Infor SyteLine User Guide for Infor Operating Service Apps

Release 9.01.x

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Contents

About this guide

This guide describes the Infor SyteLine content that you can use in Infor Operating Service:

- In-Context BI metrics and reports
- SyteLine .Home forms that can be used as widgets
- Critical numbers that can be used as widgets or in the InContext KPI app
- Infor Document Management and Related Information context app worfklows

The guide assumes that SyteLine has already been configured with Infor Operating Service as described in the *Infor SyteLine Configuration Guide for Infor Operating Service*.

Intended audience

This guide is for users of SyteLine within Infor OS.

Related documents

You can find these documents in the product documentation section of the Infor Support Portal site:

- *Infor SyteLine Configuration Guide for Infor Operating Service*
- *Infor Ming.le User Guide*
- *ION Desk User Guide*

Contacting Infor

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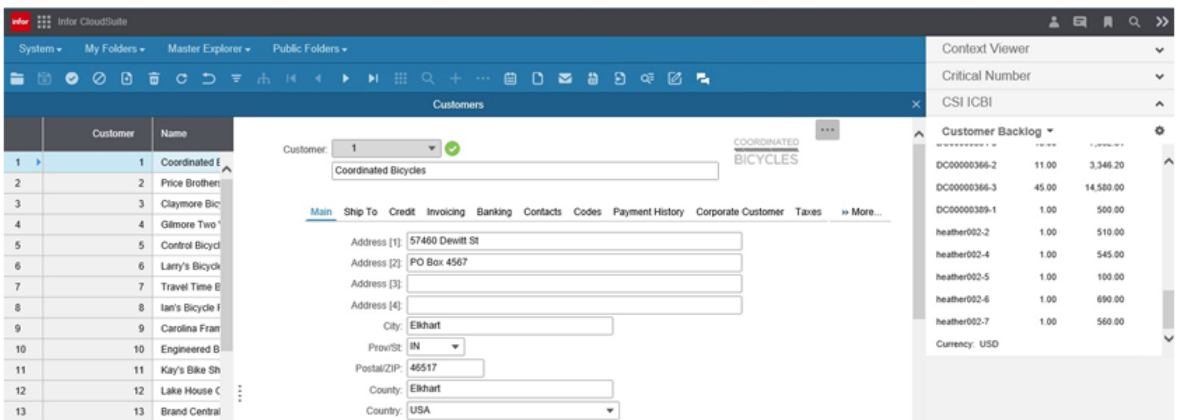
Chapter 1: Using In-Context BI metrics and reports

This section describes the use of In-Context BI metrics and reports. For information about SyteLine Analytics metrics and reports, see the *Infor SyteLine Analytics User Guide*.

When you run SyteLine in Infor OS, you can use the BI context application to view business-critical metrics and reports in an adjacent pane while certain SyteLine forms are displayed. For example, when you are viewing a customer record on the **Customers** form, you can see metrics specific to that customer, such as Invoices by Month, Margin Dollars per Period, Customer Backlog, On-Time Shipping Performance, and so on.



A description of each available metric and report is provided, along with information about how to enable or disable the metrics for each form.

Displaying metrics and reports from forms

Metrics and reports are displayed in the In-Context BI area if both of these are true:

- Metrics and reports have been defined for the currently displayed SyteLine form. If no metrics or reports are available for a form, the context application displays a message.

  See Metric and report descriptions on page 8 for information about the forms where metrics and reports are defined.
- Your system administrator has configured Infor OS to include In-Context BI for use with SyteLine.

You can disable and re-enable the metrics and reports for a particular form from the BI toolbar.

Using In-Context BI

This example shows the toolbar area of the context application:

The context application toolbar includes these options:

- Use the drop-down arrow to move to another in-context metric or report for this form.
- Click the gear icon to select **Turn auto update off**. Use this option to disconnect the context application if you do not want the information to refresh every time you move to a new record or form. Refreshing can affect the speed with which new records or forms are displayed.

For more information on using context applications, see the *Infor Ming.le User Guide*.

Metric and report descriptions

The metrics and reports that are available for each form are listed in alphabetical order by form.

Customer Orders Quick Entry

When this form is displayed, In-Context BI displays these metrics and reports:

Name	Description	For current
Accounts Receivable Aging	Grid that displays accounts receivable aging information. Includes the length of time the amounts have been outstanding. Categorizes receivables as current, 30 days, 60 days, 90 days, 120 days and over.	Customer (Ship To is always 0)
Actual Item Availability	Grid that displays site, warehouse and item availability. Item Availability is calculated as On Hand - Alloc Order - Alloc Prod - Alloc Transfer.	Item
Actual vs Planned Shipments	Column chart that displays the actual orders shipped vs. the planned orders shipped for the current date. Actual, shown in red, means the ship date is equal to the current date. Planned, shown in green, means the due date is equal to the current date.	Customer and Ship To
Booking PTD	Bar graph that shows the net price of what was booked for the current period and previous three periods.	Customer and Ship To

Name	Description	For current
Contacts	Grid that displays the contact name, phone and email for the Order contact, Sales contact, Bill To contact, and the Ship To contact for this order.	Customer and Ship To
Customer Backlog	Grid that displays all open orders, with a status of Ordered, that have not been shipped. For each open and item order line, the report displays the amount of the item to be shipped and the net price.	Customer, Ship To, and item
Invoices by Month	Bar graph that displays total invoice amounts by month for the last 12 months.	Customer
Item On Hand	Grid that shows the quantity on hand at all warehouses, broken out by location.	Item
On Time Shipments	Column chart that shows percent late vs. percent on time for the last four accounting periods, starting with the current period. The formula used to arrive at the Y-axis data is [number of lines with due date in the time period where line due date >= date shipped / number of lines with due date in time period]. Red indicates late; green indicates on time.	Customer and Ship To
Price Breaks	Grid that shows break quantity and price, set up on the **Customer Contract Prices** form.	Customer and item
Related Items	Grid that shows the item number and description for items that are related, as defined on the **Related Items** tab of the **Items** form.	Item
Sales History with Margin Dollars	Grid that shows what has been sold to the customer over the last year, taking into account discounts that were applied. For each order, the net price, cost and margin are displayed.	Customer and Ship To

Customer Orders

When this form is displayed, In-Context BI displays these metrics and reports:

Name	Description	For current
Booking PTD	Bar chart that shows the net price of what was booked for the current period and the previous three periods.	customer and Ship To

Customers

When this form is displayed, BI displays these metrics and reports:

