



# TIPS & TRIKS – NYHETER FRA M3 DEVELOPMENT OG CLOUD DELIVERY

Teams Meeting 16 Juni 2021

Lena Lundell - InfoTeam

Björn Torold, Gunilla Andersson - Infor

# Dagens ämnen

Inledning

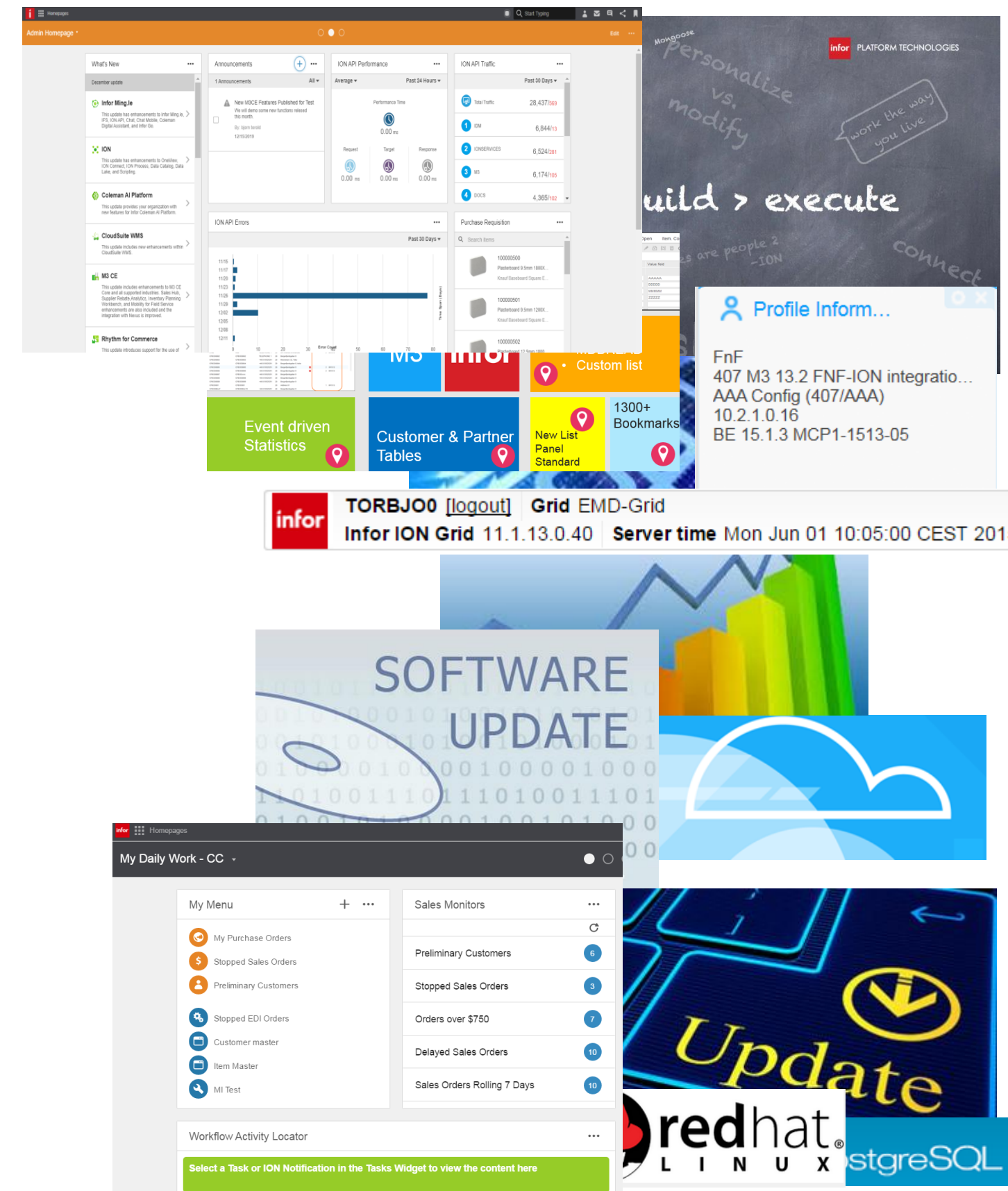
Senaste nytt från fältet angående M3 Cloud

Infor Development introducerar Gunilla Andersson

Rapport från Infors Cloud Delivery Team

Infor Document Manager används mer i molnet vilket skapar nya utmaningar för System Air

Avslutning och en snabb blick på vad som väntar oss i höst



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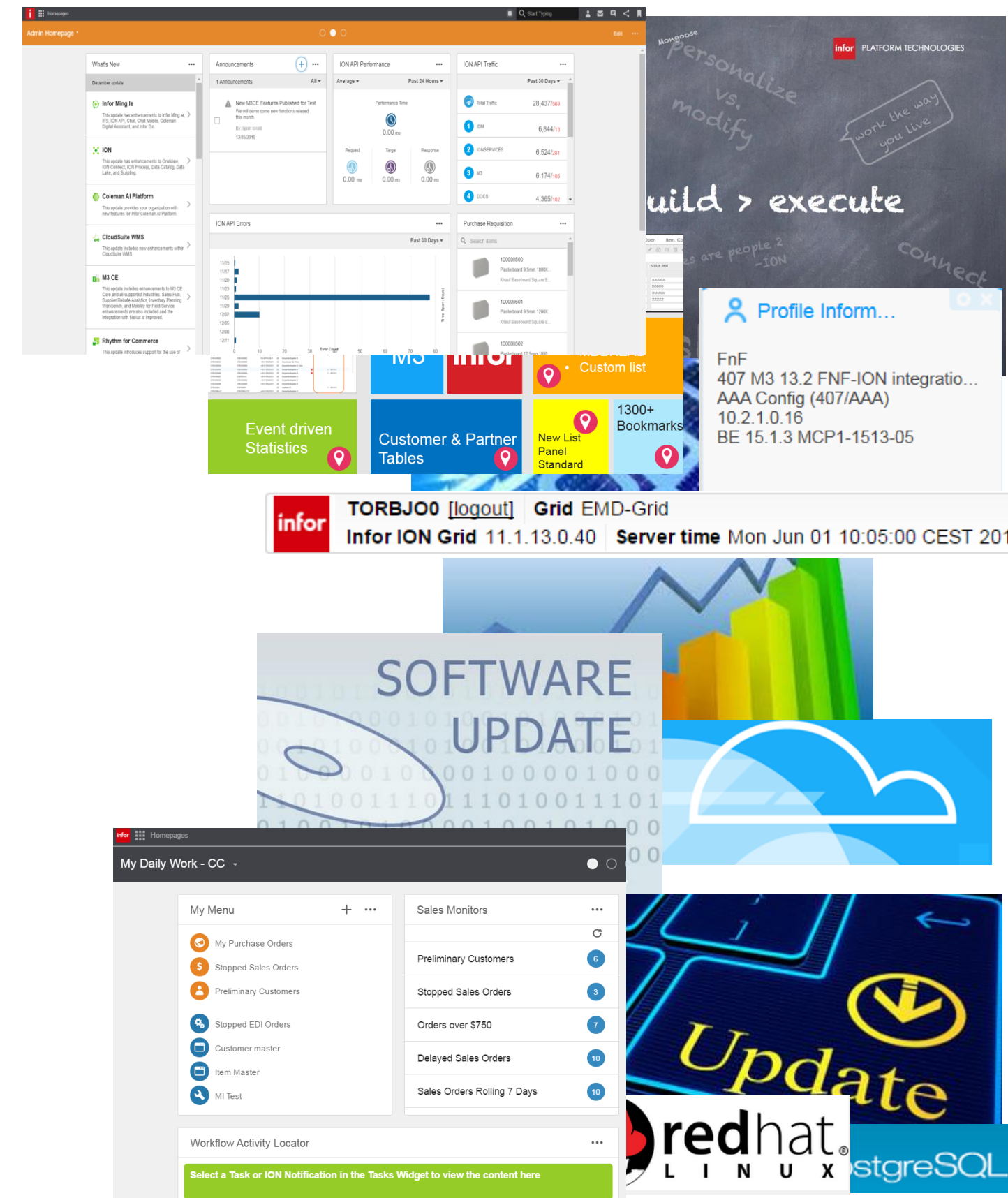
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# Nordic Customers - M3 CloudSuite (MT)

