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M3BE Administrative Tools and CFT Cloud Storage

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Agenda

01

Administrative Tools

Overview of M3 BE Administrative Tools, walkthrough of some features delivered during last year, also information on some future roadmap items.

02

CFT Cloud Storage

When was CFT Cloud Storage introduced, retention policy for files saved in Cloud, when is CFT Client still needed.

Move Tenants to Cloud Storage?

M3 Business Engine Administration Tools

- The Administration Tools can be accessed via the Infor M3 menu in Infor Ming.le

- The Administration Tools has a submenu and the entries shown in the submenu are controlled by IFS roles

- Information on BE Admin Tools can be found in "M3 CE Core Administration Guide" docs.infor.com

Required Security roles for M3 CE Core

If any of the required Security roles are missing, you must add these roles manually through the User Management menu in Infor Ming.le™ or Security menu in Infor OS Portal. To add new roles, you must be connected to the UserAdmin role.

See information about adding a security role in the *Infor Ming.le Online Help* or *Infor OS Portal User Guide*.

Required Security roles

This table shows the list of Security roles that are required to accomplish administration tasks for each M3 application type:

Application type	Security role	Description
Grid	GRID-Administrator	Users with this role can download the CFT Client installation.
M3 Business Engine	M3BE-FndAdmin	Users with this role can list, stop, configure logging and log levels, and configure profiling for all M3 BE jobs on the M3 Business Engine Jobs page, as well as download logs for any M3 BE user on the Business Engine Logs page.
M3 Business Engine	M3BE-FndUser	Users with this role can list and stop their own M3 BE jobs on the Business Engine Jobs page, as well as download their own dump logs on the Business Engine Logs page.
M3 Business Engine	M3BE-LogEnabler	Users with this role can configure logging, log levels, and profiling for their own M3 BE jobs on the M3 Business Engine Jobs page.

Administration Tools

- Experience Designer
- Experience Designer Administrati...
- Business Engine Configuration D...
- Business Engine Data Management
- Business Engine Field Audit Trail
- Business Engine Files
- Business Engine Interactive Prog...
- Business Engine Jobs
- Business Engine Logs
- Cloud File Transfer Agent Admini...
- Configuration Management
- Data Lake Publisher
- Event Analytics Rules
- Event Hub
- H5 Administration
- M3 Function Search Administration
- M3 Metadata Publisher
- M3CE About

Business Engine Data Management

- Business Engine Data Management have six different features/tabs:
    - Export
    - Import
    - Import from Database
    - Delete Company
    - Job Overview
    - Update Database

- To see the Data Management node under Administration Tools, either the *M3BE-DBAdmin* role or *M3BE-DBViewer* role is needed

- To access and run Export/Import or Delete Company the *M3BE-DBAdmin* role is needed

- **Note:** The Admin role is very powerful and allows updates of the Business Engine Data

Export M3 BE data based on date

- 2022.01

- For the selected export by date tables only data newer than the set date will be included in export (based on LMTS column)

- Use export on date to keep export/import data size down, resulting in faster exports/imports

Import from Database

- Roadmap item

- Enhance Import from database
  - Currently the read speed from source is limited by write speed to target
  - For big copies this could result in data from source is read over long period of time
  - Goal is to enhance read speed to its max

Update Database

- 2022.09
- Via "Update Database" data in BE table can be viewed
  - A user with the role *M3BE-DBAdmin* can update data, a user the role *M3BE-DBViewer* can view data

- The data is read via the M3 Foundation database layer. (but not via any M3 Business Engine logic)

- The list with data is sorted based on selected "Sort order"
  - Options are available database indexes for the selected table

- Event log
  - If there has been any changes done using the Update Database tool, then it will show in the Event log
  - Timestamp, username, and data state before after is shown

Business Engine Data Management - Update Database

| Export | Import | Import from Database | Delete Company | Job Overview | Update Database |

Table name: BPLEAD   Open   Event Log   Sort order: 00, Company, Division, Project mgr

Company	Division	Project mgr	Description
720	AAA		Test
720	AAA	FHAKANSSON	Filip Hakansson
720	AAA	HLUNDH	Hakan Lundh

Data Management enhancement for XtendM3 tables

- 2023.05

- Data Management for XtendM3 Dynamic Tables (EXT component), has been aligned with standard functionality (MVX and Mxx components)

- Enhancement includes:
  - Export/import tables based on Company and Division
  - Clear target table at import
  - Delete company

