TIPS & TRIKS – HÖJDPUNKTER FRÅN SPECIALISTHÖRNET

Teams Meeting 24 Oktober 2022

Lena Lundell - InfoTeam

Björn Torold, Joakim Mattsson - Infor

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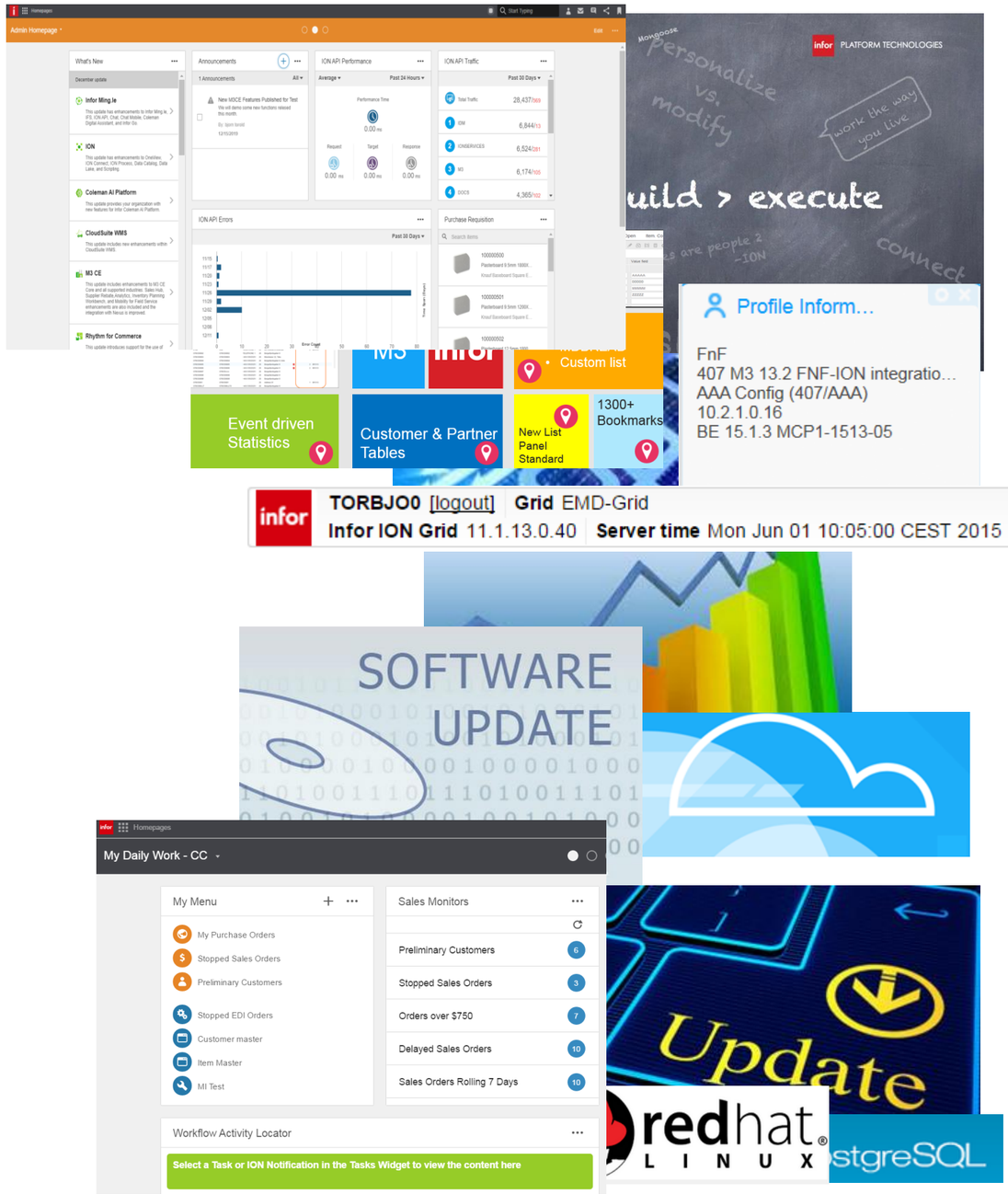
Dagens ämnen

Inledning

Senaste nytt från fältet angående M3 Cloud

Höjdpunkter från Specialisthörnet

Vad händer mer i höst?



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October 2022

Infor M3 (AWS)

Infor CloudSuite

Infor M3 (AWS) Customers

Customers provisioned with Infor M3 (AWS)

376 (124)

Usability Features Delivered

Developments for Technology and User Experience

156

Total Countries Supported

Countries Supported with Infor M3 (AWS)

71

Capability Features Delivered

Developments for Integrations and Geo Support

601

Total Integrations supported

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

27

Industry Features Delivered

New features within the technology layer

1264

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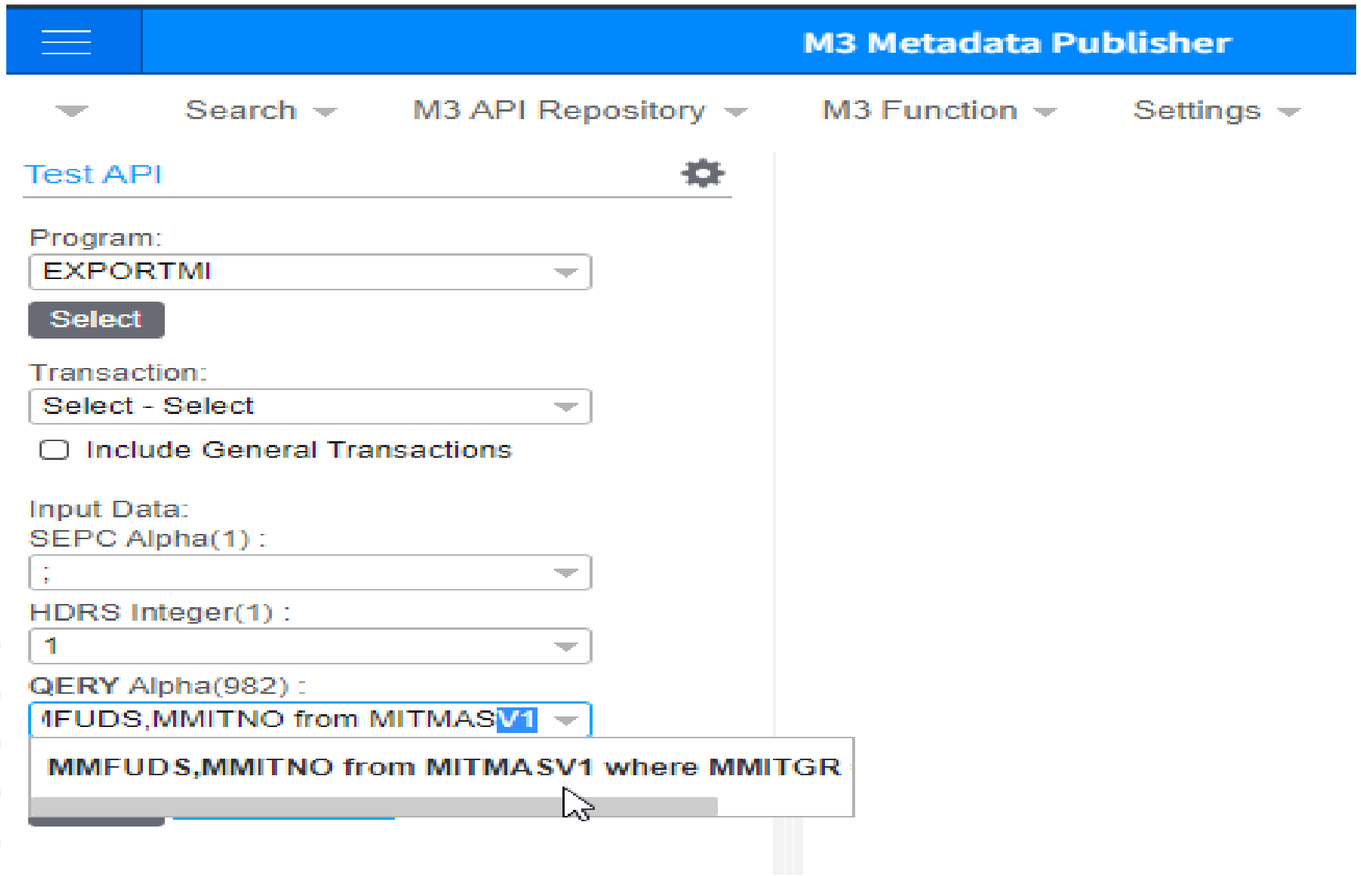
Available in the M3 Cloud

Highlight

M3 API´s

M3 toolbox API´s



EXPORTMI

- Specify index and related filters (requires filters according to selected index)
- Supports user defined index (U, V, X sorting options)
- Possible to use more than 10000 records when index is selected

Relative performance

- EXPORTMI with specified index = 1
- MDBREADMI = 1,1
- EXPORTMI without specified index = 1,4
- CMS100MI without related tables = 10
- CMS100MI addition per extra related table= 5

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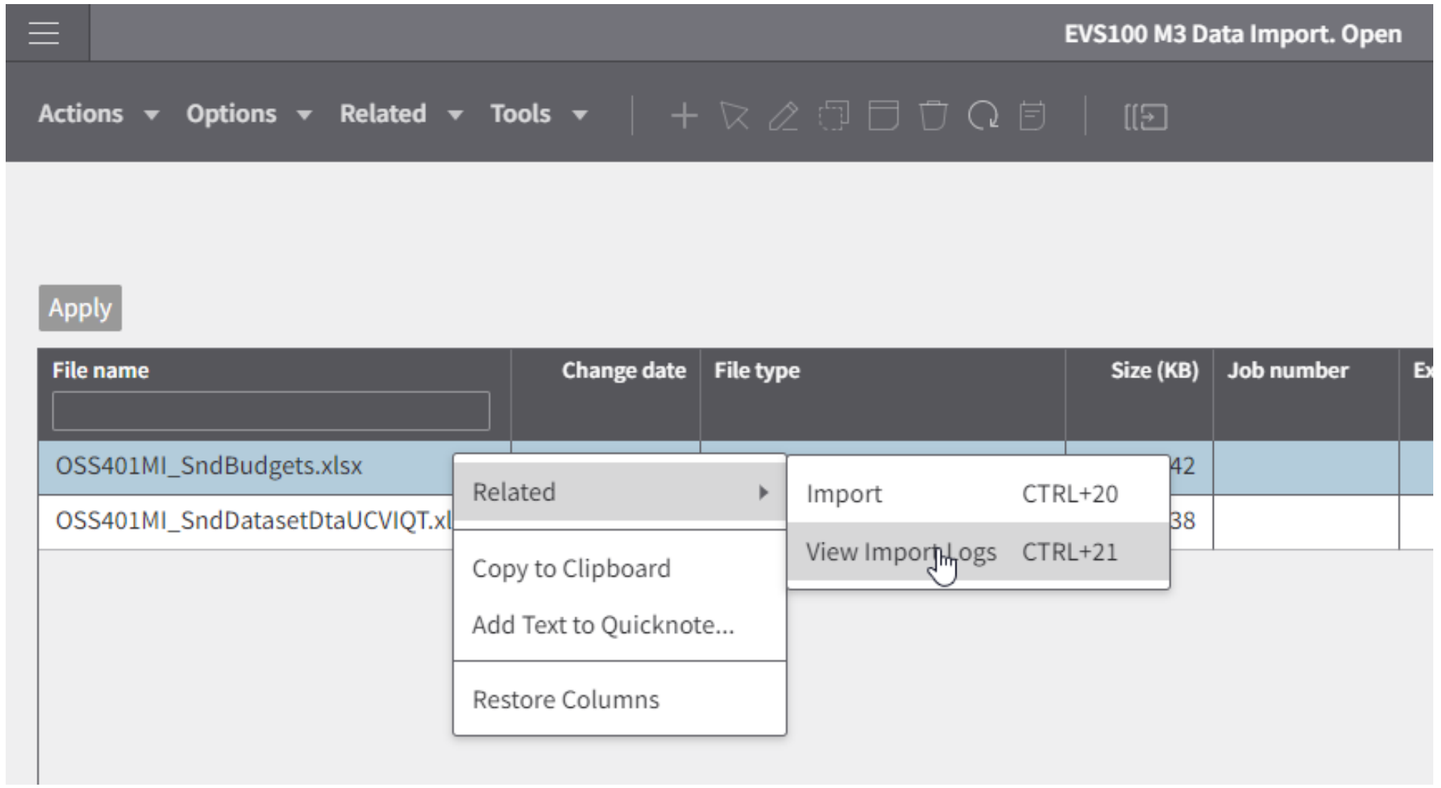
Available in the M3 Cloud

Highlight

Massupdate/import data

EVS100



EVS100

- Structured import of data into M3
- Accepts CSV and Excel
- Import done via standard M3 API´s
- Excel manages sequence of import

Enhancements:

- Simplified access to log (related option 21)
- Changed format of log to single line (October 2022)
- Added support of import via direct Fnc calls. Expands number of possible data to import but not as simple as API imports (Use MDP – M3 Function – Fnc Developer Client)

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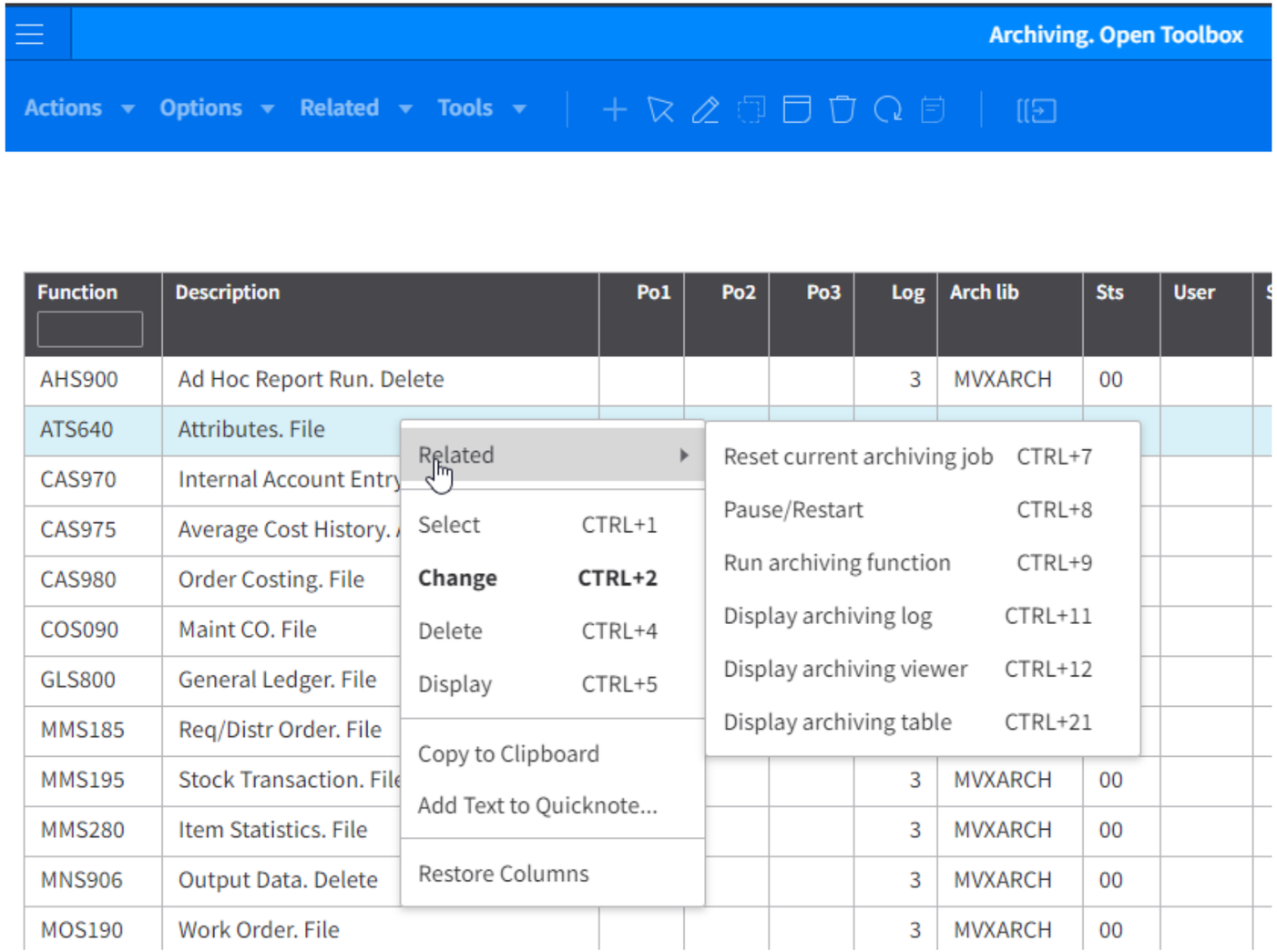
Available in the M3 Cloud

Highlight

M3 Archiving Solution overview

Archiving Solution

- New analysis function added
  - Lists tables with row count/size
  - Help deciding where archiving is mostly needed
- Better table classification in MDP to help understand work files that should be empty
- Move archived data to Data Lake
- More to come …….