NEFAB

SPERSEN

POLTTIMO

Elektroskandia

KIVIKS  
MUSTERI

Saarioinen

Ecophon  
SAINT-GOBAIN

BioMar

NORSK  
KYLING

Cloetta

PROHOUSING

JÄRVA

MÖLLERENS  
SIDEN 1866

SANDVIK

NORLEDA  
The greatest travel experiences

DC  
DELLNER

Diab

E.A. Smith

INSULA

STOKKE

Ingemarsson  
GA LINDBERG  
ChemTech AB

etac

MOWI

Q-LINEA

ALTUS  
Intervention

VEDUM

Tican

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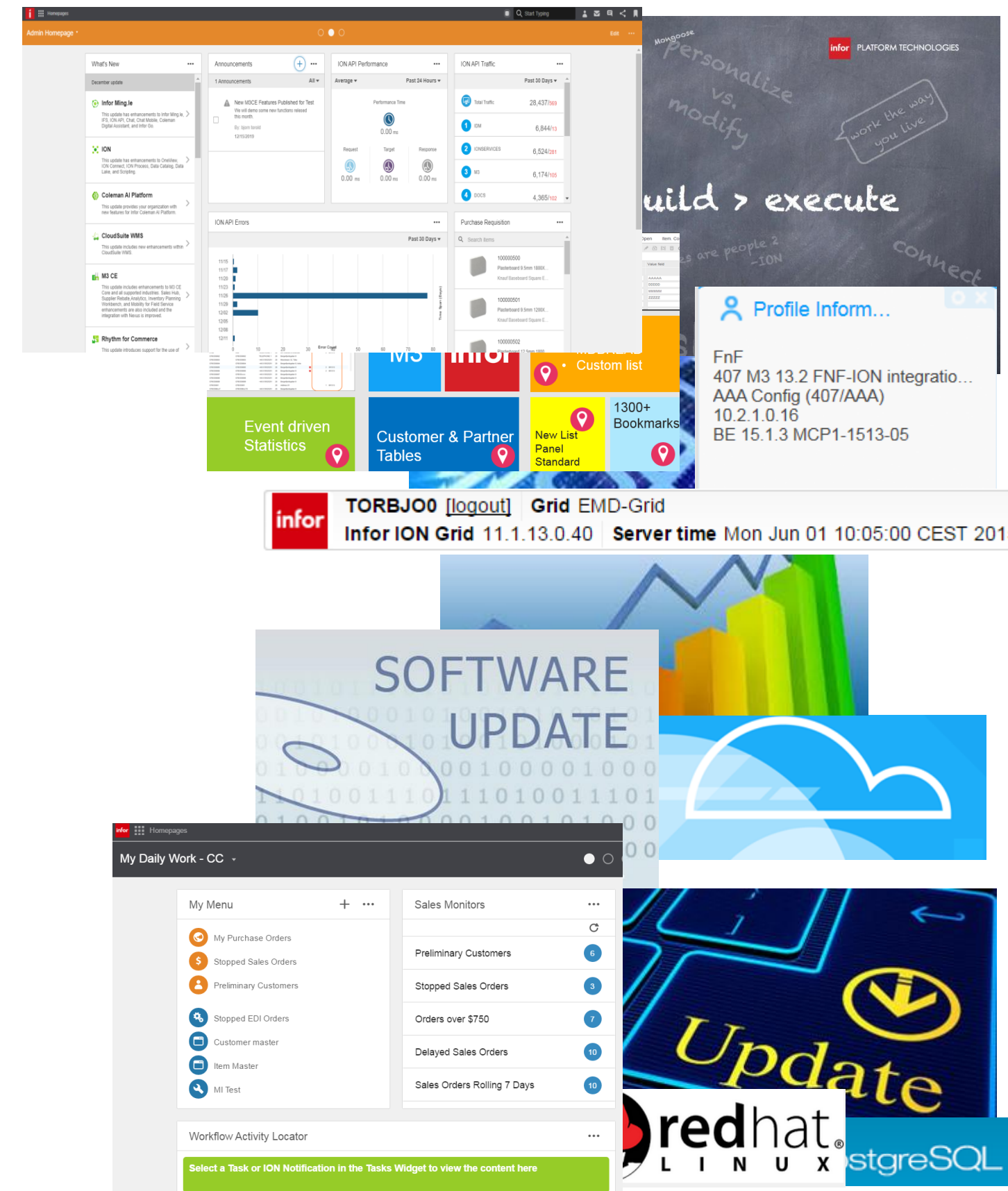
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# Who am I?

- Started as a trainee at Intentia 1997
- Worked at the Infor partner iStone/Columbus 2011-2021
- Have had various roles over the years:
  - Business consultant (MPM, purchase, warehousing mainly)
  - Presales / Solution design
  - Responsible for the M3 demo environment (GDE)
  - Regional manager for the M3 office in Gothenburg
  - User experience (and Cloud) ambassador 😊
- Director M3 User Experience





# M3 user experience



## Smart Office

Maintenance



## H5 Classic / New

New version based on latest Infor design components available in Cloud



## Personalizations

The most underestimated tool we have!



## Mashup designer

Not available in Cloud, 13.4 is the last version where you can build mashups for ISO and H5



## M3 widgets

All M3 unique widgets for the homepages in Infor OS.



## H5 SDK

Use this tool when you want to develop you own web applications for M3



## Widget SDK

Use this tool when you want to develop your own homepage widgets



## “M3 App designer”

Build your own M3 applications without programming – available in Cloud only, planned for 2022



## ?????

What will the future bring?

# Next important milestone

infor Infor M3
Customer Service
Items Overview

Customer Service
Customer
Save Refresh

**Max Machinery**
Telephone
City
Country
100124-8865
+1-518 884521
West Hartford
United States

Customer

Orders

Batch Orders

Returns

Item Info

Item number  
**987-943-98766**
Name  
**GT-252 Turbo Charger**
Description  
**GT-252 Turbo charger incl BOV**

**Basic Information**

Item Number: 987-943-98766

Name: Lorem ipsum

Description: Lorem ipsum dolor sit amend

Item responsible: CANDERSSON Charles Andersson


Length: 208

Width: 765

Gross weight: 14,3

Net weight: 14,3

**Item Image**



987-943-98766 GT-252 Turbo Charger

**Links**

- [Material plan](#)
- [On hand balance](#)
- [Transaction history](#)
- [Customer/Item](#)

**Price**

Order quantity:  Price date:  Check Price

Item number	Sales price	Spqty	U/M	Cost price	Margin	Rate	Camp	Scale
987-943-98766	11500,00	1	PCS	9500,00	200,00	100,00		

**Item/Warehouse Information**

Whs	Description	On-hand approve	Allocated qty	Reserved qty	Ltd	Responsible
B10	Prime	16	2	5	60	RMITCHELL
B14	Refurbished	10	6	4	60	RMITCHELL
B15	Prime	5		2	60	RMITCHELL
B20	Prime	1			60	RMITCHELL
C14	Prime	15	8	4	60	RMITCHELL

Infor 2020 PPT Template CORE – Rel. 2 | January 2021

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# What to do with all my mashups?

