TIPS & TRIKS – MED FOKUS PÅ EXTENSIBILITY

Teams Meeting 30 Augusti 2022

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Björn Torold, Daniel Lindblad - Infor

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Dagens ämnen

Inledning

Senaste nytt från fältet angående M3 Cloud

Demo Extensibility lösningar

Vad händer i höst?

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June 2022

Infor M3 Cloud Edition

Infor CloudSuite

M3 Cloud Edition Customers

Customers provisioned with M3 Cloud Edition

343 (104)

Usability Features Delivered

Developments for Technology and User Experience

130

Total Countries Supported

Countries Supported with M3 Cloud Edition

71

Capability Features Delivered

Developments for Integrations and Geo Support

570

Total Integrations supported

Strategic Integrations with Best-of-Breed and 3rd Party

24

Industry Features Delivered

New features within the technology layer

1117

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August 2022

Infor M3 Cloud Edition

Infor CloudSuite

M3 Cloud Edition Customers

Customers provisioned with M3 Cloud Edition

340 (119)

Usability Features Delivered

Developments for Technology and User Experience

136

Total Countries Supported

Countries Supported with M3 Cloud Edition

71

Capability Features Delivered

Developments for Integrations and Geo Support

584

Total Integrations supported

Strategic Integrations with Best-of-Breed and 3rd Party

26

Industry Features Delivered

New features within the technology layer

1182

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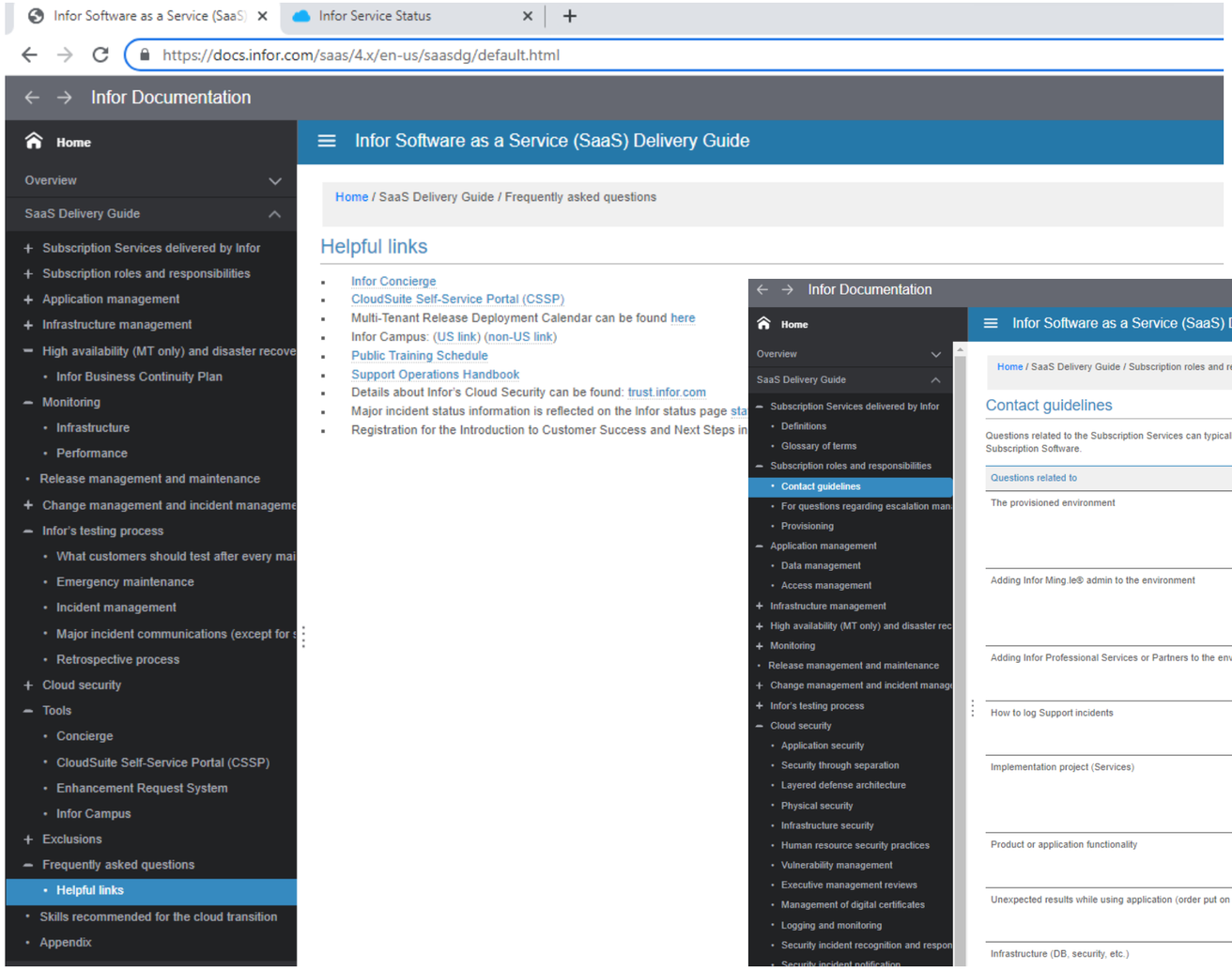
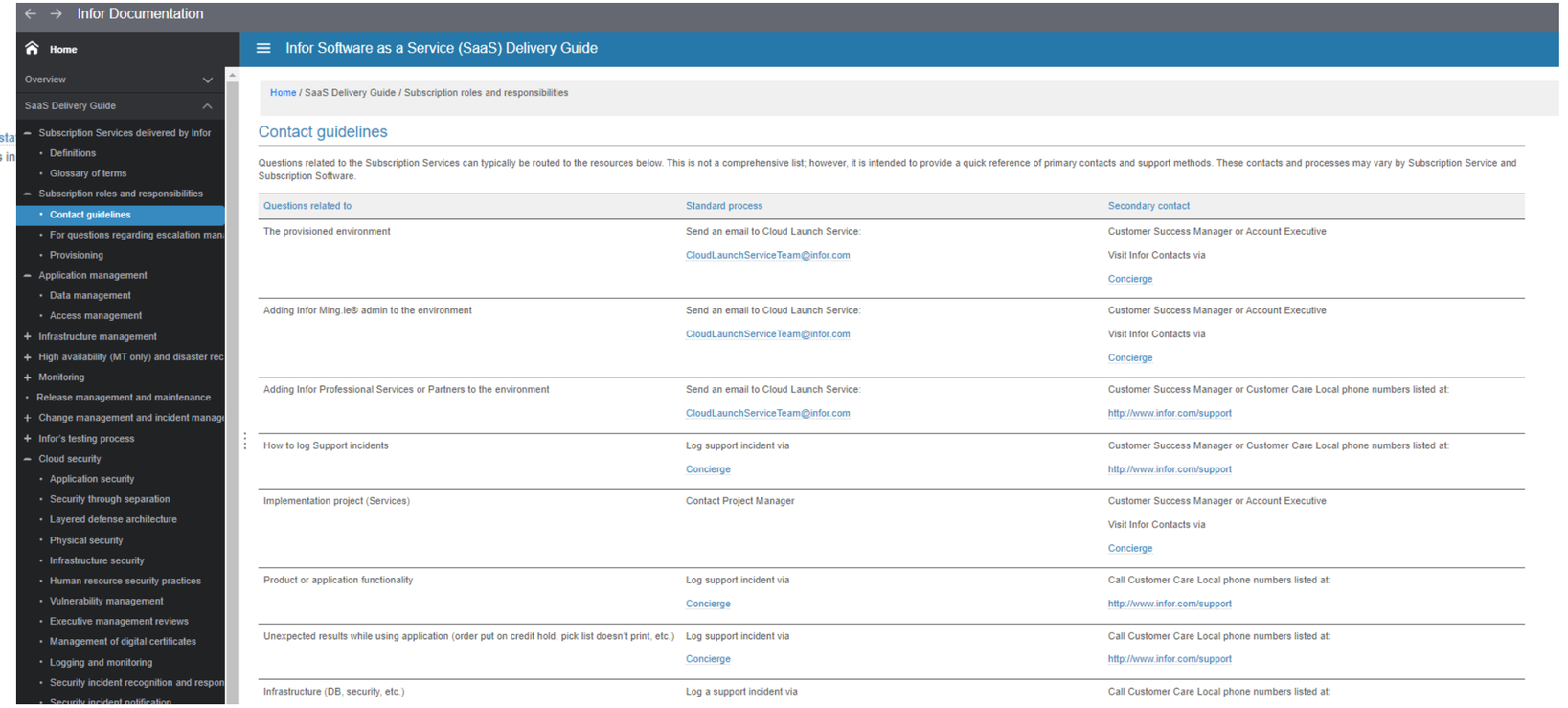
Documentation and Guides: https://docs.infor.com/saas/4.x/en-us/saasdg/default.html





