Activate the document flow.

Publishing BODs

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

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

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

Publishing initial data

During normal processing, BODs are automatically generated (published) when a user makes a data change or completes a transaction. However, when you start a new integration with another application, you must manually publish BODs that pass the current set of data from your application to another

application, so that the base systems are synchronized. The BODs are placed in the **Replication Document Outbox**, from which ION retrieves them and passes them to the other application.

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

- 1 In CloudSuite Industrial, open the **Replication Document Manual Request Utility**.
- 2 Select **Initial Load** so that the data is processed as an insert, that is, as new data.
- 3 Select the BODs to include in the data load. The BODs you select are different for each integration. See the appropriate integration guide for the BODs to load.
Note: If you select multiple process BODs at one time, the BODs are processed in alphabetical order. However, you must load certain BODs in a specific order, to prevent errors in the integration due to missing data. See [BOD dependencies](#) on page 54.
- 4 Click **Process** to process the selected BODs.
- 5 Continue to select and process BODs until all of the BODs are processed that are required for a specific integration.
- 6 Repeat this process at each CloudSuite Industrial site.

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

After the initial data load, CloudSuite Industrial automatically publishes BODs whenever users change certain data or when certain transactions occur in CloudSuite Industrial. For a list of the events that generate BODs, see [Business events that generate outbound BODs](#) on page 84.

BOD dependencies

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

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

Turning off BOD replication to reduce traffic

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

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

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

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

Replication Categories							
Category:	ESB						
Description:	Enterprise Service Bus						
	Table Or Function	Object Type	Filter	Skip Insert	Skip Update	Skip Delete	Skip Method
41	TriggerInventoryHoldSyncSp	SP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
42	TriggerInvoiceSyncSp	SP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
43	TriggerItemMasterAcknowledgeSp	SP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
44	TriggerItemMasterProcessSp	SP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
45	TriggerItemMasterSyncSp	SP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
46	TriggerJournalEntrySyncSp	SP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
47	TriggerLCLTradeStatisticsEUIntrastatSyn...	SP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
48	TriggerLCLTradeStatisticsEUSalesSyncSp	SP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
49	TriggerLocationSyncSp	SP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
50	TriggerOpportunityDeleteSyncSp	SP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51	TriggerOpportunitySyncSp	SP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
52	TriggerPurchaseTrackerSyncSp	SP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In a new cloud environment, all of the triggers are turned off (**Skip Method** is selected) except these:

- FlushBusCacheForSiteSp
- FlushBusParmsForSiteSp
- SendEntireBodSp
- TriggerBODConfirmSp
- TriggerPulseNotificationSyncSp
- TriggerSecurityPermissionMasterSyncSp
- TriggerSecurityRoleMasterSyncSp
- TriggerSecurityUserMasterAcknowledgeSp
- TriggerSecurityUserMasterProcessSp
- TriggerSecurityUserMasterSyncSp

Note: This list assumes that CloudSuite Industrial is only integrating with Infor Ming.le.

- 4 If you are integrating with other applications via BODs, you must turn on the triggers (clear the **Skip Method** field) for the required BODs when you integrate with the other applications. See the

appendixes of this guide, or the appropriate integration guide, for the list of outbound BODs used in each integration.

- 5 Save your changes.

Verifying the ION configuration

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

Verifying that BODs are published

- 1 Use the information in [Business events that generate outbound BODs](#) on page 84 to determine what user actions generate certain BODs.
- 2 Perform those user actions in CloudSuite Industrial.
For example, information from the **Vendors** form is replicated through the SyncSupplierPartyMaster BOD, so you could change the vendor address and save your change.
- 3 Check the **Replication Document Outbox** form in CloudSuite Industrial to see if a BOD was generated and marked as processed.
In our example, the SyncSupplierPartyMaster BOD is generated.
Depending on settings, the BODs might be removed immediately from the outbox after ION retrieves them. In that case, you can check ION Desk OneView to verify whether the BOD was sent and processed.
- 4 In ION Desk, review the messages by using ION Desk OneView or other ION Desk functions.
If messages are not displayed in ION Desk, check the CloudSuite Industrial **Replication Document Outbox** form to see if the BODs were generated but not retrieved by ION.
- 5 If messages are not flowing, review the XML data for the BOD.

Verifying that ION receives data

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

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

If you encounter problems, see [Data is not flowing properly](#) on page 82.

Verifying the data flow between applications

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

Chapter 10: Configuring workflows and ION messages for the ERP

You can configure workflows and ION messages for your application.