- Investigate!
  - Do we use all our mashups? Are the users happy with them as is? Development needs? Can they be replaced with other tools?
- Decide what to do with each mashup – the decision depends on your roadmap!
  - If your next step is to move to Cloud
    - Create web mashups (not recommended for complicated mashups, and it is often a quicker path to re-create the mashup from start then trying to change existing code) – **NOTE!! This is an interim solution, you will not be able to change mashups in Cloud, only use them as-is.**
    - Create H5 SDK applications
    - Wait until M3 app designer is available
    - Simpler mashups might be possible to solve by building your own program in CMS010, use personalizations, search, workflows etc?
  - If your next step is to start use H5
    - All of the options above except the app designer option
    - Maybe some roles can stay on Smart Office until you go to Cloud?

# Don't forget...

- To use personalizations!
- To build your own programs using CMS010
- Interactive briefing about these topics via Infor support Tuesday June 15th

The screenshot displays the Infor M3 'Custom list' interface for inventory management. The main table lists items with columns: Who, Site, Location, Item number, Name, On hand approve, Allocated qty, Uts, Average cost, Stock Value, Lot number, Acid, L rec, L iss, Inv dt, and Safety. The table is filtered by '90-Warehouse, Stock zone, Local' and sorted by 'LST90-Warehouse, stock zone loc'. The data is grouped by location: AS - Bulk, AS - Verkstad, WS, Y1, Y9, and YB. Each group shows a total row. The right sidebar contains sections for 'ITEM TRANSACTIONS', 'STOCK MOVEMENTS', and 'CENTRAL WAREHOUSE'.

Who	Site	Location	Item number	Name	On hand approve	Allocated qty	Uts	Average cost	Stock Value, av	Lot number	Acid	L rec	L iss	Inv dt	Safety
901	AS - Bulk	B11	HB002	Spade	▲	3	2-Approved				2-Purchase			210110	200
901	AS - Bulk	B12	HB003	Shovel	▲	5	2-Approved				2-Purchase			210110	200
901	AS - Bulk	B21	HB002	Spade	▲	10	2-Approved				2-Purchase			210110	200
901	AS - Bulk	BUT	HB001	Snow shovel	▲	85	2-Approved	13.58	1589		2-Purchase	210112		200	
901	AS - Bulk	BUT	HB005	Hay fork	▲	10	2-Approved	4.05	73		2-Purchase	210114		200	
901	AS - Bulk	BUT	HB200	Husqvarna TS 140TXD		1	2-Approved	19431.18	18431	8764953731	2-Purchase	210113			
Total: AS - Bulk						102			20993						
901	AS - Verkstad	A01	HB100	Hex Nut M6		1250	2-Approved				2-Purchase			210110	200
901	AS - Verkstad	A01	HB101	Screw M6		900	2-Approved				2-Purchase			210110	200
901	AS - Verkstad	A02	HB102	Motor oil universal	▲	15	2-Approved				2-Purchase			210110	200
901	AS - Verkstad	A03	HB104	S-56	▲	3	2-Approved				2-Purchase			210110	200
Total: AS - Verkstad						2168									
901	WS	WS	VOLVOV90	Volvo V90		1	2-Approved	39834	79667	V900001	2-Purchase	210127	210127		
901	WS	WS	VOLVOV90	Volvo V90		1	2-Approved	39834	79667	V900005	2-Purchase	210212	210212	210128	
Total: WS						2			158334						
901	Y1	YRE	VOLVOV90	Volvo V90		1	1-Under imp	39834	79667	0050000002	2-Purchase	210427			
Total: Y1						1			79667						
901	Y9	YRA	SP008	Filter A		15	2-Approved	115.76	1736		2-Purchase	210108	210212		15
901	Y9	YRA	SP009	Filter B		15	2-Approved	144.70	2171		2-Purchase	210108	210212		15
901	Y9	YRA	SP010	Reis		36	2-Approved	23.15	833		2-Purchase	200604	200603		15
901	Y9	YRA	SP011	Batteri		1	2-Approved	92.61	93		2-Purchase	210108			
Total: Y9						67			4833						
901	YB	YBU001	HB001	Snow shovel	▲	52	2-Approved	13.58	1589		2-Purchase	210112		200	
901	YB	YBU001	HB006	Hay fork Erika Long	▲	15	2-Approved	53.33	800		2-Purchase	201204			

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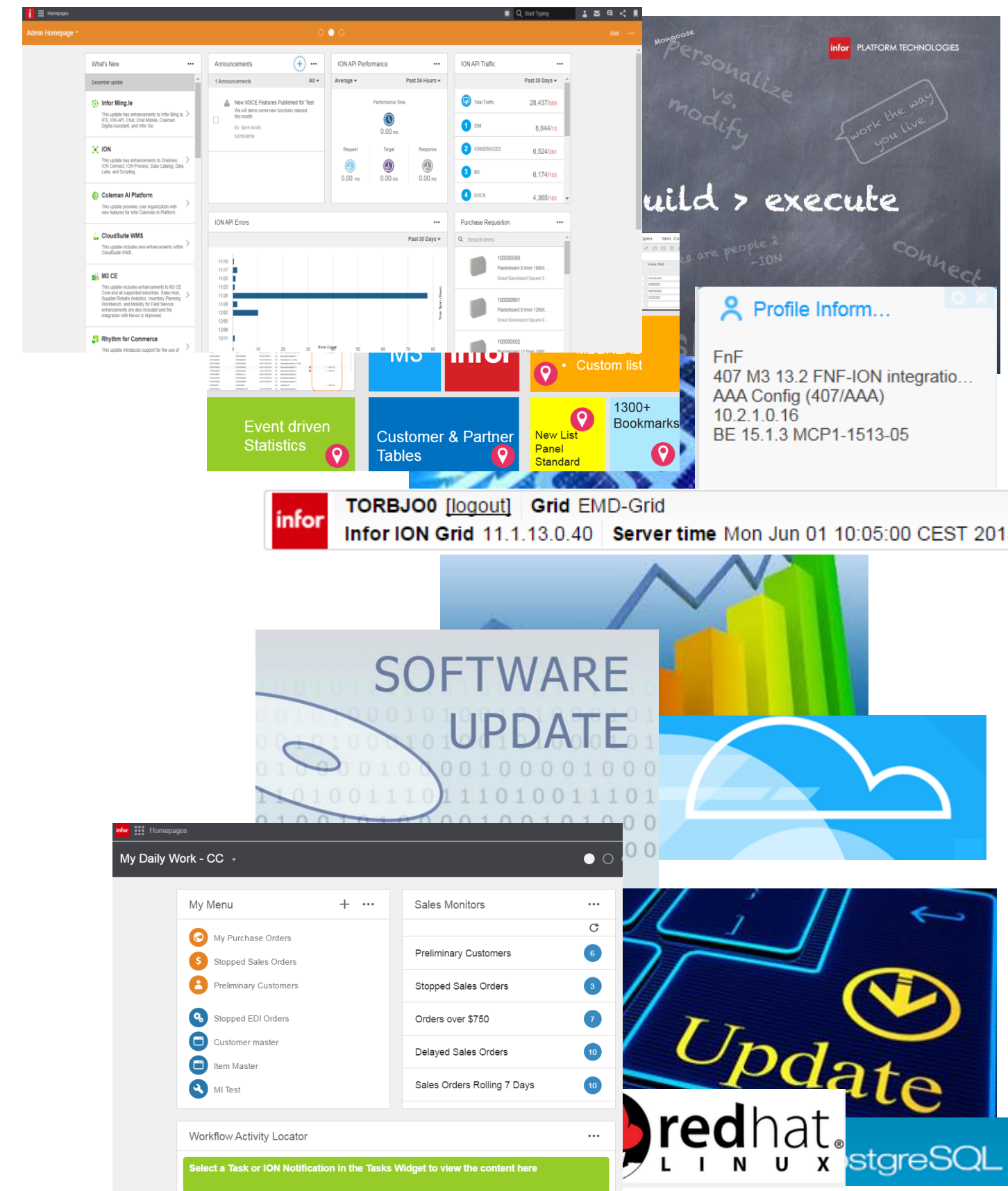
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# Our Project Expert Q&A