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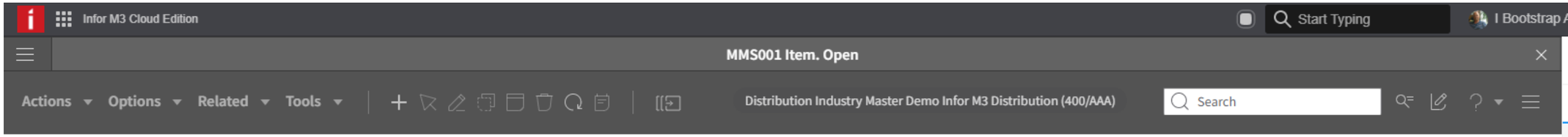


Filter Options

Sorting order: 1-Item number View: P01-01-01

No. filters: 0-No filter

Status: -Blank - -Blank

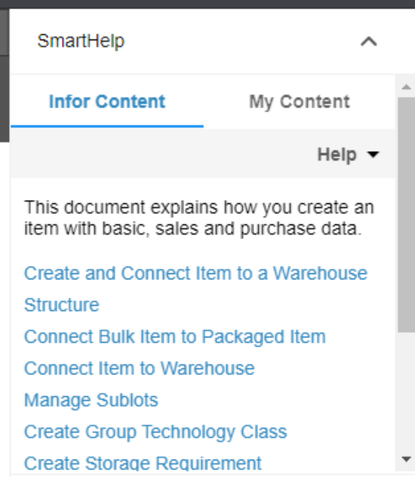
Responsible: -

Item group: -

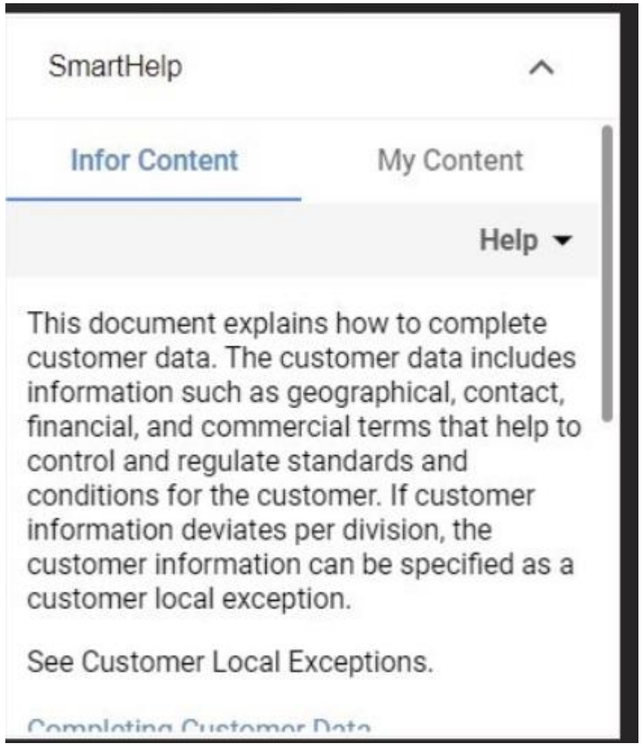
Apply

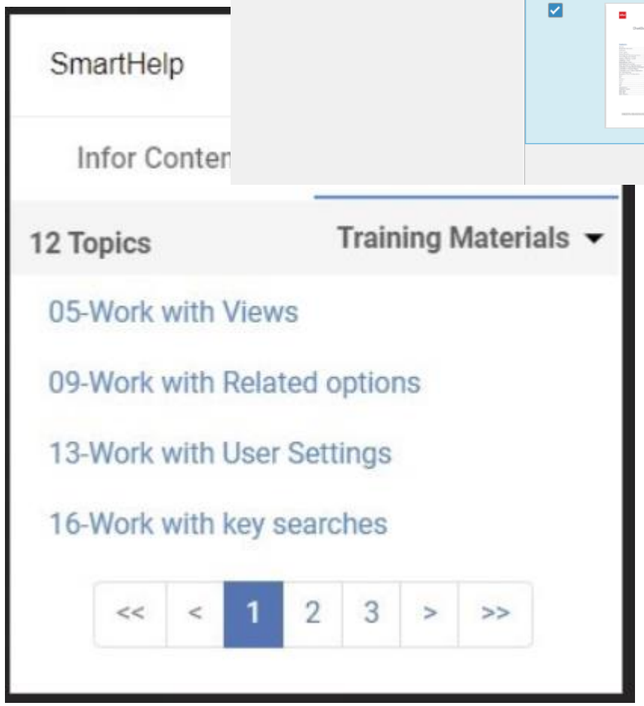
Item number	Itp	Sts	Name	Description 2	Item grp	Item grp	U/M	P grp	Specification 5	Specification 4	Ext item number	
75												
75-081503	D01	20	75-1128BT CPH20 0110	Demo for KGK	ZZZZZ	ZZItem group ex	EA	ZZZ			75-081503	2019-08-
75-0825BT	D01	11	Test Item for demos	New Description 220308	ZZZZZ	ZZItem group ex	EA	ZZZ			75-0825BT	2021-08-
75-0829	D01	15	Test 22	This is a demo Description 88	ZZZZZ	ZZItem group ex	EA	ZZZ			75-0829	2017-08-
75-1113BT	D01	11	Test Item for demos	Updated Description	ZZZZZ	ZZItem group ex	EA	ZZZ			75-1113BT	2018-11-
75-1128BT	D01	20	75-1128BT update 220618	Test Description	ZZZZZ	ZZItem group ex	EA	ZZZ			75-1128BT	2016-11-
75-1221BT	D01	09	New Demo for Metso	75-1128BT CGI	ZZZZZ	ZZItem group ex	EA	ZZZ			75-1221BT	2016-12-
75-BT0125	D01	09	Demo Workflow	New demo for Trelleborg	ZZZZZ	ZZItem group ex	EA	ZZZ			75-BT0125	2017-01-