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Available in the M3 Cloud

Highlight

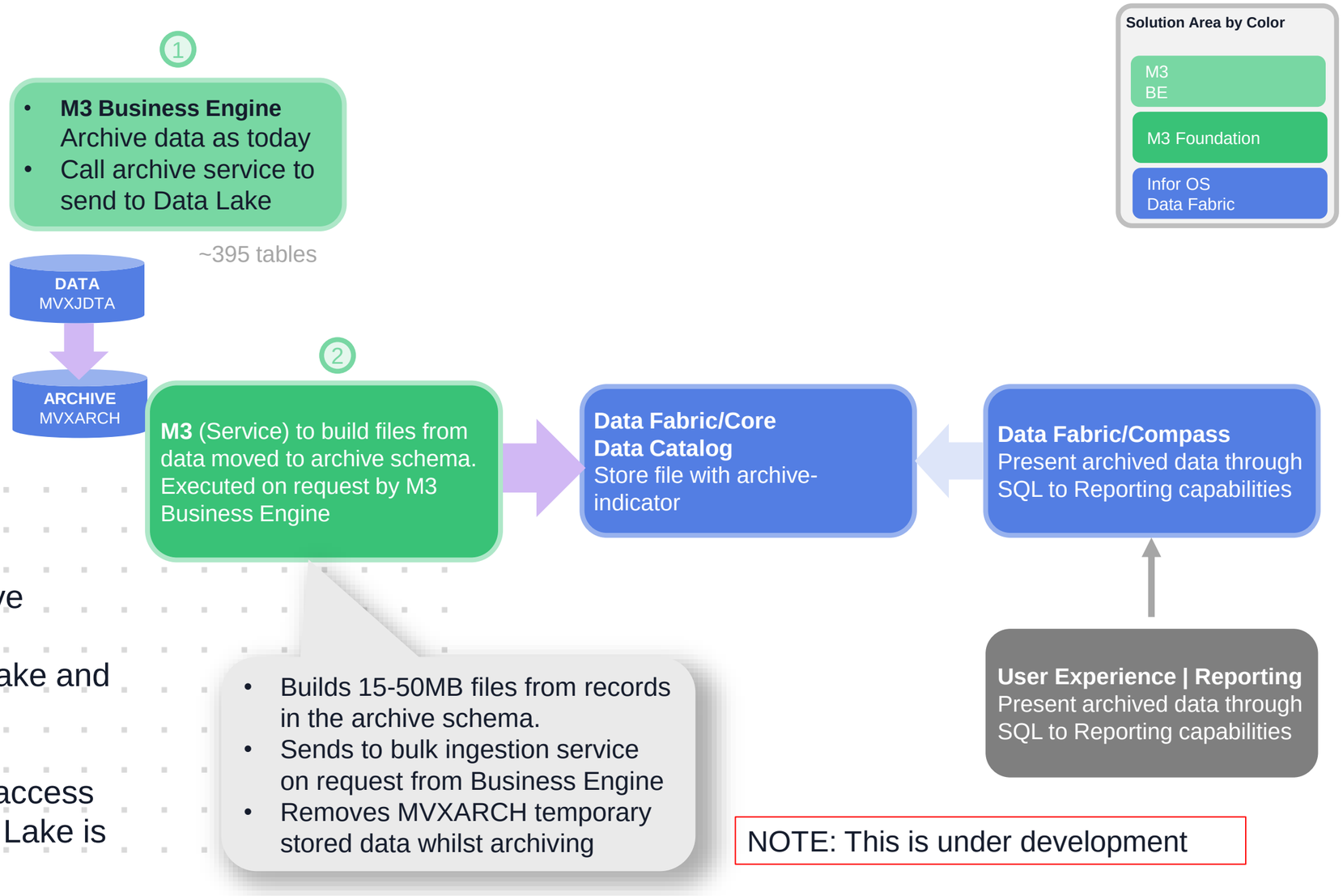
M3 Archive and Data Lake

Archive in M3

- Same process and today
- Archived data stored in Archive library
- Works in same way as earlier with Ad-hoc reports etc
- Note! Archive of data has not reduced size of stored data

Move to Data Lake:

- New process activated from M3 archive functions
- Moves data to the S3 bucket in Data lake and flagged as archived.
- Data in archived library is removed
- Note! Ad-hoc report etc in M3 cannot access this data. Queries and reports in Data Lake is used to view data



NOTE: This is under development

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...ty & Integrations

Som en wrap-up fra ITD2022 tilbyr vi denne gangen noen høydepunkter fra Spesialisthjørnet, Integrations & Extensibility

- ...oversikt over hva jeg kan bruke?

-Hvor finne...

-Hva kan jeg forbere...

- Hvordan fungerer den nye Xte...

- Hva henter jeg enkleste data fra M3 Cl...

- Hur kan jag utnyttja Streaming i min Cloud miljö?

Integrationer

- Hvordan fungerer integrasjoner i M3 Cloud Edition? Hvilke alternativer er tilgje...

- Kan jeg gjenbruke det jeg har i min eksisterende løsning? Hvilke gode erfaringer finnes...

- API i skyen, hvordan fungerer det og hvordan får jeg best ytelse?

- Hur kan API-en hjelpe meg med Extensibility?

- Hvordan bygger jeg min egen API i skyen, utan att skapa modifieringar?

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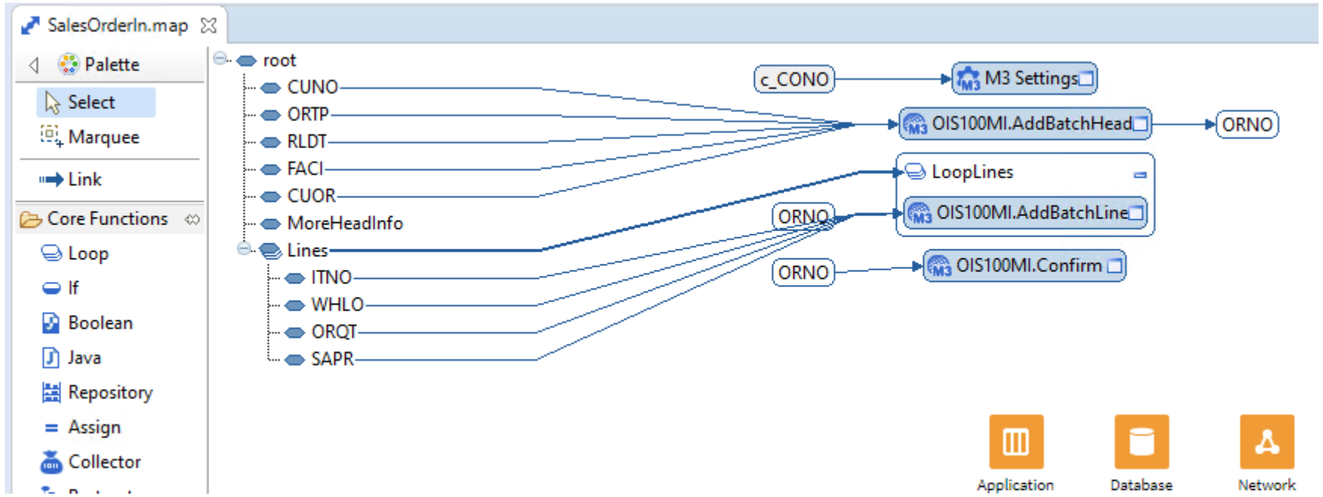
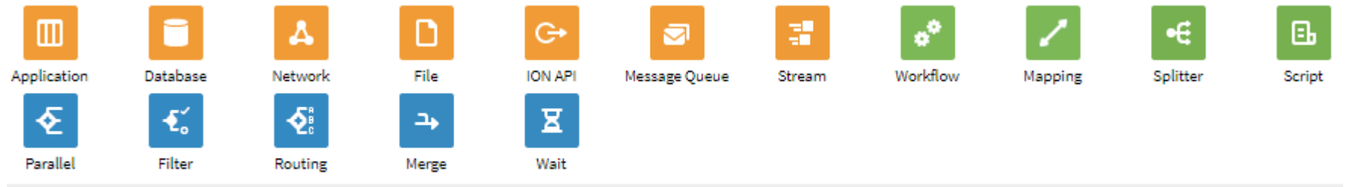
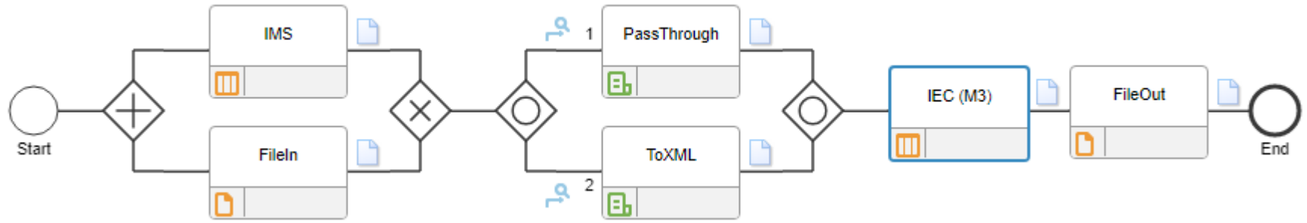
Asynchronous integration – Sales Order Entry in IEC







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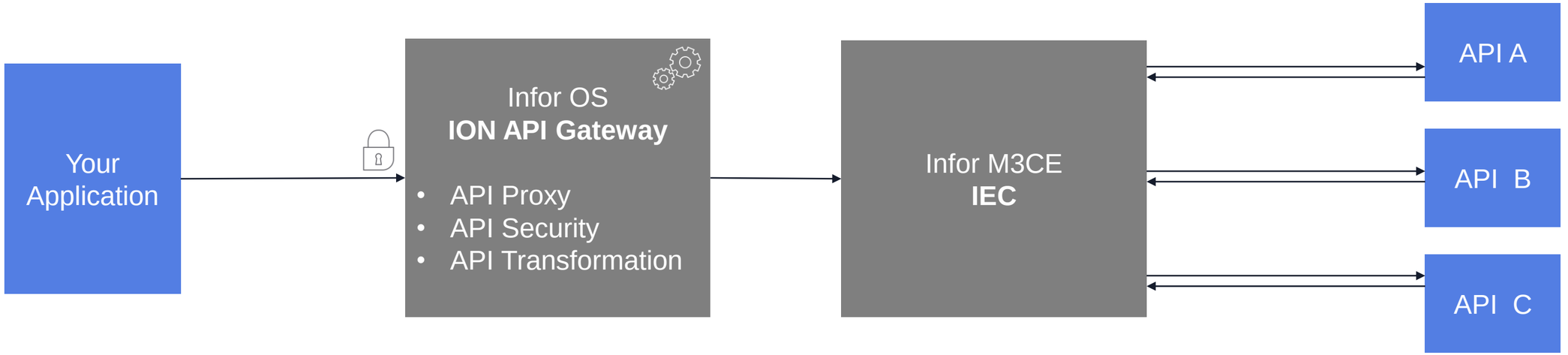
Asynchronous integration – API Orchestration in IEC



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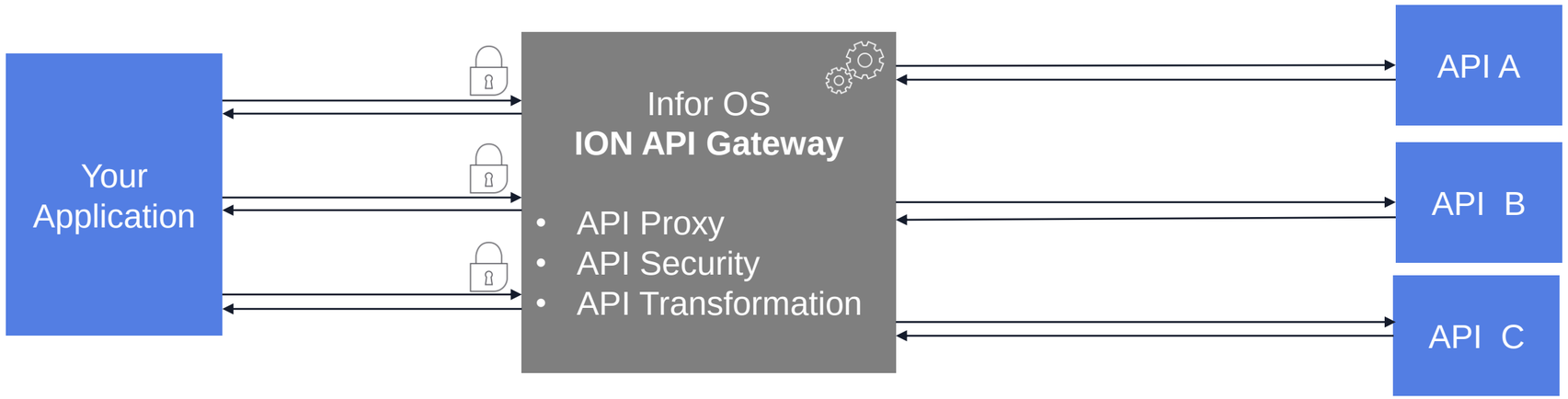
Synchronous integration – API Orchestration in client



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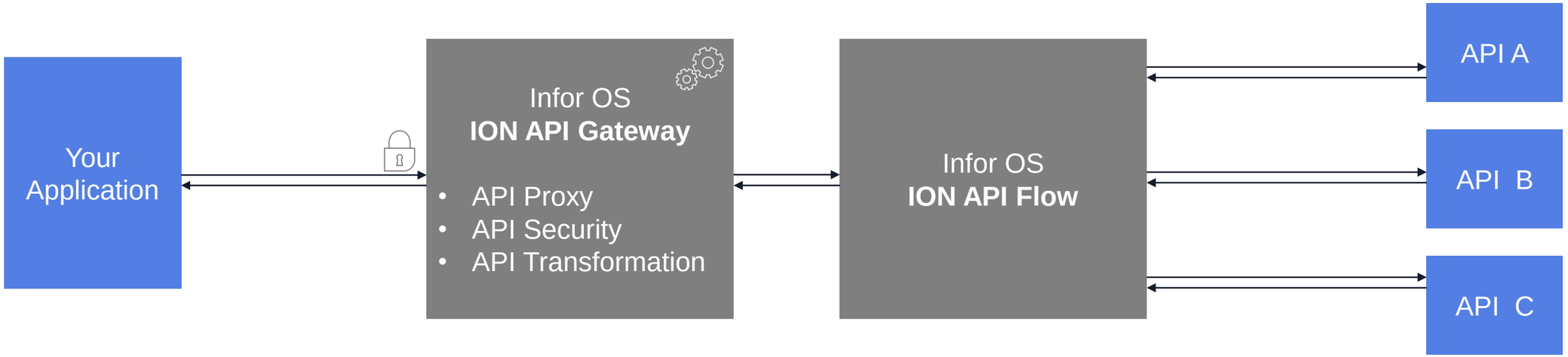
Synchronous integration – API Orchestration in ION



