



Configuration Management

Presenter Name

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Agenda

01

Introduction

Introduction to Configuration Management.

What tooling is available and who is the intended user of the tooling.

Nomenclature

02

Cloud Suite tooling

Using Cloud Suite Self Service portal to create a local package with resources from one tenant and move to another tenant.

03

M3 Tooling

Using a tag to create a local package with resources from one tenant and move to another tenant.

04

Summary

Introduction

Tooling

Configuration Management is a tool that allow configurations to be copied from one tenant to another (like from TST to TRN). This functionality is cross CloudSuite i.e., M3, Infor OS, ...

The information exported from one tenant is referred to as a local package.

A local package cannot be downloaded, it is stored in cloud for a limited time.

Value

- Structured handling of configurations
- Avoid errors from manual processes
- Lower cost of managing environments

Types of resources that can be moved

M3 Business Engine

- Sorting option, Sorting order, Delivery methods, Rental reasons, Item type, Role, and more

M3 Tech

- Xtend M3, M3 UI artifacts, Mashups, GLT, M3 Portals, Sales Hub, Event Analytics, BOD Processor, Enterprise Collaborator, DLP, and more

Infor OS

- API Gateway, Coleman, Digital Assistant, Document Management, Infor OS Portal, ION, and more

Cloud Suite Self Service Portal

Configuration Management tooling

The main user interface is in Cloud Suite Self Service Portal (CSSP), also called Self Service Portal (SSP), in the Configuration Management menu.

Tasks performed in SSP

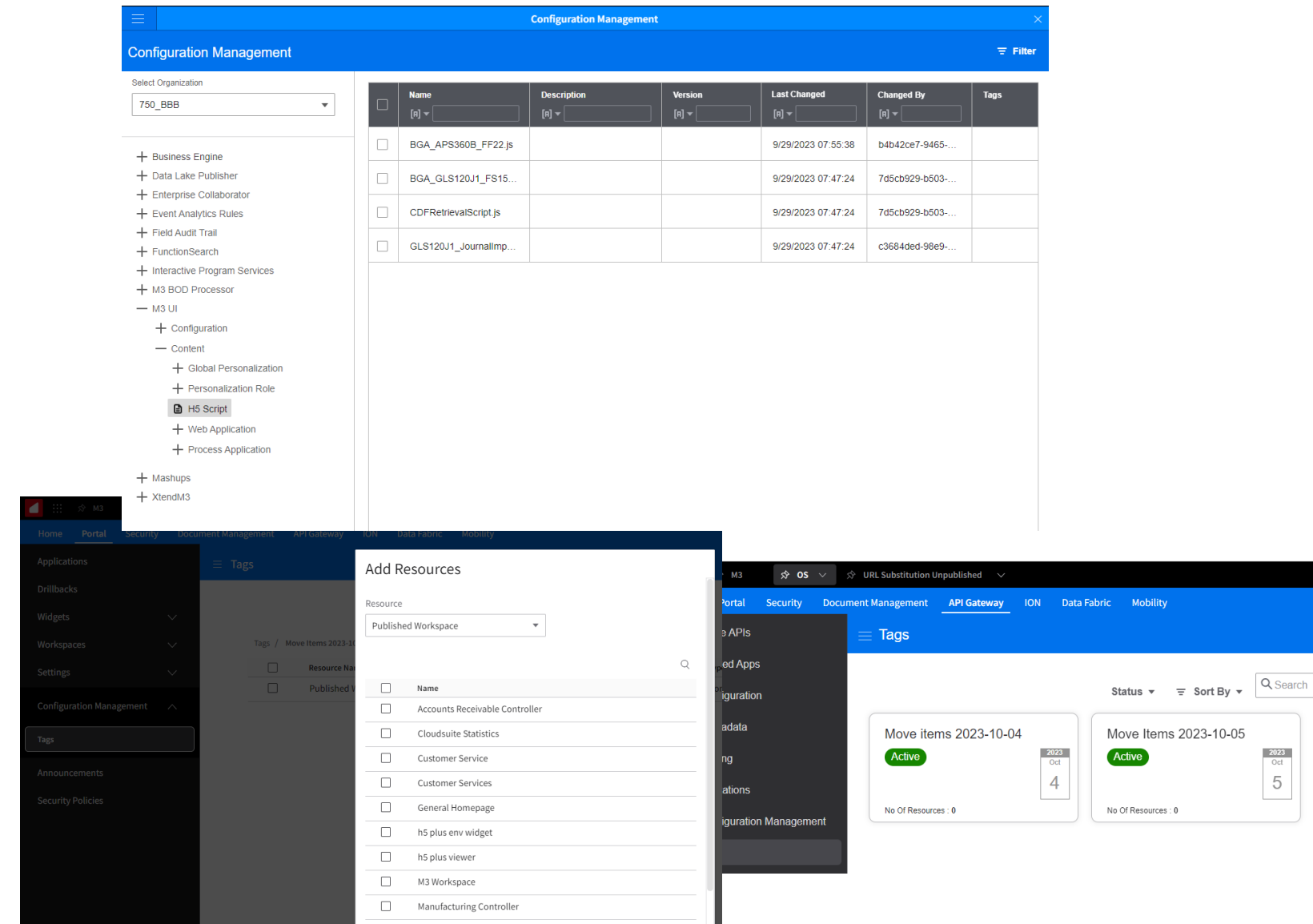
- Create a Local Package
- Deploy a Local Package
- Maintain Tags