75-BT012502	D01	12	Demo	75-1128BT Demo	ZZZZZ	ZZItem group ex	EA	ZZZ			75-BT012502	2017-01-
75-BT021201	D01	11	BT Test Item	Not for sale	ZZZZZ	ZZItem group ex	EA	ZZZ			75-BT021201	2019-02-
75-BT0221	D01	20	Bog Propeller Large fit	New Description today	ZZZZZ	ZZItem group ex	EA	ZZZ			75-BT0221	2017-02-
75-BT0223	D01	13	Ski Bygg		ZZZZZ	ZZItem group ex	EA	ZZZ			75-BT0223	2017-02-
75-BT0227	D01	20	Vedum	New Description	ZZZZZ	ZZItem group ex	EA	ZZZ			75-BT0227	2017-02-
75-BT0614	D01	20	Demo		ZZZZZ	ZZItem group ex	EA	ZZZ			75-BT0614	2017-06-

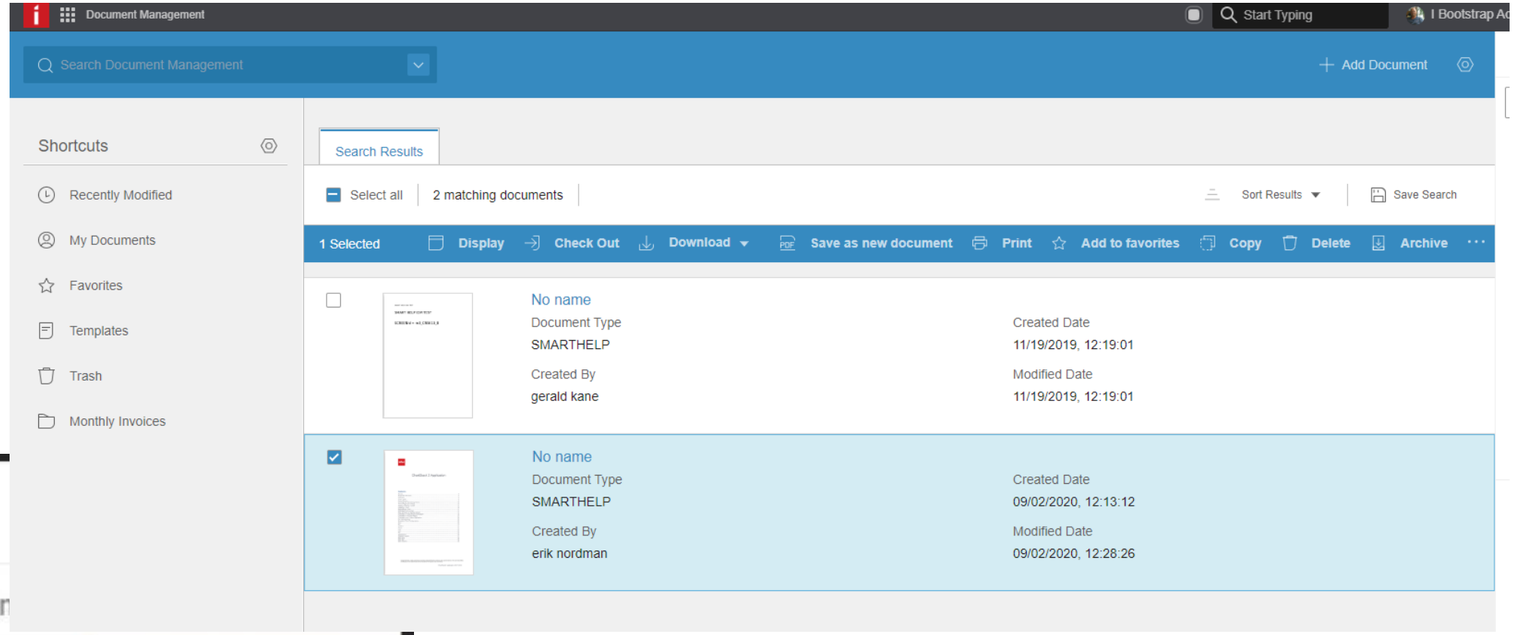
Change



SmartHelp in all M3 CloudSuites







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Performance Guidelines

This Guideline provides direction specific to executing projects moving from M3 On-premise / Single Tenant to M3 Cloud Edition.

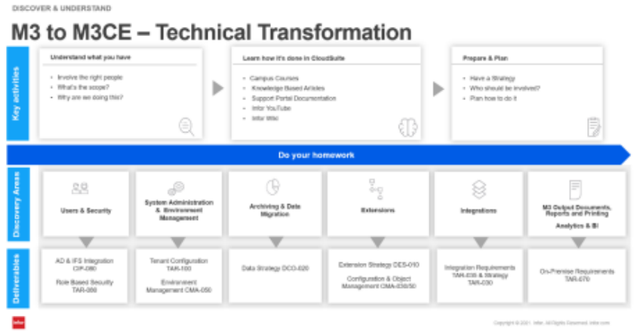
Introduction

For customers upgrading from On-premises/ST to M3CE (M3 Cloud Edition) CloudSuites we detail the areas that have changed and why in the past an upgrade was often referred to as a "technical upgrade" is now not a suitable term and that a technical transformation is more appropriate.