Andrew Rey Ballesteros

*The most important thing to remember is that transitioning to MT Cloud is a collaboration with customer and Infor. You need to understand the totally new way that updates and patches is being delivered every month. This will be crucial as they grow their company with Infor moving forward.*

**Project Team Resources** – Commitment especially testing activities. The change of technology will include lot of discussions and support of the environment in terms of managing security, user-roles, printer & server setup.

**Data Quality/Cleanup** – Rather before than after! Common items to be checked CRS949 tables, Warehouse setup, etc. Deletion or excluding old company or divisions that is no longer used in migration.

**Integrations** – Integrations must be tested by customer. Both sFTP over internet, Local Shared Folders and API;s. This also includes how they send files to BANK which is the most common delay in the project as this takes time to discuss and align.

**Testing** – Prepare 2 set of test scripts. A critical path testing – which can be used also during the maintenance windows updates as well. And the full end-to-end process testing, which includes all other business cases, which you can perform during Disruptive windows.

**Reports** – 3<sup>rd</sup> party tools (Qlikview, BI dashboards, etc...) will use ION ETL, explored if there are certain timing constraints or special requirements needed to generate these reports.

# Our Project Expert Q&A



Andrew Rey Ballesteros

**Monthly updates** – Will change the scene completely. The project phase is a good time to get experience how this is working and what process fits you. Don't forget to include patches, none disruptive as well as disruptive updates in your process. Testing is important but you can't test everything so focus on where it make sense.

**Mashups** – Instead of just migrate all existing, look for new solutions. Some new standard Mashups in IA will reduce the need for migration. Also new functions like Sales Hub can be a replacement. New H5 SDK

## Your 3 best tips for a successful project:

**Team:** Good communication and coordination between IPD, Infor Support, Infor OS (ETL, ION, H5), ICS/GDS project teams to strengthen the ONE Infor mentality.

**Agile:** Adopt the new technology and don't invest in making everything as it used to be just because it is easier.

**Collaboration:** Infor PM should build a collaborative connection with the customer PM.

Customer project plan 13.4 to MT																														
Area	Main Responsible	January					February				March				April				May				June				Status	Comments		
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25			26	27
Integrations (Standard)	customer Project Team	X	X	X	X																							Completed		
Integrations (customer specific)	customer Project Team	X	X	X	X	X																							replace	
Integrations (CO/PO between Tenants)	customer Project Team	X	X	X	X	X	X	X	X	X	X																		In Progress	
Output Documents (Accure)	Accure Project team	X	X	X	X	X	X	X	X																			Completed		
Output Reports (Accure)	Accure Project team			X	X	X	X	X	X	X	X	X																	In Progress	
IDM for Archiving and Links	customer Project Team	X	X	X	X	X	X	X	X																			In Progress		
IDM Archieve migration solution	customer Project Team	X	X	X	X	X	X	X	X																			In Progress		
Extensibility	customer Project Team																											Completed		
BI Reports/Staging Data	customer Project Team	X	X																									In Progress		
DPL (Utilize ETL tool)	customer Project Team	X	X																									In Progress		
Opto Interface	customer Project Team	X	X	X	X	X	X																				In Progress			
SWB (Hybrid ST to M3)	customer Project Team	X	X	X					X																			In Progress	Remaining task to configure the new SWB ST (Poland) to the MT-TST environment	
Factory Track	customer Project Team	X	X	X																								Completed		
Create/Validate System Integration Test Scenarios	customer Project Team	X	X	X	X	X	X																				In Progress			
Initial Cutover Plan	Infor & customer Project					X	X																				Completed			
New 6 Tenants License Contract - Signed	Infor Project Team		X																									Completed		
Provisioning (New Tenants - 3 TST, 3 PRD)	Infor CloudOps			X	X																							Completed		
Post Provisioning (New Tenants - 3 TST, 3 PRD)	Infor Project Team					X	X																				Completed	Finished ahead of schedule		
Data Migration - 1 Execution for Core Company in TST	Infor Project Team					X																					Completed	Finished ahead of schedule		
Data Migration - 3 Execution for PL, FR, DK in TST	Infor Project Team					X	X																				Completed	Finished ahead of schedule		
Deploy Integrations/Output Documents/Configuration - New 3 TST	customer Project Team							X	X	X																		In Progress		
Validate Integrations/Output Documents/Configuration	customer Project Team							X	X	X																		In Progress		
System Integration Test	customer Project Team							X	X	X																		In Progress		
System Integration Test - Issue Handling	Infor & customer Project							X	X	X																		In Progress		
Finalize Cutover Plan	Infor & customer Project									X																		In Progress		
Data Migration 2 - 1 PRD	Infor Project Team									X																		In Progress		
Data Migration 2 - 3 PRD	Infor Project Team									X																		In Progress		
Deploy Integrations/Output Documents/Configuration - PRD	customer Project Team																										Not Started			
Validate Integrations/Output Documents/Configuration	customer Project Team																										Not Started			
Migrate Factory Track Config in MT-PRD	Infor & customer Project																										Not Started			
Migrate SWB Config to ST	Infor & customer Project																										Not Started			
Post Migration Activities & Initial Validation	Infor & customer Project																										Not Started			
End User Training	customer Project Team																										Not Started	Ongoing training for customer		
User Acceptance Test	customer Project Team																										Not Started			
User Acceptance Test - Issue handling	Infor & customer Project																										Not Started			
Go-live Readiness assessment	Infor & customer Project																										Not Started			
Cutover - Data Migration 3	Infor Project Team																										Not Started	Data Migration for 4 company setup - 2 Staging environment will be used		
Go Live	Infor & customer Project																										Not Started	Go-Live is on May 17, 2021 (updated date)		
Post Go-live Support	Infor & customer Project																										Not Started			
Project Closure	Infor & customer Project																										Not Started	Project Closure June 18, 2021		
	<b>Forecasted Time</b>																											Maintenance Window - April 10		
	<b>Contingency Time / Delay</b>																											Maintenance Window - May 8		





Area	Main Responsible	January		February		March		April		May		June		Status	Comments											
		1	2	3	4	5	6	7	8	9	10	11	12			13	14	15	16	17	18	19	20	21	22	23