- Note, there are three differences to be aware of
  - Export based on date is not an option for XtendM3 Dynamic Tables
  - It will still be possible to export/import XtendM3 tables without CONO field as to not introduce breaking changes
    - Therefor, it will be possible to select "All" as opposed to "All Companies" in the case of MVX component
  - Import from database is not available for the EXT component
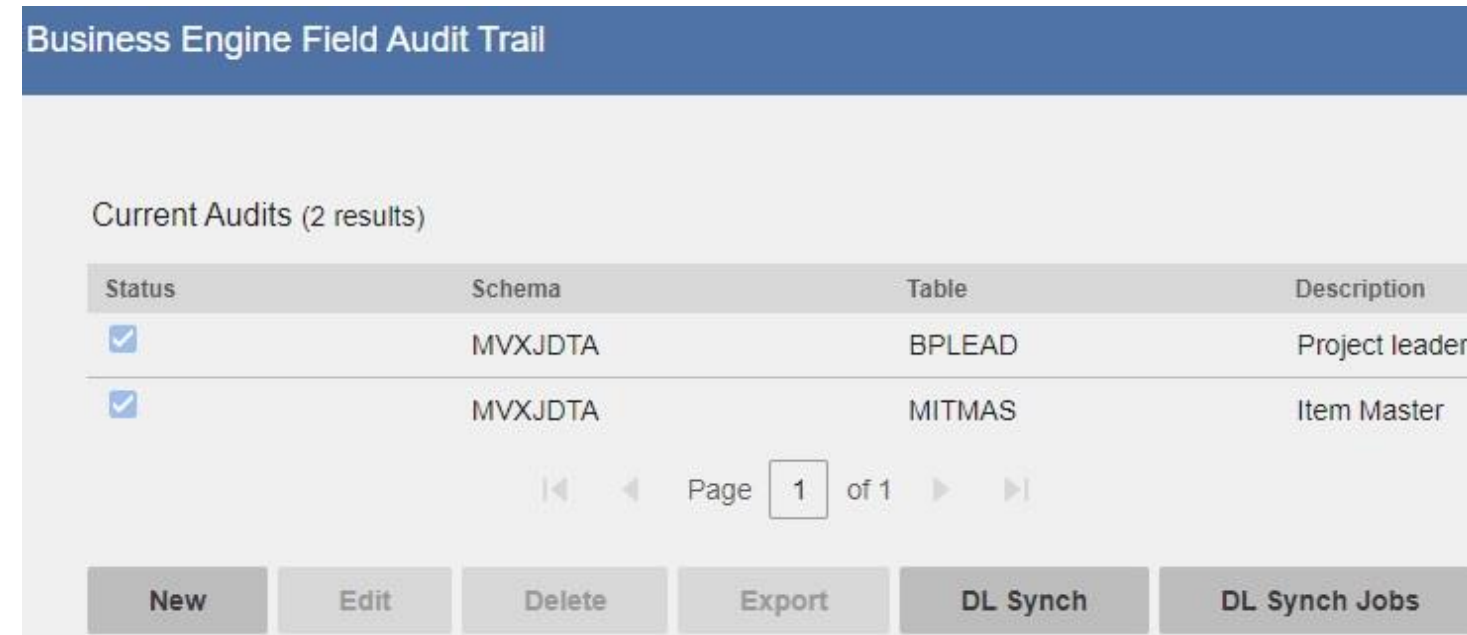
Access Business Engine Files via ION API

- 2023.11 (KB 2309150)

