INFOTEAM
JOBB SMARTERE

TIPS OG TRIKS MAJ 2023

Teams Meeting 22 Maj 2023

Lena Lundell - Infoteam

Björn Torold, Joakim Mattsson – Infor

Dagens gäster är Susanna Kellander och Simon Hagelin

infor

Copyright © 2021. Infor. All Rights Reserved. infor.com

Disclaimer

This presentation reflects the direction Infor may take with regard to the products or services described herein, all of which is subject to change without notice. This presentation is not a commitment to you in any way and you should not rely on any content herein in making any decision.

Infor is not committing to develop or deliver any specified enhancement, upgrade, product, service or functionality, even if such is described herein. Many factors can affect Infor’s product development plans and the nature, content and timing of future product releases, all of which remain in the sole discretion of Infor. This presentation, in whole or in part, may not be incorporated into any agreement. Infor expressly disclaims any liability with respect to this presentation.

Copyright © 2021. Infor. All Rights Reserved. infor.com

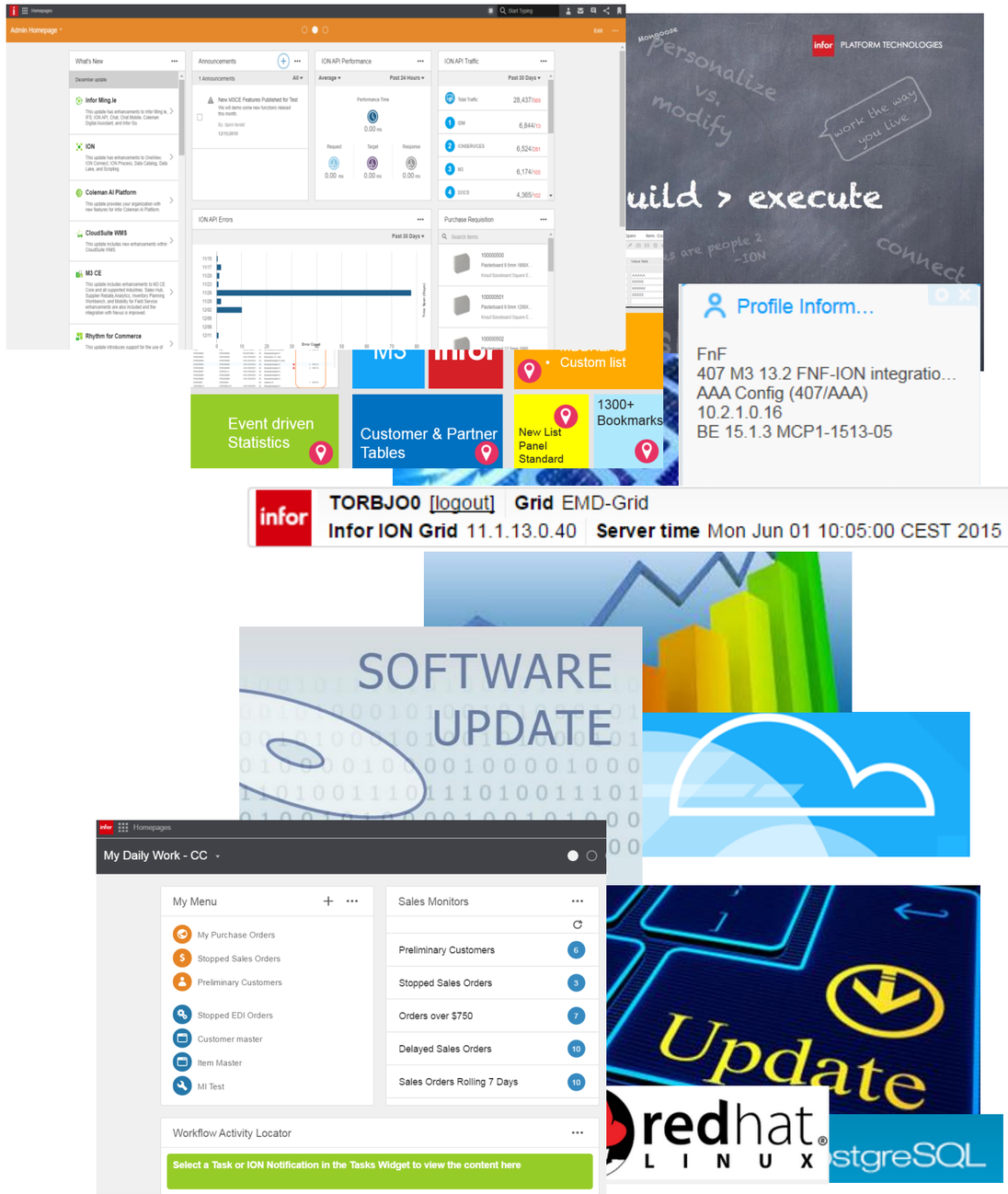
Dagens ämnen

Lite smått och gott runt M3 Cloud Edition

XtendM3 i verkligheten

Direktrapport från Simon om Experience Designer

Jockes höjdare



Copyright © 2021. Infor. All Rights Reserved. infor.com

M3 NEWSCAST April 2023

Infor M3 Cloud Edition

Infor CloudSuite

M3 Cloud Edition Customers

Customers provisioned with M3 Cloud Edition

460 *(156 live)* *(451/151)*

Usability Features Delivered

** Developments for Technology and User Experience

193 (172)

Total Countries Supported

Countries Supported with M3 CloudEdition

71

Capability Features Delivered

** Developments for Integrations and Geo Support

644 (633)

Total Integrations supported

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

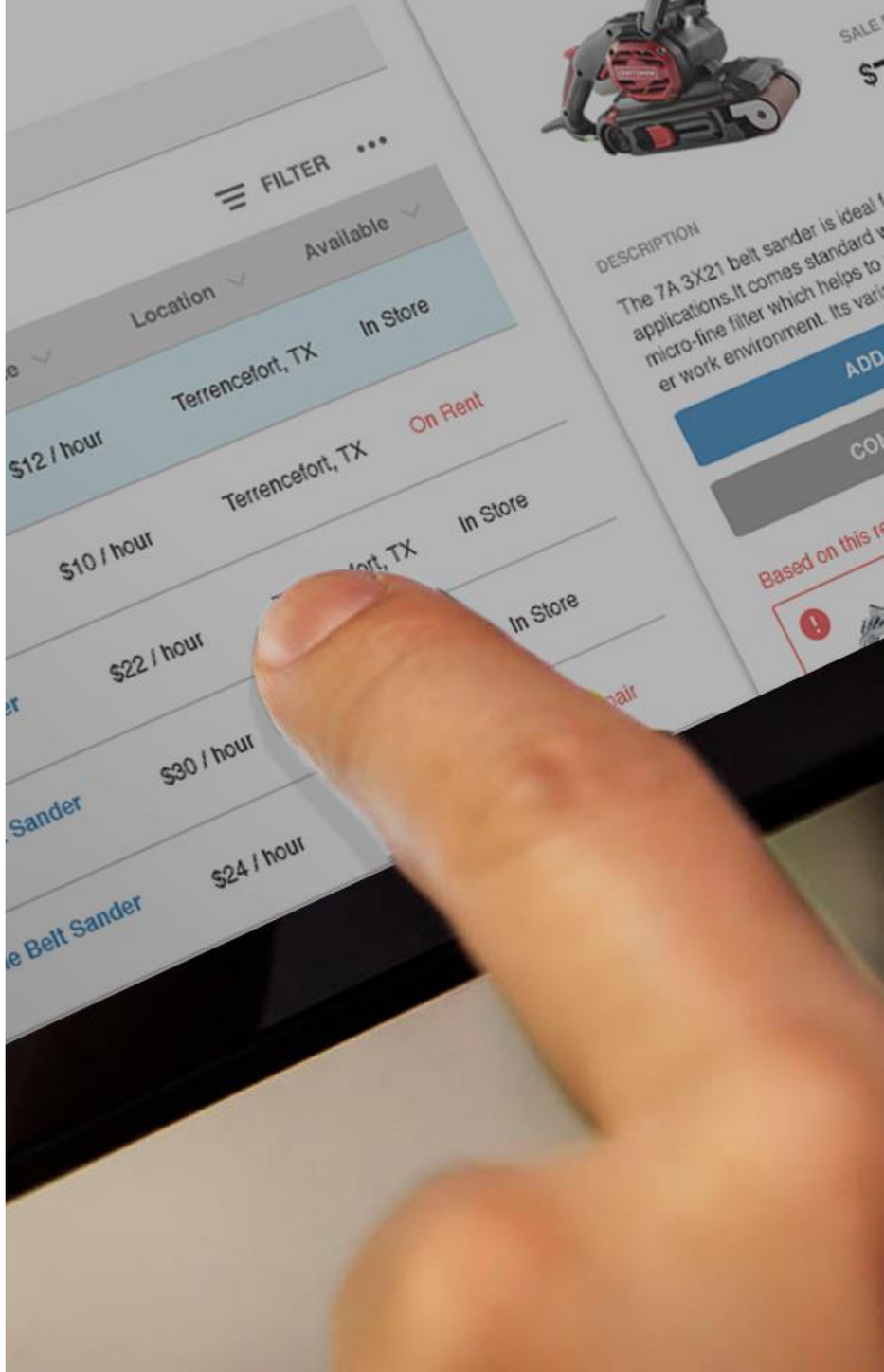
27

Industry Features Delivered

** Developments of Industry Features

1565 (1483)

- * Since the first launch of M3 Cloud Edition
- In green, numbers from last month's NewsCast



Proof of Concept – product advisor by ChatGPT

Products Advisor:

product information from ChatGPT:
- Product specifications
- Competitive products
- Compare Products
- Advantages over

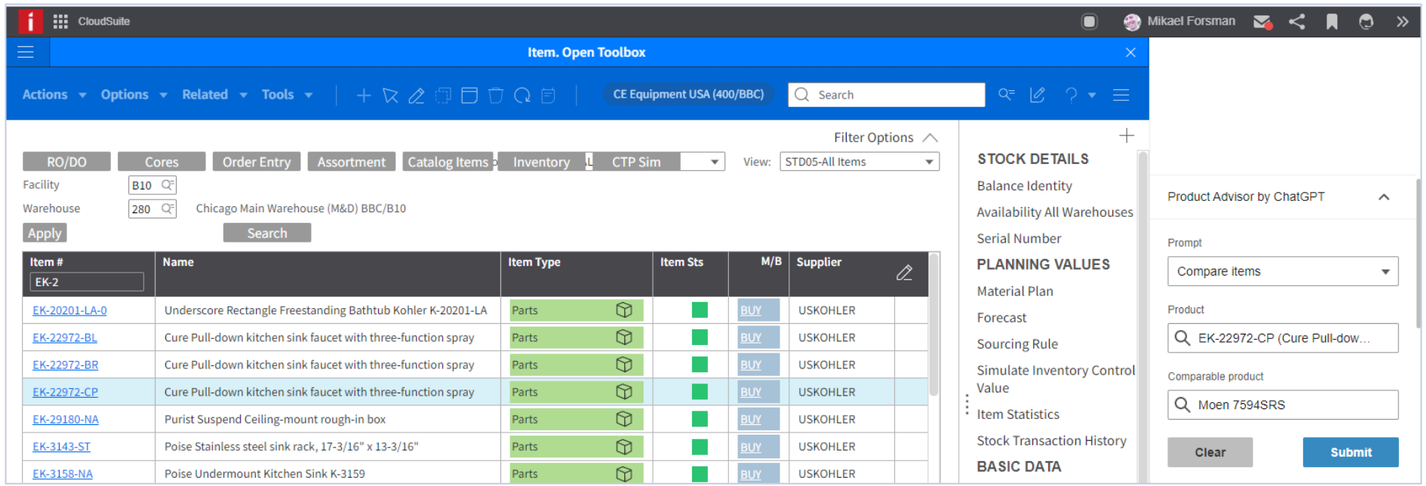
Applicable Industries:
- Distribution (primary)
- Food & Beverage (secondary)
- Fashion (less applicable)

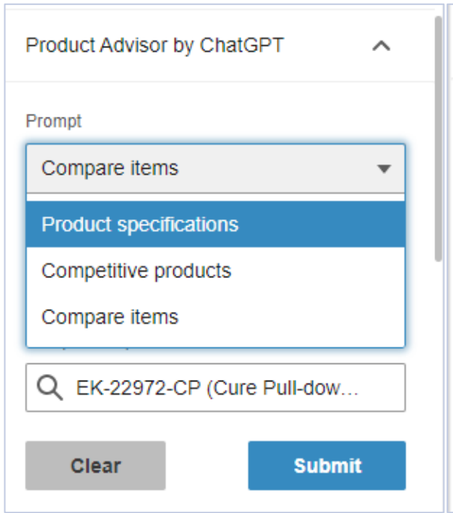
Applicable Roles:
- Sales & Customer Service