# Customer - Cloud Edition Multitenant - Week 16

Summary			
<ul style="list-style-type: none"> <li>Integrations, output documents, and extensibility are uplifted in MT-PRD, ongoing revision as needed. Finance related integrations are being tested internally.</li> <li>Customer has successfully tested the M3CE ION connection for Opto. Further testing will be done in the MT-PRD environment as part of UAT.</li> <li>UAT is now ongoing and business users will have more M3CE trainings this week.</li> <li>High-level cutover plan has been drafted. Customer agree and align internally the business downtime for the cutover.</li> <li>Factory Track concern regarding whitelisting of URL to be checked internally by Customer.</li> <li>Issue regarding the XML printouts being stuck in OPN status in MNS270 was due to a feature deployed during the maintenance window. Resolved by deactivating the feature while IPD provides the fix.</li> </ul>			

Key Risks					
Description	Mitigation	Owner	Probability	Impact	Index
Customer parallel projects and daily operations requiring same resources to be involved in this migration project.	<ul style="list-style-type: none"> <li>Active choice by Customer been</li> <li>Utilize external/internal resources as possible</li> </ul>		4	4	16
Customer migration to the new data center.	<ul style="list-style-type: none"> <li>Schedule the activities on the reinstallation of the application – ETL, EC, CFT.</li> <li>It will be closed by end of June 2021</li> </ul>		3	5	15
More activities may be found than initially planned.	<ul style="list-style-type: none"> <li>Actively look for this area early in the project and add it in the project plan.</li> </ul>		3	4	12
Multiple parties involved in the project may cause dependency in the plan.	<ul style="list-style-type: none"> <li>Weekly report to monitor the activities and progress of the other vendors</li> <li>Share project plan with 3rd party for them to align resources and activities</li> <li>Customer be proactive on key consultants (or onboard resources with equivalent skills) needed in the technical integrations, potentially changing employer during the project duration.</li> </ul>		4	3	12
Whitelisting may delay project activities	<ul style="list-style-type: none"> <li>Whitelisting approval process already in place</li> <li>Need to plan, schedule, and be aware of the items that needs to be whitelisted</li> <li>Data center security has been increased, actions to be included in the process</li> </ul>		3	3	9
Internet traffic rules demand to go via Axway API gateway. Customer policy now introduced in Q1 2021.	<ul style="list-style-type: none"> <li>Ask for exemption for the M3CE setup to get the project implemented for 2021</li> <li>Customer approved that the M3CE project will be exempted on this security policy.</li> </ul>		2	4	8
Effect of pandemic in the project not being able to meet in person.	<ul style="list-style-type: none"> <li>Setup regular meetings, Tues/Wed/Thurs to align and solve the project activities</li> </ul>		2	2	4

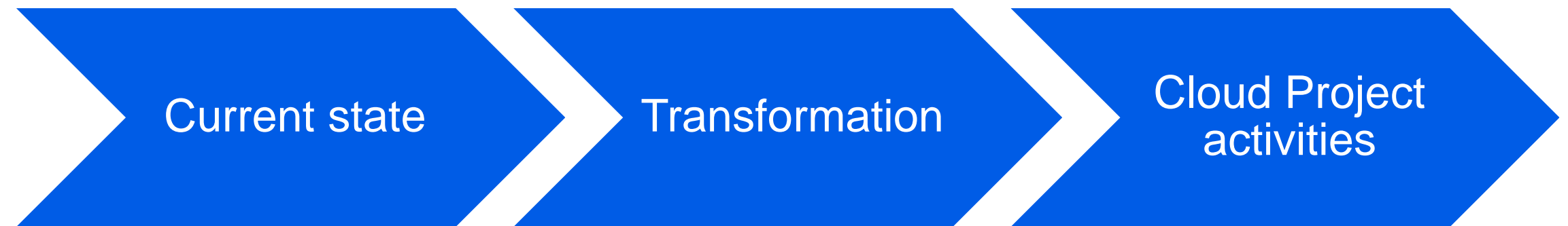
Status by Area			
Area	Previous	Current	Comment
<b>Overall Project status</b>			
• Scope			
• Schedule			• Started UAT as planned.
• Resources & Staffing			
• Risks			
• Issues			• Issues with XML printouts stuck with OPN status in MNS270 and the CFT not working in MT-TST. Both issues have already been addressed.
• Change orders			
• Other Concerns			

Key Milestones	Planned	Actual Date	Status
1 - Project Approval	25/08/2020	25/08/2020	Completed
2 - Data Migration and Test scenarios completed - Ready for System Test	06/10/2020	09/10/2020	Completed
3 - Custom Extensions Unit tested - Ready for System Integration Test	19/02/2021	19/03/2021	Completed
4 - Solution Complete – System Integration Test Completed	19/03/2021	14/04/2021	Completed
5 - Go-Live Readiness Confirmed – User Acceptance Test Completed	07/05/2021		In Progress
6 - Cut-over Confirmed to Start	14/05/2021		Planned
7 - Go-live	17/05/2021		Planned
8 - Project Closure	18/06/2021		Planned

Key Issues				
Description	Mitigation/Next Steps	Assignee	Target Date	Priority
All XML printouts configured in CMS006 stops in status OPN in MNS270	<ul style="list-style-type: none"> <li>Identified by IPD that this feature – 2173435 that was deployed in the maintenance window had an impact with Exception XML setup.</li> <li>Workaround is to deactivate the feature while IPD creates a fix/solution.</li> </ul>	Customer	20/04/2021	Critical
Metadata for field descriptions needed in the Data Lake ETL tool.	<ul style="list-style-type: none"> <li>Validate the data loaded in the staging database</li> <li>Apply the proposed solution for the Metadata description.</li> </ul>		23/04/2021	High
CFT not working in MT-TST	<ul style="list-style-type: none"> <li>Upgraded the CFT version installed</li> </ul>	Customer	20/04/2021	High

# Technical Challenges in the Cloud Journey

- Integrations
- Printing and Documents
- Reporting
- Customizations
- User interface and Extensibility
- Reference Architecture Data Migration



## To consider

- Volume
- Technical focus areas
- Challenges
- Resources
- Define goal technology
- Plan Coming activities

## Solution

- Review solution options for identified areas
- Cloud Status

## Outcome

- Technical Architecture
- Solution from “as-is” to “to-be”
- High level plan with effort

# Cloud Migration Analysis Tool

Import downloads

import location	C:\Users\tringia1\OneDrive - Infor\INFOR Development\Migration Factory\
Alternatives	C:\Users\tringia1\OneDrive - Infor\INFOR Development\Migration Factory\
	C:\Users\tringia1\OneDrive - Infor\INFOR Development\Migration Factory\
	C:\Users\tringia1\OneDrive - Infor\INFOR Development\Migration Factory\
	C:\Users\tringia1\OneDrive - Infor\INFOR Development\Migration Factory\
	C:\Users\tringia1\OneDrive - Infor\INFOR Development\Migration Factory\

Sheet	Short description	Active	Status
DB001	Company Overview	yes	Finished
DB002	Row count per table	yes	Finished
DB003	Stocktransactions per year	yes	Finished
DB004	FGLEDG transactions per year	yes	Finished
DB005	Total database space	yes	Finished
DC001	printservice per printfile (MNS024)	yes	Finished
DC002	Distribution channel per printfile (MNS205)	yes	Finished
DC003	Number of distribution channels per Printfile	yes	Finished
DC004	Implemented distribution channels	yes	Finished
DC005	Monthly prints per printfile and printservice (MNS206)	yes	Finished
DC006	Definition of printservices (MNS216)	yes	Finished
IN001	MEC: Partner, Agreement, Mapping overview	yes	Finished
IN002	MEC: Flat file indication per Agreement	yes	Finished
IN003	MEC: List of input channels	yes	Finished
IN004	MEC: List of output channels	yes	Finished
IN005	MEC: Message statistics	yes	Finished
IN006	MEC: Non Cloud Compatible overview per Mapping	yes	Finished
IN007	Custom API: Overview of custom API's	yes	Finished
IN008	MEC: Detail analysis overview per Agreement/Mapping	yes	Finished
IN009	MEC: Mapping version overview	yes	Finished
MN002	Menu and submenu overview (MNS110)	yes	Finished
MN001	Detail menu function overview (MNS110)	yes	Finished