Name	Tenant ID	Status	Su
[_export_target_ACM Test 51_4b28e64f-6069-4a88-9t	M3CEDEVAPPUP_DEV	SUCCESS	Sy
ACM Test 51	M3CEDEVAPPUP_DEV	SUCCESS	Ri
MUAMUPS20230414-0925	M3CEDEVAPPUP_DEV	SUCCESS	Rc
MUAMUPS20230413-0721	M3CEDEVAPPUP_DEV	SUCCESS	Rc
MUAMUPS20230411-0853	M3CEDEVAPPUP_DEV	SUCCESS	Rc
MUAMUPS20230411-0843	M3CEDEVAPPUP_DEV	SUCCESS	Rc
MUAMUPS20230411-0808	M3CEDEVAPPUP_DEV	SUCCESS	Rc
MUAMUPS20230411-0753	M3CEDEVAPPUP_DEV	SUCCESS	Rc

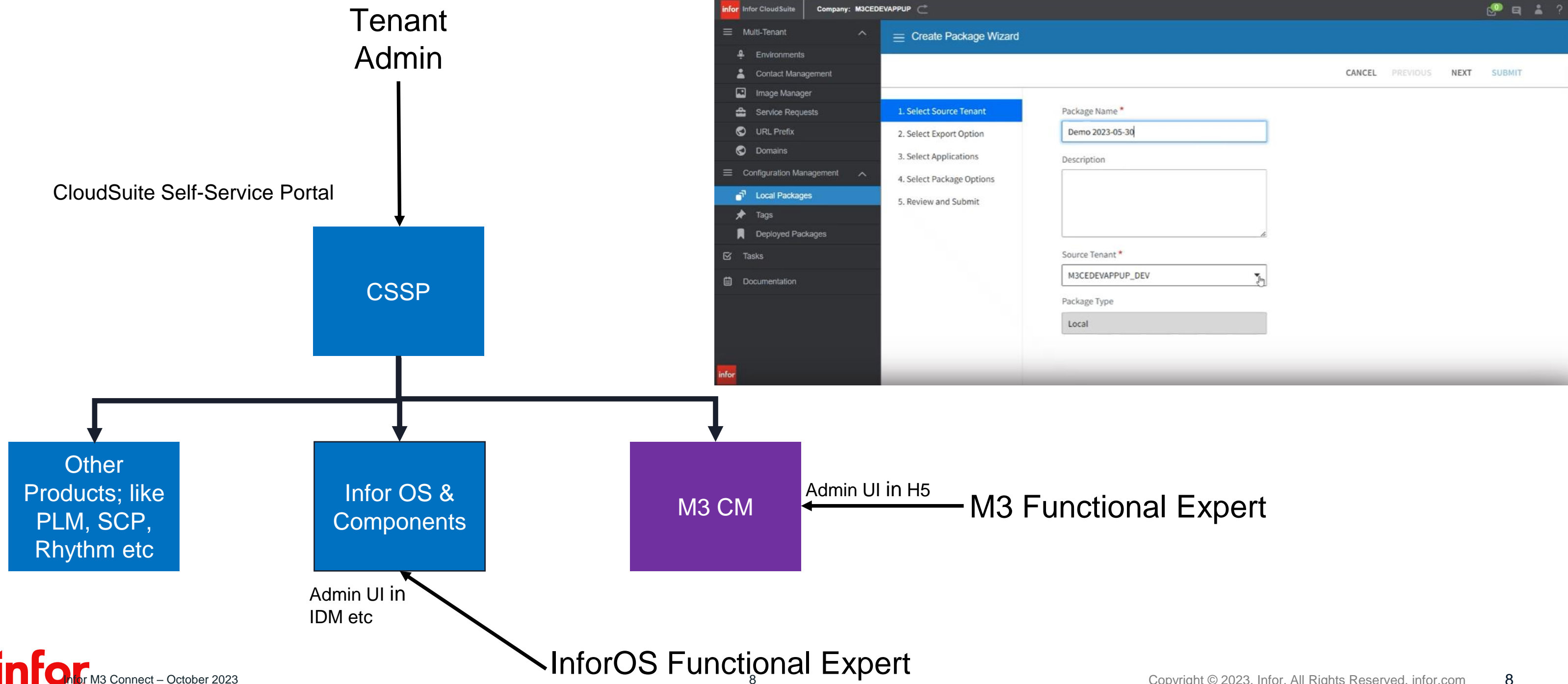
Application tooling

Configuration Management tooling

- M3
- Infor OS
 - Document Management
 - Portal
 - Security
 - API Gateway
 - ION
 - More



Cloud Suite Self Service Portal



- Configuration Management – Introduction

Differences between SSP and admin tool in an Application

In SSP the user is “super user”. All resources will be shown in the SSP selection UI.

- This is the Tenant Admin – and does not necessarily understand the components they are packaging up.

In the Configuration Management administration tool in M3, only resources that the logged-on user have the right to see are displayed.

- The user must have access to the companies and division, including blank division that are candidates for a local package – and will be a subject-matter expert in the particular application.

Moving resources using only Cloud Suite tooling

Cloud Suite tooling

Local Package

A local package is always created in Self-Service Portal (SSP)

- Manual creation
- From a tag



Manual selection

To create a local package manually in SSP

- Step one: Select an organization
- Step two: Select what resources from the organization should be included in the package

Select Organization *

Select Options to Export *

- M3
 - Modules
 - Business Engine
 - Configurations
 - API - Application Programming Interface
 - Configurations
 - MDBREADMI transaction
 - 1 Instances
 - Standard M3 Content for OpnInvoicebyCust

- RTM - Rental Agreements
- WHM - Warehouse Management
- SEC - Security Management
- TPL - Transportation Management
- COP - Customer Order Processing
- SST - Sales Statistics and Performance

Organization

An organization in M3 is build by company and division, for example 720_AAA

When selecting an organization, for example 720_AAA, the following resources will be listed

- Resources that belongs to company 720 and division AAA
- Resources that belongs to company 720 and division blank
- Resources that are configured on a tenant level

Resources that can be configured on more than one level will have different types

- An example would be ACC - Accounting Setup (not available in ACM yet but is planned later).

Validation

During deployment of a local package there is a validation step that verifies that the data can be imported.

- A successful validation is not a guarantee that the deployed resources will work properly, but the deployment should not fail.

The creator of a local package must have a good knowledge on what resources are included and their dependencies.

- An H5 Script may require a custom MI transaction to work properly. Deployment will succeed, but there will be an error when using the script.
- Some dependencies will be added automatically, but not all resources supports that.