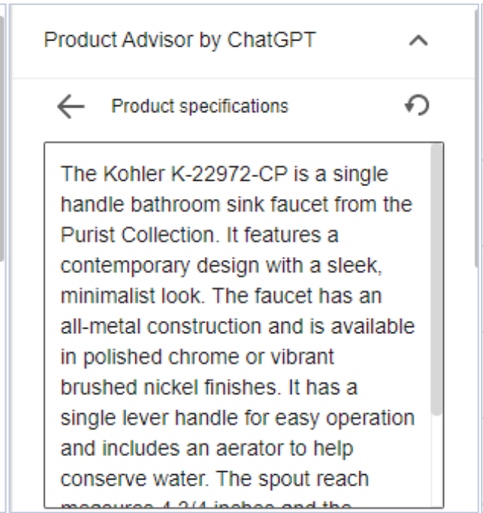
Value:
Instant access to product information for customer service when speaking to customers. Don't need to look up product information, or rely on years of experience

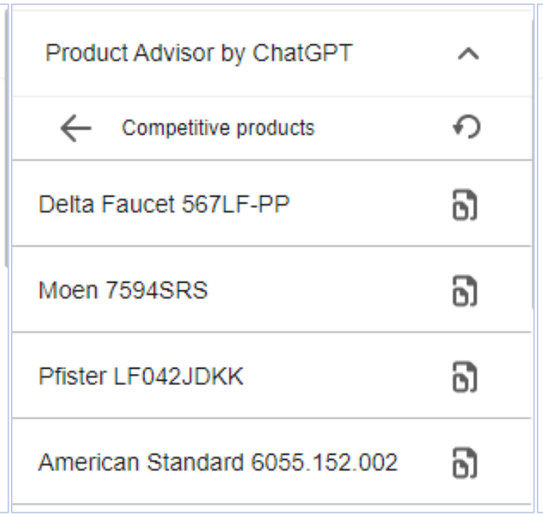
Incontext Data: (Item Master MITMAS)
External Item # (ITNE)
Manufacturer (PROD – name from CIDVEN)

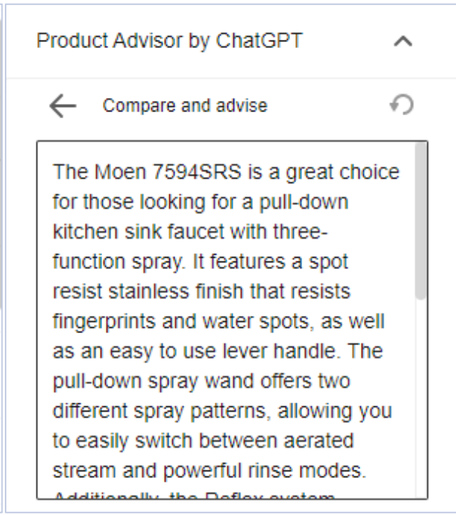
Where:
Item Toolbox (MMS200) & Order Lines (OIS101)
(SalesHub tbd)









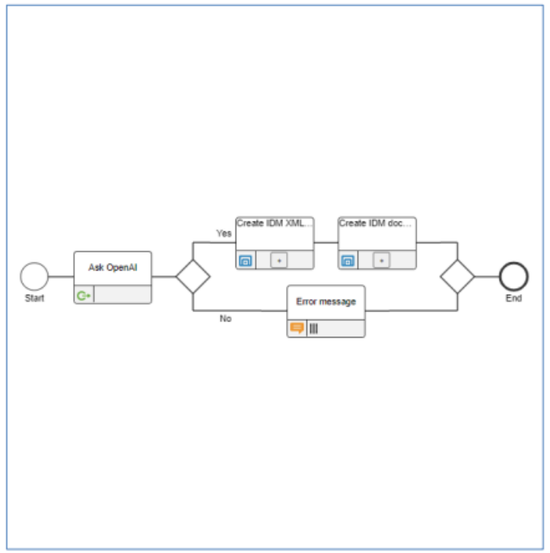


Copyright © 2021. Infor. All Rights Reserved. infor.com

New Customer Analysis - Requirements

Contents

01. Summary 2
02. Release Notes 2
03. Prerequisites 2
04. Limitations 2
05. Look-and-Feel 3
06. Setup: Service Account 4
07. Setup: ION API 5
08. Setup: ION Scripts 8
09. Setup: ION Workflows 9
10. Setup: Infor Document Management 11
11. Setup: ERP (M3 Business Engine) 15
12. Setup: ERP (Other) 18
13. Details: Workflows 19
14. Details: Scripts 20



Copyright © 2023 Infor. All rights reserved. The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All other trademarks listed herein are the property of their respective owners. www.infor.com.

05. Look-and-Feel

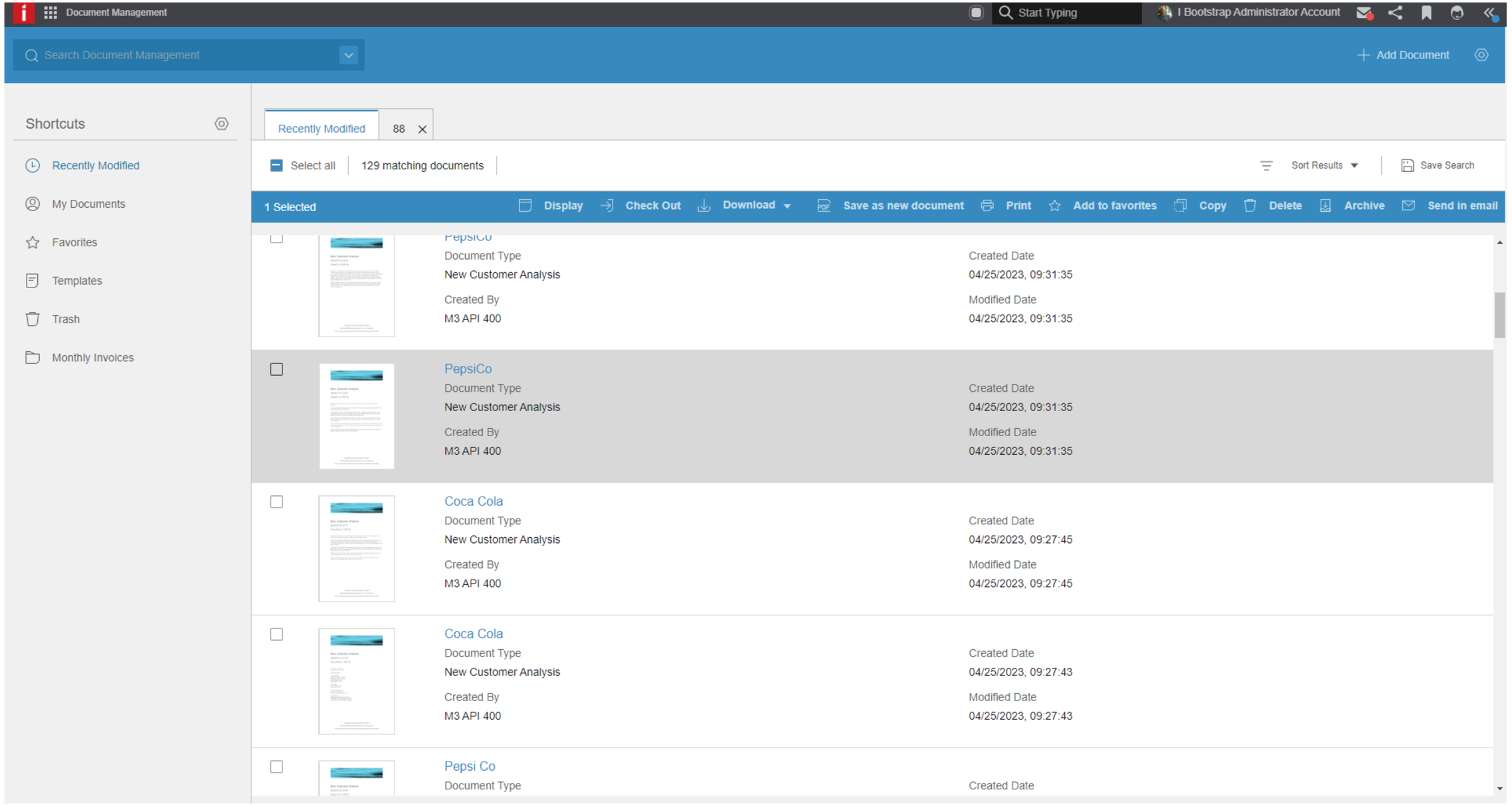
New Customer Analysis

02/14/23 14:51:23

[redacted] is a small business that sells fishing supplies and bait. The company's balance sheet can be found below:

ASSETS
Cash: $10,000
Accounts Receivable: $5,000
Inventory: $25,000
Equipment: $15,000
Total Assets: $55,000

Copyright © 2021. Infor. All Rights Reserved. infor.com



infor

Copyright © 2021. Infor. All Rights Reserved. infor.com

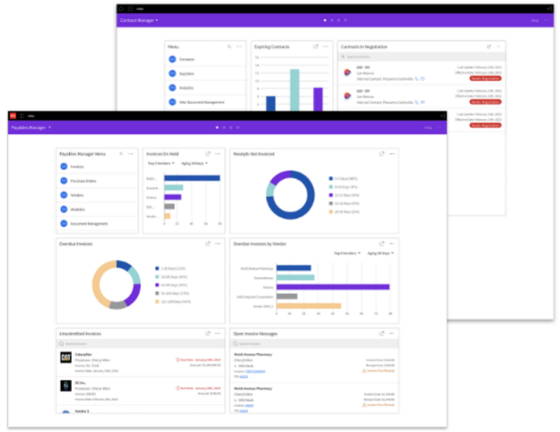
Welcome to a better way to work

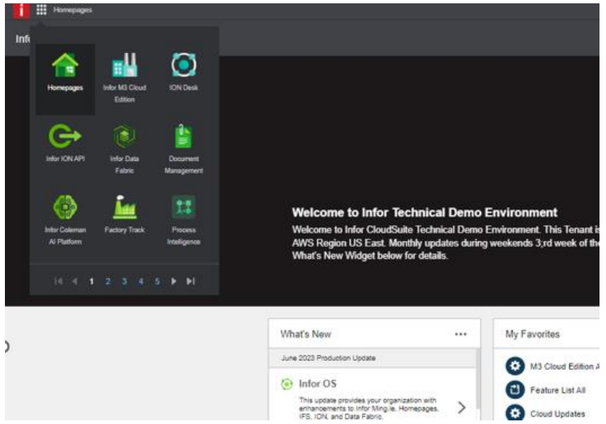
Who doesn't want to be more productive at work?

The new user Portal is designed to make work more fluid and accurate. Built on decades of industry knowledge and insights, the UX enhancements in the April 2023 release include:

- simplified navigation
- streamlined workflows
- relevant data and content

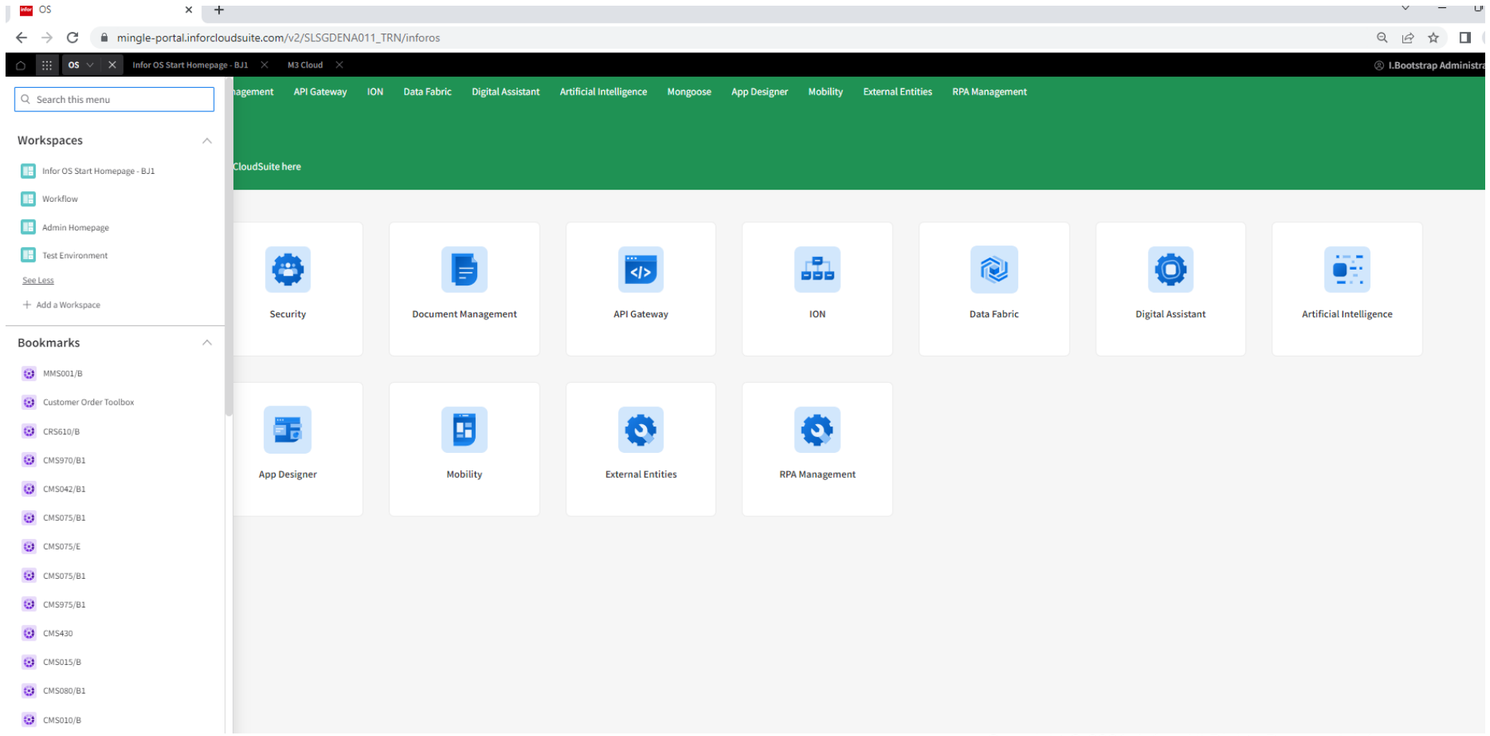
That's how we're delivering user productivity and user satisfaction. Supportive, collaborative, and always ready to help—we want to be every user's work BFF.