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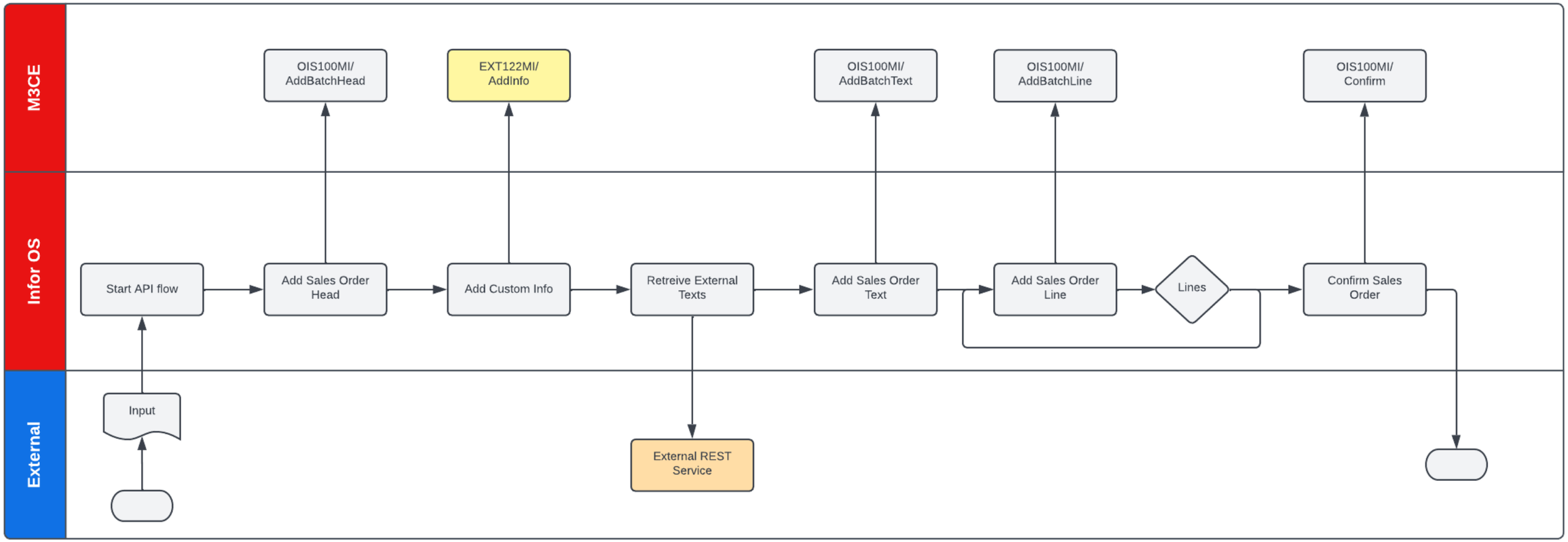
API Orchestration – Sample flowchart: Sales Order entry



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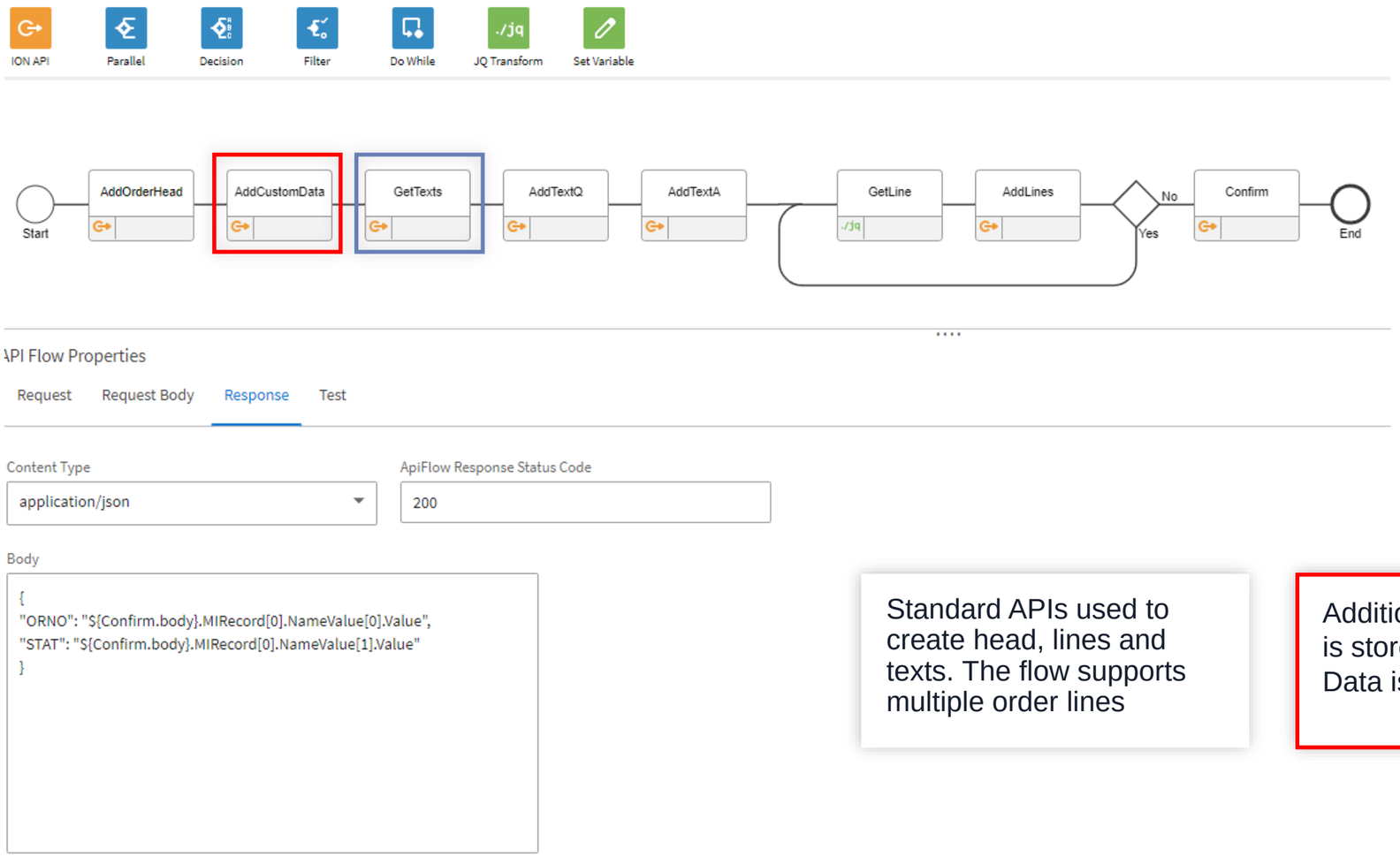
API Orchestration – Example of Sales Order entry



Standard APIs used to create head, lines and texts. The flow supports multiple order lines

Additional sales order data is stored in a custom table. Data is inserted

External REST-service used for retrieving order texts.

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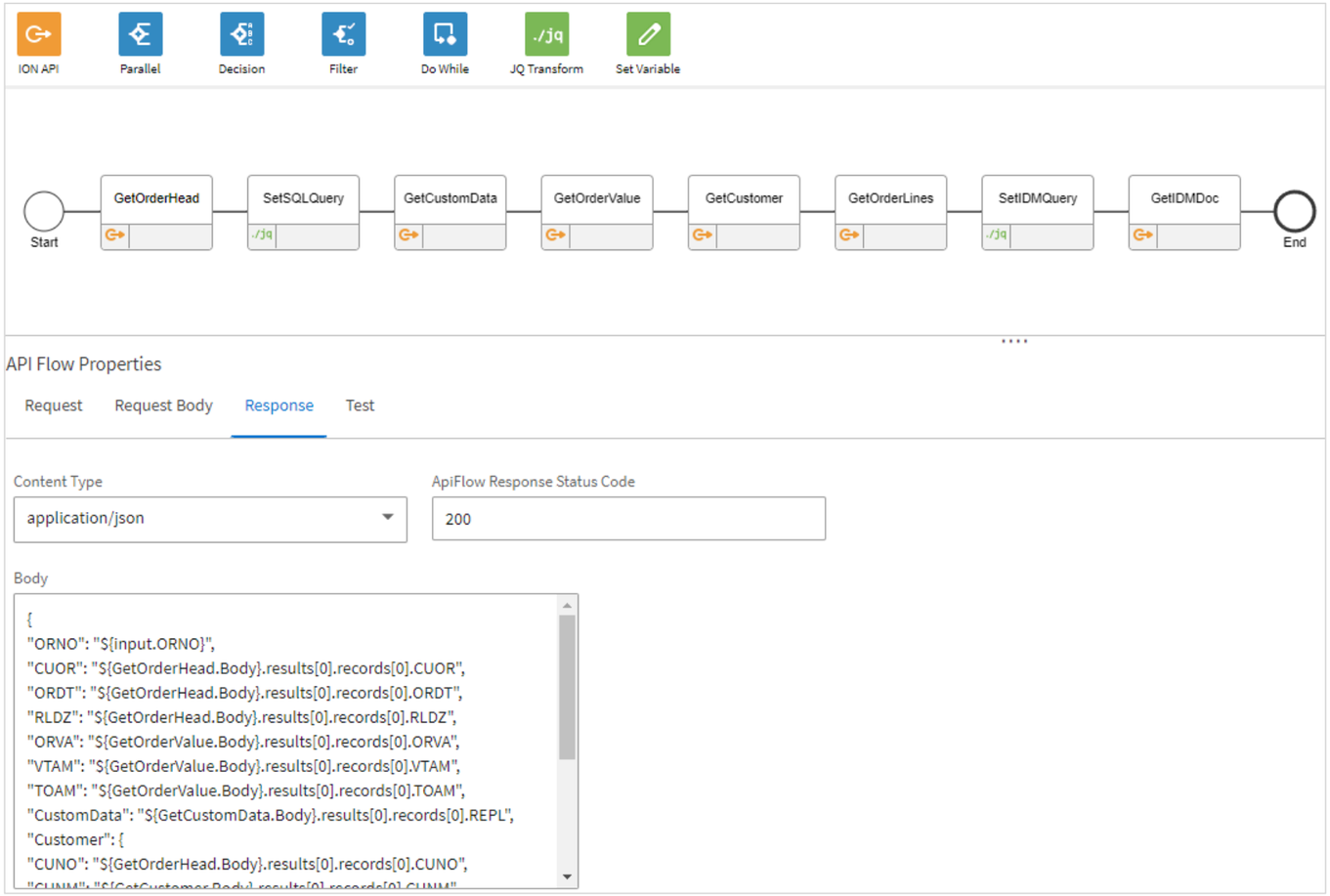
API Orchestration – Example of Sales Order retrieval




```
{
    "ORNO": "4003113251",
    "CUOR": "JM109",
    "VTAM": "5.34",
    "ORDT": "20221021",
    "RLDZ": "20221021",
    "ORVA": "70.00",
    "TOAM": "75.34",
    "CustomData": "Björns bästa",
    "Customer": {
        "CUNO": "JMSE01",
        "CUNM": "JM01 inc"
    },
    "Lines": [
        {
            "ITNO": "75-JM001",
            "ITDS": "7.5 Amp 1/2 in. Hole Hawg HD",
            "ORQT": "1",
            "SAPR": "5.00",
            "PONR": "1"
        },
        {
            "ITNO": "75-JM002",
            "ITDS": "Santa",
            "ORQT": "2",
            "SAPR": "10.00",
            "PONR": "2"
        },
        {
            "ITNO": "75-JM003",
            "ITDS": "Powerpoint clicker",
            "ORQT": "3",
            "SAPR": "15.00",
            "PONR": "3"
        }
    ],
    "IDM": {
        "FileName": "3093949286163384360IS606PF_0_0.pdf",
        "IDMURL": "https://idm.inforcloudsuite.com/ca/api/resources/CS_Orders-621-1-LATEST
    }
}
```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Adjust Stock Balances – API transactions

Transaction: AddStkHead
Description: Add Internal Stock Header

Name	Frp	Tps	Lngth	Ftp	Res	
CONO	16	18	3	N	0	Company
MSNR	19	33	15	A	0	Message number
E0IO	34	34	1	A	0	Message direction
FACI	35	37	3	A	0	Facility
WHLO	38	40	3	A	1	Warehouse
CUNO	41	50	10	A	0	Customer number
PMSN	51	67	17	A	0	External message number
STAT	68	69	2	A	0	Status
STLO	70	71	2	A	0	Lowest status
STHI	72	73	2	A	0	Highest status
GEDT	74	83	10	D	0	Date generated
GETM	84	89	6	N	0	Time generated
CHGD	90	99	10	D	0	Date changed

Transaction: AddStkId
Description: Add Internal Stock Identity

Name	Frp	Tps	Lngth	Ftp	Res	
CONO	16	18	3	N	0	Company
MSNR	19	33	15	A	1	Message number
MSLN	34	38	5	N	0	Message line number
PMSN	39	55	17	A	0	External message number
PMSL	56	60	5	N	0	External message line number
GEDT	61	70	10	D	0	Date generated
GETM	71	76	6	N	0	Time generated
CHGD	77	86	10	D	0	Date changed
WHLO	87	89	3	A	1	Warehouse
ITNO	90	104	15	A	0	Item number
WHSL	105	114	10	A	1	Location
BANO	115	134	20	A	0	Lot number
CAMU	135	154	20	A	0	Container

Transaction: AddStkIns
Description: Add Internal Stock Instruction

Name	Frp	Tps	Lngth	Ftp	Res	
CONO	16	18	3	N	0	Company
MSNR	19	33	15	A	1	Message number
MSLN	34	38	5	N	1	Message line number
MSGS	39	41	3	N	0	Sequence number
QLFR	42	45	4	A	1	Qualifier
QLFS	46	48	3	N	0	Sequence number
QLFT	49	49	1	N	0	Qualifier type
STAT	50	51	2	A	0	Status
GEDT	52	61	10	D	0	Date generated
GETM	62	67	6	N	0	Time generated
PLFD	68	77	10	D	0	Planned finish date
PLFT	78	83	6	N	0	Time generated
FIDT	84	93	10	D	0	Finish date