An upgrade differs from an IA (Implementation Accelerator) implementation as the processes are already in place and only the net change needs to be reviewed from a functional perspective (unless process improvements are to be included).

This Knowledge Based (KB) Article describes the Key Differences when Moving from M3 On Premises to M3 Cloud Edition.

In this document we highlight the areas which should be understood to determine where special consideration should be taken, especially in technical areas and that the design and best practices, particularly for integrations & extensions should be followed to ensure optimal performance and future proofing.

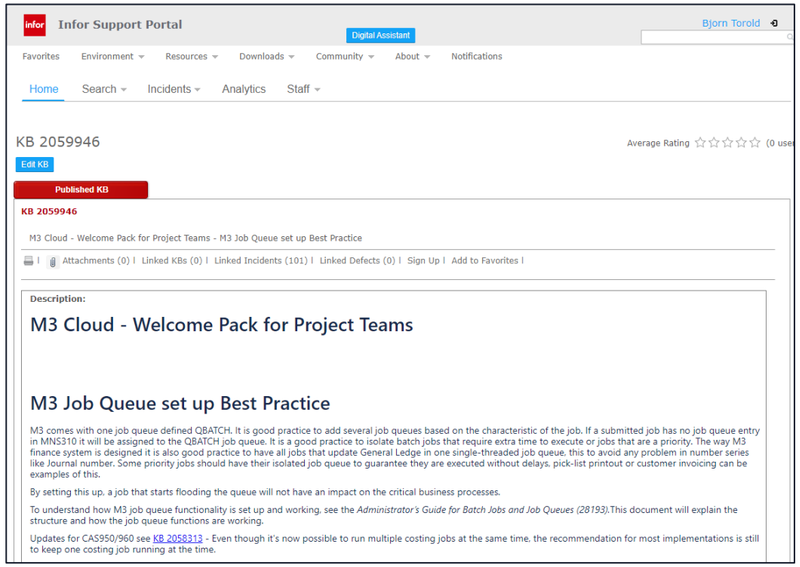


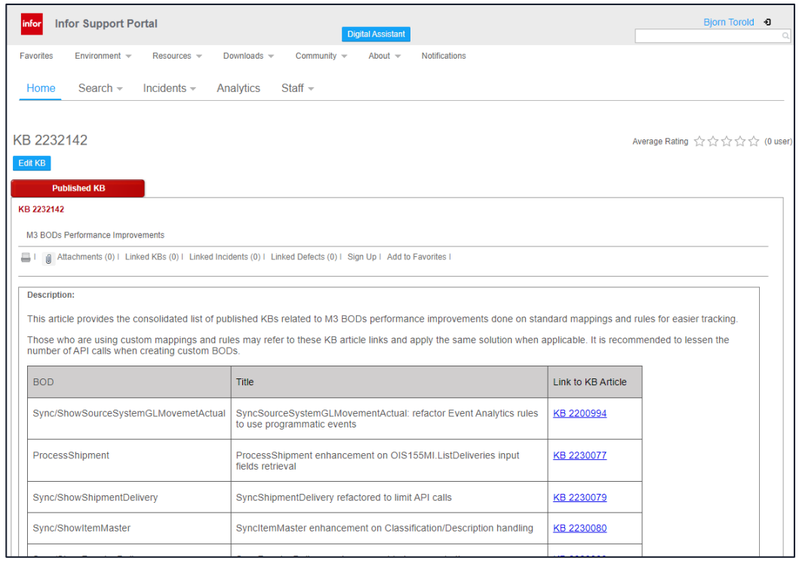
Tenants

Tenants are provisioned with all products as per the SaaS (Software as a Service) Agreement / Reference Architecture, those products may then need additional configuration to work within the CloudSuite. The Infor M3 Cloud Configuration Guide should be followed as needed.

This master KB Infor M3CE CloudSuites - Release Information Overview must be referred to for all latest information.

Monthly maintenance calendars are an important part of the CloudSuite and patching does have an impact to the business, both in that those patches need business review and testing, but also in that it means progress and constant change is mandatory and should be accommodated for.





BOD	Title	Link to KB Article
Sync/ShowSourceSystemGLMovemetActual	SyncSourceSystemGLMovementActual: refactor Event Analytics rules to use programmatic events	KB 2200994
ProcessShipment	ProcessShipment enhancement on OIS155MI.ListDeliveries input fields retrieval	KB 2230077
Sync/ShowShipmentDelivery	SyncShipmentDelivery refactored to limit API calls	KB 2230079
Sync/ShowItemMaster	SyncItemMaster enhancement on Classification/Description handling	KB 2230080

EVS100 - M3 Data Import Business Engine tool to support import of data through API's File Format (CSV and Excel Files) Video demonstrating how to use	2132563 2162765 2188245		Mar 15, 2022
Migration from IOBOX to IMS connection point for M3 BODs	2235044	Recommended actions to prepare for IOBOX to IMS migrations for M3 BODs	June 7, 2022
Migrate older MEC Mappings to CE version using CLI commands	2219158		May 24, 2022

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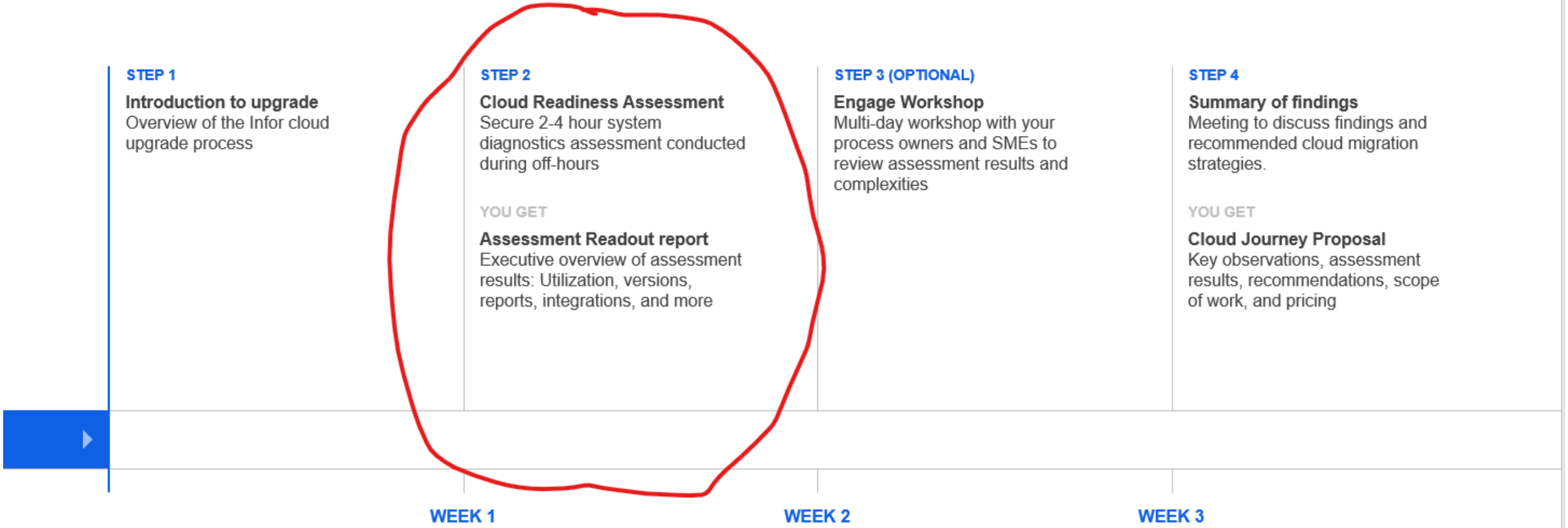
INFOR CLOUD UPGRADE