Create and move a local package using Self Service Portal

Demo

Tag resources to be included in a local package at a later time

M3 Tooling

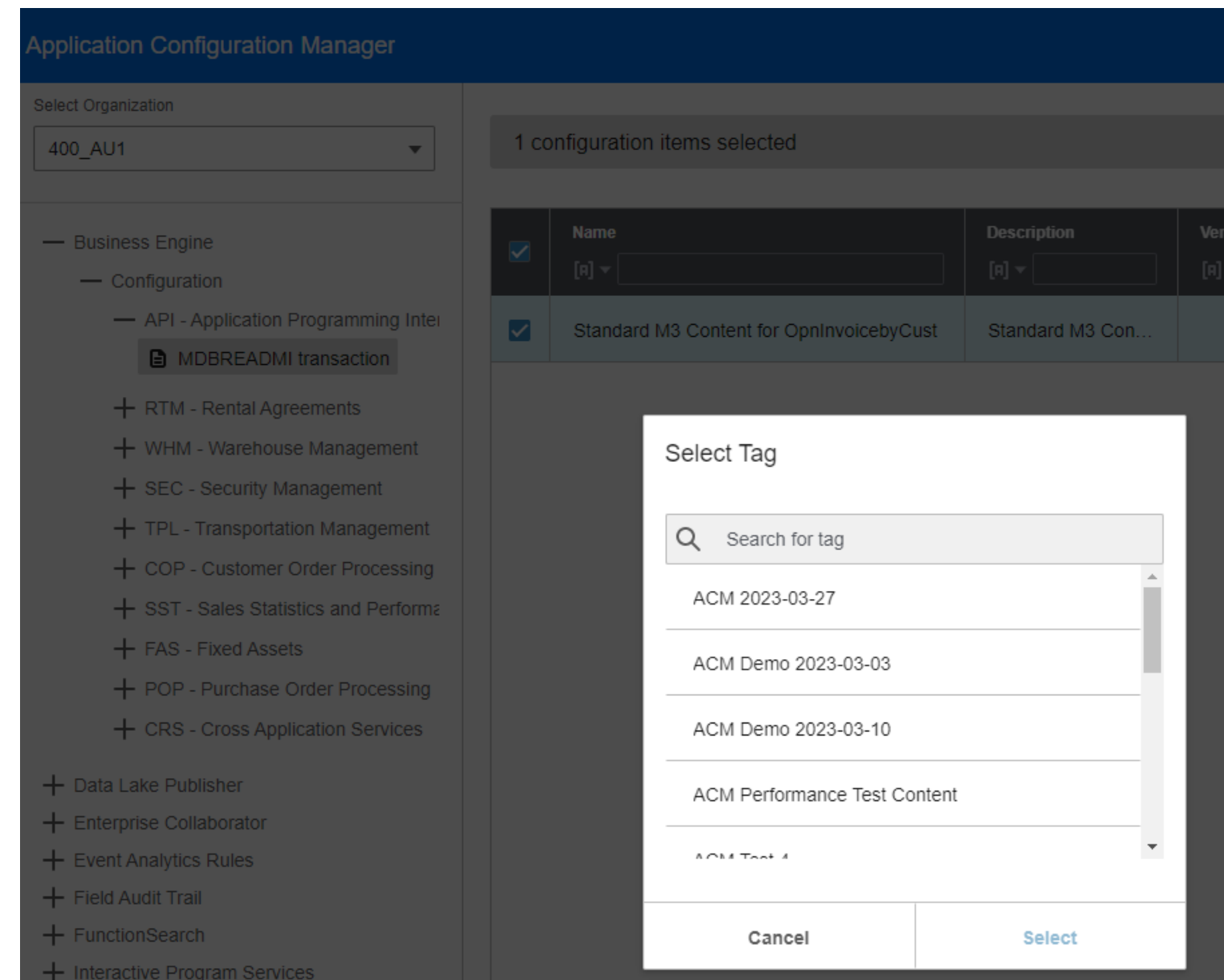
Tagging

- Tagging is a mechanism to group resources that is to be included in a local package that will be created at a later time.
- Tags are only used when creating a local package. The tag does not exist in the created package or in the tenant where such a package been deployed.
- Self-Service Portal is where tags are maintained.
 - Not possible to create a tag in M3.
- Why use tagging?
 - Users with access to Self-Service Portal are probably not the same users with the domain expertise that select what should be included in a local package.
 - A local package can be large and require several domain experts to select what resources should be included in the package.
 - Self-Service Portal does not list all resources. Resources that there can be many instances of or takes to long to query are not visible.