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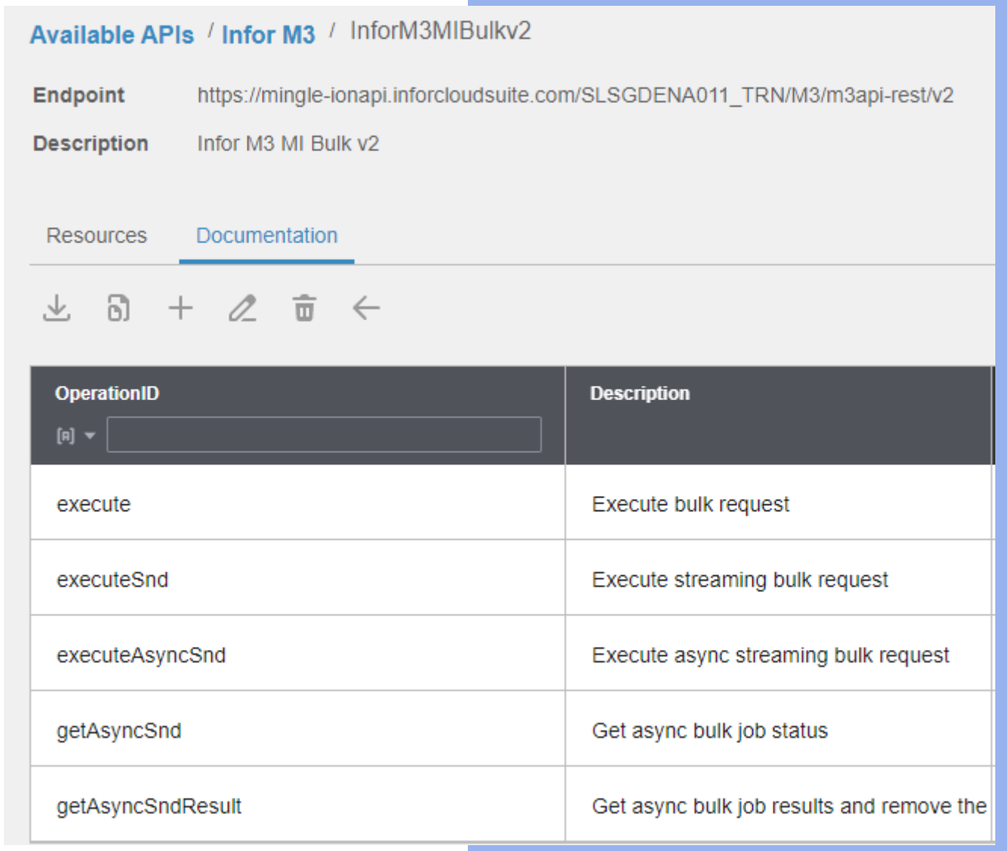
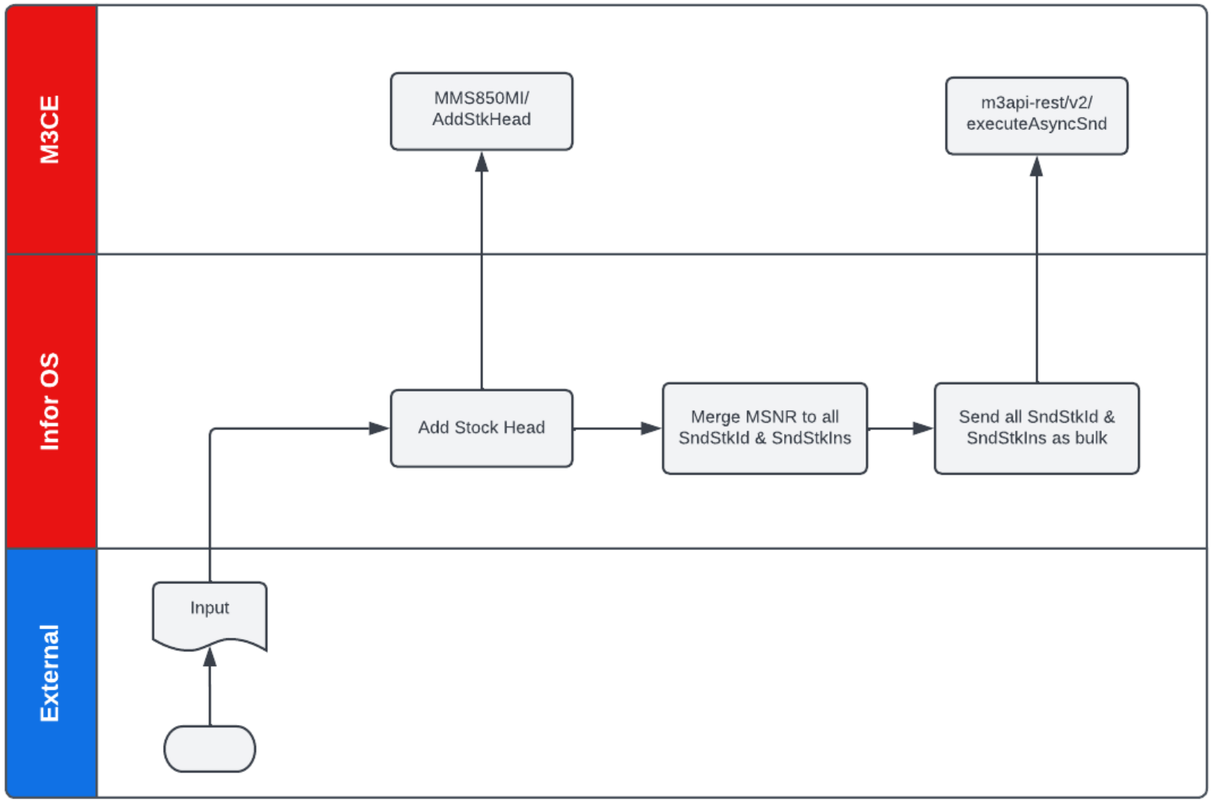
M3 Bulk APIs

- Bulk APIs executes multiple APIs calls
- Supports different transactions within one API
- Does not support orchestration of calls and data
- Response includes response from each API call
- Significant performance gain possible
  - … especially when executing smaller batches in parallel.



Stock Balances – Basic flow




```
{
    "WHLO": "001",
    "E065": "ALL",
    "E0PA": "JM",
    "E0PB": "JM",
    "E0IO": "I",
    "PMSN": "000001",
    "Lines": {
        "program": "MMS850MI",
        "transactions": [
            {
                "record": {
                    "MSNR": "",
                    "WHLO": "001",
                    "WHSL": "YB0101",
                    "MSLN": "00001",
                    "PMSN": "00001",
                    "ITNO": "75-JM001"
                },
                "transaction": "SndStkId"
            },
            {
                "record": {
                    "MSNR": "",
                    "WHLO": "001",
                    "WHSL": "YB0101",
                    "MSLN": "00001",
                    "PMSN": "00001",
                    "ITNO": "75-JM001",
                    "QLFR": "0145",
                    "QLQT": "950"
                },
                "transaction": "SndStkIns"
            },
            {
                "record": {
                "transaction": "SndStkId"
            },
            {
            {
                "record": {
                "transaction": "SndStkId"
            },
            {
                "record": {
                "transaction": "SndStkIns"
            },
            {
                "record": {
                "transaction": "PrcStkTran"
            }
        ]
    }
}
```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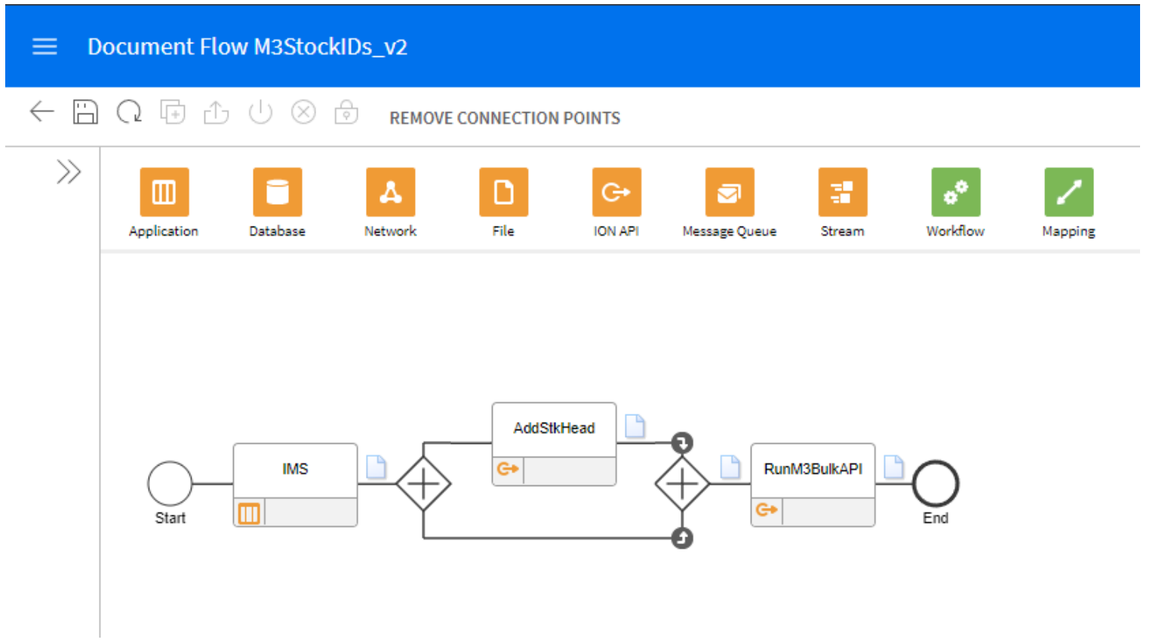
Document flow with Merge – Update stock balances

- ION receives JSON-file over IMS.
- File contains information
  - Header: AddStkHead
  - Lines: SndStkId & SndStkIns
  - Footer: PrcStkTran (*AUT)
- Header added to M3 via ION API with MSNR in response
  - The replied number (MSNR) is being merged into the lines and footer of the JSON message using the merge functionality in the Doc Flow.
- Finally, the M3 bulk ION API is called to enter the lines into M3.



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INTEGRATION

Infor OS Services

> “ **one of the most mature and complete EAP platforms**
>
> constellation RESEARCH

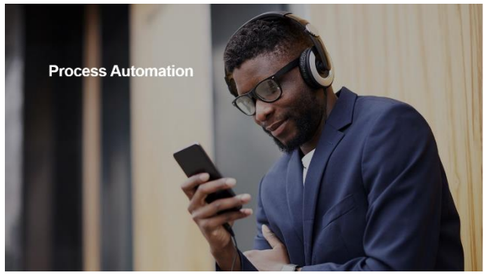
Portal: Modern flexible desktop/mobile user experience

Integration: Connect data from anywhere to anywhere

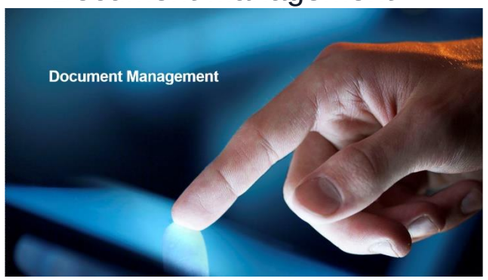
Data: Store all your enterprise data from everything

Insights: Analyze and Visualize Data everywhere

Automation: Automate workflows with data anytime

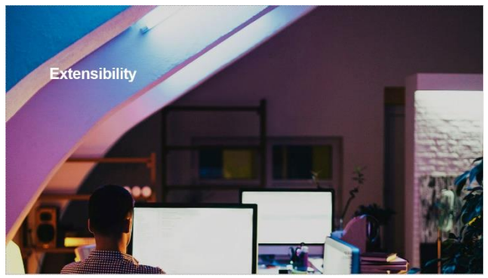


Documentation: Embedded contextual Document Management

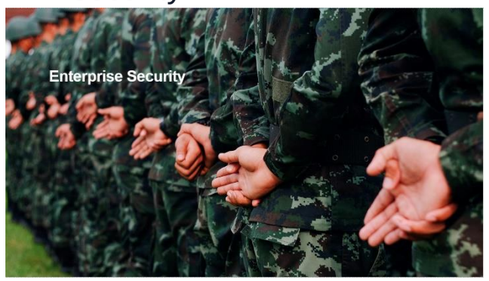


Machine learning: model training and deployment

Extensibility: Build data drive apps for anything



Secure: Comprehensive user authentication and role-based security



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Overview Extensibility Architecture

Self Service

The capabilities in the CloudSuite for self-service of the technical environment

Data Retrieval

The available capabilities for data retrieval and user personalizations

Create & Edit Data

Possible solutions for creating and editing data from the technical platform

ION Datalake Access

The different tools and method to access the Datalake

H5 SDK

Description of the development tool H5 SDK

Mongoose XtendM3

(PaaS)

Add Applications in Cloud Infrastructure

File name	Description
Infor M3 Cloud Edition Extensibility white paper	For M3 CE, the attached document provides an answer to the question of what the possibilities and restrictions for M3 CE Core will be in a multi-tenant cloud deployment context.
Infor M3 Extensibility white paper on-prem + ST_env	The Attachment for M3 on-premise/single tenants is included for completeness – although this does NOT apply to M3 CloudEdition
Extensibility options available within M3 Multi-Tenant CloudSuite on AWS	Presentation originally given at Infor TechEd 2019 in Stockholm covering the extensibility options within M3 CloudEdition available at this time. Since this presentation; XtendM3 has been launched, Coleman DA and Coleman AI are onboarded to the M3 Suites.

https://support.infor.com/espublic/EN/AnswerLinkDotNet/SoHo/Solutions/SoHoViewSolution.aspx?SolutionID=1858460&kb_is_archived=0&kb_accessed_from=KBSearchResult

Linked KBs

Extensibility Area	Skill Name	Description	Link to KB Article
Infor OS Adoption	Coleman Digital Assistant	Coleman Digital Assistant template skills for M3 CE Core	KB 2115095
	Coleman AI Platform	This KB contains both information and demo solutions of the components needed for a worked example of how to use Coleman AI: Use Coleman AI to support Customer Order Discount suggestions and utilize them in M3 Price Guidance.	KB 2132011
Integration templates	Infor M3 CE Generic Solution for Credit Card Service White Paper	This White Paper is intended for the system administrator or consultant who will design, develop, and configure an integration between Infor M3 CE and a card payment provider.	KB 2117982
	M3 CE Integration and Infor OS content - Knowledge Base Articles	A knowledge base article with links to resources related to Infor OS Content and M3 CE integrations, such as implementation guide for EDI, Credit Card Service etc.	KB 2017962
	Infor M3 Cloud - Salesforce Integration	This guide describes the integration of Infor M3 Cloud and Salesforce and explains the integration process requirements, configuration tasks, and troubleshooting information.	KB 2117544
	Infor M3 Cloud - MSCRM (Microsoft Dynamics CRM 365) Integration	This guide describes the integration of Infor M3 Cloud and Microsoft dynamics 365 CRM and explains the integration process requirements, configuration tasks, and troubleshooting information.	KB 2117820

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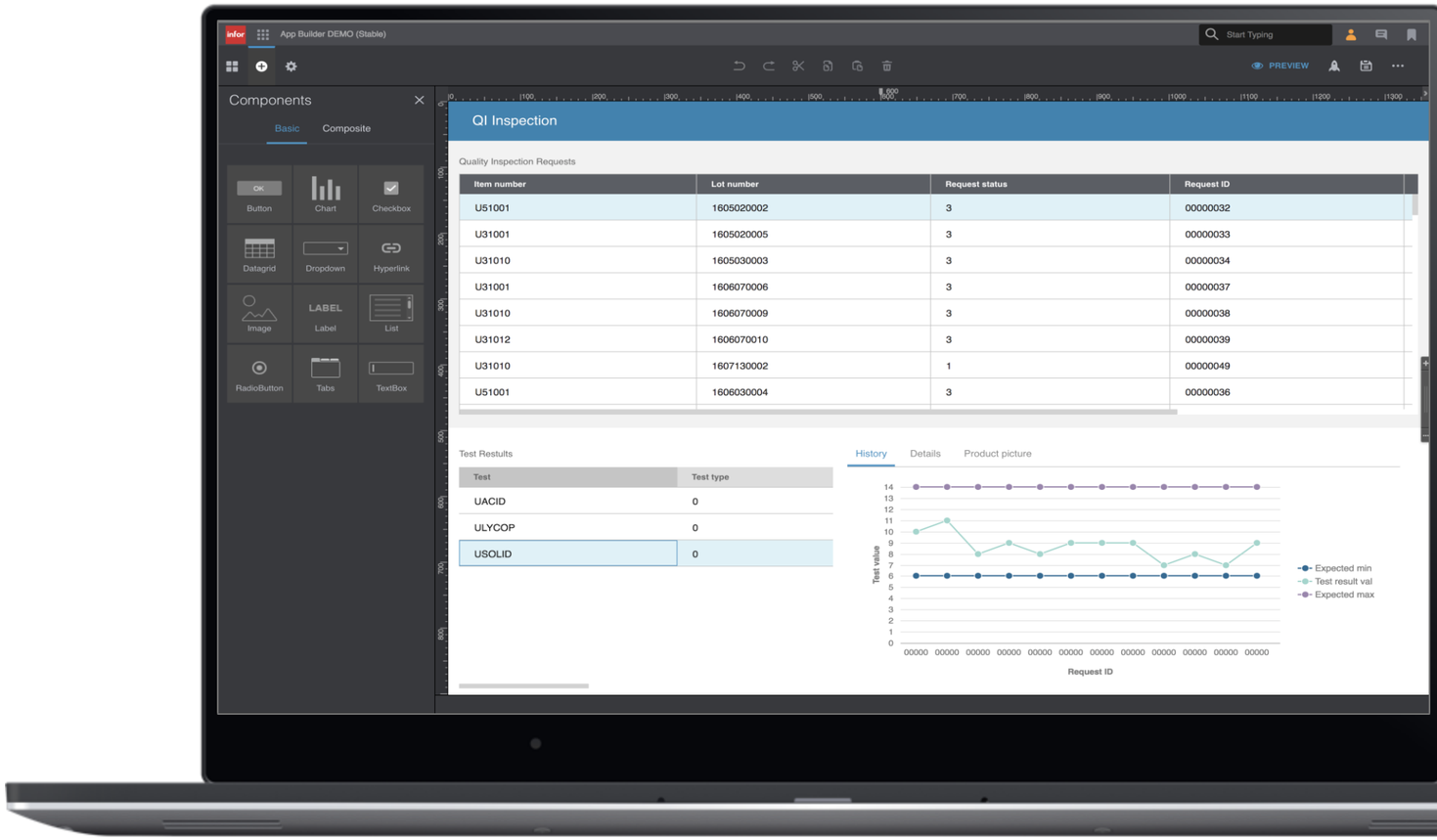
Innovate With New Apps And Features