Row Labels	Sum of #users	Max of LastChanged
0	207	20210419
1	163318	20210423
DISWHM	22	20210422
Prepare Warehouse and Logistics	22	20210422
Prepare Outbound Logistics	22	20210422
Prepare Transport Management	22	20210422
Settings	22	20210422
M3	163296	20210423
Accounts and Balances	4178	20210423
Accounts Receivable	2093	20210423
API - Application Programming Interface	37	20210331
Archiving	293	20201222
AUX - Auxiliary Functions	579	20210408
Balances and Accounts	2340	20210423
Capacity Requirement Planning	5	20170307
Checks	38	20190828
CMP - Change company	0	0
CSF - Country Specific Functionality	0	0
Customer Data Management	2995	20210423
Customer Order Invoicing	3664	20210423
Customer Order Processing	9919	20210423
Demand Management	17	20151008
Distribution Order Goods Receipt	12	20161220
DO and RO Management	486	20210423
EDI - EDI Management	65	20210421
ENV - System Environment	366	20210422
EQM - Equipment Quotation Management	27	20200320
FIC - Financial Controlling	3519	20210422
FIM - Financial Accounting	27884	20210423
GBD - Systems Management	89	20210326
General System Settings	590	20210422
GLedger, Internal Accounts & Costing	14494	20210423



## Cloud Readiness Intake

# Advice : Document Management

- Migrate documents to Document Designer instead of Streamserve
- Research on unknown documents
- Preparation: validate documents on extending input via XML. Implement in later stage. Check standard layout in CLOUD based on Document Design
- Implement Document Archiving

# Dagens ämnen

Inledning

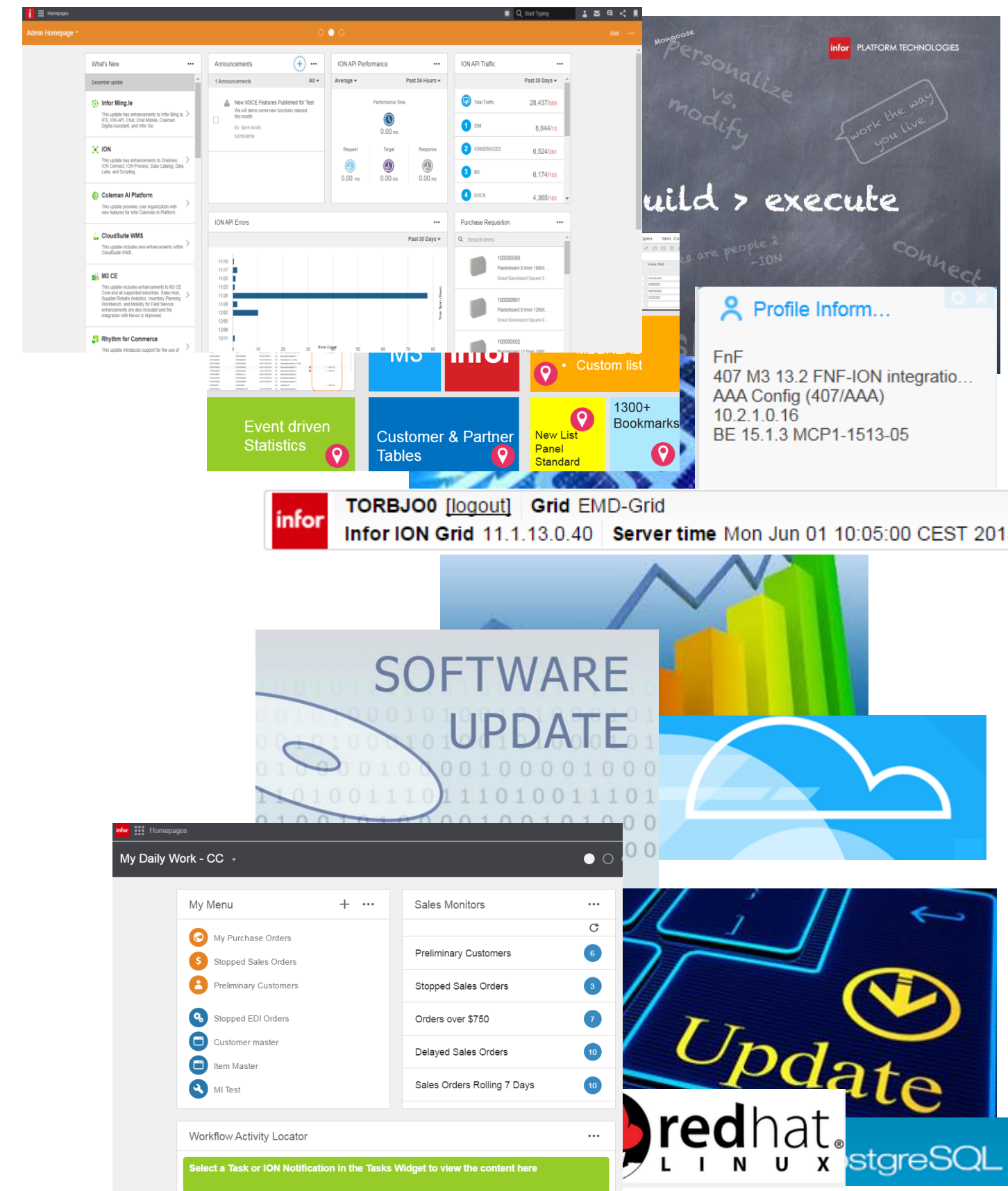
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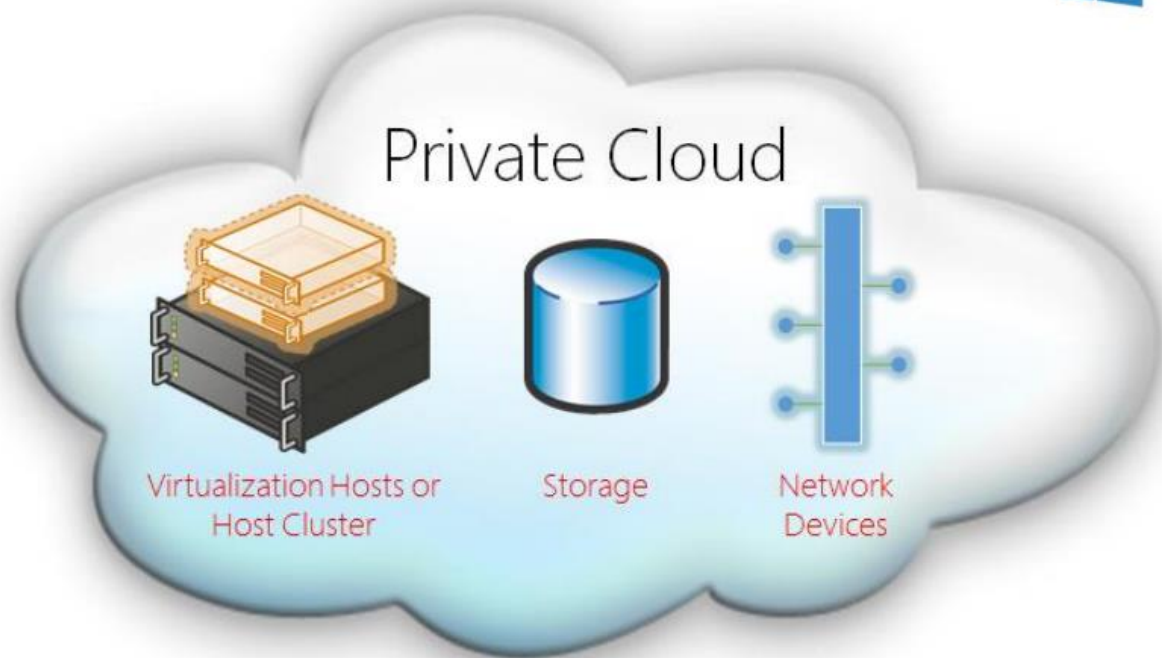