- Access Business Engine Files via ION API
  - Manage files located in the MvxFileTransfer folder
    - AdHoc reports, Excel sheet for the EVS100, GLS850 "FIM Interface" related files, …
  - The available operations are list, upload, download and delete
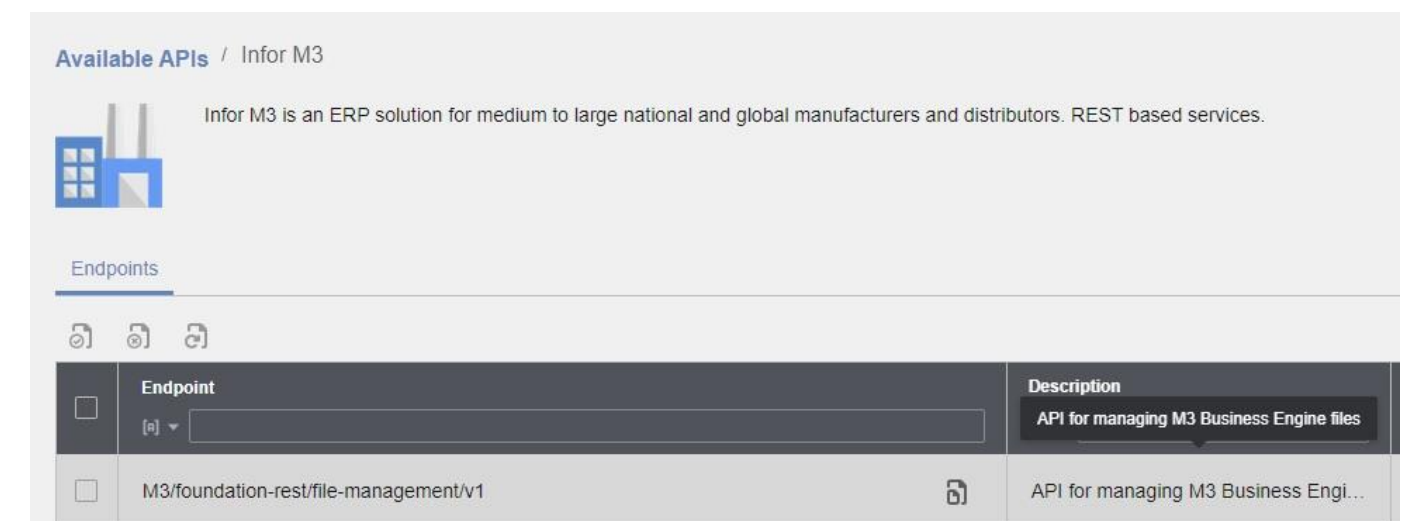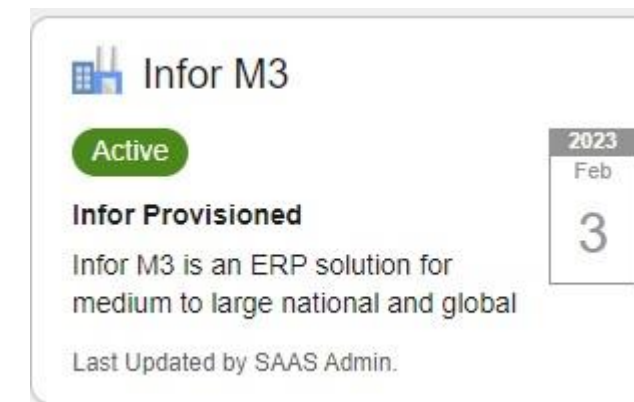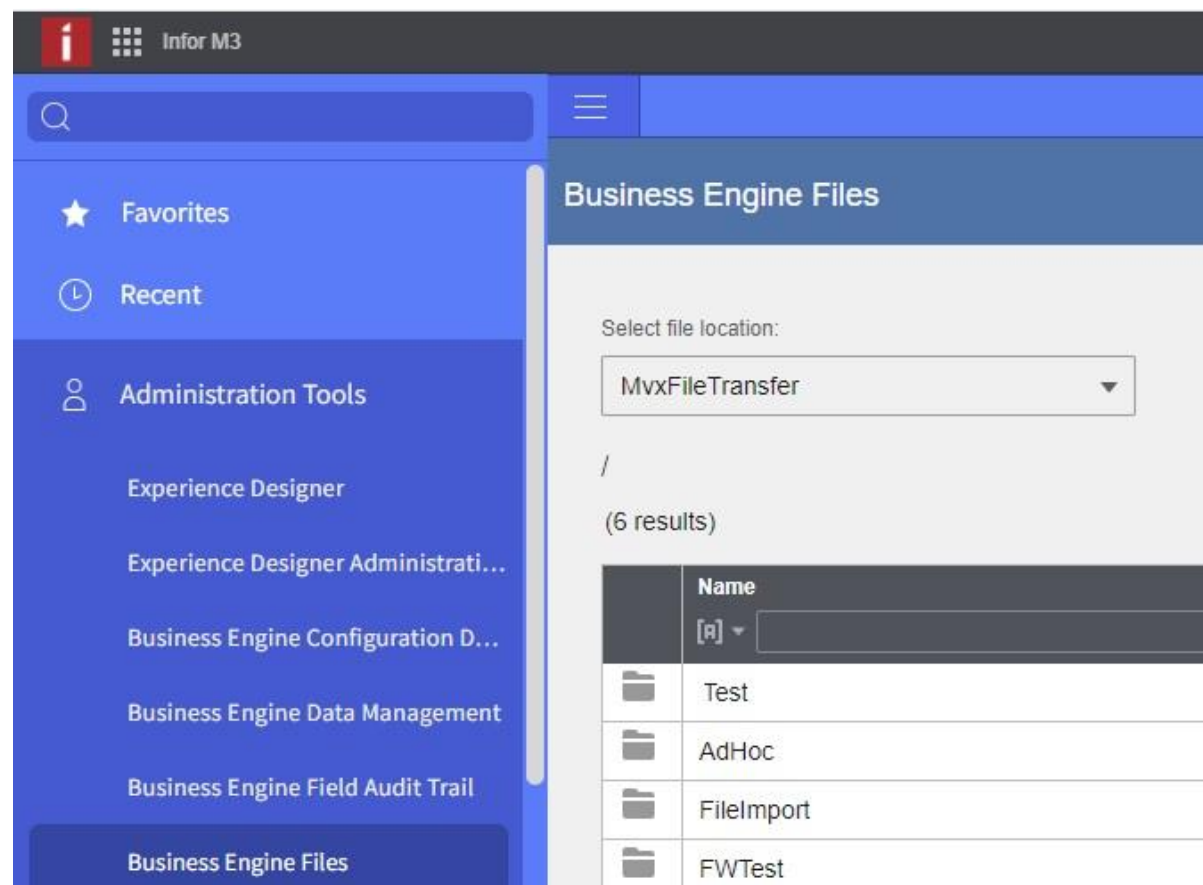
Field Audit Trail