Name	Description	For current
Accounts Receivable Aging	Grid that displays accounts receivable information. Includes the length of time the amounts have been outstanding. Categorizes receivables as current, 30 days, 60 days, 90 days, 120 days and over.	Bill To customer only
Actual vs Planned Shipments	Column chart that displays the actual orders shipped vs. the planned orders shipped for the current date. Actual, shown in red, means the ship date is equal to the current date. Planned, shown in green, means the due date is equal to the current date.	Bill To and all Ship To customers
Contacts	Grid that displays the contact name, phone and email for the Order contact, Sales contact, Bill To contact, and all Ship To contact	Bill To and all Ship To customers
Customer Backlog	Grid that displays all open orders, with a status of Ordered, that have not been shipped. For each open order line, the report displays the amount of the item to be shipped and the net price.	Bill To and all Ship To customers
Invoices by Month	Bar graph that displays total invoice amounts by month for the last 12 months.	Bill To customer only
On Time Shipments	Column chart that shows percent late vs. percent on time for the last four accounting periods, starting with the current period. The formula used to arrive at the Y-axis data is [number of lines with due date in the time period where line due date >= date shipped / number of lines with due date in time period]. Red indicates late; green indicates on time.	Bill To and all Ship To customers
Sales History with Margin Dollars	Grid that shows what has been sold to the customer over the last year, taking into account discounts that were applied. For each order, the net price, cost and margin are displayed.	Bill To and all Ship To customers

Items

When this form is displayed, In-Context BI displays these metrics and reports:

Name	Description	For current
Inventory Across Sites	Grid that shows, for each site and warehouse, the quantity available. The unit of measure is displayed below the grid. This value should match the Qty Available on the Item Availability form.	Item
Inventory Value by Warehouse	Grid that shows, for each warehouse, the value of the inventory, in domestic currency.	Item
Item on Hand	Grid that shows the quantity on hand at all warehouses, broken out by location.	Item
Manufactured YTD	Grid that shows the manufactured this year-to-date. Manufactured YTD is defined as Job Finish transactions for the calendar year.	Item
On Time Receipts	Pie chart that shows the purchase orders that were received on time.	Item
On Time Shipments	Column chart that shows percent late vs.percent on time for the last four accounting periods, starting with the current period. The formula used to arrive at the Y-axis data is [number of lines with due date in the time period where line due date >= date shipped / number of lines with due date in time period]. Red indicates late; green indicates on time.	Item
Purchased YTD	Grid that shows, by warehouse, how much of this item has been purchased this year to date. This value should match the Purchased YTD on the Item/Warehouse form.	Item
YTD Job Usage	Shows the quantity and unit of measure that has been issued to jobs for the calendar year to date.	Item
Safety Stock Quantity	Grid that shows the safety stock currently maintained at each warehouse. Safety stock protects you from stock outages that result from unexpected customer demand or vendor shipment delays.	Item
Sold YTD	Grid that shows, by warehouse, how much of this item has been sold this year to date. This value should match the Sold YTD on the Item/Warehouse form.	Item
Transferred In YTD	Grid that shows, by warehouse, how much of this item has been transferred into each warehouse this year to date. This value should match the Transferred In YTD on the Item/Warehouse form.	Item
Transferred Out YTD	Grid that shows, by warehouse, how much of this item has been transferred out of each warehouse this year to date. This value should match the Transferred Out YTD on the Item/Warehouse form.	Item

Job Orders

When this form is displayed, In-Context BI displays these metrics and reports:

Name	Description	For current
Labor – Planned vs. Actual	Column chart that shows planned vs. actual job labor costs, calculated in domestic currency.	Job number and suffix
Material – Planned vs. Actual	Column chart that shows planned vs. actual job material costs, calculated in domestic currency.	Job number and suffix
Operation Percent Complete	Grid that shows the operation and the percentage complete for that operation.	Job number and suffix
Planned vs. Actual Total Costs	Column chart that shows planned vs. actual total costs, calculated in domestic currency. Total cost equals labor + material costs only.	Job number and suffix

Purchase Orders Quick Entry

When this form is displayed, In-Context BI displays these metrics and reports:

Name	Description	For current
AP Aging	Grid that displays accounts payable information. Includes the length of time the amounts have been outstanding. Age is determined by invoice date or due date, depending upon the Aging Basis specified in the **A/P Parameters** form. Payables are categorized as current, 30 days, 60 days, 90 days, 120 days and over.	Vendor
Item on Hand	Grid that shows the quantity on hand at all warehouses, broken out by location.	Vendor and item
On Time Receipts	Pie chart that displays the purchase orders that were received on time.	Vendor
Past Due POs	Grid that displays, for each past due purchase order, the due date, purchase order/line/release, and extended costs.	Vendor
Period To Date Paid	Bar graph that shows the amount paid in the current accounting period plus the three previous accounting periods, if applicable. The distribution date of the payment is used to determine if it falls within a certain accounting period.	Vendor
PO Funds Committed	Grid that shows the vendor name and the committed amount for all purchase orders.	Vendor

Name	Description	For current
Price Breaks	Grid that shows break quantity and price, set up on the Vendor Contract Prices form. This uses the latest effective date that is earlier than the current date.	Vendor and item
Purchase Order History	Grid that shows the cost of your purchase orders for the last 12 months. It does not include POs with a status of Planned.	Vendor and item
Vendor Backlog	Grid that shows each open purchase order, the quantity ordered, and the extended price.	Vendor

Projects

When this form is displayed, In-Context BI displays these metrics and reports:

Name	Description	For current
Accumulated Cost	Stacked column chart that displays the cost to complete (top) and accumulated cost (bottom).	Project
Cost Analysis by Project	Pie chart that summarizes actual cost, forecast cost and planned cost for all project cost codes.	Project
Cost Code Analysis by Project	Grid that displays the cost code and the actual, forecast and budget cost for each cost code.	Project
Invoiced	Column chart that displays the amount invoiced, in domestic currency.	Project
Open vs. Completed Jobs	Bar chart that compares the number of open (red) jobs to the number of completed (green) jobs.	Project

Vendors

When this form is displayed, In-Context BI displays these metrics and reports:

Name	Description	For current
AP Aging	Grid that displays accounts payable information. Includes the length of time the amounts have been outstanding. Age is determined by invoice date or due date, depending upon the Aging Basis specified in the **A/P Parameters** form. Payables are categorized as current, 30 days, 60 days, 90 days, 120 days and over.	Vendor
On Time Receipts	Pie chart that displays the purchase orders that were received on time.	Vendor