Trial Mode provides customers with the ability to simultaneously run Infor Ming.le portal and Infor OS Portal within the same tenant. In this way, customers can try the new UX before making the full transition. Trial Mode will be enabled on all tenants - not just TST - but tenant administrators have the ability to determine which users have Trial Mode access for each of their tenants. Therefore, even though we will activate Trial Mode on PRD tenants, a customer doesn't have to enable it for users.

Latest info about the Infor OS Portal Migration on this KB 2277419
https://support.infor.com/espublic/EN/AnswerLinkDotNet/SoHo/Solutions/SoHoViewSolution.aspx?fromEmail=True&kb_accessed_from=NotificationMail&SolutionID=2277419



Copyright © 2021. Infor. All Rights Reserved. infor.com

The Manilla Cloud Factory Team

Architecture

UX Tools

Data Migration

Performance

Testing

ADO – Project Management Tool

Reports / BI

XtendM3

Documents

infor

Copyright © 2021. Infor. All Rights Reserved. infor.com

M3 Cloud Upgrade Tool Team

Introduction

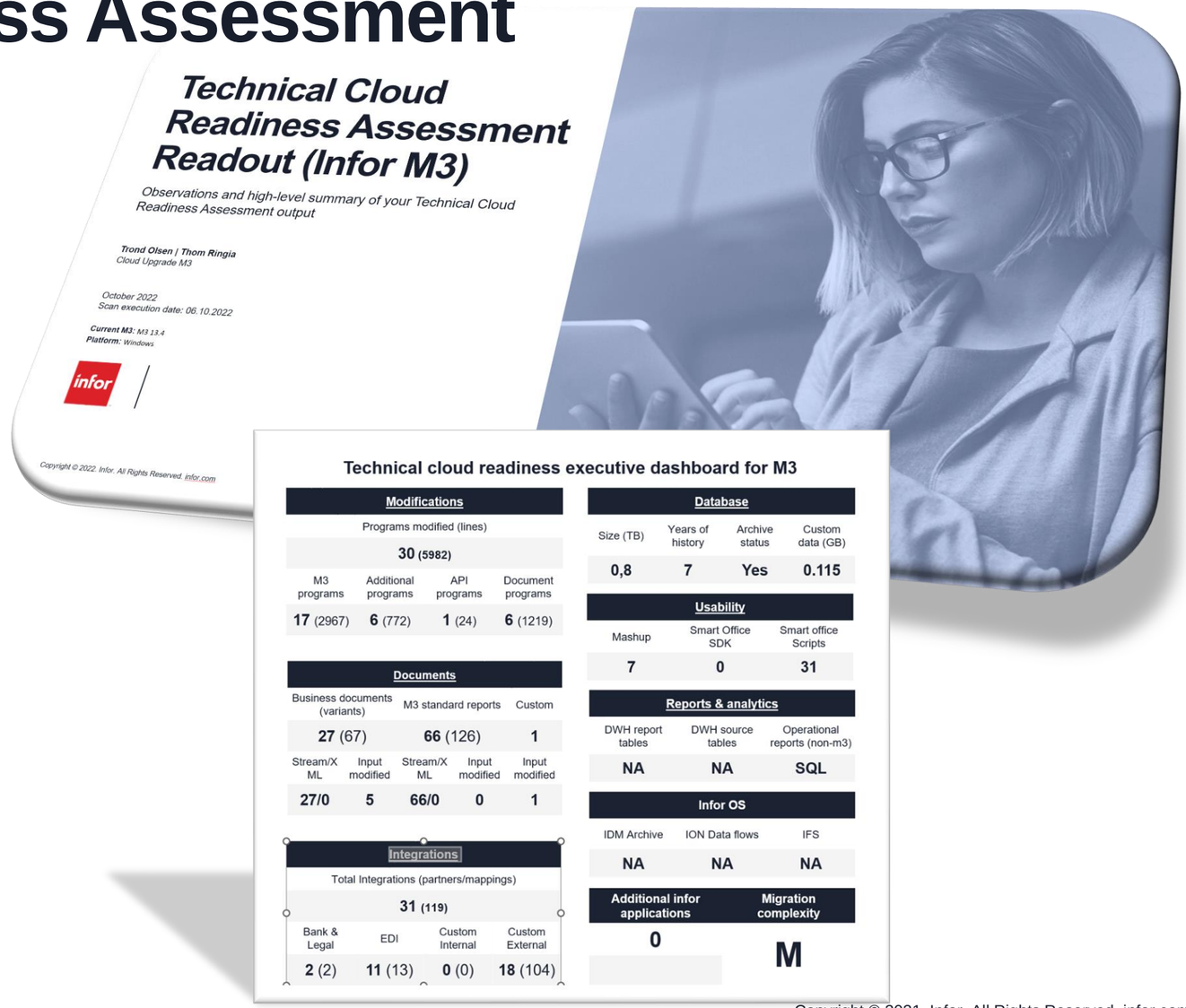
Cloud Upgrade process encounters all kind of (technical) challenges during its Engage and Project lifecycle. The Cloud Upgrade Team is focused on eliminating these challenges by providing Best-Practices and supporting tools.

M3 focused;

Copyright © 2022. Infor. All Rights Reserved. infor.com

Technical Cloud Readiness Assessment

- **Identifying (technical) challenges in current system**
  - Initial complexity indication
  - Advise on migration activities
- **Input for next steps**
  - Customer specific workshops
  - Possible solution directions for extensions
  - Reference Architecture
  - Service Workorder
- **80+ scan on M3**



Copyright © 2021. Infor. All Rights Reserved. infor.com

Cloud upgrade tooling

System analysis

- Technical Cloud Readiness Scan

Post Data migration (also tenant to tenant)

- Sorting options (CRS021)
- Sortings and views (CRS020/022)
- Information Browse Categories (CMS010)
- Custom API (CMS015)
- Adhoc Reports (AHS100/110)
- Document XML Configuration (CMS006/7/8/9)
- MDBREADMI

- Scheduled Jobs (SHS010) * no migration tool, but conversion support

- User and Security Migration (IFS)

Extension conversion

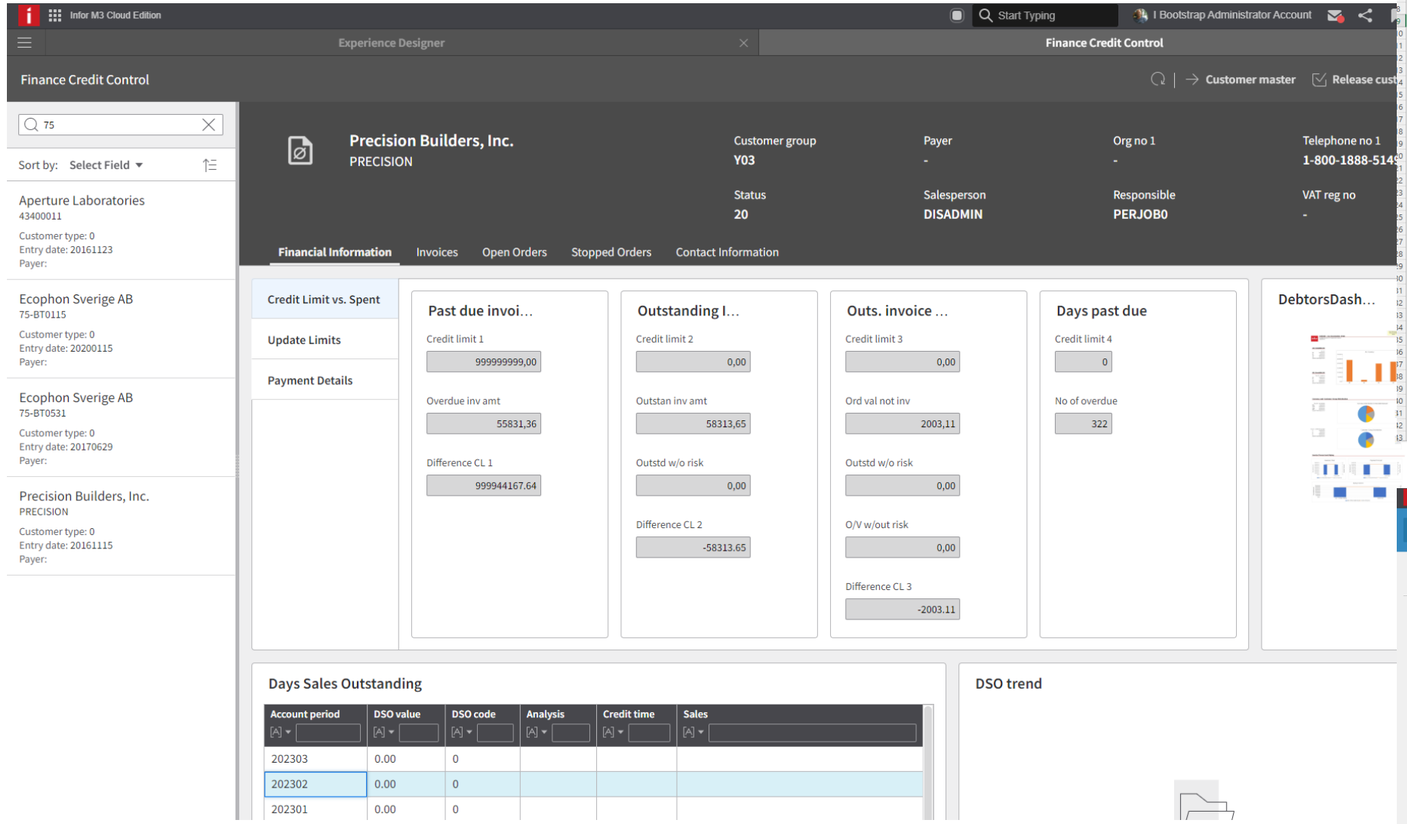
- IDM Document Generator
  - Streamserve PageOut
  - Any document
- MEC Integrations