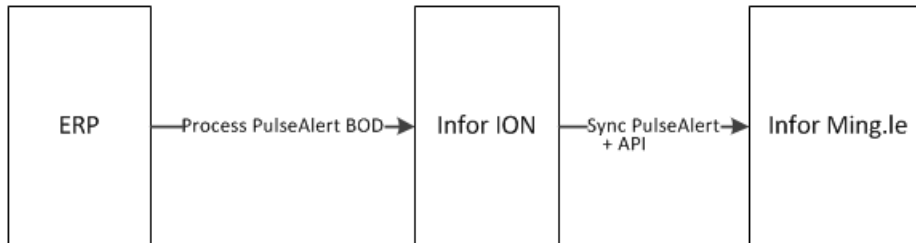
ION messages

This table shows the types of ION messages:

Type	Description
Alert	Alerts are generated by Infor OS Event Management or by a PulseAlert BOD. An alert is a business notification or exception indicating that something out of the ordinary has happened in the flow of application documents.
Task	Tasks are generated by Infor OS Workflow or by a PulseTask BOD. A task is an activity that must be completed within a defined period of time. When the task is generated by Workflow it suspends the execution of the workflow until the task is completed. When a task is completed, the user's response is sent back to ION Workflow to resume execution of the workflow.
Notification	Notifications are generated by Infor OS Workflow or by a PulseNotification BOD. A notification is similar to a task, but does not require immediate user action. A notification does not suspend the execution of the workflow.
Alarm	<p>The ION Alarms mobile application for Android devices is available to create monitors, called alarms.</p> <p>In ION Desk, the business administrator can create alarm templates. After the templates are activated, mobile users can use the templates to create alarms in the ION Alarms mobile application. The alarm creator can specify the distribution list for the resulting alert. See the <i>Infor ION Alarms Mobile Application User Guide</i>.</p> <p>The users receive the alert on their Infor Ming.le page, in the Infor Ming.le mobile application, or by email.</p>

About alerts sent from the ERP to Infor Ming.le

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



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

Publication	Description	Where defined
CustomerCreditHoldAlert	A customer was put on credit hold	Event: IdoOnItemUpdate, Seq 15
CustomerInteractionFollowUpAlert	A follow-up is needed to a customer interaction. Key Value 1 defines the customer number.	Event: CustomerInteractionFollowupAlert, Seq 1
CustomerOrderCreditHoldAlert	A customer order was put on credit hold	Event: IdoOnItemUpdate, Seq 16
CustomerShipmentAlert	An order was shipped to a customer (for specific orders/customers)	Event: IdoOnItemUpdate, Seq 17
DCShopFloorTransactionErrorAlert	A specified number of Data Collection shop floor transaction errors occurred. Key Value 1 defines how any errors must be generated before the user receives an alert	Trigger on dcsfc_mstlup
JobMaterialCostAlert	The quantity issued against a job is more than required and the total material cost (actual) of the job exceeds the required cost by a certain percent (tolerance) set by the user	Trigger on jobmatl_mstlup
JobOperationHoursAlert	Labor hours for a job were more than estimated	Trigger on jobroute_mstlup
JobOverProductionAlert	The completed quantity of a job is greater than the released quantity	Trigger on job_mstlup

Publication	Description	Where defined
JobProjectedLateForCustomerAlert	A job is projected to be late for a specified customer. Key Value 1 is the customer number.	Trigger on job_sch_mstlup
LateOrderShippingAlert	At least one open order line for a customer has a due date prior to the current date. Key Value 1 is the customer number	Event: LateOrderShippingAlert, Seq 1
LeadAssignedAlert	A lead is assigned to a salesperson	Event: IdoOnItemUpdate, Seq 19
LockedUserAlert	A user is locked out	Trigger on UserNameslup
OpportunityDueAlert	An opportunity is due	Event: OpportunityDueAlert, Seq 1
OverBudgetAlert	The specified account's actual amount is above budget for the current fiscal period. Key Value 1 is the account number, and Key Value 2 is the percentage over budget that triggers an alert	Event: OverBudgetAlert, Seq 1
ProjectedLateShipAlert	An order line is projected to ship late. Key Value 1 is the customer number.	Event: IdoOnItemUpdate, Seq 18
ProspectInteractionFollowUpAlert	A follow-up is needed with a prospect. Key Value 1 is the prospect ID.	Event: ProspectInteractionFollowUpAlert, Seq 1
ScheduledMaintenanceAddedAlert	A scheduled maintenance task is added for a resource. This alert is used only with the Molding Industry Pack.	Trigger on MO_resource_maint_mstlup
ScheduledMaintenanceAlert	A scheduled maintenance task has been changed from Planned to Scheduled for a resource. This alert is used only with the Molding Industry Pack.	Event: ResourceMaintenanceScheduleUpdateStatus, Seq 1
TransactionAmountAlert	The amount of a transaction for a specified account is over the specified amount. Key Value 1 is the account number. Key Value 2 is the amount to which transactions should be limited.	Event: TransactionAmountAlert, Seq 1

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

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

Groups Additional Info Login Information **Email Address** Source Control

Primary Email Address: Primary bob.smith@infor.com

Use Reply To PersonID bsmith@infor.com

Send External Notifications Primary bob.smith@infor.com

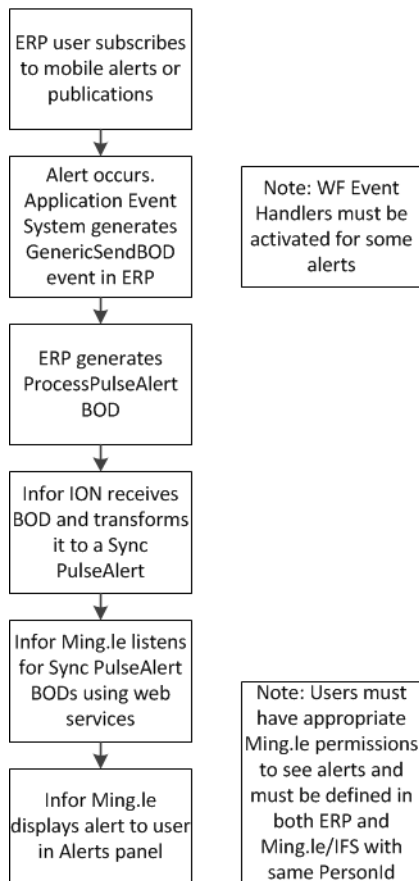
Send External Prompts Primary bob.smith@infor.com