EXTENSIBILITY

- Rapid application development tools / WYSIWYG design
- No code – Low Code – Full Code
- Simple mashups to full stack web development
- Deployed as HTML 5 / Device responsive
- Integrated with other services
  - IFS / SSO
  - Employee Portal
  - ION IPaaS (ION / API)
  - ION Workflow
  - AI / ML



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Low code – Wizards

New data maintenance

Allows developers to quickly and easily build base tables/IDOS and forms with zero coding

Master form

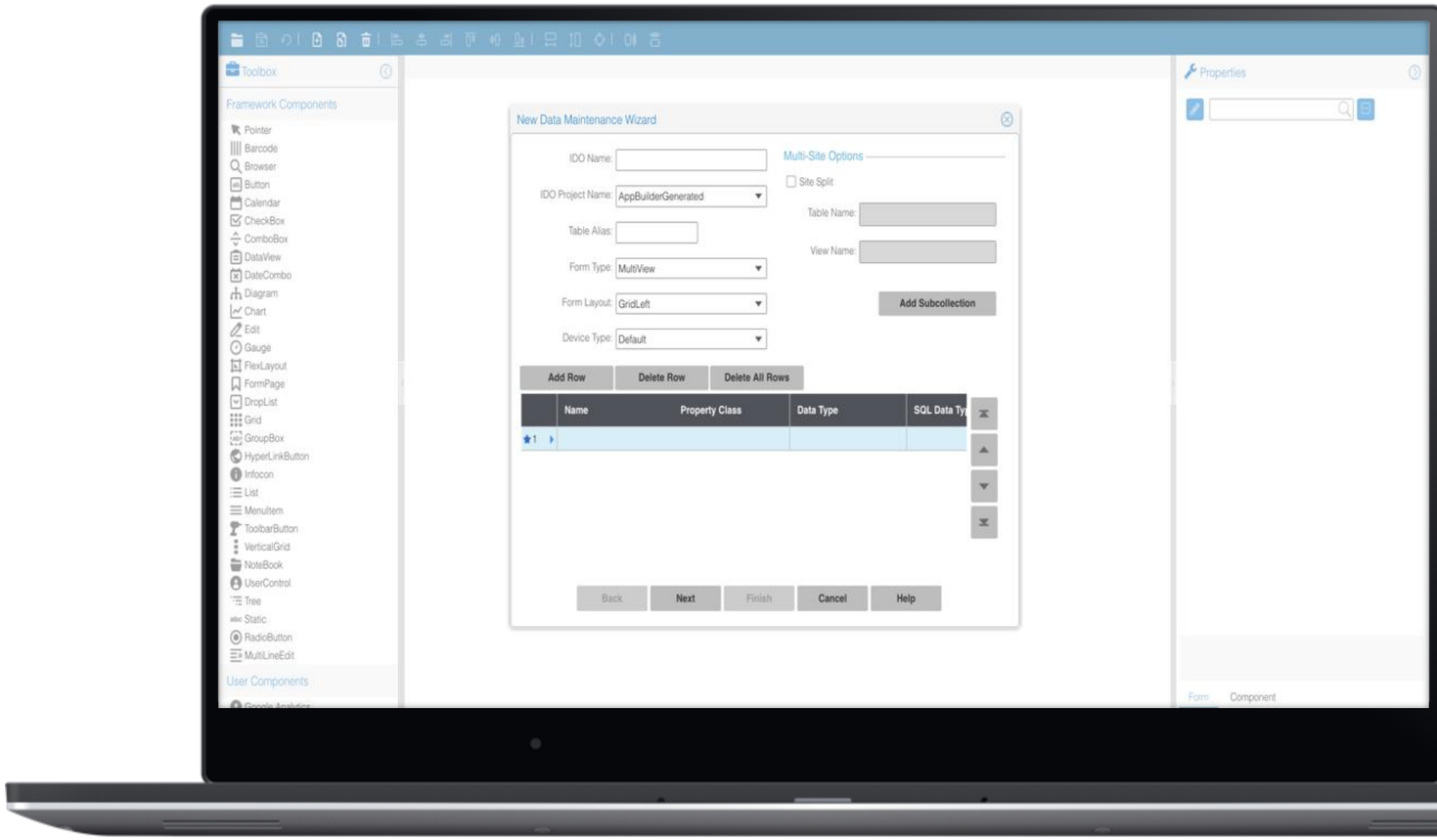
Master forms allow developers to build the base of their application and not have to copy/paste over and over. Also allows for easy uplift/ maintenance.

XML to IDO

This tool allows you to absorb BODs and create and IDO without any issue

DataViews

Being able to quickly and easily build views for either screen or basic reporting.



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Full code – Designer

Custom assemblies

Allows to developer to access items like REST or SOAP calls and have them in a reusable state..

IDOs

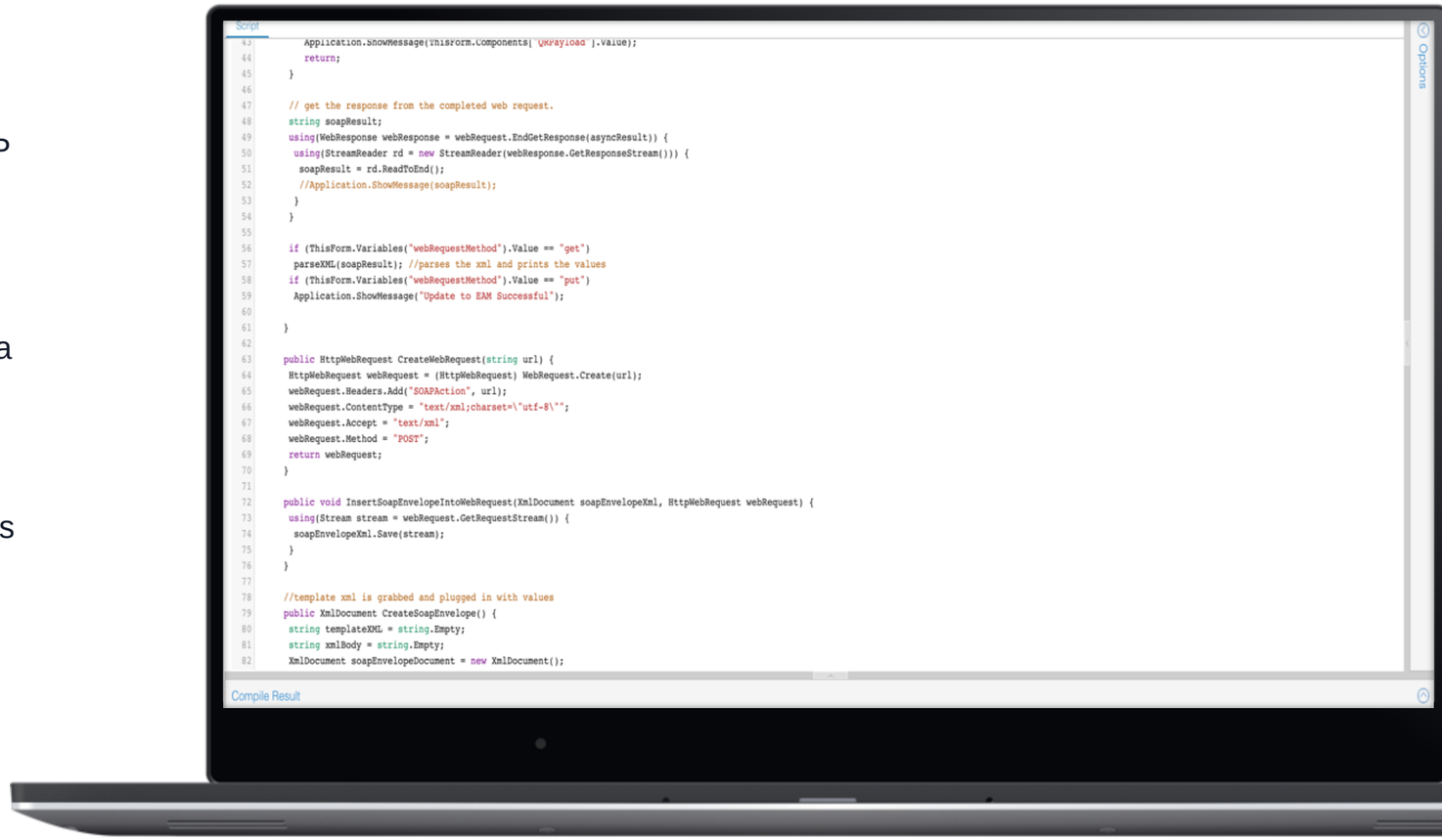
Intelligent Data Objects control all the interaction of data with user in either form, report or back end processing

AES

This workflow engine allows developers to interject forks and controls with outside individuals to allow proper business processing to take place

Form scripting

Similar to Custom Assemblies, Form Scripting allows developers to take control where the base framework does not suffice.



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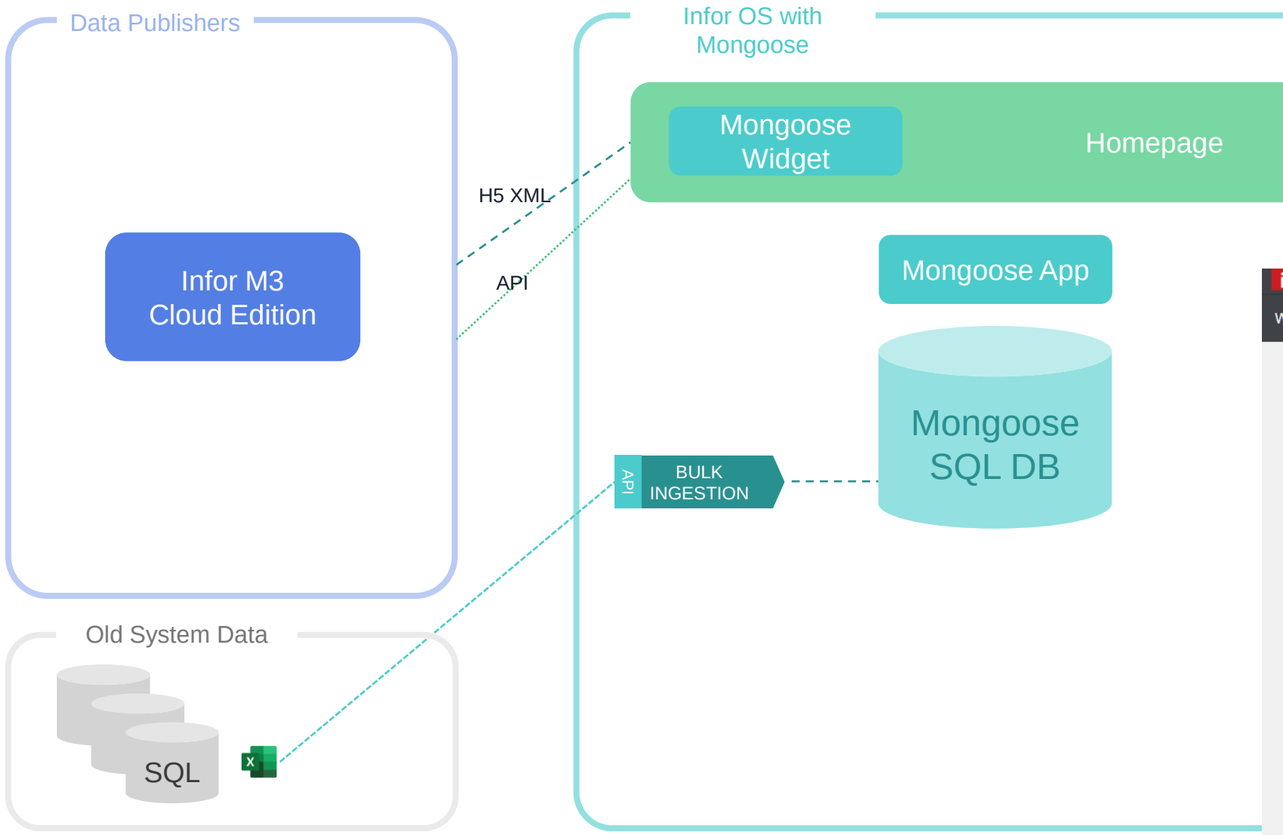
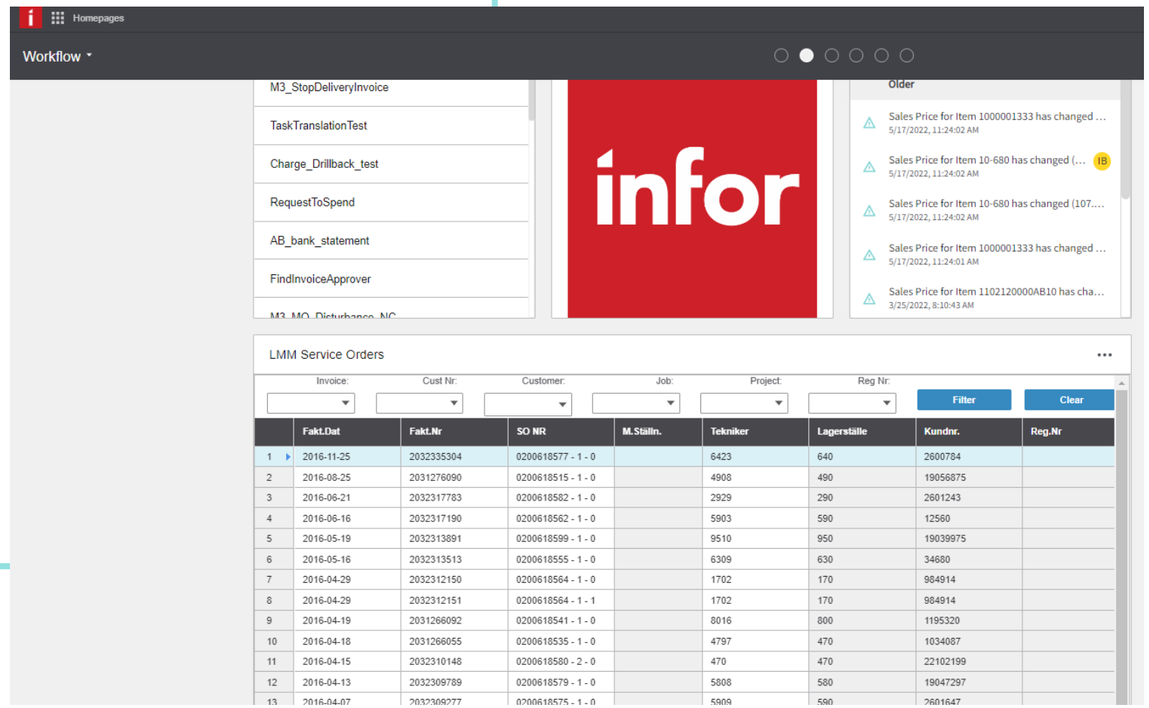
Architecture - Mongoose App in M3CE Solution





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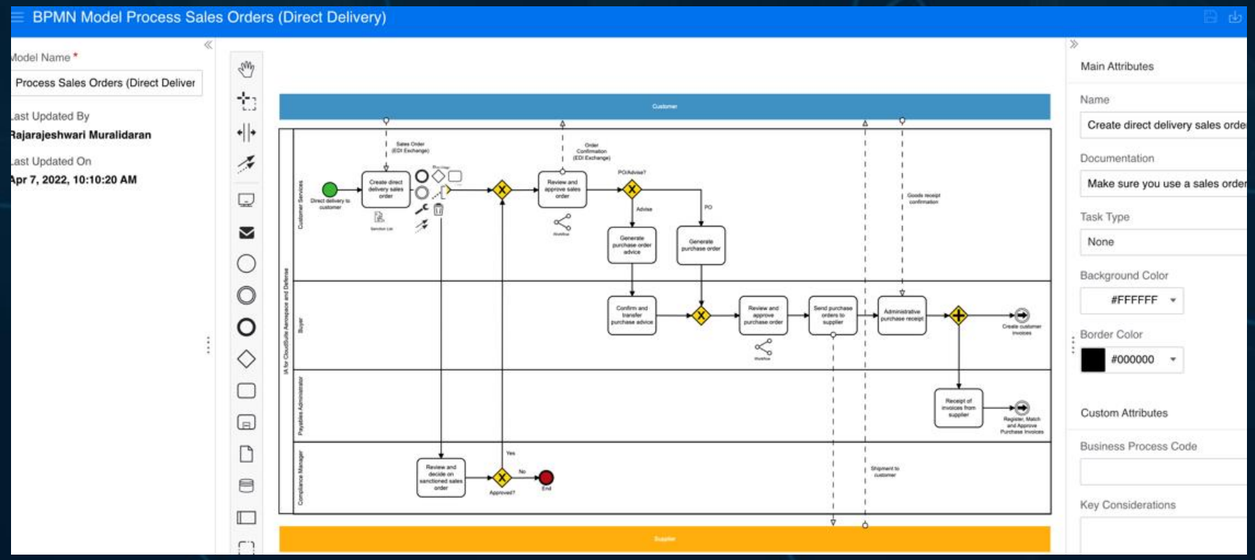
Infor Process Intelligence