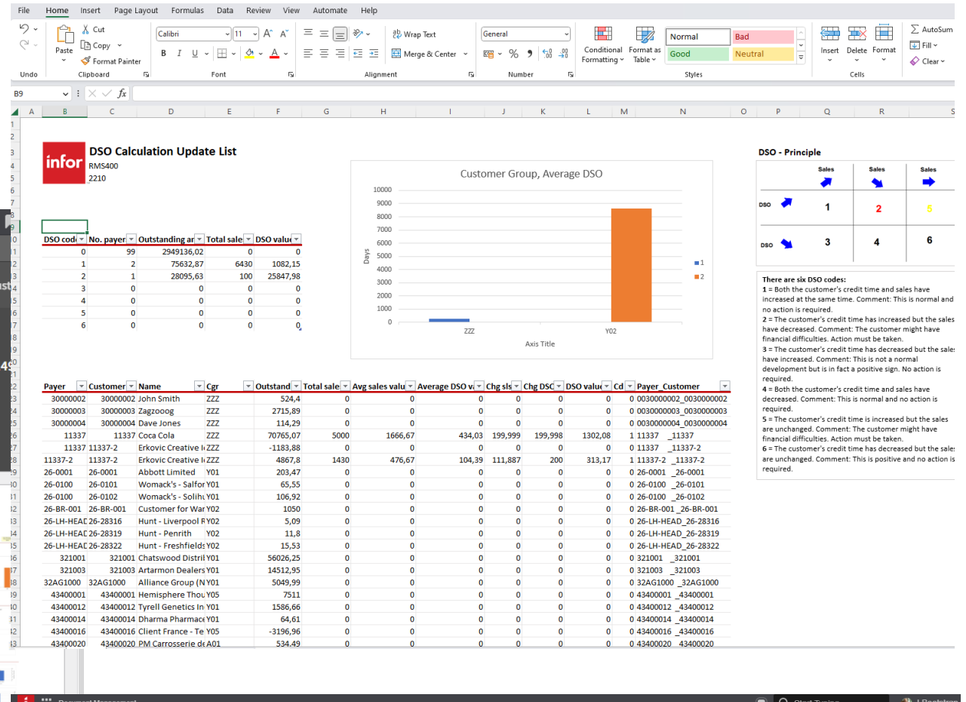
Datasize reduction best-practice

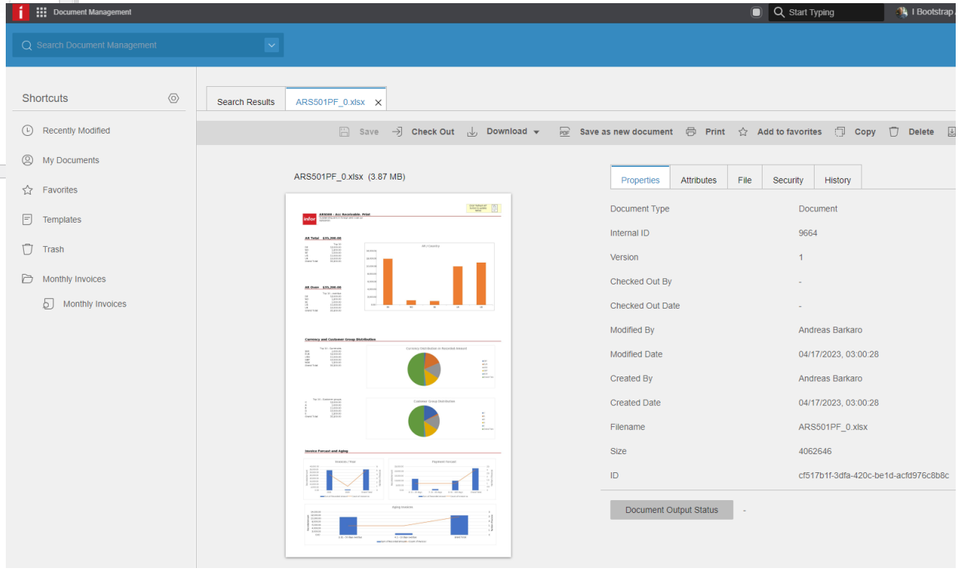
- Data Hygiene
- Data archiving (Roadmap)

Copyright © 2022. Infor. All Rights Reserved. infor.com

Time 2 Value – Copy templates







Copyright © 2021. Infor. All Rights Reserved. infor.com

SharePoint

Search this site

- Home
- Search Assets
- Contribute Asset
- My Items
- Analytics
- Guidelines
- FAQs
- NEWS
- Calendar
- Presentation / Video

Welcome, Bjorn Torold!

Select Industry-Vertical | ERP M3 | Select Other Product

Add Key Words | Add Functional Domain | Select Component classification

Search documents

Clear all | Search

Total search results:50

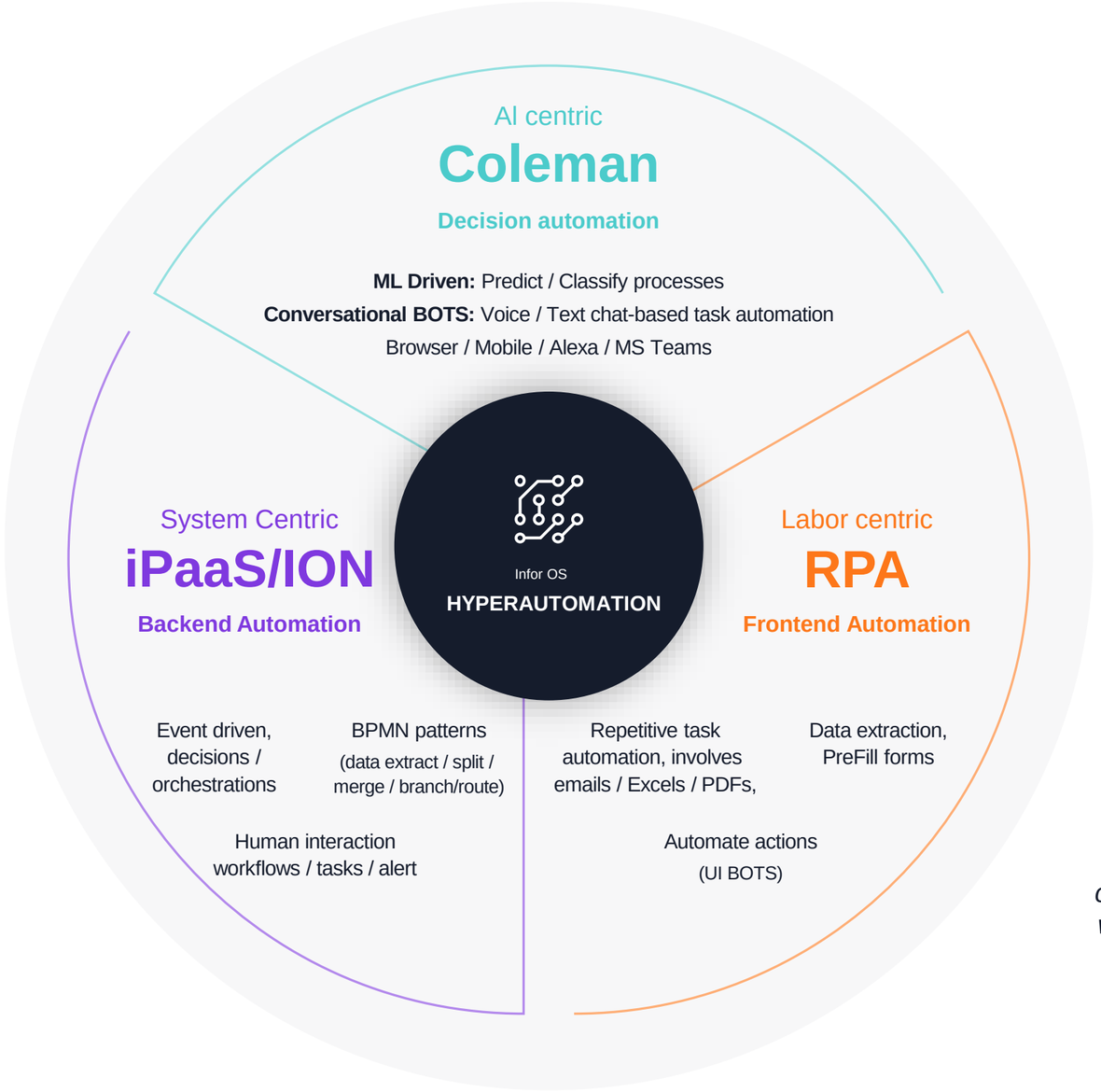
Name of the compon...	ID	Feedback	Component c...	Code r...	Short Desc	Pro...	Rele...	Mo...	Functional Do...	Business Do...	Effort(Hours)	Inc
M3-BarTender Integration ...	263		Code		Segaull BarTender	ERP M3	14.x			Warehousing		Dis
CINACC correction	258		Functional		Correct accountin	ERP M3	16	CAC	Finance	Financial Plan to F	75	Pro
Update standard cost	257		Functional		Update standard	ERP M3	16	CAC	Finance	Financial Plan to F	38	Pro
Bank reconciliation BAI file	256		Integration		bank rec using BA	ERP M3	16	ABS	Finance	Financial Plan to F		Pro
H5 script - F4 browsable c...	250		Technical		Custom F4- brow:	ERP M3	CE 16.0	All	All	All	40	NA
Grading/ Sorting Process ...	238		Functional		Grading/ Sorting	ERP M3	13.4, F&	Product	Manufacturing	Production to Inv	8	Pro
IPS OIS437	237		Technical		IPS OIS437 Trade	ERP M3	CE 16.0	Sales	Sales	Sales		Pro
Metapack Integration	236		Code		Sending to and P	ERP M3	MT	Supply				Pro
Material Handling Equipm...	235		Functional		Material Handling	ERP M3	13.4, F&	Product	Manufacturing	Production to Inv	8	Pro
APS130 - Payment Propos...	227		Integration		Custom IPS API to	ERP M3	CE 16.0	Financia	Financial Plan to F	Financial Plan to F	24	NA
SQL query to migrate conf...	225		Migration		Sql query to migr	ERP M3	11.0.38	M3	All	All	8	Ot

infor

Copyright © 2021. Infor. All Rights Reserved. infor.com

Infor Hyper Automation

Infor continues to expand automation capabilities that work together through a common low code Infor OS platform that is pre-wired with Infor CloudSuites for rapid time to value.



Infor RPA & IDP

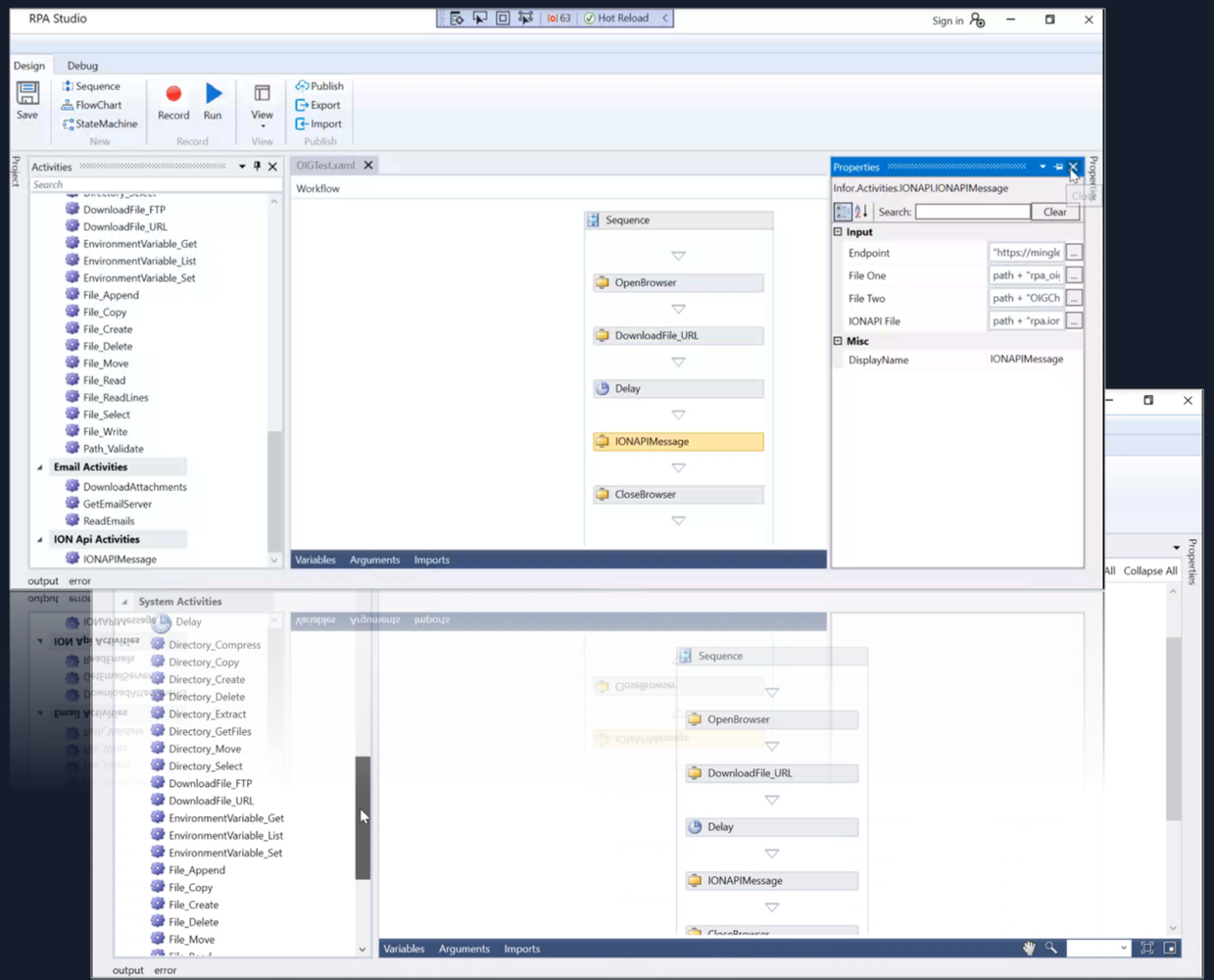
Give customers the ability to accelerate digital transformation and foster a creative culture of continuously automating processes without having a ton of prerequisites or costs to get started with a single idea.

.

Copyright © 2021. Infor. All Rights Reserved. infor.com

RPA

STUDIO



RPA

STUDIO

RICH MODELER TO DEFINE RPA FLOWS

- Based on Windows Workflow Foundation.
- Comprehensive set of Activities.
- Integrates to the Cloud Tenant via Gateway
- Sub-flows that can be added via a sequence.
- Test mode to run your flow.
- Comes with a separate Installer of its own; Windows only;

Copyright © 2021. Infor. All Rights Reserved. infor.com

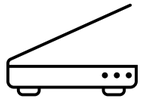
IDP

Infor Document Processor

OCR and More..