Simpler to deploy: **Cloud upgrade process**



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Introduction and Background

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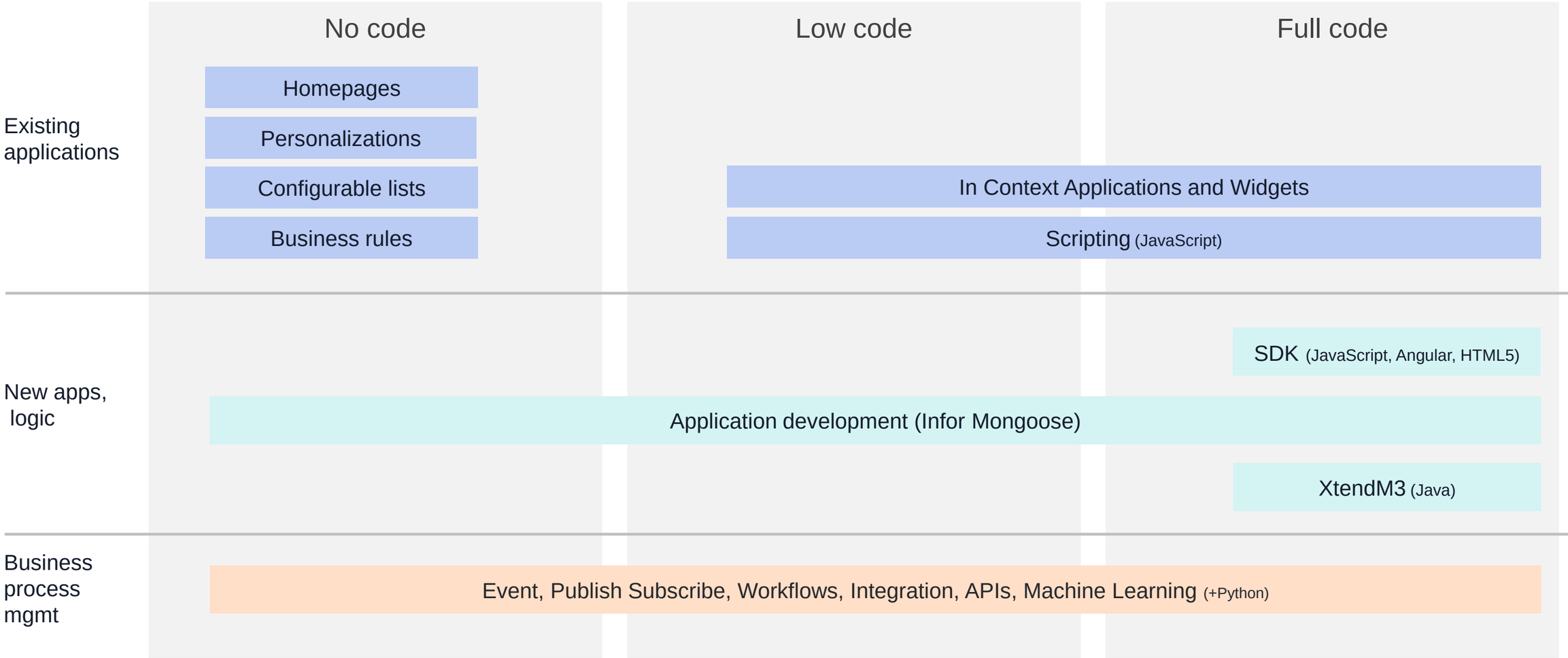
M3 CE Extensibility tools



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Lantmännen

Daniel Lindblad

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Demo Extensibility lösningar

Vad händer i höst?

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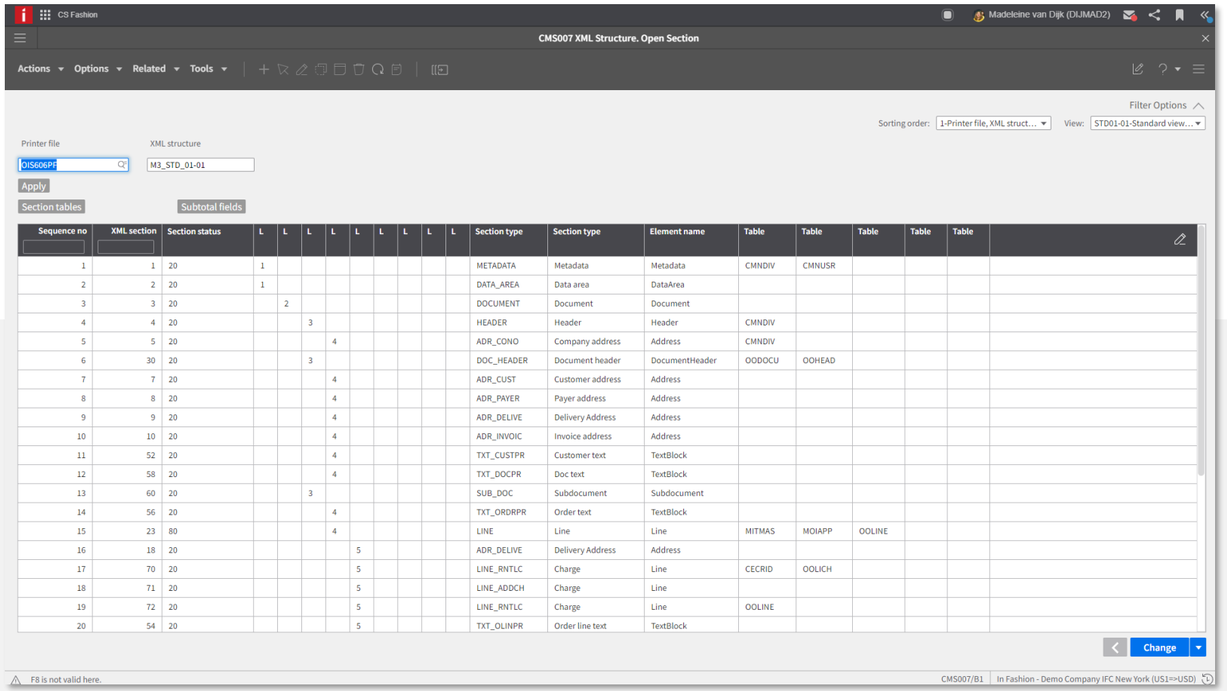
Available in the M3 Cloud