# Systemair – Ventilation World Wide

# Ventilation World Wide



# Cloud



Cloud Strategy Cloud Ready Including M3 13.4 and Infor OS with Homepages and H5.



The Challenge to CEO Juergen Hernadi and his Team with over 6,5 million documents added annually, is that users was used to Smart Office and a direct overview of connected IDM document types. The following slides will show the challenge and the solution that was created by the Infor Applied Innovation team.







Status: -Blank -Blank  
Customer group: [ ]  
Apply

Customer	Payer	Name	Telephone no 1	Status	Country	Address Line 1	City	Contact	Bank acnt BG	Amount
PJ										
PJ001		Nick's Tackle & Bait	+46733159147	Approved						
PRECISION		Precision Builders, Inc	1-800-1888-5149	Approved						
PV0001		John Smith	07478486066	Approved						
Q-GREE0000	Y10000	Q-Greenwith		HOLD						3000.00
Q-KIRB0000		Q-Kirby	+618881109	Approved						3000.00
Q-KIRB0001	Y10000	Q-Kirby	+618881109	HOLD						3000.00
REWE		REWE Central Payer	TELEPHONE 1	Approved						3000.00
ROSEWOOD		Rosewood Homes, Inc.	1-800-1888-9456	Approved						3000.00
S00		Generic Shop Customer-S00	TELEPHONE 1	Approved						3000.00
S31		Generic Shop Customer-S31	TELEPHONE 1	Approved						3000.00
S32		Generic Shop Customer-S32	TELEPHONE 1	Approved						3000.00
S36		Generic Shop Customer-S36	TELEPHONE 1	Approved						3000.00
SAMSUN0000	SAMSUN0000	SAMSUNG	COLINCLARSON	Approved						3000.00
SCECUS01		London Builders Ltd	TELEPHONE 1	Approved						3000.00
SCECUS02		Supply Chain Execution	TELEPHONE 1	Approved						3000.00
SCECUS03		Supply Chain Execution 03	TELEPHONE 1	Approved						3000.00
SCECUS04		Supply Chain Execution 04	TELEPHONE 1	Approved						3000.00
SCECUS05		Supply Chain Execution 05	TELEPHONE 1	Approved						3000.00
SCECUS06		Supply Chain Execution 06	TELEPHONE 1	Approved						3000.00
SCECUS07		Supply Chain Execution 07	TELEPHONE 1	Approved						3000.00
SH-Y10009	Y10000	Lofield & Sons	00441151285477	Approved	GB	125 Grimston Road	Nottingham	Tom Jones	HUBSTE0 BODJOA0	51000.00
SHUB	Y10000	Sales Hub Customer	TELEPHONE 1	Approved	SE	Local Customer Address Line 1	St Paul	Contact 1	MIKFLE98 ZZZZ	
SHUBCSH		Sales Hub Customer -Cash	TELEPHONE 1	Approved	SE	Local Customer Address Line 1	St Paul	Contact 1	PAAOUT0 ZZZZ	
TA001		TA inc.	+34895301888	Approved	US	545 N. Dearborn Street	Chicago	Tehin Aubry	BODJOA0 BODJOA0	300000.00
TA002		Gym Accessories TA	+15167801394	Approved	US	Passeig de Gracia, 50	Barcelona	Tehin Aubry	BODJOA0 BODJOA0	300000.00

### Link Properties

New Link, step 1 of 2  
Name and describe the link below, and add its source and target.

**Link Information**  
Title: CO\_Confirmation

**Source**  
Function: CRS610  
Panel: CRA610BC

**Target**  
Web

Cancel Next

[https://idm.inforcloudsuite.com/ca/client/documents?\\$query=/MDS\\_Image\[@M3ItemNumber = "OKCUNO"\]](https://idm.inforcloudsuite.com/ca/client/documents?$query=/MDS_Image[@M3ItemNumber = )

Free text search

Use Query Builder  Enter Query Manually

Image

Item Number

= Equal

PJ001

Active

Reset + Search

Document Management

Free text search

Use Query Builder  Enter Query Manually

/MDS\_Image[@M3ItemNumber = "PJ001"]

Active

Search

Treasure Ches  
Document Type  
Image  
Created By  
Peter Johansson

No name  
Document Type  
Image  
Created By  
Peter Johansson

Link Properties

New Link, step 2 of 2

Add the link details below.

Url

https://idm.inforcloudsuite.com/ca/client/documents?\$query=/CS\_Orders[@M3\_Customer = "<OKCUNO>"]

Transactions

Field	
WWQTP	
OKCUNO	
OKPYNO	
OKCUNM	
OKPHNO	
OKSTAT	
OKCSCD	
OKCUA1	
OKTOWN	
OKYREF	
OKRESP	
OKSMCD	

Field

New Window

Examples

1) http://www.infor.com

2) http://www.google.com/search?q=<Customer>

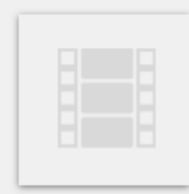
Previous Finish Cancel

- Shortcuts
- Recently Modified
  - My Documents
  - Favorites
  - Templates
  - Trash

My Documents No name x

Save Check Out Download Save as new document IDM Approve workflow Print Add to favorites Copy Delete Archive Send in email

Cerealia movie.mp4 (28.05 MB)



IDM\_Approve

- Properties
- Attributes
- File
- Security
- History

Document Type	File
Internal ID	801
Version	1
Checked Out By	-
Checked Out Date	-
Modified By	bjorn torold
Modified Date	06/04/2021, 13:50:14
Created By	bjorn torold
Created Date	06/04/2021, 13:50:14
Filename	Cerealia movie.mp4
Size	29411734
ID	da22118d-cfbd-4810-938c-2d19dbb091e0

Document Output Status

# Document Type

+ New Document Type Back to Documents

- Type search term here
- CRM\_Presentations
- CRM\_Reports
- CRM\_SpreadSheets
- CRM\_Zips
- CS\_Finance
- CS\_Invoices**
- CS\_Operations
- CS\_Orders
- Customer Order
- Document
- EAM
- Employee Document
- Employee Document Generic
- Employee Document No Template
- EQM Document
- File
- IA Documents

Save Changes Copy Delete

General Attributes ACL **Related Documents** ACL Rules

Items in bundle	
	+
	🗑️
Order Confirmation	
[ New Rule ]	

Description

Document Type

Property or Attribute

Operation

Search

Enable dynamic mapping

+

Show XQuery

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# Streaming!