	Email Type Description	Email Type Address
1	PersonID	bsmith@infor.com
2	▶ Primary	bob.smith@infor.com

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

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

This is the general process flow:



Configuring monitors for alerts

1 Configure CloudSuite Industrial to send alerts.

- a In the **Process Defaults** form, set **ION Pulse Interface** to 1.
- b For publications (alerts) that have associated event handler sequences, activate the sequences so that the BOD will be sent when the events fire. In the **Workflow Event Handler Activation** form, select the appropriate event and sequence, and select **Active for this Site**.

See the list of publications and their associated event handler sequences in [About alerts sent from the ERP to Infor Ming.le](#) on page 59.

- c CloudSuite Industrial users must subscribe to the appropriate publications (alerts) from the list above, through either the **Mobile Alerts** form or the **Publication Subscribers** form.
- d Set up CloudSuite Industrial users with either a PersonID email address or a primary email address, or both. In the **Email Addresses** tab on the **Users** form, add a record to the grid where **Email Type Description** is set to **PersonID** and an email address is assigned. You can optionally set the **Primary Email Address** to another email address for the user.

See [Person IDs](#) on page 78.

2 Configure ION to process alerts from this application.

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

- a In ION Desk, select **Connect > Connection Points**.
- b Select the Infor Ming.le connection point and add Process.PulseAlert in the **Documents** tab (as Send from Application) if it does not exist.

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

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

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

In addition, the value in the Infor Ming.le/IFS **Person ID** field must match the **Workstation/Domain ID** field for the same user in CloudSuite Industrial, and the **User Name** field in Infor Ming.le must match either the PersonId email address or Primary email address for the same user in CloudSuite Industrial. This is handled automatically if you set up users first in Infor Ming.le/IFS and then use SecurityUserMaster BODs to populate the user records in CloudSuite Industrial, as described in [User and role BOD usage](#) on page 78.

Configuring workflows for tasks and notifications

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

- 1 Configure this application to send tasks and notifications.
- 2 Configure ION to process tasks and notifications from this application.
- 3 Configure Infor Ming.le to display tasks and notifications for this application.

Chapter 11: Configuring context apps and utility apps that are used with the ERP

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

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

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

Understanding business context messages

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

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

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

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

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

Process default settings that allow context messages to be sent

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

- **Send Context Message on Form Focus** enables sending of business context messages for forms. Default is 0 (not sent), but it is automatically set to 1 for CloudSuite Industrial through initialized data. When set to 1, the context message "screenId": "MGCore_Formname" is sent for all forms, where *Formname* is the form name, for example, "screenId": "MGCore_UsersMaint".
Note: This process default is set to 1 so that CloudSuite Industrial context apps work in Infor Ming.le.
- **Optional Context Message Form Prefix** replaces the MGCore default prefix on all forms with a specified prefix. For CloudSuite Industrial, the prefix is set to CSI_. So, for example, the Customers form is sent as CSI_Customers.

Supported business context messages

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

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

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

```
{
  "type": "inforBusinessContext",
  "data": {
    "screenId": "CSI_Customers",
    "entities": [
      {
        "entityType": "InforAccountingEntity",
        "id1": "DALS"
      },
      {
        "entityType": "InforShipToPartyMaster",
        "id1": "4851",
        "id2": "0",
        "accountingEntity": "DALS",
        "drillbackURL": "?LogicalId=lid://infor.sytelescope.dals&page=foronly&form=Customers (FILTER (CustNum%3D%27%20%20%20%202013%27%20AND%20CustSeq%3D0) SETVARVALUES (InitialCommand%3DRefresh))",
        "bodReference": {
          "noun": "BillToPartyMaster",
          "documentId": "4851",
          "accountingEntity": "DALS",
          "logicalId": "lid://infor.sytelescope.dals"
        },
        "entityType": "InforCustomerPartyMaster",
        "id1": "4851",
        "name": "Brand Central Dept Store",
        "accountingEntity": "DALS"
      }
    ]
  }
}
```