Name	Description	For current
Past Due POs	Grid that displays, for each past due purchase order, the due date, purchase order/line/release, and extended costs.	Vendor
Period to Date Paid	Bar graph that shows the amount paid in the current accounting period plus the three previous accounting periods, if applicable. The distribution date of the payment is used to determine if it falls within a certain accounting period.	Vendor
PO Funds Committed	Grid that shows the vendor name and the committed amount for all purchase orders.	Vendor
Purchase Order History	Grid that shows the cost of your purchase orders for the last 12 months. It does not include POs with a status of Planned.	Vendor and item
Vendor Backlog	Grid that shows each open purchase order, the quantity ordered, and the extended price.	Vendor

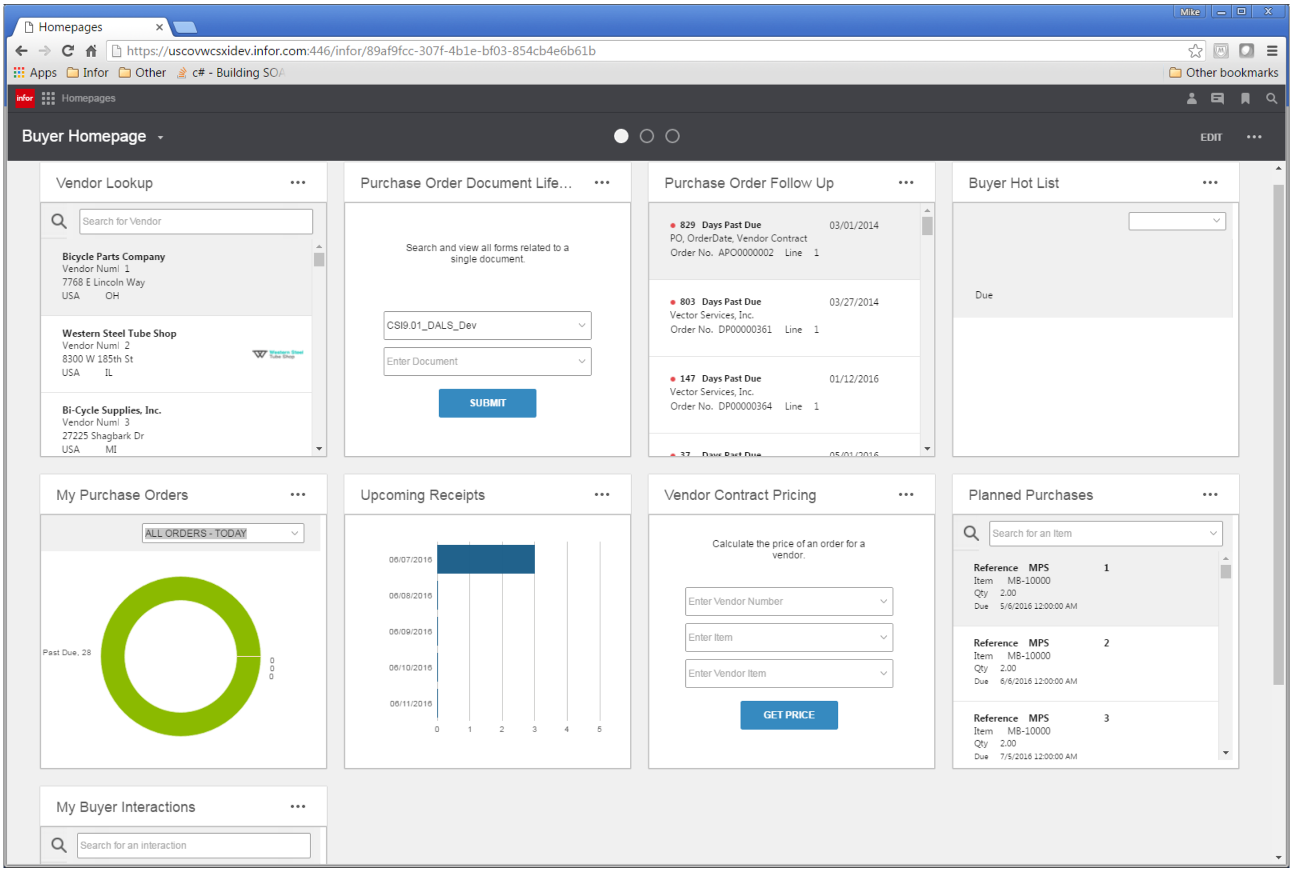
Chapter 2: Using widgets on homepages

SyteLine forms with a .home extension are intended for use with the "CloudSuite Industrial" widget. in Infor OS and are tailored to these roles:

- Controller
- Customer Service
- Executive
- Inventory Control
- Production Planner
- Project Manager
- Purchasing
- Salesperson

SyteLine provides a predefined homepage in Infor OS for each of these roles. The predefined homepages already contain widgets with metrics and KPIs that are appropriate for that role.

For example, this is the Purchasing homepage:



You can also create your own homepages in Infor OS and add multiple instances of the "CloudSuite Industrial" widget. You can then configure each instance of the widget to display a different SyteLine .home form. For example, on your custom homepage in Infor OS, you can add widgets to display dashboard information such as Vendor Lookup, PO Requisition Line by Status, Item Availability, and My Inbox.

Some of the widgets provide drillback to a specific SyteLine form for details.

Adding homepages from the page catalog

Preconfigured SyteLine-specific homepages are available in the catalog as soon as the SyteLine application is added into Infor Ming.le.

To add a preconfigured Homepage to your Infor Ming.le environment:

1. From the Infor OS app menu, select **Homepages**.
2. Add one homepage to use as a default, if one does not already exist.

   Note: This default Homepage, which is displayed initially when you log into Infor Ming.le, should not contain any SyteLine widgets, because the SyteLine application must be started before the widgets are displayed.

3 Open the SyteLine application in Infor Ming.le.
4 Open the Homepages app again.
5 Click the ellipses (**…**) and select **Page Catalog**. Select one of the preconfigured homepages.
6 Select one of the predefined SyteLine Homepages, such as **Controller Home** or **Project Manager Home** and click **+**.