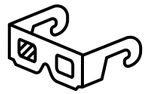
A Complete Document Digitization Platform

Inhouse solution that provides pre and post extraction services, Extraction and analysis of text



Text Extraction

- Key-Value Pair extraction
- Region of interest/ Template driven



Document Analysis

- Processing Tables, Forms
- Pre/ Post enhancement of content
- Support for PDF and images

AI/ ML based Extraction

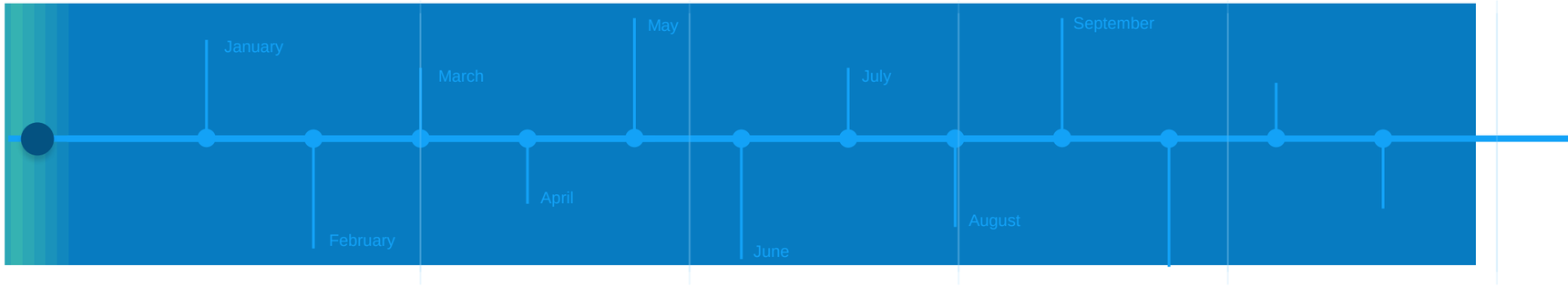
- Ability to make a ML model and train them
- Integrated with Coleman AI
- Support for Opensource algorithms

Copyright © 2021. Infor. All Rights Reserved. infor.com

Complete Roadmap

Initiatives

Our Journey
Next 9 months



Industry

- FSM Invoice Creation
- FSM Item Master
- FSM OIG Vendor Check List
- SX.e Pick Ticket

Experiences

- Core Components: *Studio, Mastermind, Installer, RPA Assistant, Agent, Security config manager*
- Extensive set of automation activities:
  - *Web, desktop, excel, email, user events, ION API, system*
- Browser Extension: *Recorder and Inspector*
- Life Cycle Management
- T2V Phase 1

Innovation

MVP – April

- OCR
  - Text, key-value, template-based extraction
- Bots in API Gateway
- OCR APIs in API Gateway

- IDP Stand alone service
- Usage Metrics
- GDPR adoption
- Time2Value Phase 2
- Desk App automation activities
- Audit Logs in RPA Studio
- Reporting in MasterMind
- Process details in MasterMind

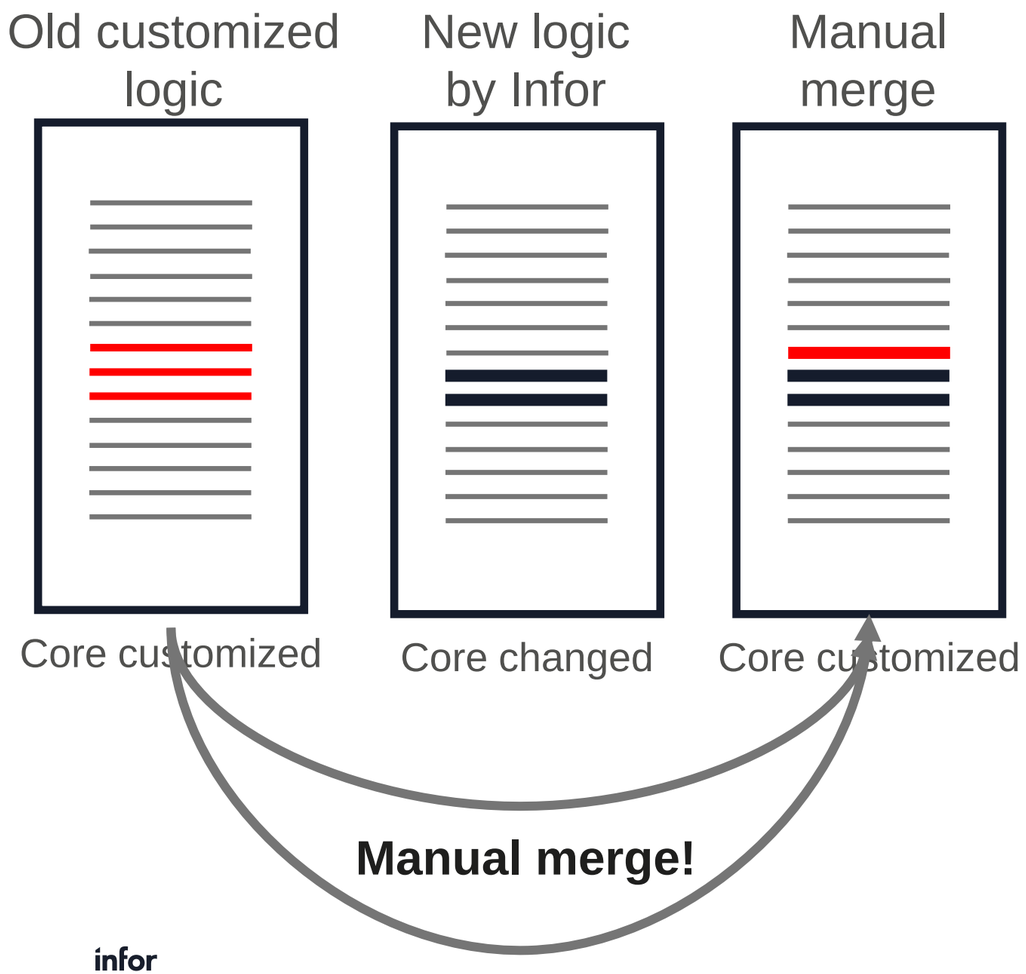
October

- Google Tesseract OCR
- SKU Provisioning Automation
- Hyperautomation
  - API flow execution from ION
- Agentless Execution
- Nested Process

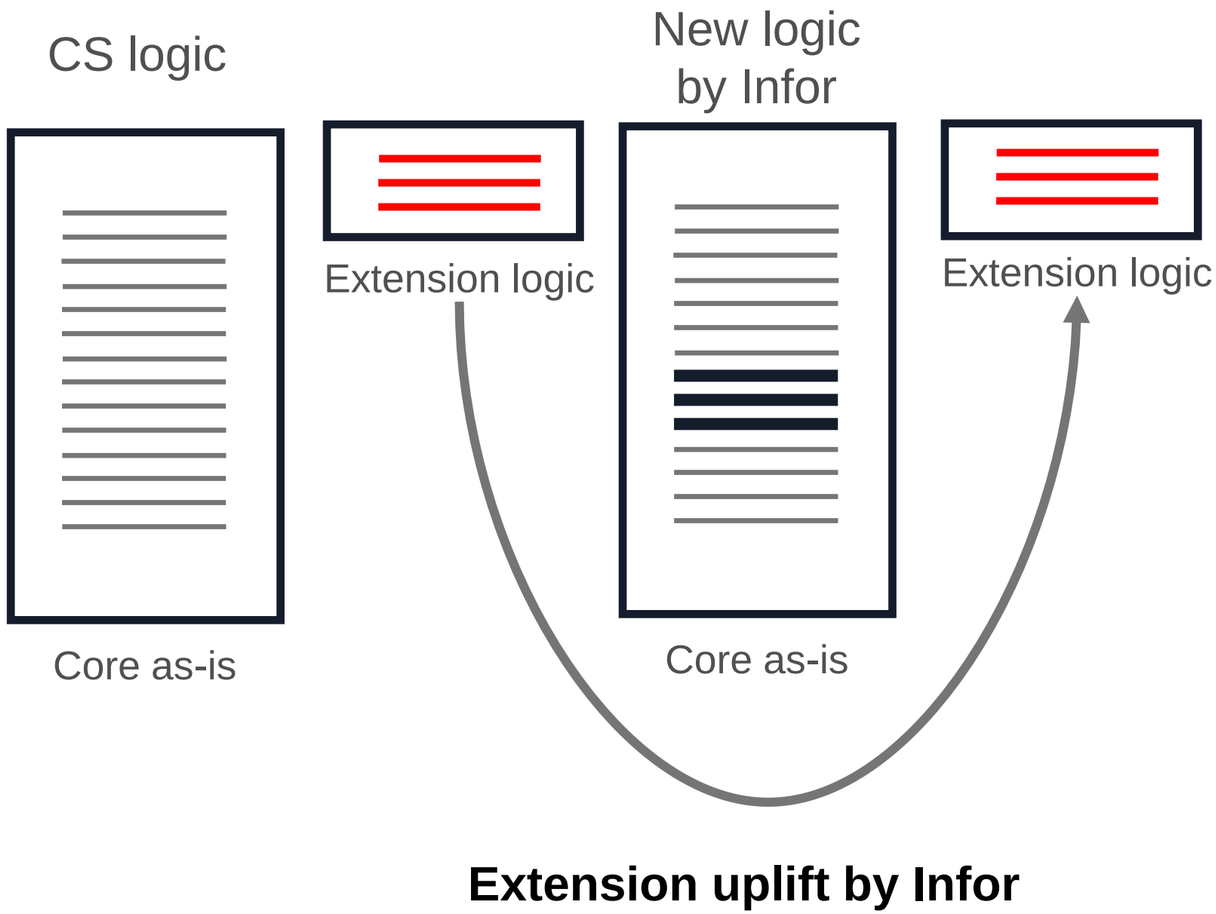
Copyright © 2020. Infor. All Rights Reserved. Infor.com

Extensibility in the Cloud

“Traditional Customisation”



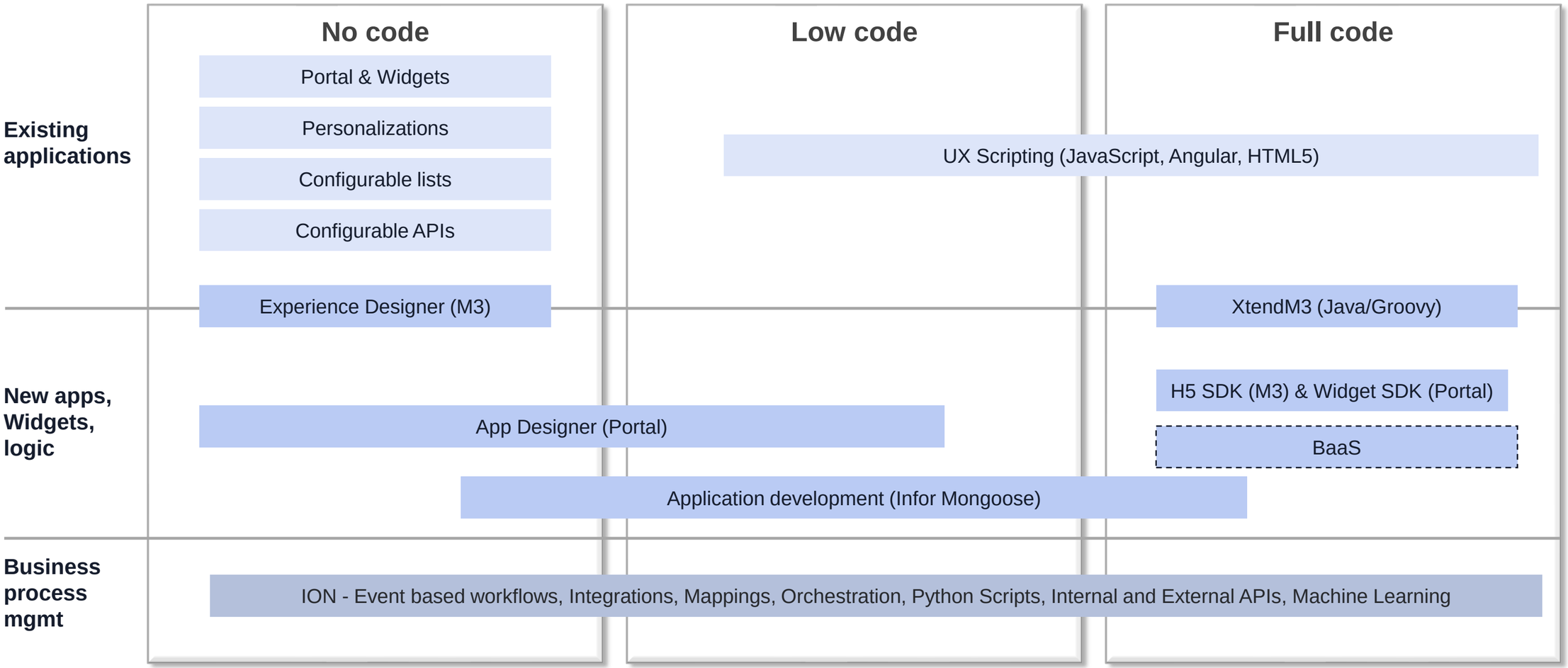
“Extensibility”



Copyright © 2021. Infor. All Rights Reserved. infor.com

EXTENSIBILITY

CloudSuite Extensibility Tools



Copyright © 2021. Infor. All Rights Reserved. infor.com

Attachments (6) | Linked KBs (4) | Linked Incidents (374) | Linked Defects (0) | Sign Up | Add to Favorites |

Description:

M3 CE Output Management - Master KB Article

For more information on Configurable Output Management for M3 15.1.4 please go to this link: 15.1.4 - KB 191224: Configurable Output Management - All Patches.