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

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

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

Context and utility apps that work with the ERP

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

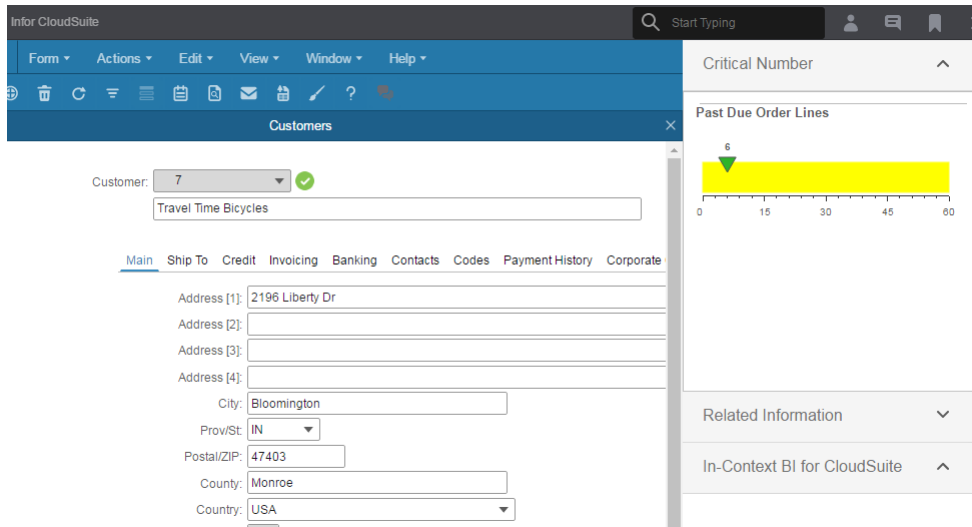
- Alerts
- Context Viewer
- Paparazzi
- Posts
- Tasks

These application-specific context apps are also available:

- Critical Number context app
Critical numbers are key performance indicators, or KPIs, that are specific to CloudSuite Industrial data and transactions. Users must be authorized to view critical numbers, which are associated with certain CloudSuite Industrial forms. See [Authorizing users to display critical numbers in widgets or the Critical Numbers app](#) on page 67.
- In-context BI for CloudSuite context app
Use this app to view business critical metrics and reports in an adjacent pane while certain forms are displayed. For example, when you are viewing a customer record on the **Customers** form, you can see metrics specific to that customer.
- Related Information
This app can display context-sensitive files that are stored in Infor Document Management but that are associated with specific CloudSuite records. You can set up workflows in CloudSuite Industrial to handle this. See [Activating the IDM workflows in the ERP](#) on page 33.

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

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



Enabling a context or utility app for the ERP

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

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

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

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

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

- 1 Enable the Critical Numbers context app as described in [Enabling a context or utility app for the ERP](#) on page 67
- 2 In CloudSuite Industrial, open the **Critical Number Users** form.
- 3 Select a user record.

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

How critical numbers are displayed in the Critical Numbers app

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

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

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

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

Chapter 12: Verifying Homepages for the ERP

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

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

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

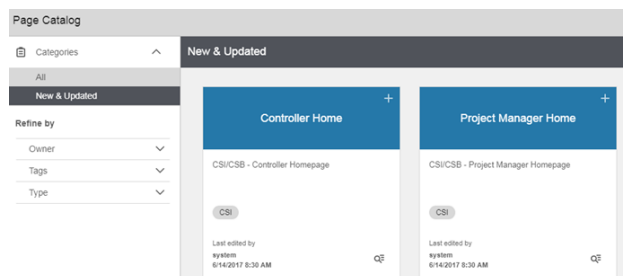
For general Homepages administration tasks, see the Infor Ming.le online help.

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

Verifying the homepage and widget content

- 1 Log into Infor Ming.le as a non-administrative user who has access to both Infor Ming.le and CloudSuite Industrial.
- 2 Open the Homepages application.
- 3 Add a Homepage:
 - a Click **Create New Page**.
 - b Specify a title and description for the page and click **Create**.
 - c Click the ellipsis (...) button and select **Page Catalog**.
 - d Select one of the predefined Homepages and click **Add Page**.

You must be authorized in CloudSuite Industrial to open that “home page” form.



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

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

- e Close the catalog to view your new Homepage.
- 4 Add a widget:
 - a Click the ellipsis (...) button and select **Widget Catalog**.
 - b Select **Categories > Application**.
 - c In the **Refine By** filter, select **Infor CloudSuite**. You should see the CloudSuite Industrial widget.
 - d Click **+** (Add Widget).
 - e Close the catalog to view your new widget.
 - f Configure the widget.
- 5 Add a critical numbers widget, and configure it. Ensure that you can view critical numbers that you are authorized to view in this widget.
You must be authorized in CloudSuite Industrial to view the critical numbers.
- 6 Drill down to CloudSuite Industrial forms from the appropriate widgets.

Modifying permissions for standard pages

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

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

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

- 1 Open the Homepages application.
- 2 Click the ellipses (...) button and select **Advanced > Administration**.
- 3 Click the **Standard Pages** link and select the home page you want to edit.
- 4 Select **Permissions > Edit Permissions**.

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

Chapter 13: Configuring and integrating other applications in the CloudSuite

You must configure some of the optional products in the CloudSuite to work with the components of Infor OS (which include ION, Infor Ming.le, Infor Document Management, and Infor Local.ly).

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

Integrating with Infor CPQ

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

During post-provisioning, the configuration parameters were set up in the **Inventory Parameters** form, some sample ruleset data was added to Design Studio, and sample content was added to the Infor CPQ Workbench app. See *Configuring CPQ*.