You must be authorized in SyteLine to open that “home page” form. These are the default authorization groups/roles associated with each home page:

Homepage name	Security role/group
Controller Home	Mobile Controller
Customer Service Home	Order Entry, Service
Executive Home	Mobile Executive
Inventory Control Home	Inventory
Production Home	Shop Floor Control
Project Manager Home	Projects
Purchasing Home	Purchasing
Quality Control Home	QA Process (QC widgets have different security settings - see each widget description)
Salesperson/Sales Manager Home	Order Entry
System Administration Home	System Administration

7 Close the catalog to view your new Homepage. Verify that the widgets display as expected.
8 If the widgets on the homepage do not display data, log out of SyteLine and Infor Ming.le and close the browser.
9 Log into Infor Ming.le and open the SyteLine app again.
10 Open your second homepage and verify that the widgets are shown as expected.

Note: The homepages use the theme that you set in the SyteLine user preferences page.

Adding widgets to homepages

Note: SyteLine-specific predefined homepages and widgets are available in the catalog as soon as the SyteLine application is added into Infor Ming.le.

The predefined homepages already include all of the widgets related to each role. However, you can also add SyteLine-specific widgets to customize your own homepages:

1 From the Infor Ming.le app menu, select **Homepages**.
2 Add one generic homepage to use as a default, if one does not already exist.

Note: This default homepage, which is displayed initially when you log into Infor Ming.le, should not contain any "CloudSuite Industrial" widgets, because the SyteLine application must be started before the widgets are displayed.

3. Open the SyteLine application in Infor Ming.le.
4. Add another homepage to hold your "CloudSuite Industrial" widgets.
5. On the homepage, click **Edit**.
6. Add a widget.
7. Click **Application**.
8. Next to the "CloudSuite Industrial" widget, click **Add** several times to add multiple instances of the widget. Each instance of the widget can be used to display a different SyteLine .home form.

   Alternatively, you can select the predefined widgets. See Available home forms and widgets on page 19 for information about each preconfigured widget.
9. Close the dialog box.
10. Click **Save**. Initially the widget displays a login page. Do not enter login information here.
11. Click **Configure Widget** to configure each widget. This step is not needed for predefined widgets.
    a. Click **…** in the widget and select **Configure**.
    b. Select the .home form to display in the widget.

       Note: You must have the appropriate authorization in SyteLine to access the .home form in order to display it in the widget.
    c. Click **Save**.The widget shows a login page.
12. If the widget does not show any data, follow these steps:
    a. Log out of SyteLine and Infor Ming.le and close the browser.
    b. Log into Infor Ming.le and open the SyteLine app again.
    c. Open your second homepage and verify that the widgets are shown as expected.

       You might still see the login page instead of the .home page inside the widget. If so, select your configuration and click **Workstation Login**. The widget should then display the correct .home page.

    Note: The homepage widgets use the theme that you set in the SyteLine user preferences page.

Using drillbacks in homepage widgets

If the widget includes a drillback, click in a record tile to drill back to the ERP form with that record selected.

For example, in the **Customer/Prospects Lookup** widget, click in the tile for customer 124 to open the **Customers** form filtered on customer 124.

Available home forms and widgets

This section lists and describes the .home forms that you can display as widgets on Infor OS Homepages. They are listed by role.

Note: You must have authorization to access a form in order to add it through a "CloudSuite Industrial" widget or to drill down to it from the widget.

The data in each widget is only for the current site.

Buyer homepage

Widget/.home form	Description	Drillback
Buyer Hot List	View items where on-hand inventory cannot cover the demand as of today's date.	Detail record for the selected item
My Buyer Interactions	View vendor interaction details that you entered. Search on contact, vendor or date.	**Vendor Interactions**
My Purchase Orders	Graph the receiving status of purchase orders: in process, received, or past due. You can choose to show all orders or only your orders, and filter by due date.	
Planned Purchases	Search for and view your planned purchases: requisitions, PLNs, and MPS orders.	
Purchase Order Document Lifecycle	Select a document type and search for a document.	**Submit** button opens **Purchase Order Document Lifecycle**
Purchase Order Follow Up	View POs that are past due.	**Purchase Order Lines**
Upcoming Receipts	View the number of PO lines that are due today and for the next four days.	
Vendor Contract Pricing	View the contract pricing for a specific vendor, item, and vendor item. Click **Get Price** to show the contract break quantities and unit prices.	
Vendor Lookup	Search for and select a vendor.	**Vendor 360**

Controller homepage

Widget/.home form	Description	Drillback
Cash Impact	Graph the cash impact amounts for the previous, current and next three periods.	
Cash Received	View the total cash amount received this period, as well as daily amounts.	
Controller Today's Key Values	View the booked, shipped, and invoiced amounts for today.	
Customer Analysis	Select a customer and view their aging data and Credit Hold status.	**A/R Posted Transactions Summary**
Days Outstanding	Graph the Days Sales Outstanding and Days Payable Outstanding for this period.	
G/L Account Lookup	Specify an account number to look up information about the account, including the beginning and ending balance, period credit and debit, budget and plan amounts.	
Inventory Value	Graph the inventory value for the current period and the previous 3 periods.	
PO Funds Committed	View the purchase order funds that are committed to vendors as of today.	
Remaining Shipment Value for Period	Graph the value of shipments that are remaining for this period.	
Vendor Analysis	Select a vendor and view their aging data and Payment Hold status.	**A/P Posted Transactions Summary**

Customer Service homepage

Widget/.home form	Description	Drillback
Customer Lookup	Search for and select a customer.	**Customer 360**
Customer Order Document Lifecycle	Select a document type and search for a document.	**Submit** button opens **Customer Order Document Lifecycle**
Customer Order Follow Up	View orders that are past due.	**Customer Order Lines**

Widget/.home form	Description	Drillback
Hot List	View items where on-hand inventory cannot cover the demand as of today's date.	Detail record for the selected item
Item Availability	View the warehouse quantities available for a specified item, site group and warehouse.	
Jobs Sourcing My COs	Graph the status of job orders that are sourcing customer orders: in process, stopped, or past due. You can choose to show all orders or only your orders, and filter for jobs where the start or end date is today, this week, or this month.	
My Customer Interactions	View customer interaction details that you entered. Search on contact, vendor or date.	**Customer Interactions**
My Customer Orders	Graph the shipping status of customer orders: in process, complete, shipped, or past due. You can choose to show all orders or only orders taken by you, and filter by due date.	
POs Sourcing my COs	Graph the status of purchase orders that are sourcing customer orders: in process, received, or past due. You can choose to show all orders or only your orders, and filter for POs where the due date is today, this week, or this month.	
Pricing	View the contract pricing for a specific customer, item, and customer item. Click **Get Price** to show the contract break quantities and unit prices.	
Upcoming Shipments	Show the number of CO lines that are due today and for the next four days.	