Highlights

Your Output changeable in a split sec

Configurable XML



Using the IDM Word Plugin and M3 configurable XML makes changes on documents easier

Over the last two years ~50 improvements were made helping configuring your output and their devices

- An endless number of standard reports
- Customized file name
- Export configuration
- Excel output
- IDM layouts for Financial Report generator
- Watermarks
- Calculation fields
- Excel and PDF at same time
- Email distribution to multi email addresses and groups
- Tray selection for printer
- Limit size of output files
- Configurable text blocks
- Group output content and send in one email

Value

- Configurable
- Stored in IDM and available at your request (in-context or direct)
- Easy adjustments

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KB 2239630

Average Rating ☆☆☆☆☆ (0 user)

Edit KB

Published KB

KB 2239630

NCD - Generic Business Engine extension point for printouts

Description:

Abstract: In this development, an extension point has been added to a new batch program with generic input parameters that are available for all printouts.

Background: In many cases, an additional process step may be needed before a printout is generated. It could be calling external web services or doing additional calculations. Adding an extension point for each section and each variant of a printer file allows the customer to inject their custom business logic before a section is printed out.

Resolution:

A new batch program is created for this development where an extension point is added. This batch program contains generic input parameters that are available for all printouts. These parameters are printer file, XML structure, variant, section number, batch job number, and HashMap containing fields and field values. Key values for specific documents are necessary to retrieve more information related to the document through XtendM3. Some example key values are delivery number, invoice number, order number, etc.

You can also use the extension point to update the XtendM3 tables that can be used to populate the configurable XML for the printout.

A new field, EXSE (Extend section), is added to 'XML Structure. Open Section' (CMS007). The purpose of this new field is to toggle on or off the extension point logic of the current section.

A new batch program, CREXTPRT, is also created to execute the extension point. In cCRMNGRP, after a section is printed, a logic for validating a particular section is executed (that is, check if the EXSE field in (CMS007) is selected). If the section is extended, all field values are stored in a HashMap and are passed on to the new batch program, CREXTPRT.

Lastly, a new interface class is created to define the extension point, extendOutput. The extendOutput method accepts the parameters printer file, batch job number, XML structure, variant, section number, and HashMap containing fields and field values of the current section. The printer file, XML structure, variant, and section number parameters help the users separate the logic in the XtendM3 script for different printer files and sections. While the batch job number and HashMap containing fields and field values are used to retrieve information from M3 which can be used to extend the print process.

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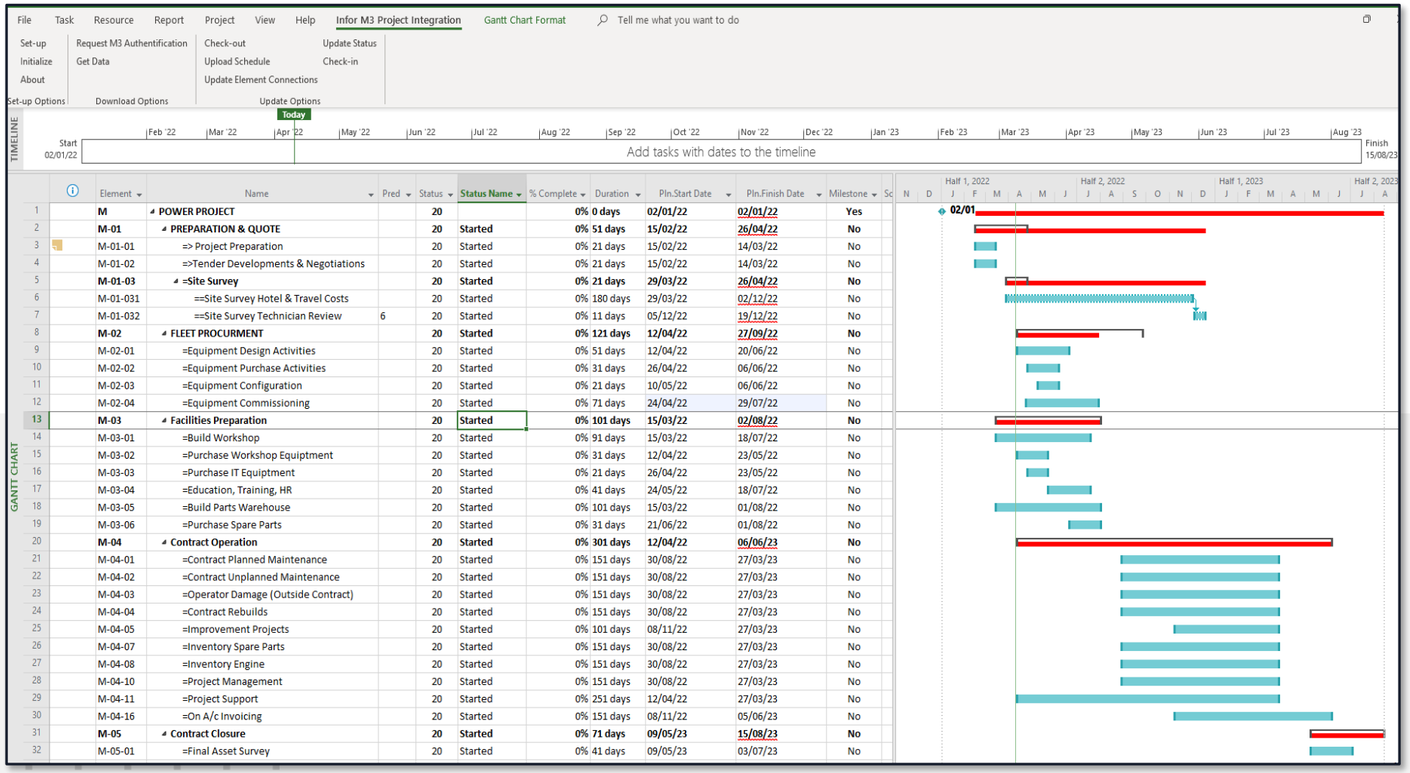
Available in the M3 Cloud