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

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

Integrating with Infor CRM

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

- 1 To install the Enterprise Connector and set up the CRM connection point for ION in the Cloud, see these guides:
 - *Infor CRM Back Office Extension Configuration Guide for Infor ION*
 - *Infor CRM Implementation Guide*
- 2 If Infor CRM is included in the CloudSuite, you, Infor Consulting, or the business partner configure the BODs and document flow during Post Provisioning. See these sections:
 - *Configuring BODs for the Infor CRM integration with Infor Ming.le*

- [Creating the CSI > CRM > CSI document flow](#) on page 25
- 3 To complete the integration between CRM and the ERP, see the *Infor CloudSuite Industrial Integration Guide for Infor CRM - Cloud Edition*.

Integrating with Infor EAM

- 1 If EAM is included in the CloudSuite, you, Infor Consulting, or the business partner must configure the BODs and document flow during Post Provisioning. See these sections:
 - [Configuring BODs for the Infor EAM connection point](#) on page 23
 - [Creating the CSI > EAM > CSI document flow](#) on page 28
- 2 To set up additional EAM configuration with Infor Ming.le and ION, see these guides:
 - *Infor EAM Configuration Guide for Infor Ming.le*: See the sections on loading EAM in-context BI content and importing EAM drillbacks. Other sections are mainly intended for the on-premises version.
 - *Infor EAM Configuration Guide for Infor ION*: See the sections on Configuring Databridge Partners, Configuring EAM, Sending the initial data load, and Infor EAM BOD dependencies. Other sections are mainly intended for the on-premises version.
- 3 To complete the integration between EAM and the ERP, see the *Infor CloudSuite Industrial Integration Guide for Infor EAM – Cloud Edition*.

Integrating with Infor Expense Management

- 1 If Infor Expense Management is included in the CloudSuite, you, Infor Consulting, or the business partner must configure the BODs and document flow during Post Provisioning. See these sections:
 - [Configuring BODs for the Infor Expense Management connection point](#) on page 24
 - [Creating the CSI > XM > CSI document flow](#) on page 29
- 2 To set up additional Infor XM configuration with Infor Ming.le and ION, see these guides:
 - *Infor Expense Management Configuration Guide for Infor ION*
 - *Infor Expense Management Configuration Guide for Infor Ming.le*
- 3 To complete the integration between Infor XM and the ERP, see the *Infor CloudSuite Industrial Integration Guide for Infor Expense Management – Cloud Edition*.

Integrating with Infor Factory Track

If Infor Factory Track is included in the CloudSuite, the Infor Ming.le connection and the point-to-point connection to CloudSuite Industrial are configured by the Infor Cloud team. That team also creates one administrative user for Factory Track in Infor Ming.le and Factory Track.

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

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

Integrating with Microsoft Office

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

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

Configuring add-in applications

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

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

Appendix A: Useful URLs

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

Standard URLs

Infor Ming.le Web:

`https://<Mingle_Prod_Domain>/<TenantID>`

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

Web Client:

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

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

Mobile Client:

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

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

IDO Web Service Connection:

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

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

ERP specific URLs

Click Once Client:

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

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

Production Tax Interface Web Service:

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

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

Development Tax Interface Web Service:

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

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

Credit Card Interface Web Service:

https://<ERP_Prod_Domain>/CreditCardIntegrationService/

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

Employee Self Service:

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

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

Online Service Mobile:

https://<CSI_Prod_Domain>/WSWebClientM/default.aspx?page=FormOnly¬itile=1&ConfigGroup=<TENANTID>&form=HomePage_Service.mobi

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

Factory Track standard URLs**Click Once Client:**

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

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

Light Client:

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

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

Shop Floor URL:

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

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

Warehouse Mobility URL:

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

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

Appendix B: User and role BOD usage

This appendix provides detailed information about how the security BODs are used between CloudSuite Industrial and Infor Ming.le.

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

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

When you create or edit an authorization group in CloudSuite Industrial, a Sync.SecurityRoleMaster BOD is generated. This BOD is defined at the tenant level. The information from this BOD is used in Infor Ming.le to automatically create a matching security role.

Note: Remember that CloudSuite Industrial is the system of record for roles/groups. It sends the Sync.SecurityRoleMaster BOD. You can create a security role in Infor Ming.le that does not exist in CloudSuite Industrial. If you assign that role to a user, then when the Sync.SecurityUserMaster BOD is sent to CloudSuite Industrial, CloudSuite Industrial will automatically create a group for that role. However, this method is not recommended, because no Sync.SecurityRoleMaster BOD is sent to subscribers such as the Infor Risk and Compliance application.