Executive homepage

Widget/.home form	Description	Drillback
Cash Received	View the total cash amount received this period, as well as daily amounts.	
Days Outstanding	Graph the Days Sales Outstanding and Days Payable Outstanding for this period.	

Widget/.home form	Description	Drillback
Inventory Value	Graph the inventory value for the current period and the previous three periods.	
On Time Shipments	Graph the percentage of shipments that were on time for the current period and the last three periods.	
Opportunity Close	Graph the opportunity win vs. loss percentage, as well as the value of the won vs. lost opportunities.	
Order Bookings Today	Graph the price and margin amounts for orders that were booked today.	
Pipeline Value	Graph the current value of the sales pipeline by stage.	
PO Funds Committed	View the purchase order funds that are committed to vendors as of today.	

Inventory Control homepage

Widget/.home form	Description	Drillback
Expiring Lots/Serials	View the count and value of lot and serial numbers that are expiring. You can filter by expiration date.	Click on the Lots area or the Serials area to drill down to the **Lots** form or the Serials form.
Hot List	View items where on-hand inventory cannot cover the demand as of today's date.	Detail record for the selected item
Inventory Follow Up	View items that are below safety stock or quarantined.	**Items**
Inventory Value	Graph the inventory value for the current period and the previous three periods.	
Item Exceptions	View items with MRP or APS exception messages.	
Item Lookup	Search for and select an item.	**Item 360**
Receipts	Graph the receiving status of purchase orders: in process, received, or past due. You can filter by due date.	

Widget/.home form	Description	Drillback
Shipments	Graph the shipping status of customer orders: in process, shipped, past due, or hold. You can filter by due date.	

Production Planner homepage

Widget/.home form	Description	Drillback
Hot List	View items where on-hand inventory cannot cover the demand as of today's date.	Detail record for the selected item
Item Exceptions	View items with MRP or APS exception messages.	
Job Orders	Graph the completed status of job orders: in process, complete, stopped or past due. You can filter by the job start or end date.	
Planned Production	Search for and view a list of purchased items with requisitions, PLNs and MPS orders.	
Production Follow Up	View jobs that are past due or due today.	**Job Orders**
Resource Group Utilization	View the resource group utilization for resources that are being used today.	**Resource Group Load Profile**
Top WIP Value Job Orders	Graph the five open job orders with the highest WIP value.	
Upcoming Starting Jobs	Graph the number of job orders that are starting today or the next four days.	
Upcoming Ending Jobs	Graph the number of job orders with an end date of today or the next four days.	

Project Manager homepage

Widget/.home form	Description	Drillback
Jobs Sourcing My Projects	Graph the status of job orders that are sourcing projects: in process, complete, past due or stopped. You can choose to show all projects or only projects where you are the project manager. You can filter for jobs where the start or end date is today, this week, or this month.	
My Project Shipments	Graph the shipping status of project resources that are tied to customer orders: shipped, in process, hold, or past due. You can choose to show all projects or only projects where you are the project manager, and you can filter by due date.	
My Project Variances	View the counts of project variances (budgeted costs / actual costs) for active projects. Projects can be In Control (within the acceptable range), or have a Schedule Variance or Cost Variance. If the variance exceeds the lower deviation, the yellow symbol is displayed. If the variance exceeds the higher deviation, a red symbol is displayed.	**Projects**
Past Due Milestones	View the past due invoice and revenue milestone amounts.	**Invoice Milestones**
POs Sourcing My Projects	Graph the receiving status of POs that are sourcing projects: in process, received, or past due. You can choose to show all projects or only projects where you are the project manager. You can filter for jobs where the start or end date is today, this week, or this month.	
Project Follow Up	View projects and project tasks that are past due, and estimates that are either expired or will expire in the next seven days. You can choose to show all projects or only projects where you are the project manager.	**Projects**
Project Hot List	View items where on-hand inventory cannot cover the demand prior to today's date, and the item is tied to a project resource.	Detail record for the selected item

Widget/.home form	Description	Drillback
Project Item Exceptions	View items with MRP or APS exception message that are tied to project resources. You can choose to show all projects or only projects where you are the project manager.	
Project Period Costs	Graph actual vs. planned costs for the current period.	

Salesperson homepage

When you add this homepage, all of the widgets listed in this section are displayed by default. You can delete widgets that you do not want. For sales managers, widgets on this page include data for all salespersons who report to you.

.Home form	Description	Drillback
Contact Lookup	Search for and select a contact.	**Sales Contacts**
Customer Lookup	Search for and select a customer.	**Customer 360**
Prospect Lookup	Search for and select a prospect.	**Prospects**
My Salesperson Customer Orders	Graph the shipping status of your customers' orders: in process, shipped, past due, or hold. You can filter orders by due date.	
My Salesperson Interactions	View sales contact interaction details that you entered. Search on contact, date, or the customer or prospect.	Customer, Prospect, or Sales Contact Interactions
Salesperson Follow Up	View opportunities and opportunity tasks that are past due, and estimates that either have expired or will expire in the next 7 days.	**Opportunities**, **Opportunity Tasks**, or **Estimates**
Salesperson Opportunity Close	Graph your opportunity vs. loss percentage and values. If you are a sales manager, this information is the total for all salespersons for whom you are the manager.	
Salesperson Pipeline Values	Graph the current value of your sales pipeline, or of all salespersons for whom you are the manager.	
Salesperson Today's Key Values	View your commission due amount for today, and the amount that you have booked this period.	

Other available forms for widgets

You can add these forms in a widget on any Homepage; they are not restricted by role.

My Inbox widget

The **My Inbox** .home form is not included in any of the predefined Home pages, but you can add it to any home page, using the **CloudSuite Industrial - Form** widget.

This widget shows your SyteLine inbox. You can search for and view messages that contain specified text. Click on any displayed message to drill back to the **Inbox** form in SyteLine.

Critical Numbers

You can use the "CloudSuite Industrial - Critical Numbers" widget to display SyteLine critical numbers in Infor OS Homepages. See Using critical numbers as KPIs or widgets on page 27.

If applicable, you can click on the critical number graph to drill down to a form in SyteLine.

CloudSuite Industrial – Form widget

The "CloudSuite Industrial – Form" widget is also available. You can use it to display other SyteLine forms. Forms that are intended for use in widgets end in ".home". Other types of forms can be displayed in widgets; however, they might not work correctly or look good.