M3 CE Core Output Management is delivering new documents and reports through M3 CE. Use the KB's 'Sign-up feature' to get the latest updates through mail notifications.

Key messaging for M3 Customers and projects using M3 Output Management capabilities, KB 2219053.

WHAT'S NEW?

Important updates and information regarding M3 Output Management are published continuously here.

Note: Check CMS975 – To see new feature that has been released with feature toggles.

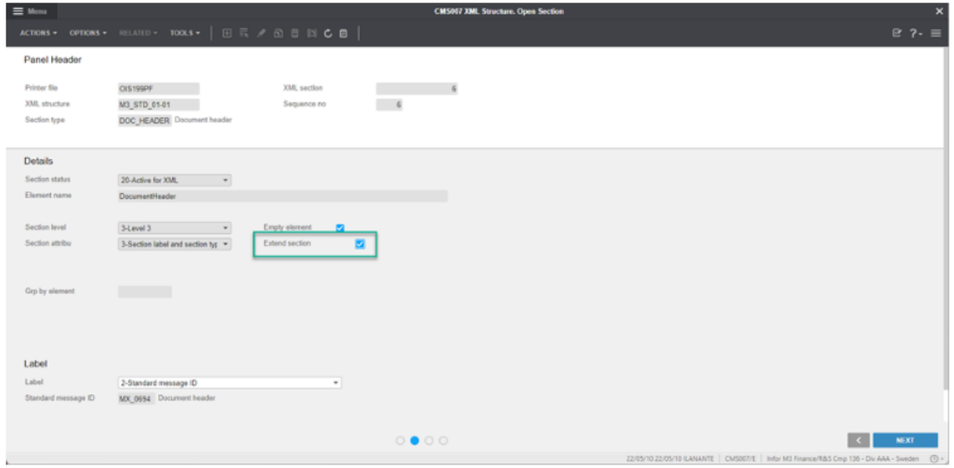
Date	Information	KB or Link
2023-02-15	OpenText Exstream version 22.3 (16.6.6) is now available to download from Infor Product Download center	OpenText Exstream 22.3 from Infor Product Download Center
2022-12-22	**M3: 2022 Output Management Catch Up Session** (02_9112022_EEN0521_M3O) has been published in Infor Campus.	US Course Deep Link Non-US Course Deep Link SSO Deep Link
2022-11-15	Printout for best performance using an output application OnPrem	KB 2275422
2022-10-30	Creation of TLV QR Code string using virtual fields in Configurable XML in M3. A country specific requirement for Saudi Arabia.	KB 2272145
2022-08-30	Clarification KB - Locale functionality in M3 Output Management.	KB 2265440
2022-06-08	How to use the Xtend M3 Generic Extension Point for Printouts scripts.	KB 2253585
2022-03-18	Added instruction for how to create TLV QR Codes in Exstream, a country-specific requirement for Saudi Arabia.	KB 2242384
2021-11-01	From November 1, 2021, all enhancement requests for XML conversion should be handled by each specific product and module. Please see instructions below.	
2021-03-30	Updating ICP jar file used in Exstream for communicating with IDM	KB 2189373
2020-12-17	Added documentation - QR Code creation and configuration for M3 Output Management	KB 2172186
2020-08-24	IDM Enterprise Print available, documentation available in **Infor Operating Service Documentation List**	Infor Operating Service Documentation List Browse to: -Infor Document Management Administration Guide
2020-06-22	IDM Content Package is now available and Downloadable via CFT (Cloud File Transfer)	KB 2123349
2019-11-07	Interactive Briefing Infor offered an interactive briefing on the topic "How to configure Infor M3 Cloud Edition to best use IDM Output Management, including an overview of the solution" on November 7, 2019. A recording is available on KB 2097908.	KB 2097908

Description:
How to use the XtendM3 Generic Extension Point for Printouts script

Resolution:

Extend a section

To extend a section, the "Extend section" checkbox in CMS007/E should be selected:

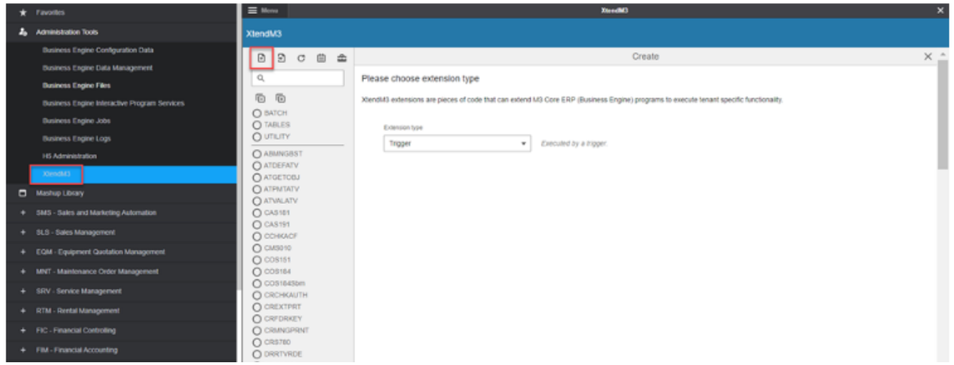


When "Extend section" is active, parameters are passed on to a batch program and made available in the XtendM3 script.

For more information about this development, you may refer to KB Article: 2239630: Prepare Program for Business Engine Extensions: Generic extension point for printouts.

Create an XtendM3 extension

1. Select Administration Tools > XtendM3 and create new extension:

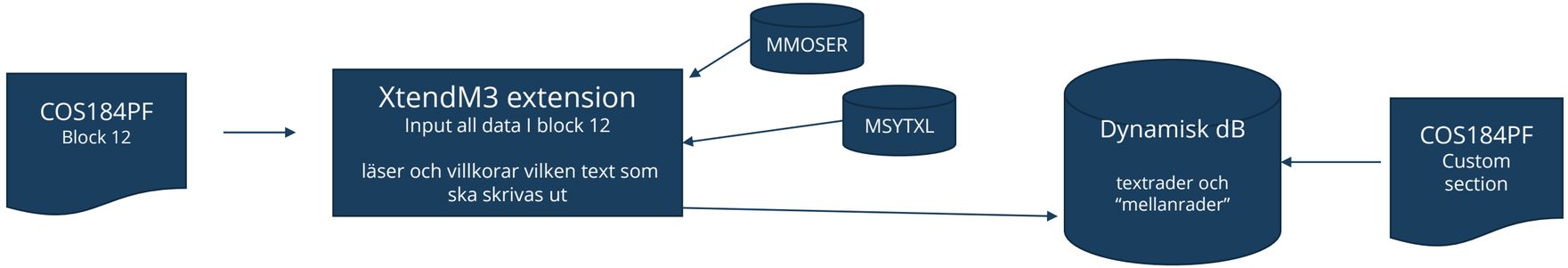


infor

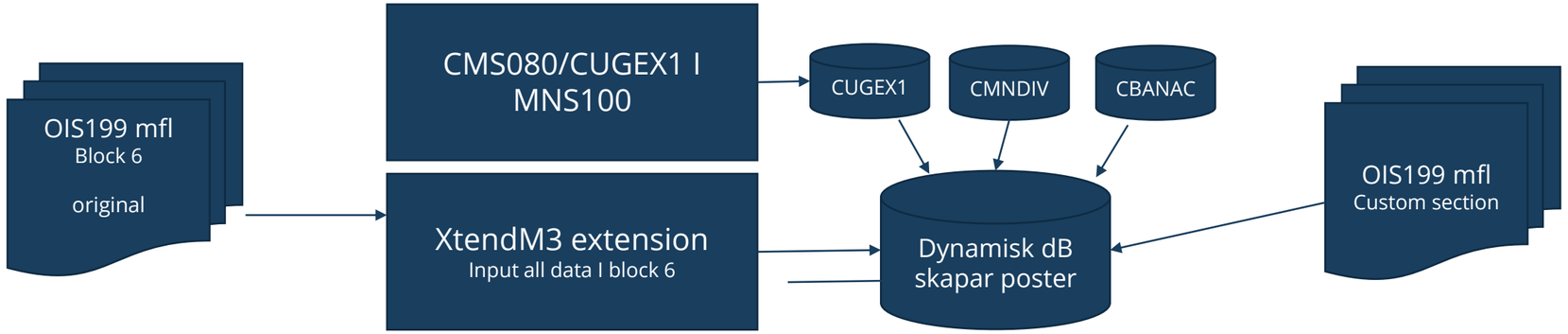
Copyright © 2021. Infor. All Rights Reserved. infor.com

Idéer på lösningar

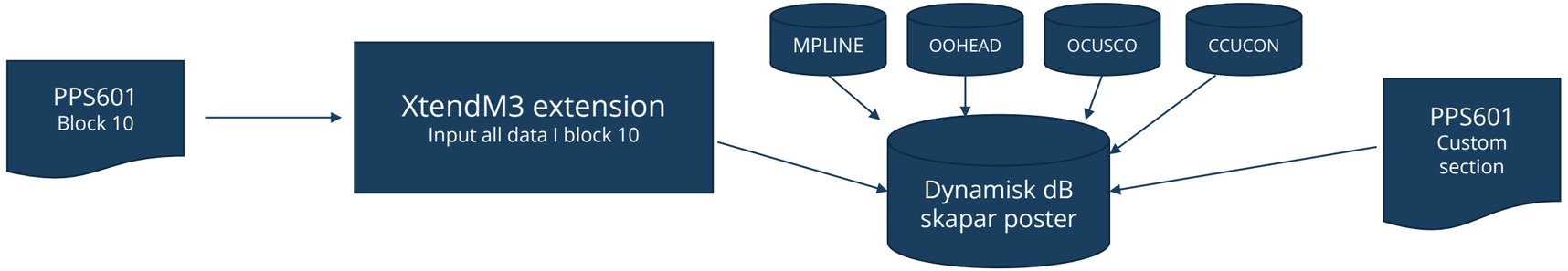
Skriva ut texter på faktura



Skapa sidfot på dokument



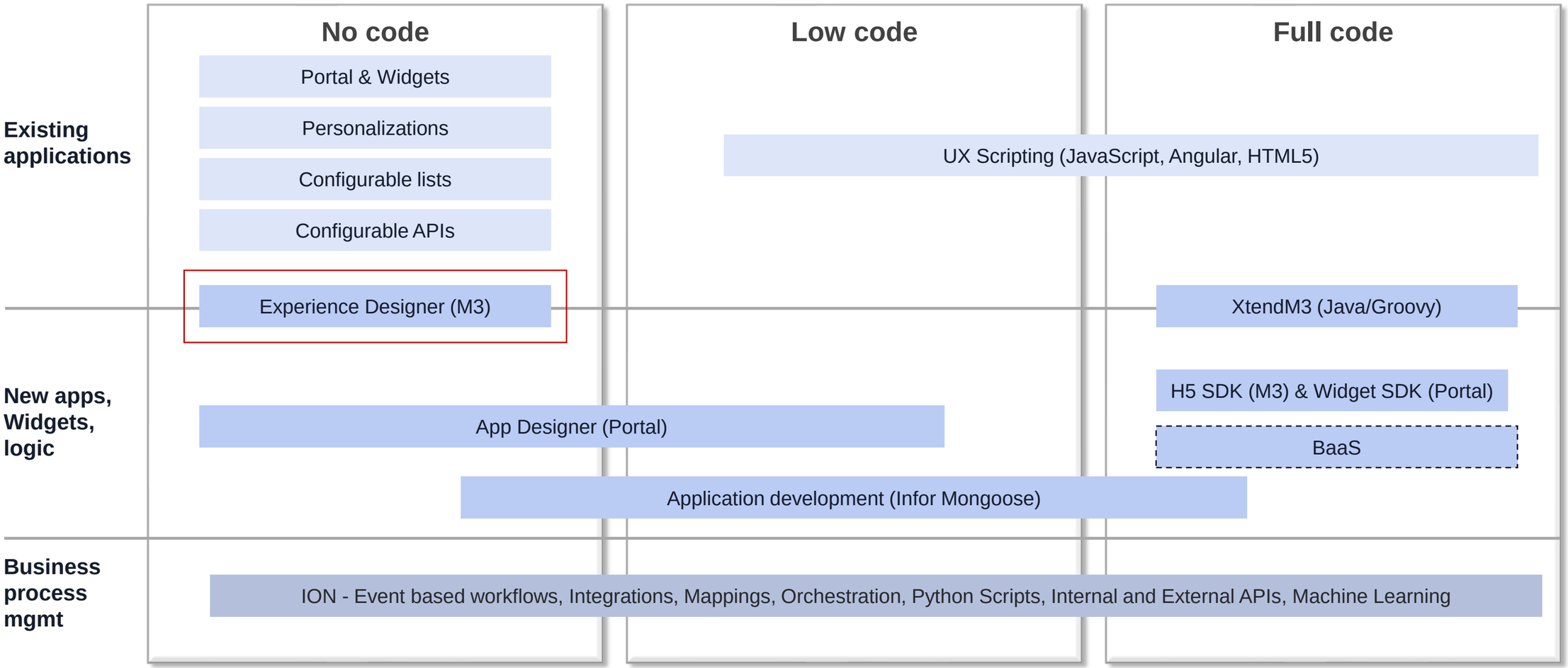
Hämta ut telefonnummer och mailadress vid direkt leverans