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

Person IDs

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

Person IDs in Infor Ming.le

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

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

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

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

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

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

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

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

When CloudSuite Industrial receives the BOD, these actions occur:

- For a new user that does not exist in CloudSuite Industrial:
 - A new user record is added.
 - The **Workstation Domain/ID** field is populated with a row pointer value that should not be changed.
 - The group authorizations for that user are added.
 - A primary email type description is added that contains the user's email address.
 - The user's First Name and Last Name values from Infor Ming.le are combined into the CloudSuite Industrial User Description field, separated by a space.
- For an existing user in CloudSuite Industrial, if the existing user ID has not changed:

- The existing user group authorizations are deleted.
- The user status, user descriptions, primary email address, and user group authorizations are updated.
- For an existing user in CloudSuite Industrial, if the existing user ID has changed:
 - The record for the user with the matching Workstation Login is set to a status of disabled, and the Workstation Login for the user is cleared.
 - The **Workstation Domain/ID** field is populated with a row pointer value that should not be changed.
 - A new user record is created, copying the user information from the disabled record. Any existing user group authorizations in CloudSuite Industrial are deleted, and then the groups from the BOD are added. The status, email, and description are updated if they have changed.
 - An Acknowledge SecurityUserMaster BOD is sent back to Infor Ming.le.

About the "Keep Groups in SecurityUserMaster" process default

You can set a process default in the **Process Defaults** form that determines how the groups assigned to a user should be treated in CloudSuite Industrial when synchronizing user records with Infor Ming.le:

- When set to 0 or left as null (the default), any groups that are assigned to the user in CloudSuite Industrial, but that are not referenced by (or known by) Infor Ming.le are automatically removed from the user record in CloudSuite Industrial during synchronization.
- When set to 1, the default behavior is overridden and the groups assigned to the user are left intact in CloudSuite Industrial. In this case, if you want to remove a group membership for a user in CloudSuite Industrial you must remove it manually on the **Users** form.

Note: This process default has no effect on the ability to *add* roles to users in Infor Ming.le, which end up as group memberships for that user in CloudSuite Industrial. It also has no effect on whether the role/group itself is deleted entirely from the application.

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

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

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

- Group authorizations

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

CloudSuite Portals users

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

See the portal administration guide for information about creating new portal users.

Appendix C: Troubleshooting

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

Data is not flowing properly

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

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

ION OneView can be found in the menu for ION Desk. You can perform these actions in ION OneView:

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

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

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

BOD information needs to be purged

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

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

ERP help is not working

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

Appendix D: Business events that generate outbound BODs

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

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

Business events that generate outbound BODs

Verb	Noun	User action to generate the BOD
Sync	CarrierRoute	Select the Physically Shipped check box on the Special tab of the Delivery Orders form.
Sync	ChartOfAccounts	Create or update an account record in the Chart of Accounts form. Statistical and allocation accounts are not included.
Acknowledge	CodeDefinition	Acknowledge the receipt of a CodeDefinition from an external application
Sync	CodeDefinition	<ul style="list-style-type: none"> * Add an Education Major * Add an External Expense Type * Add an Indirect Labor Code * Add an Inventory Adjustment Reason Code * Add or update an ISO U/M on the Unit of Measure Codes form * Add an Item Category * Add an Obsolete Slow Moving Reason Code * Add an Opportunity Source * Add an Opportunity Stage * Add a Payment Type * Add a Position * Add a Price Code * Add a Product Code * Add a Project Cost Code * Add a Province/State * Add a Shift ID on the Scheduling Shifts form * Add a Ship Via Code * Add a Skill * Add a Tax Code of type Exempt * Add a Tax Jurisdiction * Add a Territory * Add a Training Course * Add a unit code on the Unit Code 1 - 4 forms * Add a Work Code * Add a Work Experience <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>

Business events that generate outbound BODs

Verb	Noun	User action to generate the BOD
Process	ConstrainedResource	Insert or modify a Shift ID (creates a BOD for associated resources)
Acknowledge	ContactMaster	Acknowledge the receipt of a ContactMaster from an external application
Sync	ContactMaster	* Add or change a Contact * Create a Customer Sales Contact Cross-Reference
Sync	Contract	* Add or update Customer Order header * Add or update Customer Order Blanket Line
Sync	CreditTransfer	Create a Bank Reconciliations record for a vendor payment, employee payment, or customer payment
Sync	CurrencyExchangeRateMaster	Add or update a Currency Rate
Acknowledge	CustomerPartyMaster	Acknowledge the receipt of a CustomerPartyMaster from an external application
Sync	CustomerPartyMaster	* Change any information on the Customers form, Ship Tos form, or Customer Sales Contact Cross References form * Add a prospect on the Prospects form to send this BOD with a status of "Pending"
Sync	CustomerReturn	* Print the RMA Order Verification Report * Change the status of an RMA
Sync	DebitTransfer	Post a direct debit transaction from a customer on the A/R Direct Debit Posting form.
Acknowledge	ExpenseReport	Acknowledge the receipt of an expense report.
Sync	FinancialCalendar	* Change any information on the Accounting Periods form * Run the change Reports To Entity utility

Business events that generate outbound BODs

Verb	Noun	User action to generate the BOD
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>
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>
Acknowledge	ItemMaster	Acknowledge the receipt of a Process ItemMaster from an external application.
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	LCLTradeStatistics	<ul style="list-style-type: none"> * Print EU Sales List Report * Print SSD Transaction Listing Report
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)