When you add and configure instances of this widget, specify the name of the form to show in the widget. Specify the camel-case form name, for example, **`SalespersonFollowUp.home`**, not the form caption, for example, **Salesperson Followup**.

Troubleshooting

Use this section to troubleshoot issues with widgets.

Widget name does not display on Homepage

Sometimes the widget continues to display the generic name even after you configure it. This is usually a problem with the browser cache. If you reload the page, the widget name should change to the correct name.

Chapter 3: Using critical numbers as KPIs or widgets

SyteLine includes more than 100 predefined critical numbers. You can also create your own critical numbers, if you have the appropriate authorizations.

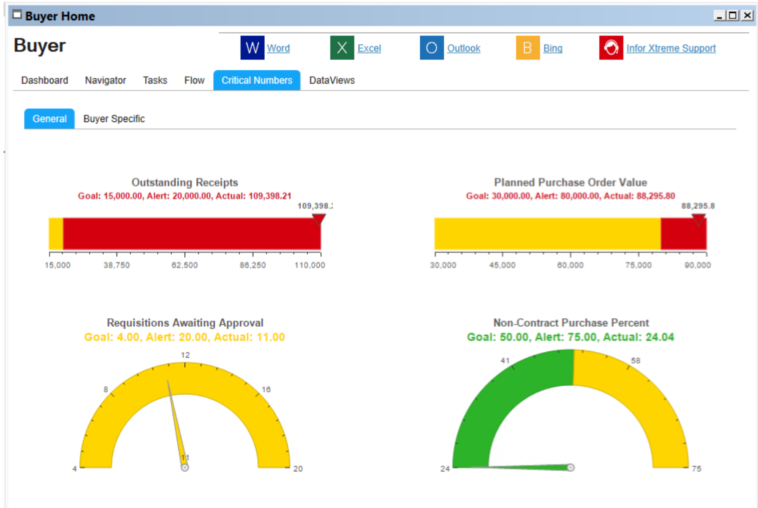
You can add critical numbers in any of these areas:

- As widgets on Homepages in Infor OS. See Adding widgets to display critical numbers in Homepages on page 30 .
- As context-sensitive widgets that are displayed when you open the SyteLine app, or when you open specific SyteLine forms in Infor OS. See Adding critical numbers to the Critical Number app on page 29.
- As widgets on your **Start** form in SyteLine. This is described in the online help.
- On any form in SyteLine. To add a critical number as a component on a form, you must have appropriate authorizations to access the form and design mode editing permission to add the component. The SyteLine Home forms, such as **Customer Service Home** and **Inventory Control Home**, include some examples of critical numbers. This is described in the online help.

About critical numbers

Critical numbers are key performance indicators, or KPIs, that you can use to get a quick view of important statistics or track progress.

For example, the **Buyer Home** form in SyteLine, as shown in this example:



Critical numbers are based on stored procedure calculations or on IDO calculations. For example, you can quickly generate numbers based on this information:

- The sum, count, average, minimum or maximum of a value
- The Group By and Date Range properties
- Comparisons with other properties on the form

You can see the details behind the critical number using an "enhanced drilldown" and do further analysis on issues that you discover.

Critical number definitions

If you want to define new critical numbers, use the **Critical Numbers Setup** form.

On that form, use this basic process:

- Specify a source for the data that is to be used.
- Define how the critical number's value is to be calculated.
- Determine whether you want to use goal and alert settings, and if so, how.
- Optionally, specify what drilldowns are to be used when the user seeks more information about how the critical number was calculated and what it means.
- Determine what groups and users will have access to the critical number data, using critical number categories and individual user assignments.

  Viewing a critical number is controlled by the permissions set for the specific number. User or group permissions can be set for a category of critical numbers on the **Critical Number Categories** form, or user permissions can be set for a specific number on the **Critical Numbers Setup** form.
- Define critical number parameters and how they will be used in critical number calculations and displays.
- Determine and set up filters to be used in retrieving critical number data.

For more information, see the online help.

Goal and alert status

Critical numbers are color-coded to show their goal and alert status: red for alert or critical range, yellow for warnings, green for normal, and gray for informational values.

Viewing critical numbers

Your ability to view a critical number, in either SyteLine or Infor OS applications, is controlled by the authorizations that are set for that critical number. Authorizations for a specific critical number are set on the **Critical Numbers Setup** form. Authorizations for a category of critical numbers are set on the **Critical Number Categories** form.

Adding critical numbers to the Critical Number app

You can select the predefined critical numbers that you want to display in either of these cases:

- In the Critical Number app pane when you open the SyteLine application within Infor OS
- In the Critical Number app pane when you open a specific form in the SyteLine application within Infor OS

The categories and the critical numbers in each category are predefined.

1. Open the **User Critical Number Selection** form in SyteLine.
2. Select the category from which you want to select a critical number.

   Note: You must have the appropriate authorizations set on the **Critical Number Users** form to see and select critical numbers on the **User Critical Number Selection** form. Check with your system administrator.

   If you select critical numbers in the **General** category, these critical numbers are shown in the In-Context KPI app pane when you open the application.

   If you select any category other than **General**, the **Effective Forms** tab lists the SyteLine forms that are associated with the category. When you select critical numbers from that category, the critical numbers are shown in the Critical Number app pane when you open any of those forms in Infor OS.

   Note: There is no relationship between these predefined categories and the categories you can define on the **Critical Number Categories** form.

3. Select the check box for each critical number that you want to view in Infor OS.

   The selections that you make on this form are unique to you. Another SyteLine user can select different critical numbers to be displayed.

4. Save your changes.
5. Log out of SyteLine. If you are in Infor OS, log out and close your browser.
6. Log into SyteLine through Infor OS.

7 Verify that the critical numbers are shown in the Critical Number app when you open the appropriate forms. For example, if you selected a critical number in the Customers category, open the **Customers** form and select a customer record. The critical number should be displayed.

   Note: To display more than one critical number at a time, the system administrator must add multiple instances of the Critical Number app. Each critical number is displayed in a separate instance.

8 If you plan to show critical numbers on your Homepages in Infor OS, continue with the steps in Adding widgets to display critical numbers in Homepages on page 30.

Adding widgets to display critical numbers in Homepages

You can select the CloudSuite Industrial-Critical Numbers widget from the widget catalog and add multiple instances of the widget to your Homepages.