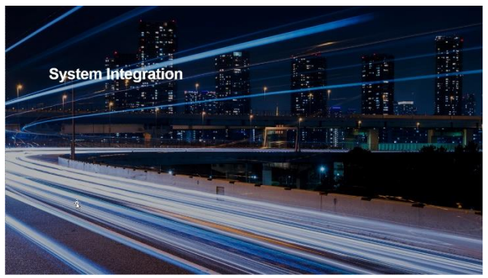
INTEGRATION

Infor OS Services

> “ **one of the most mature and complete EAP platforms**
>
> constellation RESEARCH

Portal: Modern flexible desktop/mobile user experience

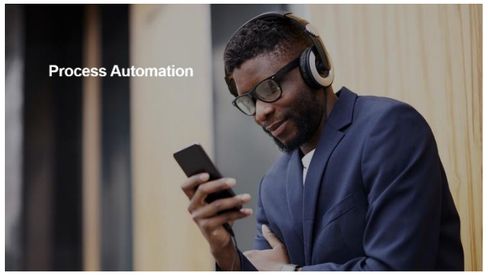
Integration: Connect data from anywhere to anywhere



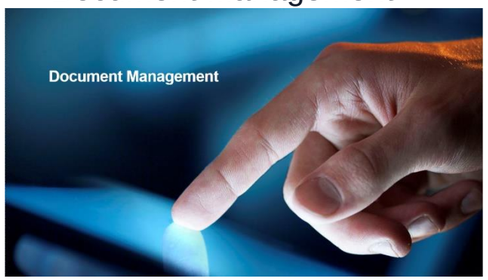
Data: Store all your enterprise data from everything

Insights: Analyze and Visualize Data everywhere

Automation: Automate workflows with data anytime

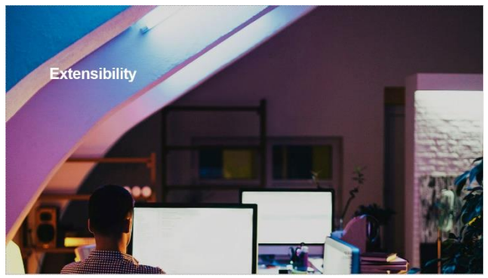


Documentation: Embedded contextual Document Management

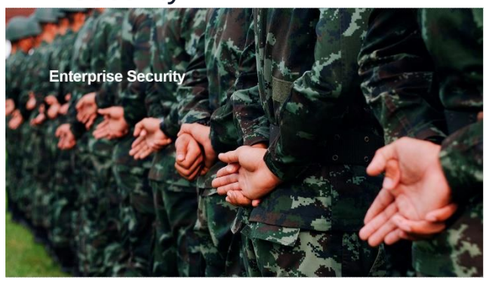


Machine learning: model training and deployment

Extensibility: Build data drive apps for anything



Secure: Comprehensive user authentication and role-based security



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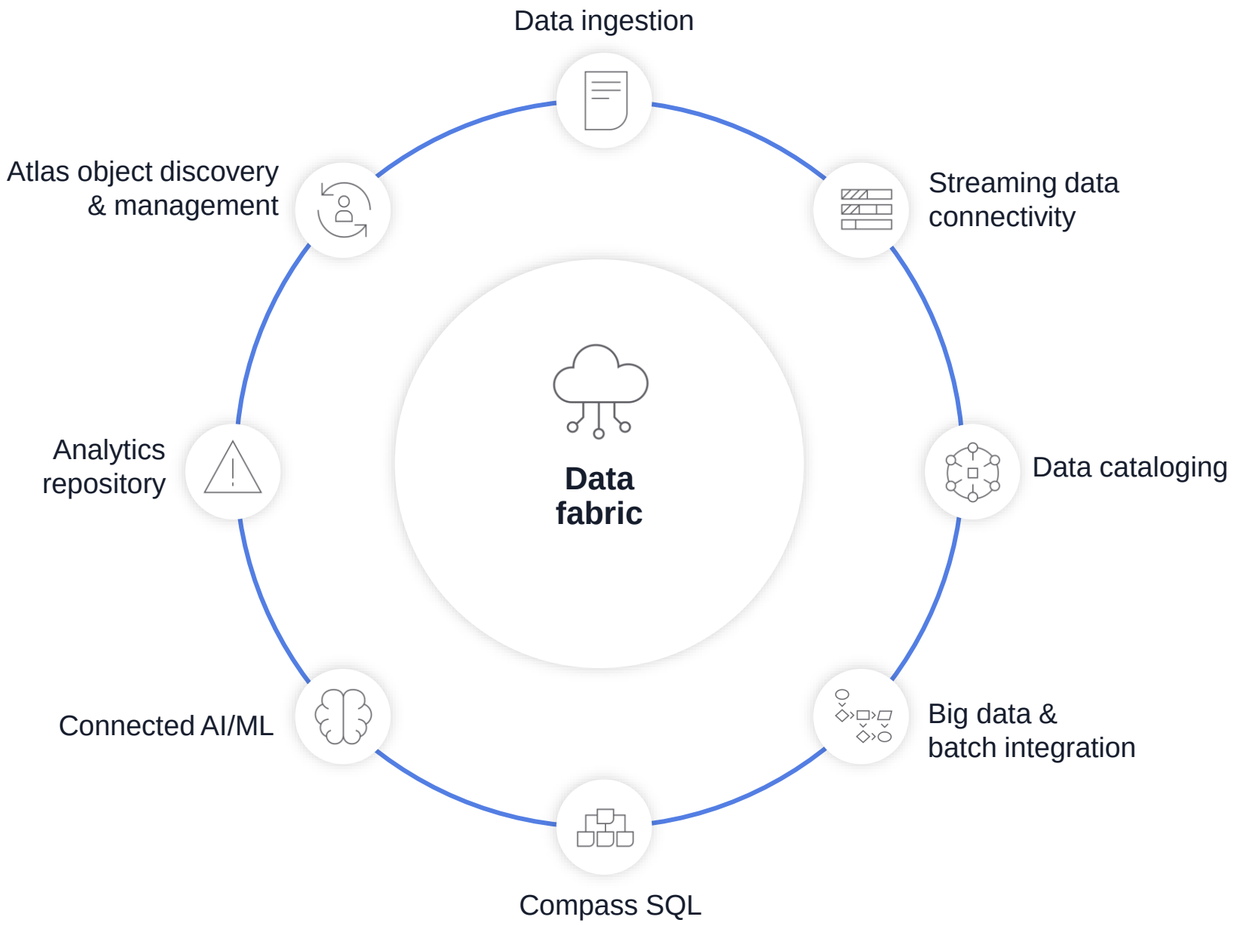
Data fabric

With an ever-increasing array of enterprise applications, APIs, devices, and users, having a big data platform to centralize the entirety of your data portfolio helps organizations start their journey from analytics to predictive AI application.

The Infor Data Fabric is able to receive and capture every instance of data generated in an immutable, long-term storage platform while allowing content developers and self-service users to quickly ask questions, find trends, and extract content managed by the Data Fabric with Data Lake's Compass SQL platform.



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Infor OS Enablement | Data Fabric Streaming Data Ingestion

Streaming data & its benefits

Streaming data is data that is generated continuously by data sources processing each transaction record by record to Data Fabric Streaming Ingestion services to get it stored in Data Lake and simultaneously be processed in real-time with Stream Pipelines for delivery to a database

Publishers

- Publishers can send data events when they happen
- Publishers do not worry about micro-batching and optimal object size
- Publishers provide the 1st half of operational insight capabilities

Data Lake

- Data Fabric becomes author of the data objects
- Data Fabric ensures optimal object sizes are reached before storing
- Existing Data Lake concepts and services continue to work as today with data published in a novel way

Stream Pipelines

- Stream Pipelines allows customers to subscribe to streamed data to continuously push it downstream for a real-time delivery to a cloud data destination
- Stream Pipelines is the 2nd half that enables the operational reporting capabilities

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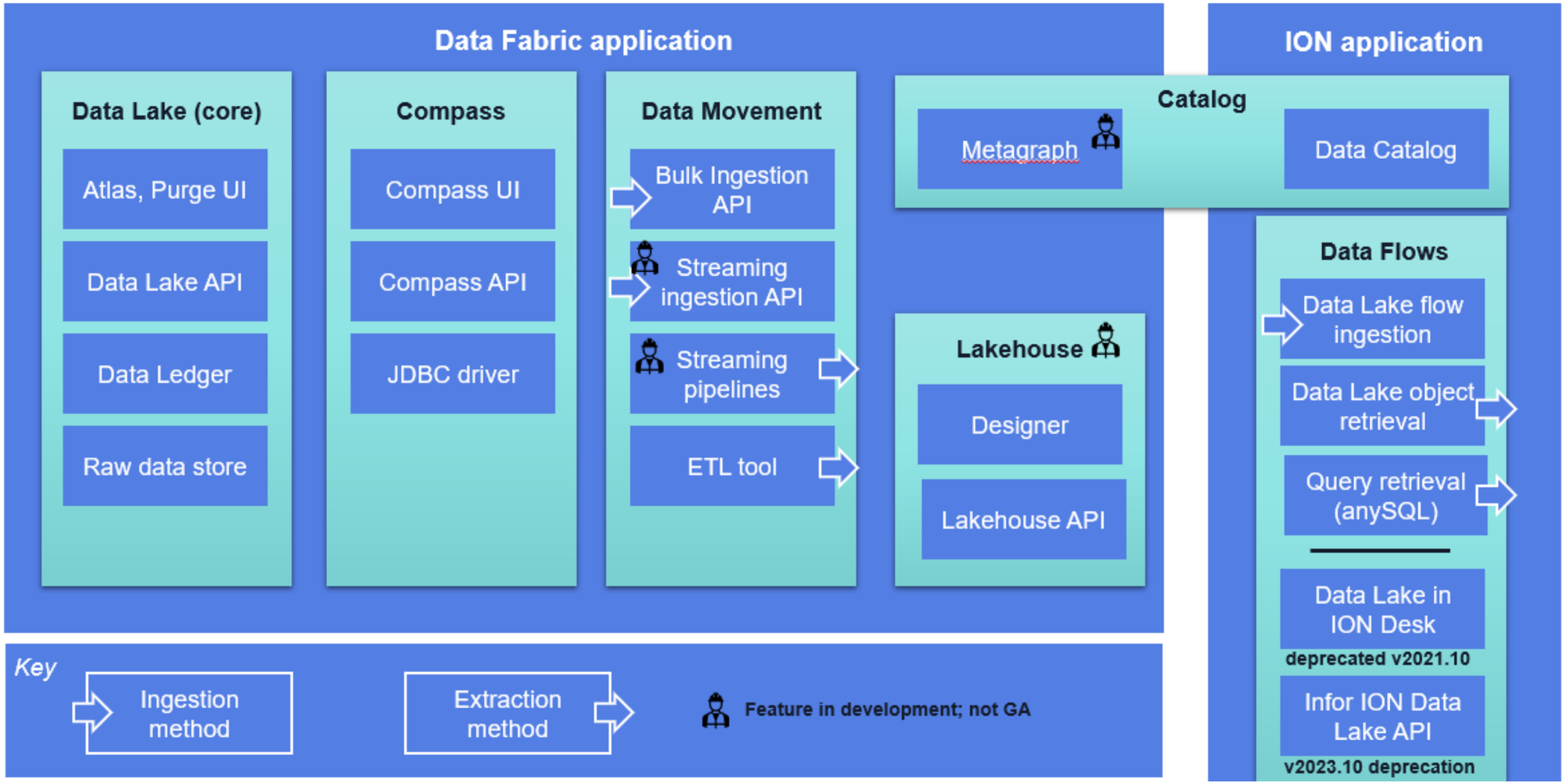
Data Fabric Overview Architecture



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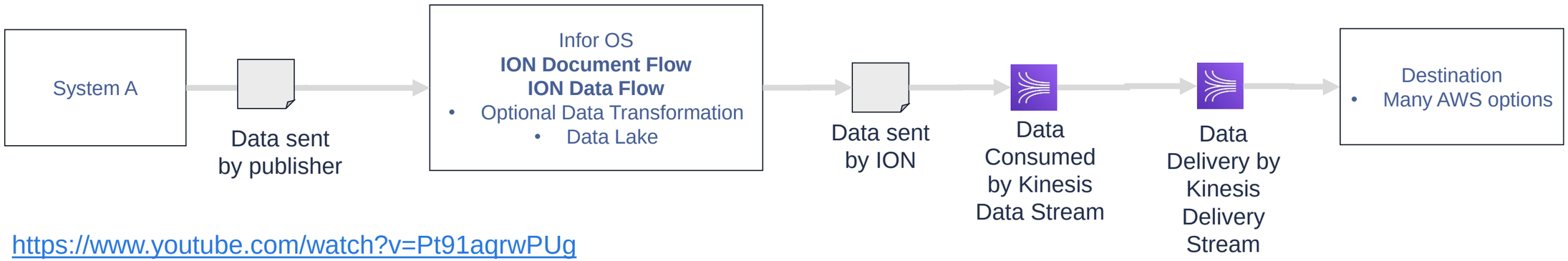
Stream data from Infor ION

- Infor Intelligent Open Network (ION) is an Enterprise Application Integration platform
- Data can be interfaced to and from the ION platform
- Amazon AWS Kinesis is a data streaming tool
- You can connect to a Kinesis Data Stream from ION



https://www.youtube.com/watch?v=Pt91aqrwPUg

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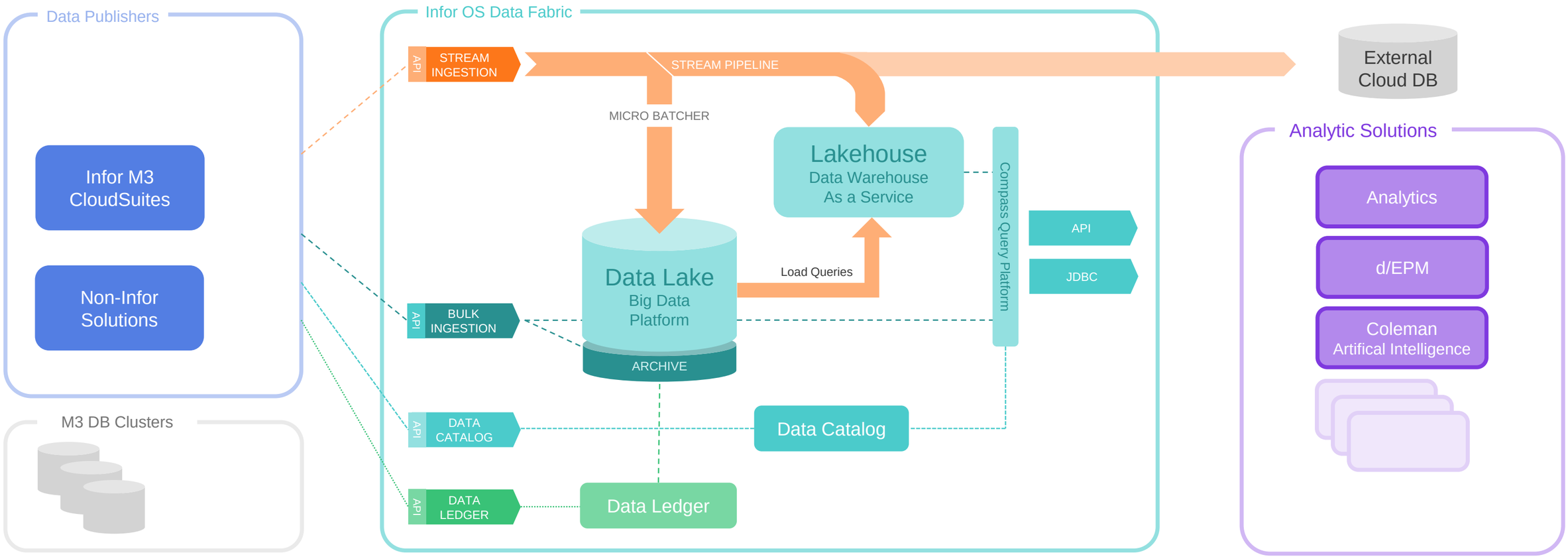
M3 and Data Fabric