Business events that generate outbound BODs

Verb	Noun	User action to generate the BOD
Sync	Opportunity	* Create or update a record on the Opportunities, Customer Orders, or Opportunity Tasks form
Sync	PayableTracker	* Post a voucher or an Adjustment through the A/P Voucher Posting form * Post a payment from any of these forms: A/P Check Printing/Posting, A/P Draft Printing/Posting, A/P EFT Posting, A/P Wire Posting
Sync	PayableTransaction	* Post a voucher through the A/P Voucher Posting form * Post a payment from any of these forms: A/P Check Printing/Posting, A/P Draft Printing/Posting, A/P EFT Posting, A/P Wire Posting * Set or release a Hold status on a voucher
Acknowledge	PayFromPartyMaster	Acknowledge the receipt of a PayFromPartyMaster from an external application
Sync	PayFromPartyMaster	* Change any information on the Customers form * Change any information on the Ship Tos form
Sync	Person	* Add or update information about a salesperson or sales manager on the Salespersons form * Update information related to a salesperson on the Employees form (for employee sales people) or Vendors form (for outside sales people)
Sync	Personnel	* Add or update information on these forms: Employee, Employee Skills, Employee Cert/License, Employee Education, Employee Training Courses, Employee Work Experience, or Employee Position
Acknowledge	PlanningSchedule	Acknowledge the receipt of a Planning Schedule from an external application.
Acknowledge	ProductionOrder	Acknowledge the receipt of a ProductionOrder from an external application

Verb	Noun	User action to generate the BOD
Sync	ProductionOrder	<p>* 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.</p> <p>* Change the status of a job or production schedule.</p> <p>* Change the Qty Released of a job or production schedule when the status is Released.</p> <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	ProjectMaster	Create a Project or change the project status.
Process	PulseAlert	One or more of these publications is triggered by a system event: CustomerCreditHoldAlert; CustomerInteractionFollowupAlert; CustomerOrderCreditHoldAlert; CustomerShipmentAlert; DCShopFloorTransactionErrorAlert; JobMaterialCostAlert; JobOperationHoursAlert; JobOverProductionAlert; JobProjectedLateForCustomerAlert; LateOrderShippingAlert; LeadAssignedAlert; LockedUserAlert; OpportunityDueAlert; OverBudgetAlert; ProjectedLateShipAlert; ProspectInteractionFollowupAlert; ScheduledMaintenanceAddedAlert; ScheduledMaintenanceAlert; TransactionAmountAlert
Sync	PurchaseOrder	<p>* Print the Purchase Order Report</p> <p>* Print a Change Order Report</p>
Acknowledge	Quote	<p>* Print the Purchase Order Report</p> <p>* Print the Builder Purchase Order Report</p> <p>* Change the Purchase Order status to Complete</p> <p>* Print a Change Order Report</p>
Sync	Quote	Acknowledge the receipt of a Quote from an external application.
Sync	ReceivableTracker	Change the Estimate status to Quoted

Verb	Noun	User action to generate the BOD
Sync	ReceivableTransaction	<ul style="list-style-type: none"> * Generate an invoice for customers with an 'Open Item' balance method. The status is set as Open. * Generate a debit memo/finance charge for customers with an 'Open Item' balance method. The status is set as Open. * Make a payment and apply it to an invoice for customers with an 'Open Items' balance method. The status changes to Paid. * Generate a credit memo and attach it to an invoice for customers with an 'Open Item' balance method. This changes the status to Paid. <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.)* 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	<ul style="list-style-type: none"> * Perform material transactions that add inventory tied to these types of orders: Project, Job, Customer Order (with a negative quantity), Purchase Order, RMA, Production Order or Transfer Order that cause a material transaction to occur * Run the Multi-Site Quantity Move utility
Sync	RemittanceAdvice	<ul style="list-style-type: none"> * 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	<ul style="list-style-type: none"> * Add or update Vendor information * Update the vendor's address information * Update Bank Address information
Acknowledge	Requisition	Acknowledge receipt of a Requisition from an external application

Business events that generate outbound BODs

Verb	Noun	User action to generate the BOD
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	<ul style="list-style-type: none"> * Print the Customer Order Verification Report * Change order header status to Completed
Sync	SecurityPermissionMaster	Add, delete or change the objects that a group or user can access.
Sync	SecurityRoleMaster	Add or delete a Group Authorization or change the group description.
Acknowledge	SecurityUserMaster	Acknowledge the receipt of a SecurityUserMaster from an external application.
Process	SecurityUserMaster	Add or change the user status, user description or workstation login.
Sync	ServiceOrder	Add or update Service Order or Service Order Operations or Lines.
Sync	ShipFromPartyMaster	<ul style="list-style-type: none"> * Add or update Vendor information * Update the vendor's address information * Update Bank Address information
Process	Shipment	<ul style="list-style-type: none"> * For customer orders or lines that are assigned to the local site and that are assigned to an external controlled warehouse, print the Order Verification Report. * For transfer orders or lines where the Ship From site is the local site and the Ship From warehouse is an external controlled warehouse, print the Transfer Order Report.
Sync	Shipment	<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