To add the widget and select a .home form:

1 From the Infor Ming.le app menu, select **Homepages**.

2 Add one homepage to use as a default, if one does not already exist.

   Note: This default homepage, which displays initially when you log into Infor Ming.le, should not contain any critical numbers widgets, because the Infor OS application must be started before the widgets are displayed.

3 Open the Infor OS application in Infor Ming.le.

4 Add another homepage to hold the critical numbers widgets.

5 On the homepage, click **Edit**.

6 Click **Add Widget**.

7 Click **Application**.

8 Next to the **CloudSuite Industrial - Critical Numbers** widget, click **Add** several times to add multiple instances of the widget.

9 Close the dialog box.

10 Click **Save** to save your homepage changes.

   All of your added widgets are set to Past Due Order lines by default. Initially they show a login page. Do not enter login information here.

11 Configure each widget:

   a Click **…** in the widget and select **Configure**.

   b Select the critical number to display in the widget.

      All critical numbers that are listed in the SyteLine **User Critical Number Selection** form are available in this widget.

      You must have the appropriate authorization in SyteLine to access the critical number in order to display it in the widget.

   c Click **Save**.

You might see an error message or a login page when the widget is refreshed. This should correct itself after you complete these steps.

12 Log out of SyteLine and Infor Ming.le and close the browser.

13 Restart Infor Ming.le and log in to SyteLine again.

14 Open the second homepage and verify that the widgets are shown as expected.

Chapter 4: Using Document Management and the Related Information context app with the ERP

Infor Document Management (IDM) is an enterprise document management application that is integrated, within the Infor OS portal, with SyteLine. IDM is a central repository where you can view, edit, create, and store the physical files.

The information in this section assumes that your system administrator has performed the initial configuration steps for using IDM with SyteLine.

Automatic document capture and tagging through workflows

Some documents are automatically captured in IDM when you generate them in SyteLine. Key metadata is stored with the document in IDM, which allows for automatic categorization and retrieval of the document based on its metadata. For example, a purchase order PDF file is tagged with theSyteLine vendor number and purchase order number for easy access.

Document capture and metadata tagging is currently available for these documents, which are generated in SyteLine through predefined document workflows:

Form where document is generated	Document type in IDM
A/R Invoice Credit Debit Memo Report	CS_SalesInvoice
Change Order Report	CS_PurchaseOrder
Consolidated Invoicing	CS_SalesInvoice
Order Invoicing/Credit Memo	CS_SalesInvoice
Post Project Invoice Milestones	CS_SalesInvoice
Purchase Order Report	CS_PurchaseOrder
Reprint Project Invoices Report	CS_SalesInvoice
Service Order Invoicing	CS_ServiceInvoice

If one of these documents cannot be stored in IDM, the user who generated the document receives an email with the document file attached. You can then manually upload the document through the

Related Information widget and manually associate the appropriate document type and attributes with the file.

Manually adding ERP-related files in IDM

You can manually insert files into IDM, and define the attribute metadata to be stored with the file.

1. In Infor OS, open the Document Management app.
2. Click **New Document**.
3. Select the document type that you want to use to classify the document, for example `CS_PurchaseOrder` or `CS_SalesInvoice`. If the new document does not belong to any of the defined types, select `Document`.
4. Click **Create** and follow the prompts to upload the attachment file.
5. In the **Attributes** tab, specify the metadata attributes that you want to link to this document.

   The attributes that you can specify depend on the document type. For example, a sales invoice document type allows you to specify attributes such as the **Customer Number**, **Customer Order Number**, and **Invoice Number** for this sales invoice. This information links the document to a specific customer record on the **Customers** form, to a specific order on the **Customer Orders** form, and so on.

   Note: You must specify the values as they are defined in SyteLine. For example, include the appropriate leading spaces for customer, vendor, customer order, and purchase order numbers, which are defined as in SyteLine as NUMSORTCHAR.

   If you selected the generic `Document` type, the attributes you can specify are not tied to a specific record on any form.
6. Save your changes.

Viewing ERP documents in Document Management

Depending on how the documents were loaded into the IDMapplication, the attributes you can use to find the documents will vary.

1. In Infor OS, open the IDM app.
2. In the Search area, select a document type, for example `CS_SalesInvoice`.
3. To filter for a specific document, select an attribute, operator and value that is related to the document type. For example, if the document type is `CS_SalesInvoice`, you could specify **Customer Number like %5984%** to view all of the sales invoices for customer 5984 that are stored in IDM.

   Some values defined in SyteLine can have leading spaces, so always use the “like” operator for comparison and the wildcard character % to represent any number of leading or following spaces.

Also remember that the attributes that are available to filter for a document depend on how and where the document was inserted. See Example: tagging and searching with attributes on page 37.

4 Click **Search**.

All documents that match the search criteria are shown in preview mode.

Using the Related Information context app

If the Related Information context app is enabled for use with SyteLine, then the context app is displayed next to the SyteLine application in Infor Ming.le. You can use this context app to view documents from IDM that are related to the current form and record in SyteLine. You can also manually add documents related to the currently displayed form and record into the Related Information context app.

Understanding context messages and context entities

Each time that you view a new record on a SyteLine form, a business context message is sent to the Related Information context app. This message includes one or more context entities. For example, the message could include the context entity InforCustomerPartyMaster for a customer record, along with parameters that are associated with the current record such as the customer ID, customer name, and accounting entity ID.

Infor Document Management receives the message and finds any files in its database that are associated with that context entity and those parameters (attributes). The files are then listed in the Related Information context app.

For example, if you open the **Customers** form and select customer 5984, Mike's Bikes, any pictures or documents that are associated in Infor Document Management with the context entity type InforCustomerPartyMaster and ID 5984 are listed in the Related Information context app. You can open and view the documents from the context app.

If you open the **Customer Orders** form and view orders for the customer Mike's Bikes, the same associated files are listed in the Related Information context app, because the context message that is sent from the **Customer Orders** form contains the context entity InforCustomerPartyMaster with customer number 5984 as a parameter.

Keyword metadata is tied to each document file. You can search and filter the context-sensitive documents in the context app based on the metadata. For example, if there are 10 documents associated with Mike's Bikes in the **Customers** form, you can filter only for documents of type CS_CustomerInvoice.

Viewing automatically tagged document files

Use the Document Information widget with the forms in this table to view document attachments that are tied to the current record in the form, where the files were captured and tagged through SyteLine workflows.