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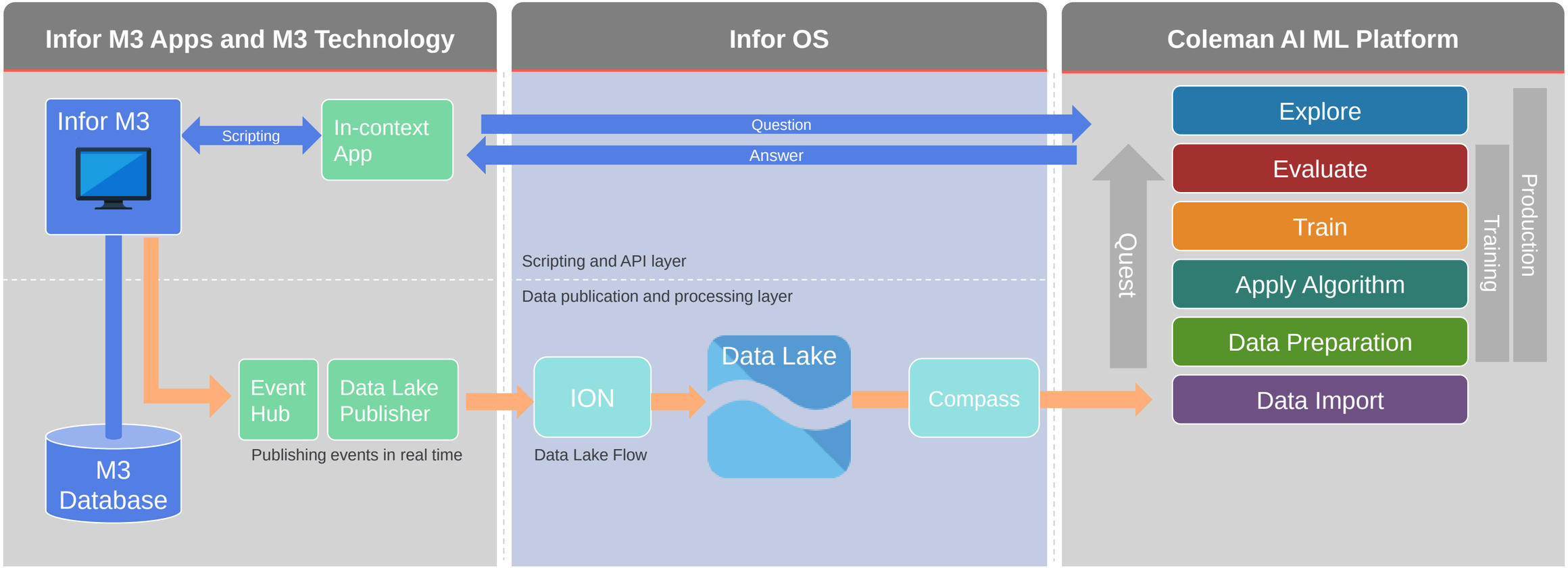
High Level Architecture



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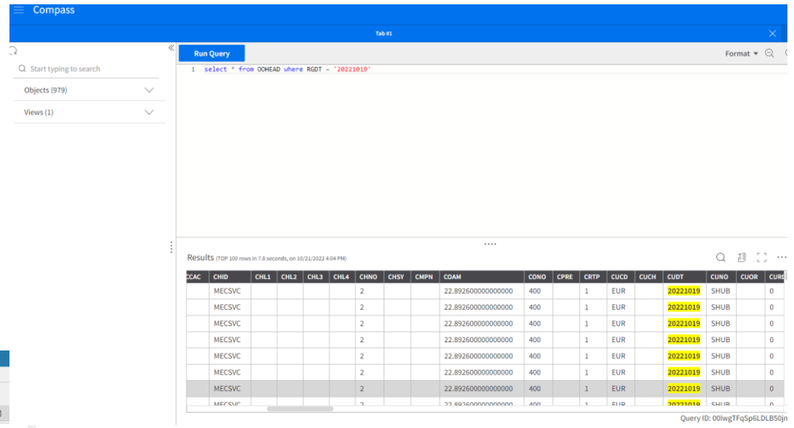
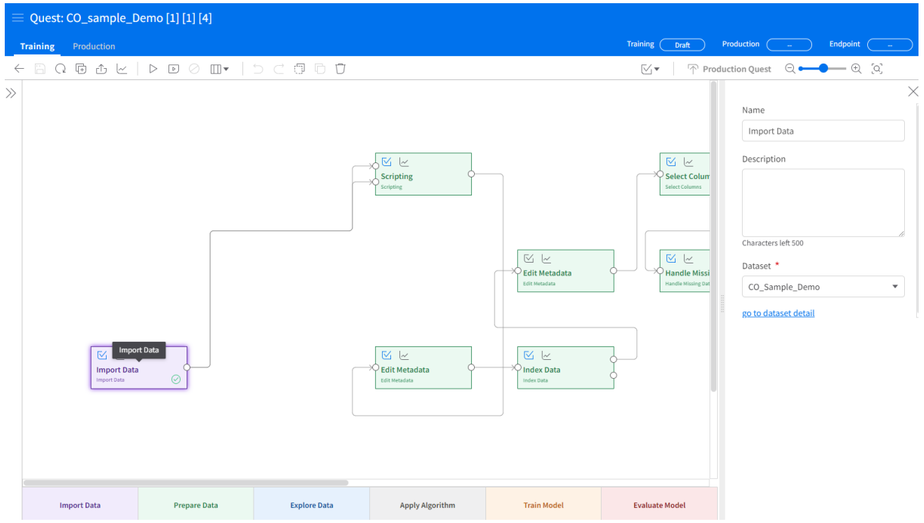
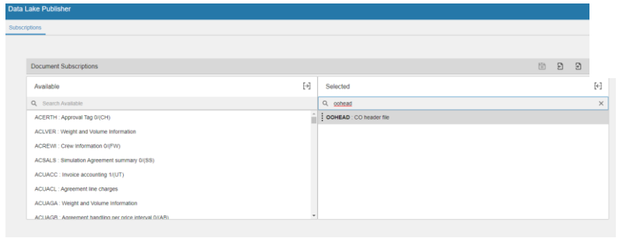
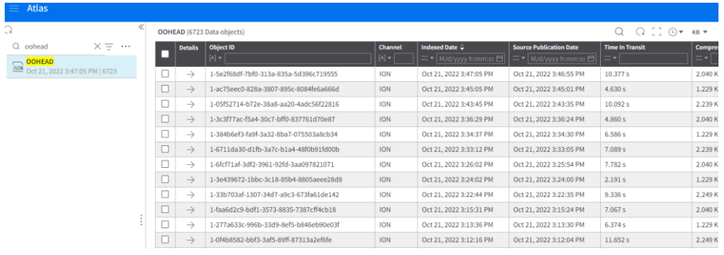
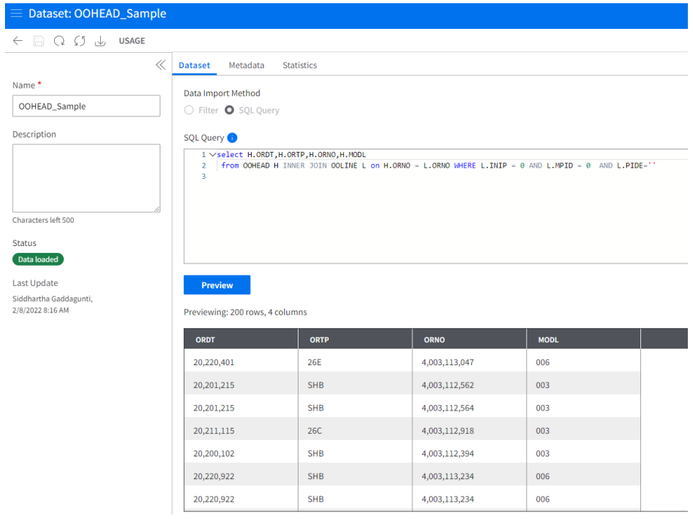






M3BE Data Lake Publisher Atlas Compass SQL Datasets Quests Endpoints





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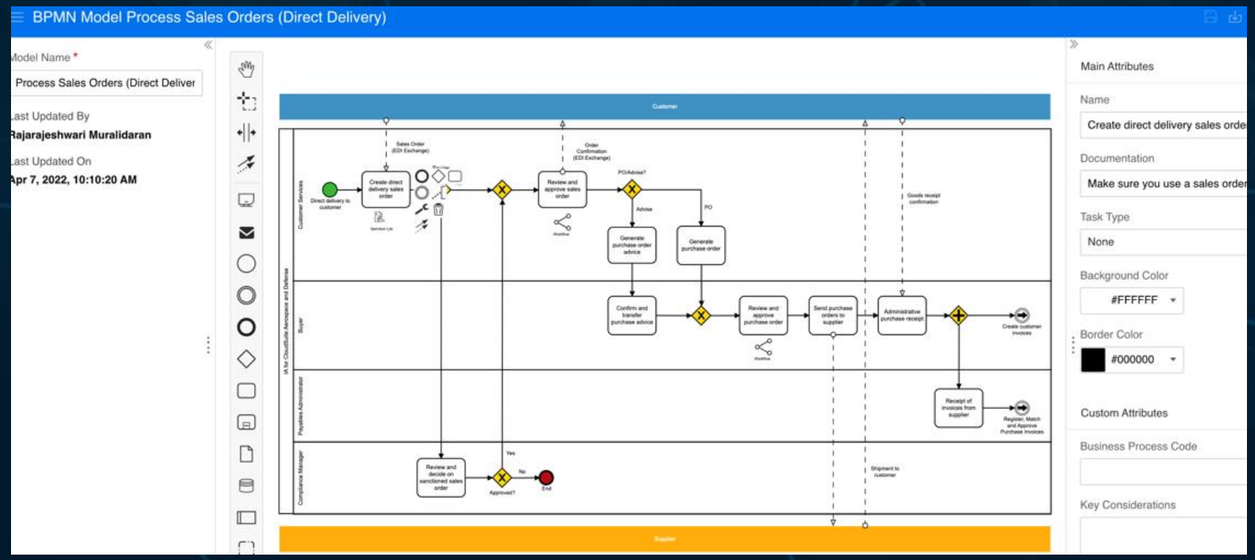
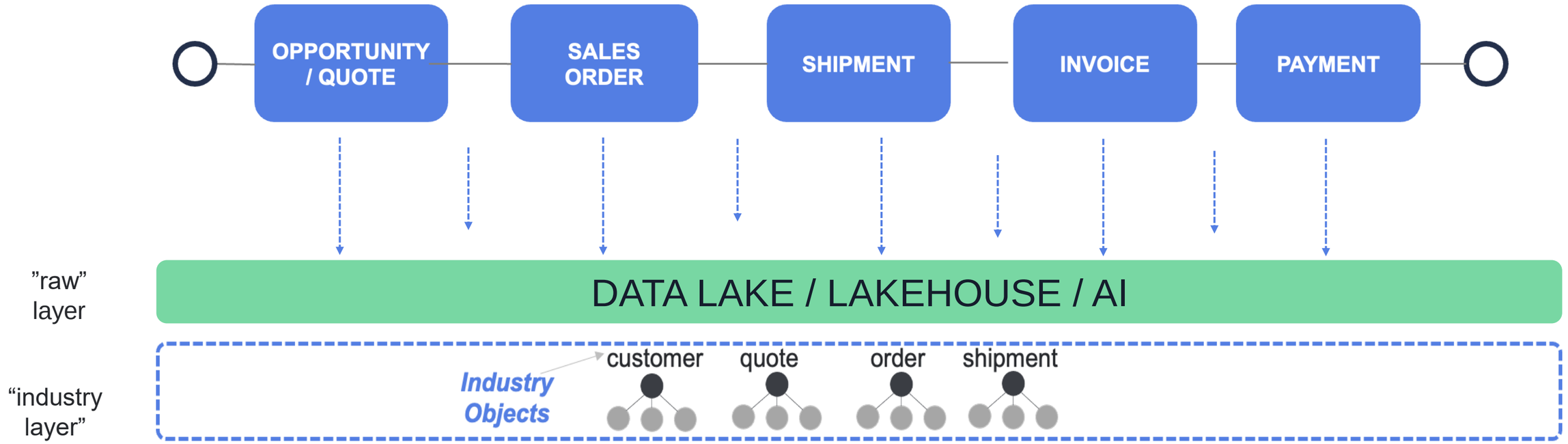
Infor Process Intelligence



1. Model a business process & collect data



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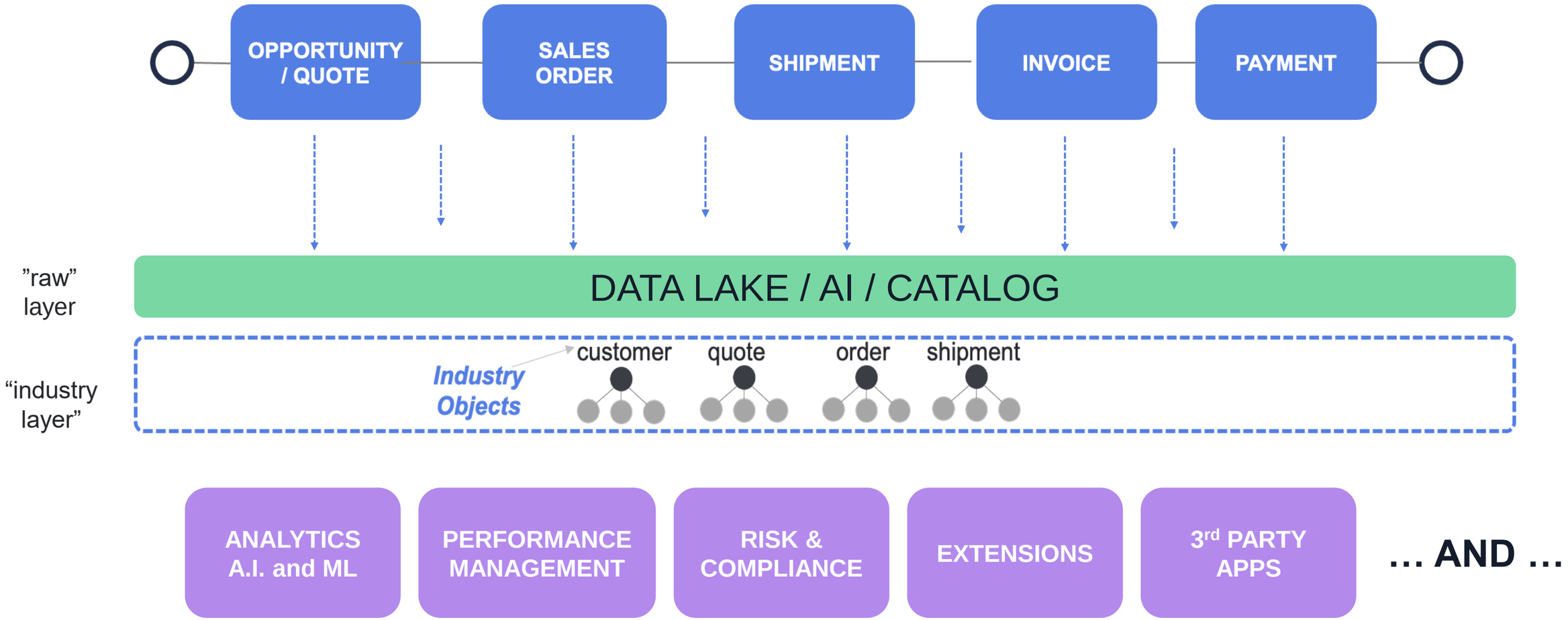
2. Enable re-usable downstream innovation