Tagging in M3

After the tag is created in SSP, it can be used in Infor OS, M3 and other application to link resources to the tag.

The Configuration Management tool in M3 is located with all other administration tools and you need to have the role M3ACM-User to be able to link resources to a tag. The role M3ACM-Viewer gives the user read-only access.



Tagging in M3

- Resource – Tag links are stored in M3.
- All tagging in M3 (creating a tag-resource link) is done in context of an organization.
 - It is not possible to link resources from different organizations to one tag.
 - One resource can be linked to many tags.
- When creating a package from a tag, the same organization must be selected in SSP as the organization used when linking the resources.



Tag	Resource	Organization
Demo Tag 1	H5_Script-Sales.js	720_AAA
Demo Tag 1	Dispatch_Policy-CO_Quotations	720_AAA

Tagging in M3

- Tagging an instance creates a link between a tag and a specific instance. For example, H5 Script – ButtonTest.js
 - If the H5 Script ButtonTest.js been removed after link been created, there will be an error when creating a local package from the tag.

Create and move a local package using a tag

Demo

Summary

M3 Resources

M3 Core - M3 Business Engine	M3 Business Engine	
		Sorting option
		Sorting order
		Language
		Delivery methods
		Rental reason
		MDBREADMI transaction
		Item type
		Dispatch policy
		QI Plan
		Goods receiving method
		Role
		Fixed asset type
		Payment term
		Purchase order type
		Settings - Deliveries
		Settings - TPL Standard Values
		Dataset
		Information browser category
		Custom list MI
		BOD Initial load configuration
		Financial reports
		Customer-defined fields

M3 Resources

M3 Core - Infrastructure and Technology	M3 Foundation	Field Audit Trail - Audits
	M3 Foundation	Interactive Program Service Definitions
	M3 Foundation	M3 Function Search - Indexed tables
	M3 Foundation/ Xtend M3	Extensions
	H5	M3 UI - Document Link
	H5	M3 UI - Settings
	H5	M3 UI - Configuration File
	H5	M3 UI - Global Personalization
	H5	M3 UI - Personalization Role
	H5	M3 UI - H5 Script
	H5	M3 UI - Web Application
	H5	M3 UI - Process Application
	H5 Enterprise (Mashups)	Mashup
	Event Analytics	Custom session content
	Event Analytics	Session configuration
	BOD Processor	Custom BOD content
	BOD Processor	Configuration for AE BODs
	BOD Processor	Configuration for Master AE BODs
	IEC	Custom Agreement content
	IEC	Agreement configuration
	DataLake Publisher	Table selection

M3 Resources

M3 Graphical Lot Tracker	M3 GLT	Localization
	M3 GLT	Settings
	M3 GLT	Panel Settings
	M3 GLT	API Interface
M3 Portals Supplier Portal (first release 2023.10), Equipment portal, Issue Management Portal	M3 Portals	Site Configuration
	M3 Portals	Menu Role
	M3 Portals	Content Connector
	M3 Portals	User Configuration
	M3 Portals	Portlet Configuration
	M3 Portals	Menu
Sales Hub	Sales Hub	Company
	Sales Hub	Company and Division
	Sales Hub	Warehouse

M3 Resources – future

M3 Customer Lifecycle Management	Mobility Core	Dialog Filter
Infor Mobility for Field Service	Mobility Core	Dialog Filter
M3 Core - M3 Business Engine	M3 Business Engine	Customer Order types Customer-defined Fields Virtual fields and field groups language translation E-signature Programs Configurable Text Blocks for configurable XML List/Printer Program Configuration XML Structure Configuration

Configuration Management

- UI in Cloud Suite Self Service Portal, accessed from Concierge
- <https://docs.infor.com/ssp/2024.x/en-us/configmgmt/default.html>