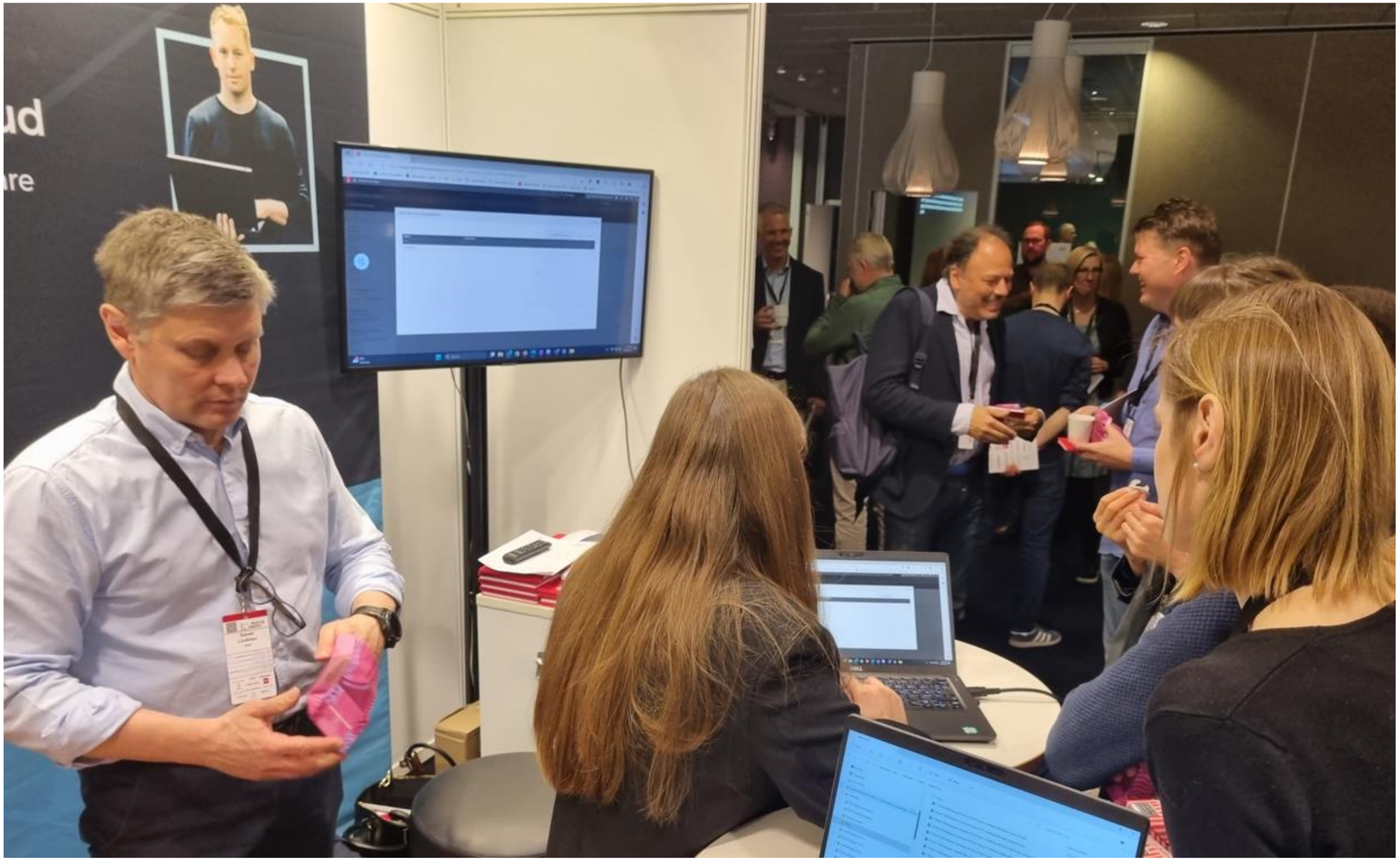
m3cs
M3 Consulting Sweden

EXTENSIBILITY

CloudSuite Extensibility Tools



Copyright © 2021. Infor. All Rights Reserved. infor.com



Copyright © 2021. Infor. All Rights Reserved. infor.com

API Gateway | BaaS

Backend as a Service

BaaS is a customer managed extension tool, where customers will be building tenant specific API extensions.

- FaaS exposed as BaaS – i.e., Event driven Functions as APIs
- Cloud Native – Serverless, scalable Architecture
- Developer’s tool/ Provides APIs and SDKs for your solution
- Cloud Agnostic – Build your API once; Run in AWS/ Azure/ …

infor

Copyright © 2020. Infor. All Rights Reserved. Infor.com
Copyright © 2021. Infor. All Rights Reserved. infor.com

API Gateway | BaaS

What you get?

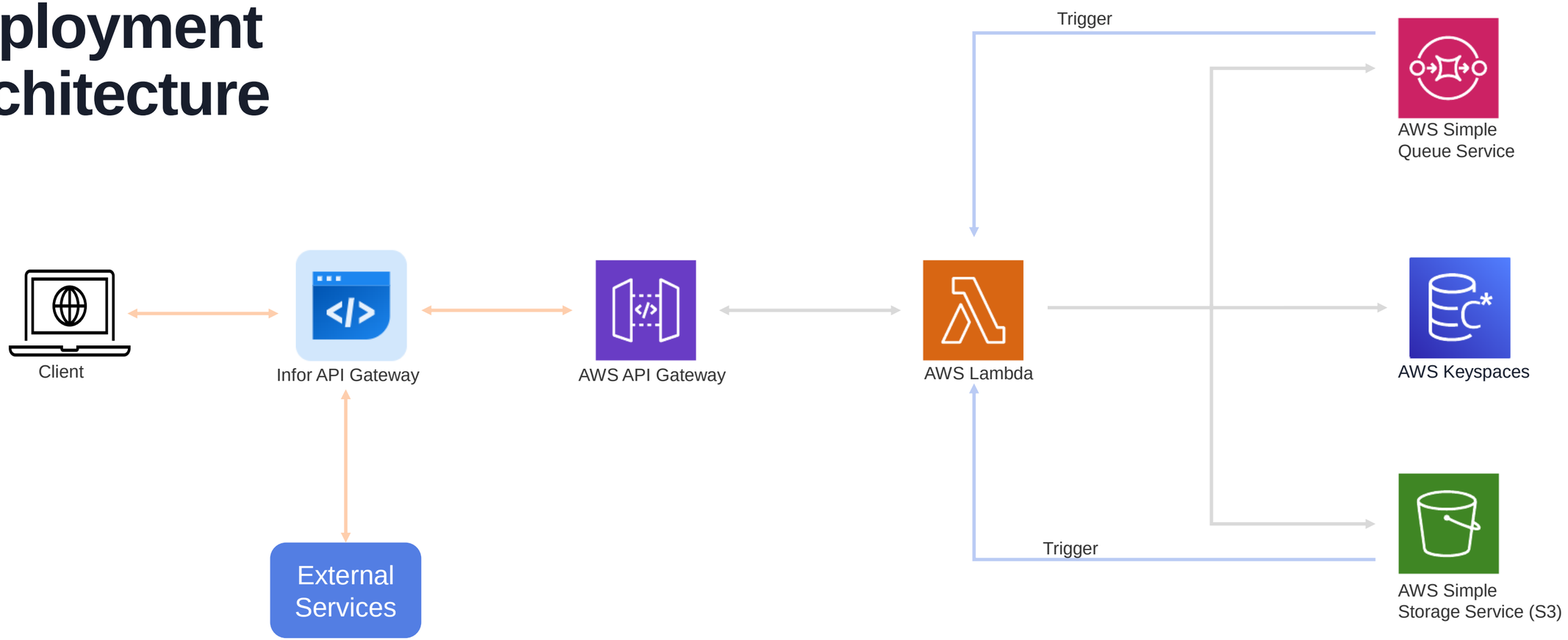
- **Managed Storage**
- **Managed Compute capacity**
- **Managed Security**
- **Managed Execution (Event driven/ Schedule Driven)**

Customers to manage development, deployment. Support and maintenance of deployed services stays with customer.