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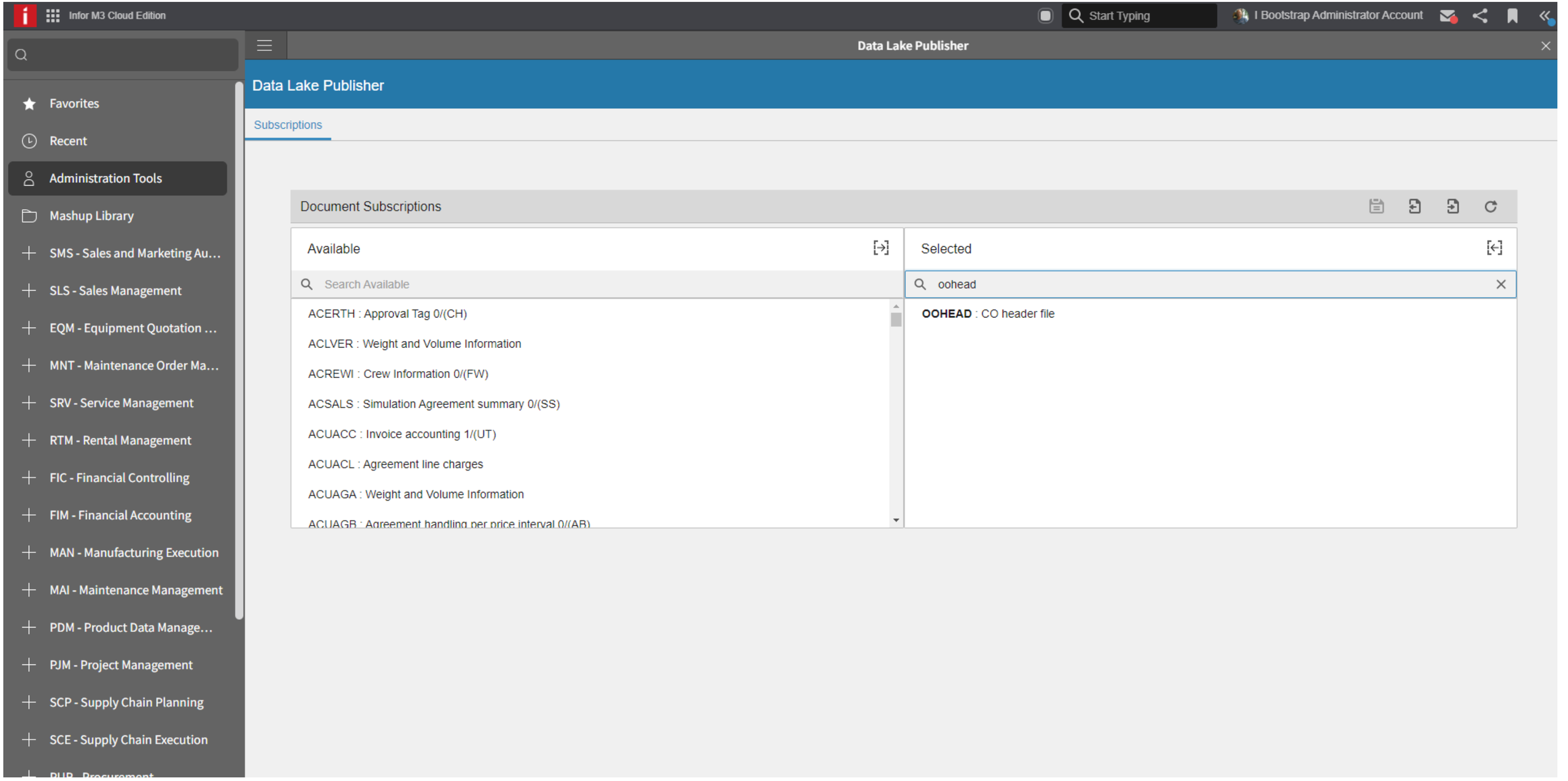

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oohead

OOHEAD
Oct 21, 2022 4:14:58 PM | 6730

OOHEAD (6730 Data objects)

KB

Details	Object ID	Channel	Indexed Date	Source Publication Date	Time In Tr
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Page 1 of 270

25 Records per page

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Purge | Mark Corrupt | Download

Start typing to search

Objects (979)

Views (1)

Run Query

Format

```
1  select * from OOHEAD where RGDT = '20221019'
```

Results (TOP 100 rows in 7.8 seconds, on Oct 21, 2022)

	3RDP	ABNO	accountingEntity	ADID	AGNO	AGNT	AICD	ARAT	BAGC	BAGD	BKID	BLRO	BRAM	BREC	BRLA	CCAC	CHID
1		0	400_AAA				0	0.000000000000000		0		74.450000000000000	64.560000000000000		64.560000000000000		MECSV
2		0	400_AAA				0	0.000000000000000		0		74.450000000000000	64.560000000000000		64.560000000000000		MECSV
3		0	400_AAA				0	0.000000000000000		0		74.450000000000000	64.560000000000000		64.560000000000000		MECSV
4		0	400_AAA				0	0.000000000000000		0		74.450000000000000	64.560000000000000		64.560000000000000		MECSV
5		0	400_AAA				0	0.000000000000000		0		74.450000000000000	64.560000000000000		64.560000000000000		MECSV
6		0	400_AAA				0	0.000000000000000		0		74.450000000000000	64.560000000000000		64.560000000000000		MECSV
7		0	400_AAA				0	0.000000000000000		0		74.450000000000000	64.560000000000000		64.560000000000000		MECSV
8		0	400_AAA				0	0.000000000000000		0		74.450000000000000	64.560000000000000		64.560000000000000		MECSV

Query ID: 00lwgTFqSp6LDLB50jnx

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Datasets
Quests
Endpoints
Custom Algorithms
Algorithm Quick Reference
About Coleman AI Platform

Dataset: CO_Sample_Demo

USAGE

Name *

CO_Sample_Demo

Description

Characters left 500

Status

Data loaded

Last Update

Siddhartha Gaddagunti,
2/8/2022 8:21 AM

Dataset | Metadata | Statistics

Data Import Method

Filter | SQL Query

SQL Query

```
1 select H.CUNO,H.ORDT,H.ORTP,H.ORNO,H.MODL,L.ITNO
2  from OOHEAD H INNER JOIN OOLINE L on H.ORNO = L.ORNO WHERE L.INIP = 0 AND L.MPID = 0  AND L.PIDE=''
```

Preview

Previewing: 200 rows, 6 columns

CUNO	ORDT	ORTP	ORNO	MODL	ITNO
00000006	20,220,513	MM1	1,000,000,193	DBX	1774473
001	20,220,906	SHB	4,003,113,194	006	99-000039
JMSE01	20,220,919	SHB	4,003,113,221	006	PJ002
JMSE01	20,220,919	SHB	4,003,113,221	006	PJ003
JMSE01	20,220,919	SHB	4,003,113,221	006	PJ004
FRCUSTTRIA	20,210,714	26C	4,003,112,753	003	100000650
FRCUSTTRIA	20,210,802	26Z	4,003,112,777	003	100000501

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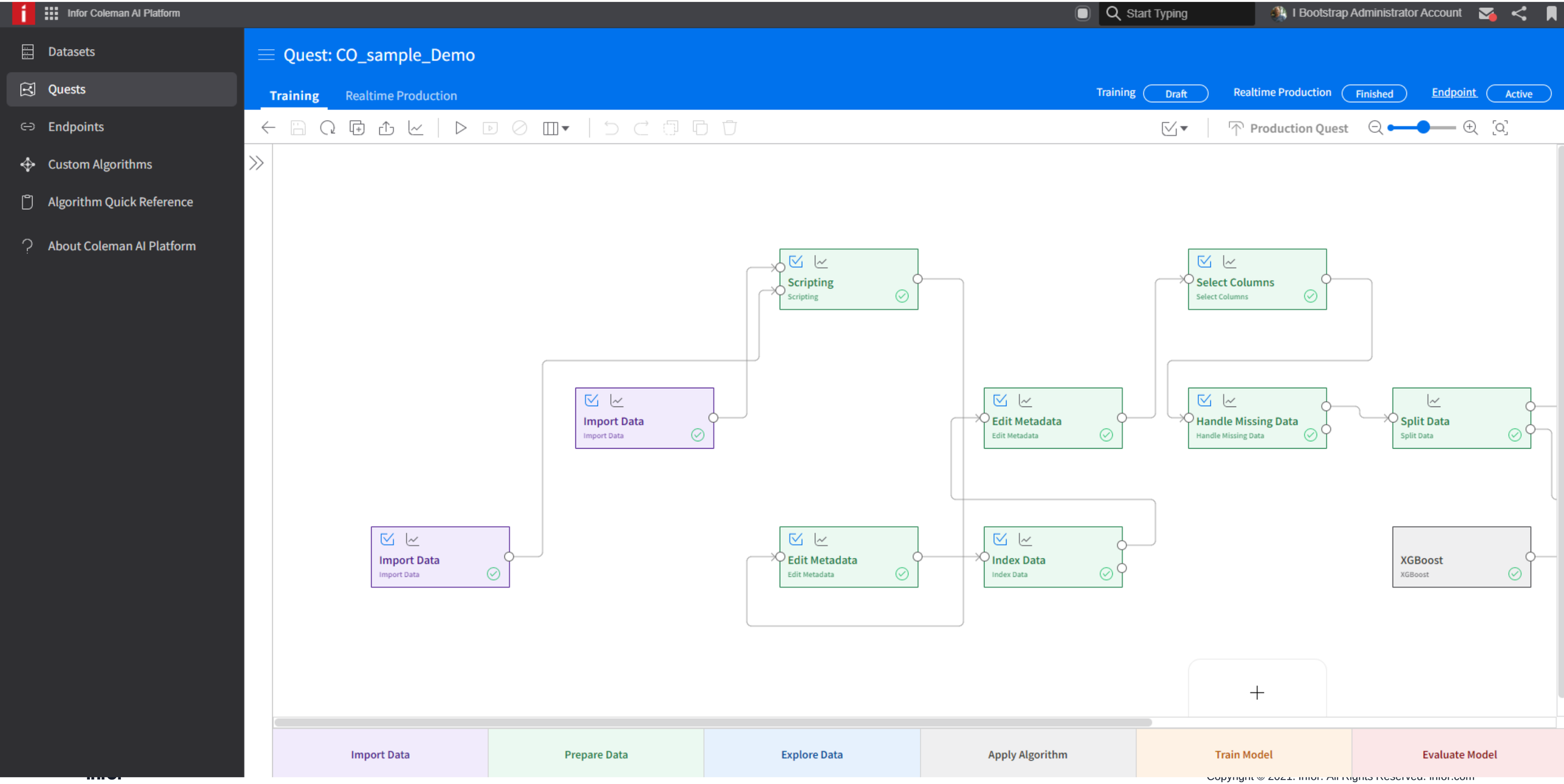

Infor Coleman AI Platform
Start Typing
I Bootstrap Administrator Account
Datasets
Quests
Endpoints
Custom Algorithms
Algorithm Quick Reference
About Coleman AI Platform
Quest: CO_sample_Demo
Training
Realtime Production
Training
Draft
Realtime Production
Finished
Endpoint
Active
Production Quest
Import Data
Import Data
Scripting
Scripting
Import Data
Import Data
Edit Metadata
Edit Metadata
Index Data
Index Data
Select Columns
Select Columns
Edit Metadata
Edit Metadata
Handle Missing Data
Handle Missing Data
Split Data
Split Data
XGBoost
XGBoost
Import Data
Prepare Data
Explore Data
Apply Algorithm
Train Model
Evaluate Model

Product Recommendations

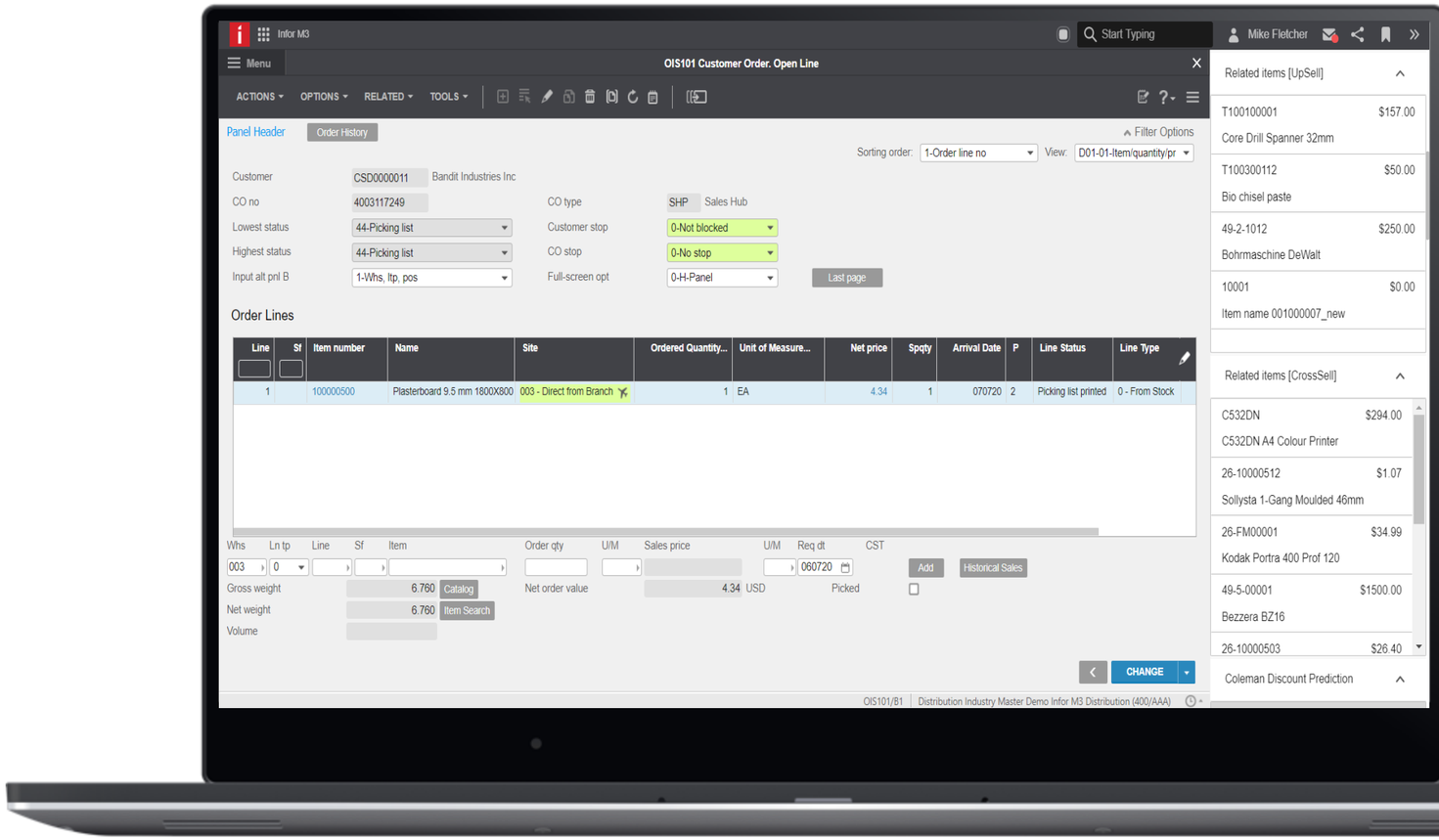
KB reference 2132011

Description

- Two Coleman Quests & In-context Apps to support Product Recommendations. The In-context widget is configurable to support a number of scenarios

Benefit/Value to Customer

- Solution One
  - Use this quest and In-context widget to support “Product Up-Sell”. For this process; the item number already selected is reviewed and suitable up-sell products are displayed
- Solution Two
  - Use this quest and In-context widget to support “Product Cross-Sell”. For this process; the item number already selected, and the Customer ID are reviewed, and suitable cross-sell products are displayed; based on similar customer’s prior purchases



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Dagens ämnen

Inledning

Senaste nytt från fältet angående M3 Cloud

Höjdpunkter från Specialisthörnet

Vad händer mer i höst?

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Thank you

Infor is a global leader in business cloud software specialized by industry.

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