If there are multiple documents for a record, you can filter using the attributes listed in the table to find the correct document. Remember that the attributes that are available to filter for a document depend on how and where the document was inserted. See Example: tagging and searching with attributes on page 37.

Form where document attachment is available through Document Information widget	Entity name (Document type)	Additional attributes for filtering and searching on this form
A/P Posted Transactions Detail	InforSalesInvoice (CS_SalesInvoice)	CustNum,CoNum,InvNum
A/P Vouchers and Adjustments	InforSalesInvoice (CS_SalesInvoice)	CustNum,CoNum,InvNum
A/R Posted Transactions Detail	InforSalesInvoice (CS_SalesInvoice)	CustNum,CoNum,InvNum
A/R Posted Transactions Summary	InforSalesInvoice (CS_SalesInvoice)	CustNum,CoNum
Commissions Due	InforSalesInvoice (CS_SalesInvoice)	CustNum,CoNum,InvNum
Customer 360	InforSalesInvoice (CS_SalesInvoice)	CustNum
Customer Orders	InforSalesInvoice (CS_SalesInvoice)	CustNum,CoNum
Customers	InforSalesInvoice (CS_SalesInvoice)	CustNum
Customer Orders Quick Entry	InforSalesInvoice (CS_SalesInvoice)	CustNum,CoNum
Invoice Listing	InforSalesInvoice (CS_SalesInvoice)	CustNum,CoNum,InvNum
Invoices, Debit and Credit Memos	InforSalesInvoice (CS_SalesInvoice)	CustNum,CoNum,InvNum
Purchase Orders	SyteLineVoucher (CS_SupplierInvoice)	VendorNumber,PoNumber, InvoiceNumber (Optional: InvoiceDate, VendorOrder, Freight, MiscCharges)
Purchase Orders Quick Entry	InforPurchaseOrder (CS_PurchaseOrder)	VendNum, PONum

Form where document attachment is available through Document Information widget	Entity name (Document type)	Additional attributes for filtering and searching on this form
Vendor 360	InforPurchaseOrder (CS_PurchaseOrder)	VendNum
Vendors	SyteLineVoucher (CS_SupplierInvoice)	VendorNumber, PONumber, InvoiceNumber

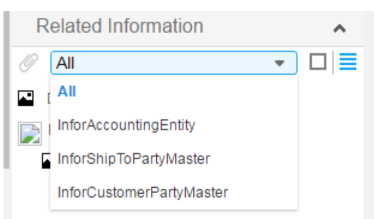
Manually adding and associating ERP documents in the Related Information context app

Use these steps to manually add a document file to IDM through the Related Information context app, and associate it with the current SyteLine form and record.

1 Open the SyteLine form and select the record to which you want to associate the document file. For example, on the **Invoice Listing** form, you might want to associate a sales invoice PDF with a specific invoice and order line number.

Note: Always insert the document file with the form that allows the most attributes to be tagged. This allows users to use all of these attributes to search for the document later. See Example: tagging and searching with attributes on page 37.

2 In the Related Information context app, use the drop-down list to select a context entity type. This type is used to associate files with the records on the SyteLine form.



The list contains all of the context entity types from the business context message that was sent when you opened the form and record. The value is initially set to the first context entity type in the message, usually `InforAccountingEntity`. You can select a different type. For example, if you want the files you add to be associated with invoices rather than the accounting entity, select `InforSalesInvoice`. The context entities that are available depend on the form.

3 Browse to select a file - for example, a document or picture that is related to the current customer - into the context app.

Alternatively, click the **Add** (paperclip) icon in the Related Information context app to attach the file.

4 You can click **Additional Details** to view the default context information that will be associated with the file.

Depending on the context entity you select, there might be multiple attributes that are associated as metadata with the document, for example, the customer number, invoice number, and order number.

You can also select the Access Control List (ACL) for the document. Generally, just use the default value.

5 Click **Upload**.

The document file is associated with the current record's context. The next time you display a record with the same context in any SyteLine form, the file is listed in the Related Information context app.

Viewing a file in the Related Information context app that is associated with an ERP record

1 In SyteLine, open the form and record. Files that are associated with the record in Infor Document Management are listed in the Related Information context app.

2 In the Related Information context app, select a context entity type to view files associated with that ERP record and context entity type.

For example, if a document file is tagged with the attribute and value OrderNum=DC00000401, it is displayed in the Related Information context app when order DC00000401 is the current record in the **Customer Orders** form. If there are multiple files tagged with that order number, you can filter by selecting the context entity type.

If you do not select an entity type, all of the documents associated with the current record are available. If no entity type is associated with an attached file, then generic attributes id1 – id15 are used, as appropriate. These can be defined in IDM.

3 Click the icon to the left of the file ID to open the file in the browser.

Alternatively, click the **Show in IDM** icon next to the file ID to open the file in IDM.

See the *Infor Document Management User Guide* for more information about how to work with the file.

Example: tagging and searching with attributes

If the SyteLine workflow is used to capture and tag a customer invoice, the invoice is tagged with the customer number, customer order number, and invoice number. Which of these attributes you can use as filters in the Related Documents widget depends on the form you are in, and what context parameters (attributes) that form broadcasts.

The forms are described here:

- On the **Invoice Listing** form, you can filter by any of the three attributes.
- On the **Customer Orders** form, you can filter by customer number or customer order.
- On the **Customers** form, you can only filter by customer number, because that is the only parameter that the form broadcasts.

See the list of forms and their available attributes in Automatic document capture and tagging through workflows on page 32.

Conversely, when you manually attach a file in the Related Documents widget, the attributes that you can use to tag the file also depend on the context of the currently displayed form:

- If you attach the file with the **Invoice Listing** form, you can specify tagging values for all three attributes: invoice number, customer order number, and customer. This allows users to use all three attributes to search for the document later.
- If you attach the file with the **Customer Orders** form, you can specify tagging values for the customer number and customer order number.
- If you attach the file with the **Customers** form, you are limited to tagging the file only with the customer number, because that is the only parameter that is associated with that form.

We recommend that you use the form that broadcasts the most attributes when you attach a related file. Otherwise, users might open the Invoice Listing form and search by invoice number in the Related Documents widget for an invoice. They will not find an invoice that you attached on the **Customers** form, because it is only tagged with the customer number, not the invoice number.

You can use the IDM app to add values for the other tags on the document – in this case, the invoice number and customer order number. In order to do this, you must check out the document in IDM and modify the attributes

Archiving documents

Archiving printed documents is not currently supported in the integration between SyteLine and Infor Document Management.