Highlight

Infor Marketplace

M3 Project Integration



Two-way integration between M3 Project Management and Microsoft Project

- Download from the Infor Marketplace
- Designed for M3 multi-tenant CloudSuites
- Infor OS secure communication via M3 API's
- Simple M3 and MS Project (MSP) configuration
- Build-in MSP column configuration for M3
- Select project and schedule version
- Project check-in and check-out
- Extensive project information available in MSP
- Updates to M3:
  - Rescheduled dates
  - Predecessor / successor processing
  - Project element status
- Go to market.infor.com and search for 'm3 project'

Value

- Secure access
- Improved visualization of M3 Projects
- MSP features available, plus off-line management of M3 projects
- Quick and easy changes to projects scheduling, relationships and status

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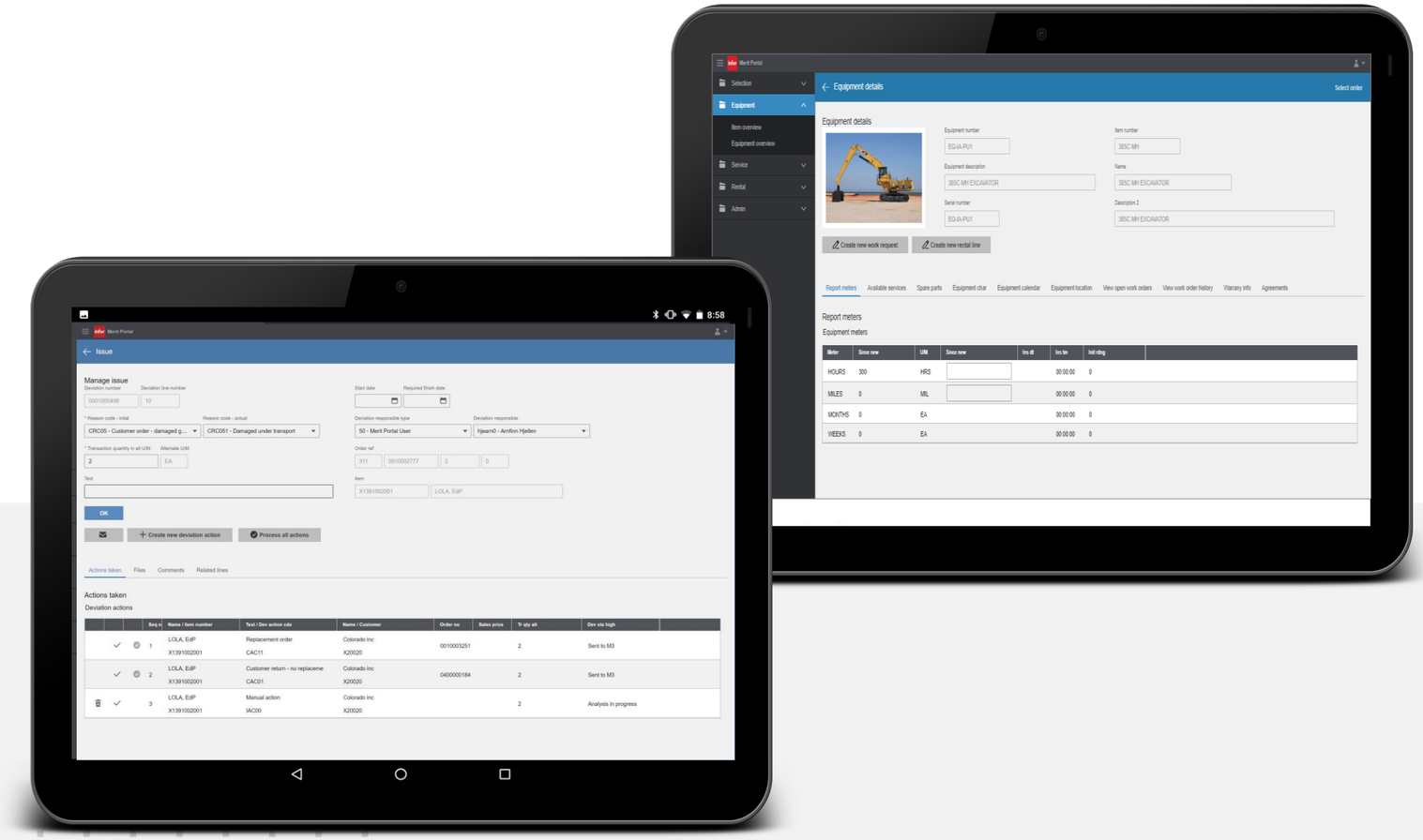
Available in the M3 Cloud

Highlight

Infor M3 Portals

M3 Equipment Portal



Streamlined customer experience through self-service portals

- Highly configurable user experience
- Targeting zero end-user training requirements.
- Self-service:
  - maintain their company information
  - create service requests
  - update meter values (equipment usage)
  - create rental contract requests
- View their equipment information including service history, warranty details
- View invoices
- Access electronic content (manuals, guides…)

Value

- End user self-service reduces internal effort
- Quick and efficient process captures information at source
- Easy to use and configure
- Flexible technology