Business events that generate outbound BODs

Verb	Noun	User action to generate the BOD
Acknowledge	ShipmentSchedule	Acknowledge the receipt of a ShipmentSchedule from an external application
Acknowledge	ShipToPartyMaster	Acknowledge the receipt of a ShipToPartyMaster from an external application
Sync	ShipToPartyMaster	* Change any information on the Customers form, Ship Tos form, or Customer Sales Contact Cross References form
Sync	SourceSystemGLMovement	* Run the Change Reports To Entity utility * Run the Copy Balances to Budgets utility * Modify Chart of Accounts Budget and Plan information * Run the Rebalance Ledger Period Totals utility * Run Ledger Posting for Journals * Run the Mass Journal Posting utility
Sync	SourceSystemJournalEntry	* Post journal entries to a ledger
Sync	SupplierPartyMaster	* Add or update Vendor information * Update the vendor's address information * Update Bank Address information
Sync	Transfer	* Perform a Transfer Order Ship * Perform a Transfer Order Receive * Perform a Combined Transfer Order Ship/Receive
Sync	WorkCenter	Add a Work Center

Appendix E: Inbound BOD usage

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

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

Verb	Noun	Destination of processed data in CloudSuite Industrial
Process	Quote	Estimates form and related forms
Acknowledge	PulseAlert	N/A
Process	ReceivableTransaction	Updates Customer Posted Balance
Sync	ReceiveDelivery	If Type="Transfer" and Status="Received" create transfer order receipt. If Type="Purchase Order" and Status="Received" create PO receipt If Type="Customer Return" create RMA receipt If Type="Sales Order" create negative CO receipt.
Process	Requisition	preq table
Process	SalesOrder	Customer Orders form and related forms
Sync	SecurityUserMaster	coitem or trnitem table (depending on record type), last_external_shipment_doc_id
Acnowledge	Shipment	If Type="Transfer" and Status="Shipped" create Transfer Order Shipment If Type="Purchase Order" create Purchase Order Return If Type="Sales Order" and Status="Shipped" create Customer Order Shipment
Sync	Shipment	coitem or trnitem table (depending on record type), last_external_shipment_doc_id
Sync	ShipmentSchedule	coitem table (blanket items)
Process	ShipToPartyMaster	Customer Ship Tos form and related forms

Appendix F: BODs used in integrations with this application

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

Outbound BODs from the ERP to integrated applications

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

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

BODs used in integrations with this application

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

BODs used in integrations with this application

Verb	Noun	To applications
Acknowledge	PayFromPartyMaster	Infor Back Office Connect
Sync	PayFromPartyMaster	CRM Infor Back Office Connect
Sync	Person	CRM
Sync	Personnel	Expense Management
Sync	ProductionOrder	Expense Management
Sync	ProjectMaster	Expense Management
Process	PulseAlert	Infor Ming.le
Sync	PurchaseOrder	EAM SCE Warehouse Management
Sync	Quote	CRM Infor Back Office Connect
Sync	ReceivableTransaction	CRM Infor Back Office Connect
Sync	ReceiveDelivery	EAM
Sync	RemittanceAdvice	Expense Management
Acknowledge	Requisition	EAM
Sync	SalesOrder	CRM e-Commerce Infor Back Office Connect
Sync	SecurityRoleMaster	Infor Ming.le
Process	SecurityUserMaster	Infor Ming.le
Sync	ServiceOrder	Expense Management
Sync	ShipFromPartyMaster	SCE Warehouse Management
Process	Shipment	SCE Warehouse Management
Sync	Shipment	CRM e-Commerce Infor Back Office Connect

Verb	Noun	To applications
Sync	ShipToPartyMaster	CPQ/EQ CRM e-Commerce Infor Back Office Connect SCE Warehouse Management
Sync	SourceSystemGLMovement	d/EPM
Sync	SourceSystemJournalEntry	d/EPM
Sync	SupplierPartyMaster	EAM PLM Accelerate SCE Warehouse Management
Sync	WorkCenter	PLM Accelerate

Inbound BODs to the ERP from integrated applications

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

Verb	Noun	From applications
Load	BankStatement	Infor Local.ly
Process	BillOfMaterials	PLM Accelerate
Process	BillToPartyMaster	CRM Infor Back Office Connect
Sync	CaptureDocument	IDM
Process	CodeDefinition	Infor Back Office Connect
Process	ContactMaster	CRM Infor Back Office Connect
Process	CustomerPartyMaster	CRM Infor Back Office Connect
Sync	EmployeeTimesheet	Expense Management
Sync	ExpenseReport	Expense Management
Sync	InventoryAdjustment	SCE Warehouse Management

BODs used in integrations with this application

Verb	Noun	From applications
Sync	InventoryCount	SCE Warehouse Management
Process	ItemMaster	PLM Accelerate
Acknowledge	PulseAlert	Infor Ming.le
Process	Quote	CRM CPQ/EQ
Sync	ReceiveDelivery	SCE Warehouse Management
Process	Requisition	EAM
Process	SalesOrder	CPQ/EQ CRM e-Commerce
Sync	SecurityUserMaster	Infor Ming.le
Acknowledge	Shipment	SCE Warehouse Management
Sync	Shipment	SCE Warehouse Management
Process	ShipToPartyMaster	CPQ/EQ CRM Infor Back Office Connect