## R&D Direct & Streaming Ingestion Ingestion Pipelines

Expanded data ingestion options provide for direct writing of content to Data Lake for bulk load, large payload operations as well as real-time data streaming for downstream real-time services

**Phase 1:** Bulk ingestion APIs (2021-09)  
**Phase 2:** Real-time streaming ingestion (2H'21)

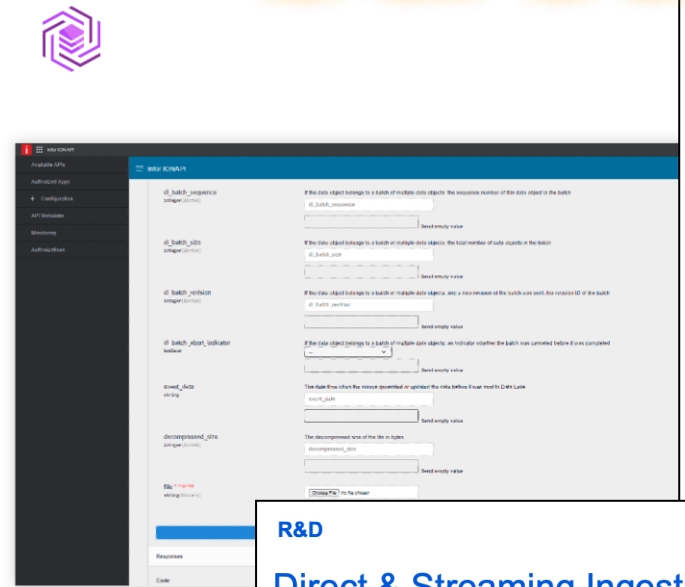
**Value**

- Direct ingestion (vs. Infor ION)
- Expanded file size support limits
- Real-time stream processing
- 1<sup>st</sup> 1/2 of Data Fabric's **Operational Data** strategy

## ROADMAP - July 2021 Infor OS

As a collection of related and interdependent components, Infor OS priorities directly benefit the other components and focus the strategy of being the leader in the enterprise application technology domain. The focus is on the collective benefits to deliver speed and agility with downstream innovation.

Now	Next 6 Months	Vision	
<b>Enterprise UX</b> <ul style="list-style-type: none"> <li>• Electronic Signatures (available for adoption)</li> <li>• IDM Bulk Import Utility Updates</li> </ul> <b>Intelligent Digital Assistance (Coleman DA)</b> <ul style="list-style-type: none"> <li>• Enabling Lex V2 Enhanced Model</li> </ul> <b>Enterprise Application Integration</b> <ul style="list-style-type: none"> <li>• Hybrid Service: PATCH/DELETE Methods</li> <li>• Custom SMTP</li> <li>• IMS Cookbook</li> <li>• File append line separator</li> <li>• Assigned to me badge</li> <li>• New "All" Message filter</li> </ul> <b>Data Fabric</b>	<b>Enterprise UX</b> <ul style="list-style-type: none"> <li>• Federated Search</li> <li>• Private branded mobile app</li> <li>• IDM Private Spaces</li> <li>• Document Capture MT</li> </ul> <b>Intelligent Digital Assistance (Coleman DA)</b> <ul style="list-style-type: none"> <li>• Coleman Microsoft Teams Integration</li> </ul> <b>Applied ML (Coleman AI PAAS)</b> <ul style="list-style-type: none"> <li>• ML Real-Time Decision Engine</li> <li>• ML Menu (see ML roadmap)</li> <li>• Neural Net Addition to ML Library</li> </ul> <b>Organizational Compliance</b> <ul style="list-style-type: none"> <li>• 3<sup>rd</sup> Party GRC Integrations</li> <li>• Certification Manager Enhancements</li> </ul>	<b>Enterprise Application Integration</b> <ul style="list-style-type: none"> <li>• System Health Service (ION)</li> <li>• Large Message Capabilities</li> <li>• IRIS FIP140-2 Encryption Support</li> <li>• External user support</li> <li>• Tenant level policy</li> <li>• Farm level APIs</li> <li>• API Flow - Terminate, Join, Looping</li> </ul> <b>Data Fabric</b> <ul style="list-style-type: none"> <li>• Hybrid service - Mutual SSL/ OAuth</li> <li>• Bulk Data Loader</li> <li>• Large Message Splitter</li> <li>• Compass Performance Improvements</li> <li>• Compass Views</li> <li>• Saved Queries &amp; History</li> <li>• Ingestion Pipelines</li> <li>• Compass API Pagination</li> <li>• Data reconciliation tooling</li> </ul>	<b>Enterprise UX</b> <ul style="list-style-type: none"> <li>• HCM/IDM integration</li> <li>• Multi-value Attributes</li> <li>• Custom BODs per Doc Type (IDM)</li> <li>• Mobile homepage welcome experience</li> <li>• External Users</li> <li>• Enterprise UX refresh</li> </ul> <b>Intelligent Digital Assistance (Coleman DA)</b> <ul style="list-style-type: none"> <li>• Contextual Awareness (DA)</li> <li>• Standard Skills Provisioning</li> <li>• Coleman Vision (Reko)</li> </ul> <b>Applied ML (Coleman AI PAAS)</b> <ul style="list-style-type: none"> <li>• Incremental Learning (ML)</li> <li>• Explainable AI; Correlation Analysis</li> </ul> <b>Enterprise Application Integration</b> <ul style="list-style-type: none"> <li>• Backend As a Service</li> <li>• API Marketplace</li> <li>• Developer Portal</li> <li>• Graph QL Proxy Support for REST APIs</li> </ul> <b>Data Fabric</b> <ul style="list-style-type: none"> <li>• Data Fabric ETL &amp; Streaming Pipelines</li> <li>• Industry 4.0 IoT integrations</li> <li>• Data Federation with Network Tenancy</li> </ul> <b>Organizational Compliance</b> <ul style="list-style-type: none"> <li>• Additional GRC Compliance (ex. HIPAA)</li> </ul>
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### R&D Direct & Streaming Ingestion Pipelines

Real-time, streaming data processing and delivery into Cloud-based relational data systems & streaming technologies to support operational data access and reporting.

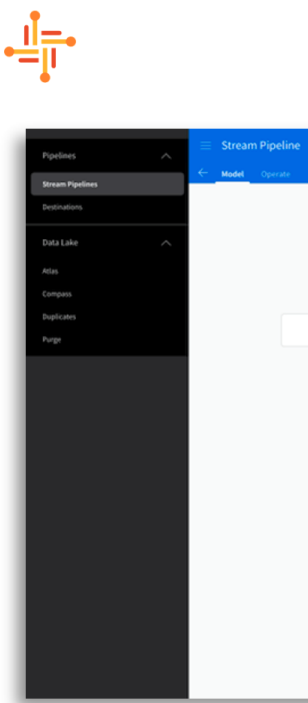
**Phase 1:** AWS Aurora (1Q'22)  
**Phase 2:**

- Expanded SaaS data warehouses (1H'22)
- Streaming SQL (1H'22)

**Phase 3:** On-premises support (2H'22)

**Value**

- 2<sup>nd</sup> 1/2 of Data Fabric's **Operational Data** strategy
- Real-time data replication into Cloud data warehouses
- End-to-end managed data lifecycle
- Real-time processing for downstream Infor consumers



smart addict

Y

electric  
drive







# Thank you

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

**Infor.com**