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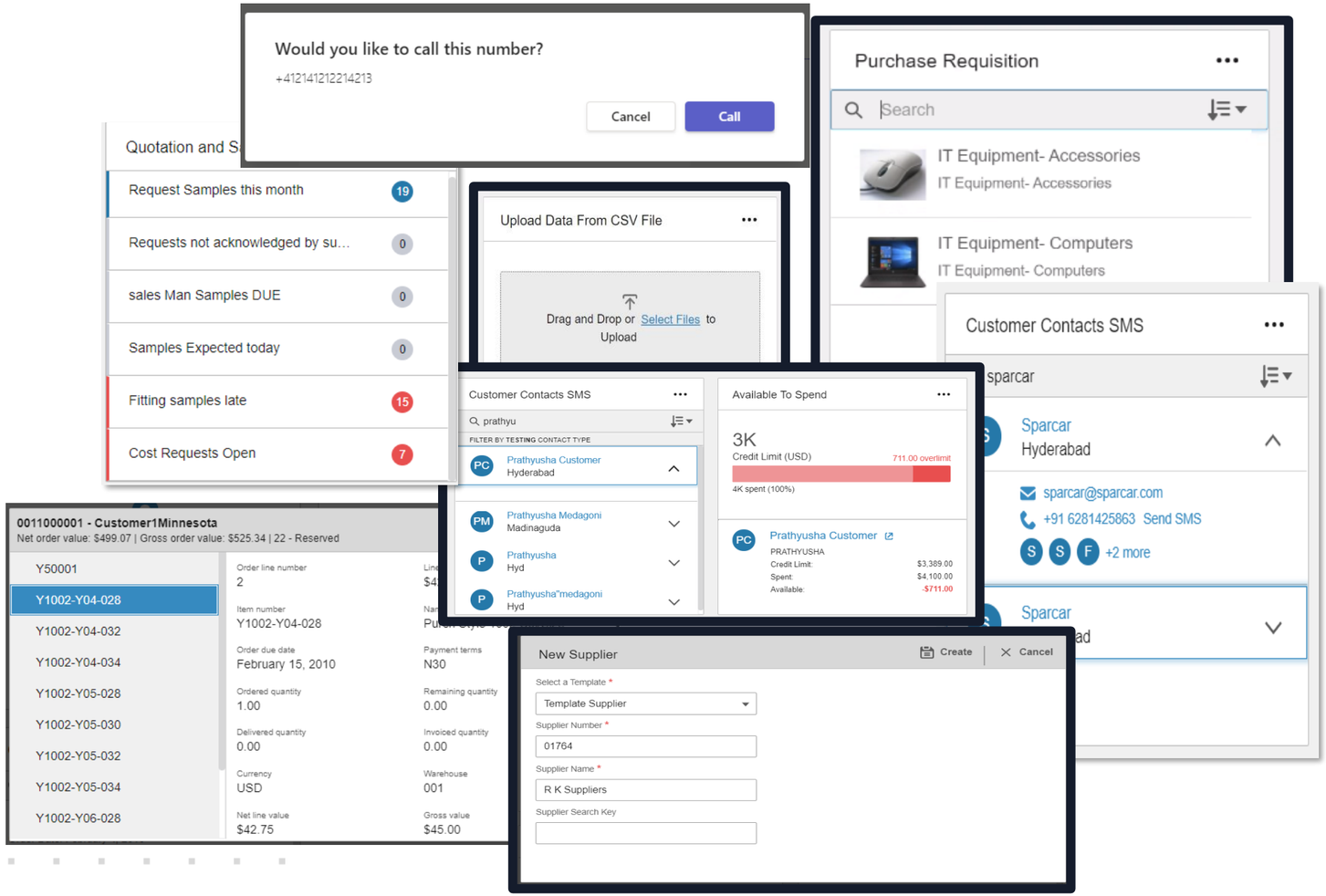
Available in the M3 Cloud

Highlights

Experience simple is better

Homepage widgets



Go get them and use or be inspired by them

The Homepages have extended the widget catalogue with some unique capabilities. Examples may apply to certain types of businesses only but can certainly be used as inspiration and new ideas

- Purchase requisition (for non-stocked items)
- Upload of data via .csv file
- Customer contacts
- Customer look up
- Available to spend
- Create item (minor info)
- Create supplier (minor info)
- Receive purchase order

Value

- Simplify processes
- Productiszed widgets on your role-based homepage
- Get inspired and create your own

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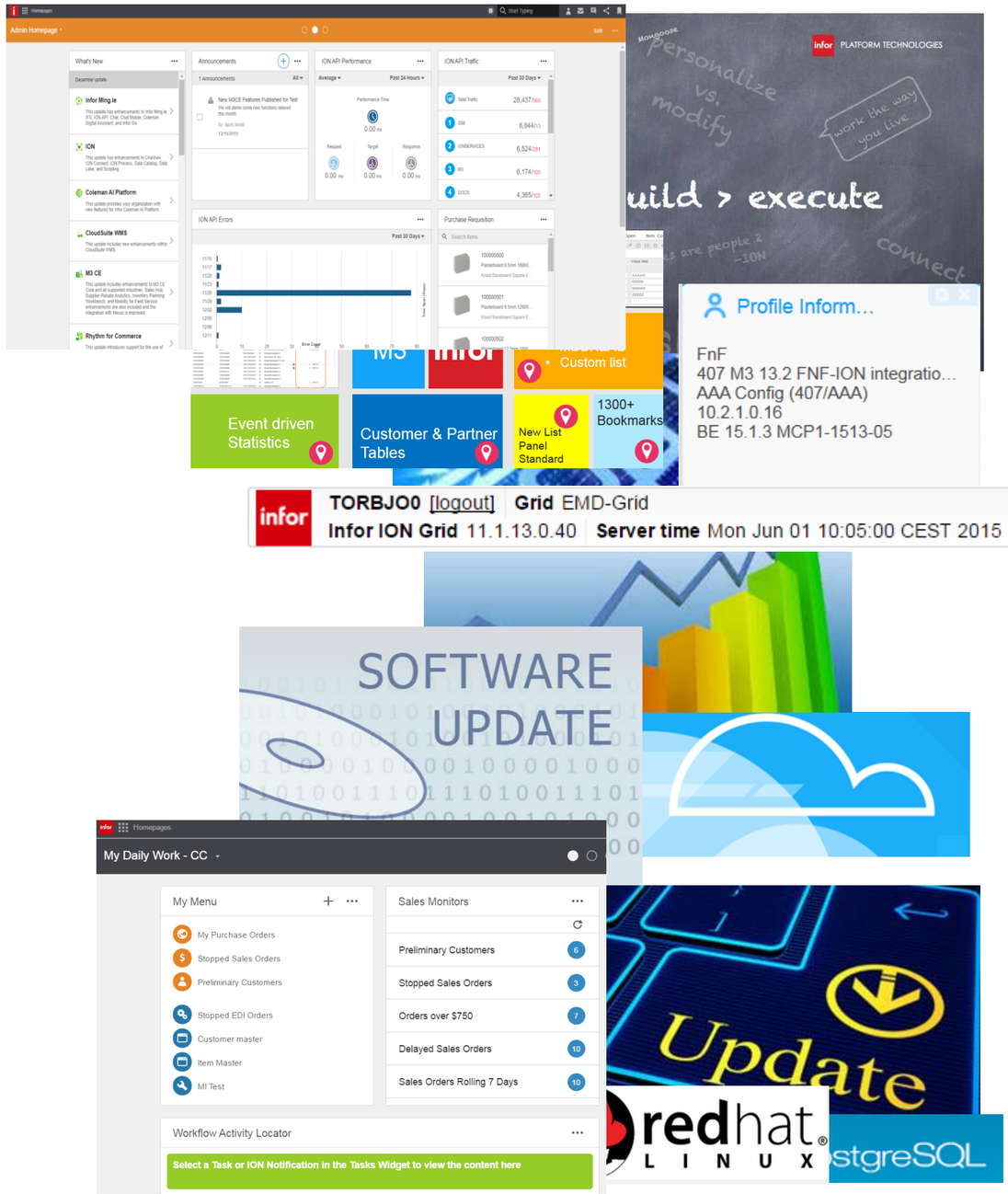

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Thank you

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