infor

Copyright © 2021. Infor. All Rights Reserved. infor.com

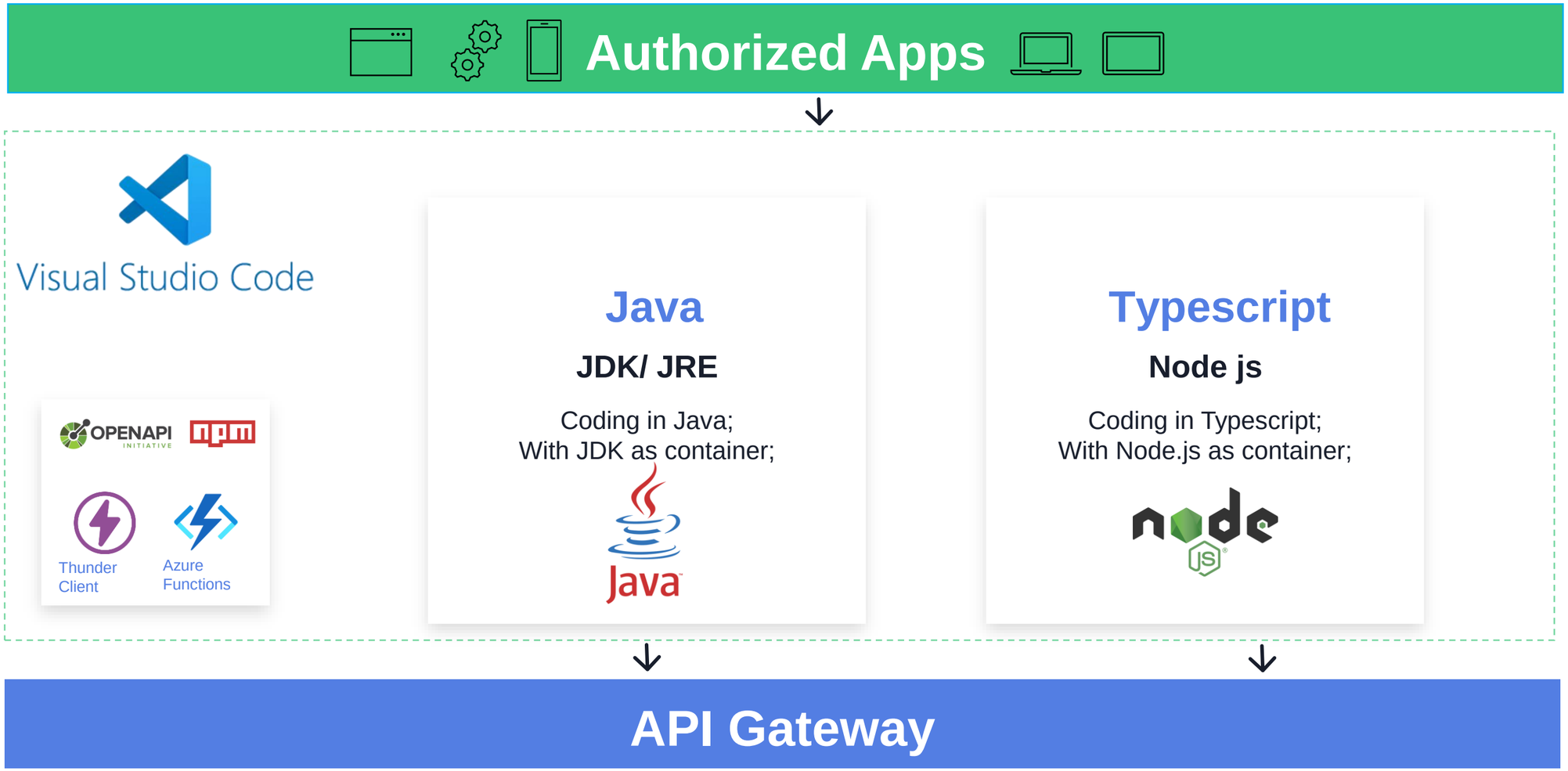
Deployment Architecture



infor

Copyright © 2021. Infor. All Rights Reserved. infor.com

Development Architecture

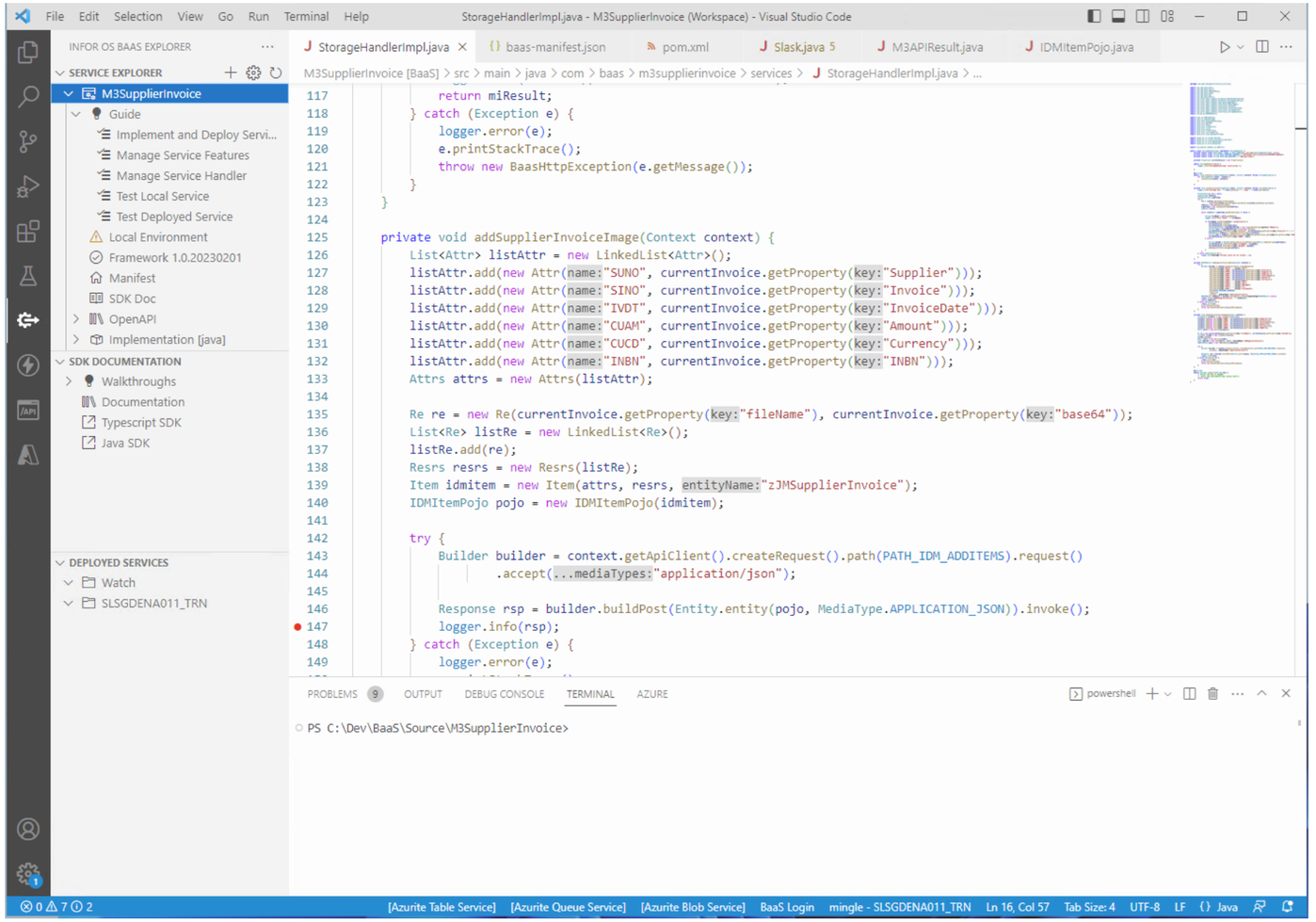


infor

Copyright © 2021. Infor. All Rights Reserved. infor.com

Skill Set required

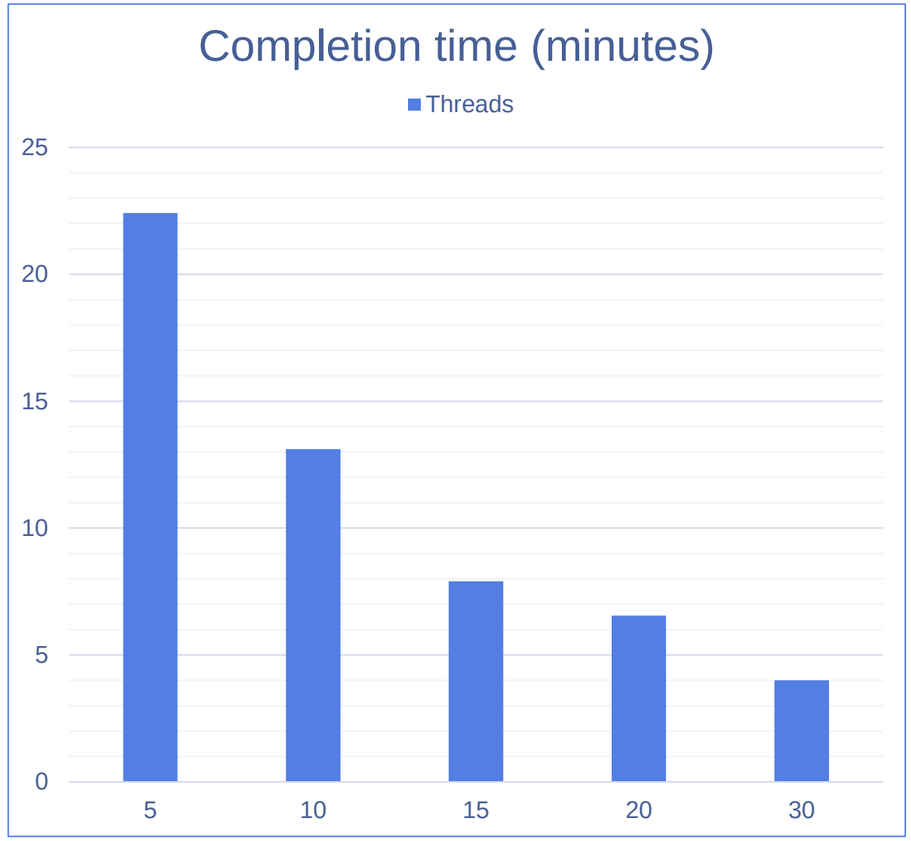
- General Programming Knowledge
- Java/ Typescript (NodeJS)
- API Domain knowledge
  - HTTP
  - REST
  - Open API (Swagger)
  - API Clients (Thunder, Postman)
  - SSL
- Source control/ CI – CD knowledge



Copyright © 2021. Infor. All Rights Reserved. infor.com

Forecast update – Synchronous approach

- Created one big file with around 50.000 records
- Using only one thread took almost two hours to complete
- Split big files into around 500 smaller files
  - Execute many smaller files in parallel.
- Scales very nicely!
  - Using 30 threads took us from 120 minutes to around four minutes.
- Comparing bulk execution vs. executing each update REST MI-transaction:
  - 2-3 times faster using bulk. No stress on Cloud Service Limits using bulk. 500 calls vs 50.000 calls!



infor

Copyright © 2021. Infor. All Rights Reserved. infor.com

Forecast integration – Implementation on client side

Client
M3

Split file	Transform file	Send file to Bulk API	Process File
The large file containing all forecast data will be split into smaller files having for instance 1.000 records each.	Each split file needs to be transformed into a format that can be understood by the M3 Bulk API.	Send each file to M3 through the M3 Bulk API via Infor API Gateway.	M3 BE will process the data as received via M3 Bulk API.

Needs to be executed in parallel.

Copyright © 2021. Infor. All Rights Reserved. infor.com

Forecast integration – Implementation on client side

Client
M3

Split file	Transform file	Send file to Bulk API	Process File
The large file containing all forecast data will be split into smaller files having for instance 1.000 records each.	Each split file needs to be transformed into a format that can be understood by the M3 Bulk API.	Send each file to M3 through the M3 Bulk API via Infor API Gateway.	M3 BE will process the data as received via M3 Bulk API.

Needs to be executed in parallel.

Copyright © 2021. Infor. All Rights Reserved. infor.com

Forecast integration – Implementation on client side

Client
BaaS
M3

Upload file	Split file	Transform file	Send file to Bulk API	Process File
Upload the large file containing all forecast data to Infor CloudSuite via API Gateway.	The large file containing all forecast data will be split into smaller files having for instance 1.000 records each.	Each split file needs to be transformed into a format that can be understood by the M3 Bulk API.	Send each file to M3 through the M3 Bulk API via Infor API Gateway.	M3 BE will process the data as received via M3 Bulk API.

Needs to be executed in parallel.

Copyright © 2021. Infor. All Rights Reserved. infor.com

Forecast integration – Implementation using BaaS

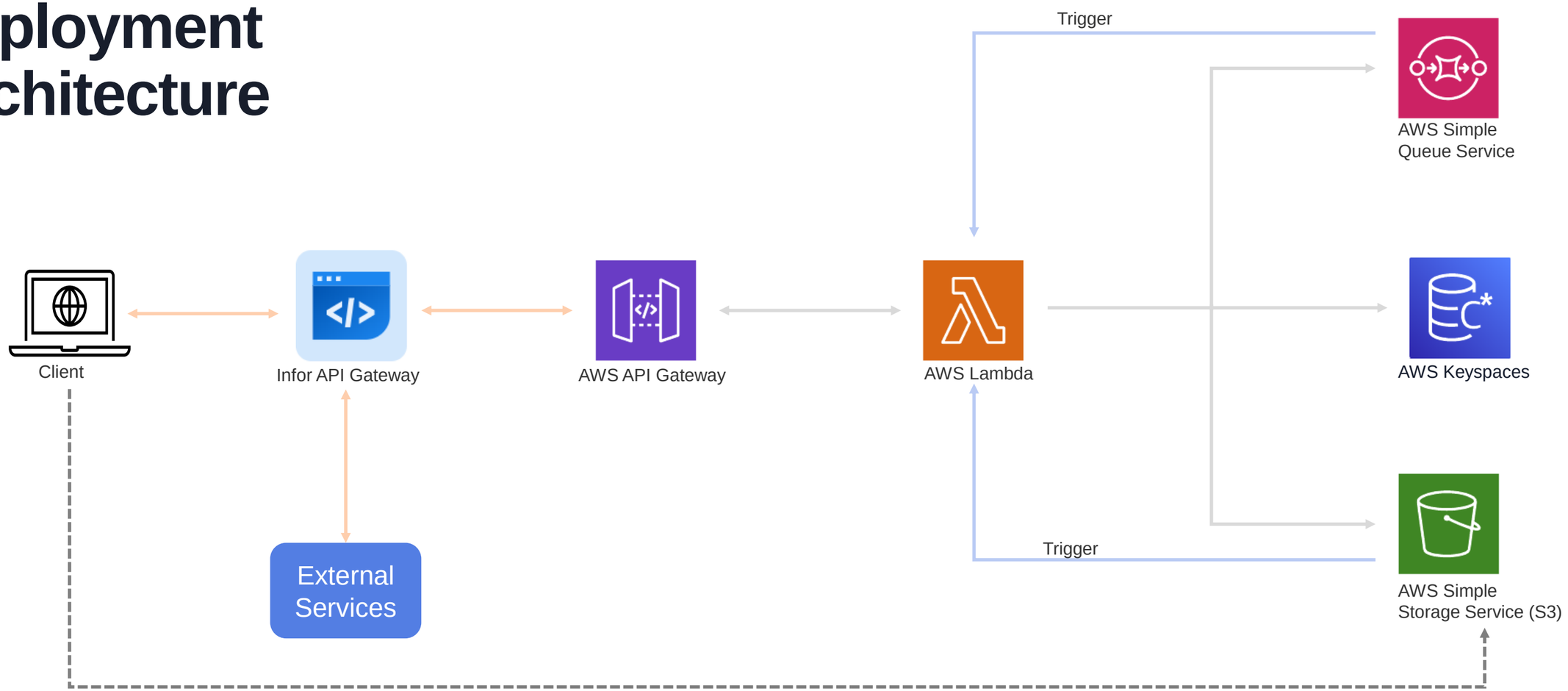
Client
BaaS
M3

Upload file	Split file	Transform file	Send file to Bulk API	Process File
Upload the large file containing all forecast data to Infor CloudSuite via API Gateway.	The large file containing all forecast data will be split into smaller files having for instance 1.000 records each.	Each split file needs to be transformed into a format that can be understood by the M3 Bulk API.	Send each file to M3 through the M3 Bulk API via Infor API Gateway.	M3 BE will process the data as received via M3 Bulk API.

Needs to be executed in parallel.

Copyright © 2021. Infor. All Rights Reserved. infor.com

Deployment Architecture



infor

Copyright © 2021. Infor. All Rights Reserved. infor.com

Tack för idag så ses vi på nästa Tips&Tricks