- The Field Audit Trail can be used to set up audits of data changes made to specific BE database fields

- The Field Audit Trail enables you to keep track of when the changes were made, what the previous value was prior to the change, and which user made the change

- Note that Field Audit Trail should be used for Audit purpose, to detect changes to data there are other functions (like Event Hub)

- 2023.03
- DL Synch, synch data for the selected table to Data Lake
  - The tool keep track of what data already been synched, so only new data will be synched 2nd time
  - Data from the FAT schema will be synched which contain historical changes, current value reside in standard M3BE Table
  - DL Synch Jobs – Show list with performed synch jobs with info on who did the synch, table date/time, status, nr records and log info

Business Engine Field Audit Trail

Current Audits (2 results)

Status	Schema	Table	Description
☑	MVXJDTA	BPLEAD	Project leader
☑	MVXJDTA	MITMAS	Item Master

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| New | Edit | Delete | Export | DL Synch | DL Synch Jobs |

Field Audit Trail data in Data Lake

- Example query for FAT_BPLEAD, includes columns for which FAT auditing has been enabled

- See attachment on KB 2278818 for additional information
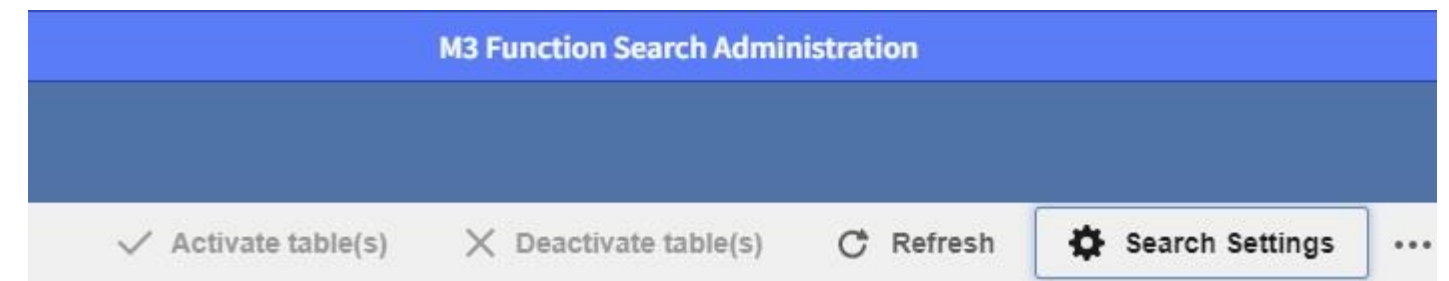
M3 Metadata Publisher

- Via MDP it is possible to explore M3BE tables, fields, programs, API;s and relations

- MDP can also display M3 source code

- In MDP APIs can be explored and tested as an alternative to Swagger tool

- 2023.02 Added "Search MI Fields"
  - Use this view to search on MI Fields information by filtering different options such as program name, description, field name, and transaction type (in or out).

M3 Function Search – Text analyzer option added

- 2023.10 (KB 2303667)

- Set text analyzer option added to switch between the standard and whitespace analyzer

- M3 Function Search uses the standard analyzer as default. This works well for many cases, but for data containing special characters the whitespace analyzer might be the better option
  - Changing text analyzer will impact how data is indexed and searched for all tables. Changing this setting may change search results and will take effect immediately (no reindexing needed)

- How to search KB 1687355
  - Tip is to subscribe to this KB

M3 Function Search Administration

✓ Activate table(s)   ✕ Deactivate table(s)   ↻ Refresh   ⚙ Search Settings   ...

M3 Function Search Settings

Current settings:
Text analyzer: **standard**

Warning!
Changing text analyzer will impact how data is indexed and searched for all tables. Changing this setting may change search results and will take effect immediately (no reindexing needed).
See section *M3 Function Search administration tasks* in the *M3 Core User and Administration Library*.

Set text analyzer:

standard   ▼

standard

whitespace

Submit

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Agenda

01

Administrative Tools

Overview of M3 BE Administrative Tools, walkthrough of some features delivered during last year, also information on some future roadmap items.
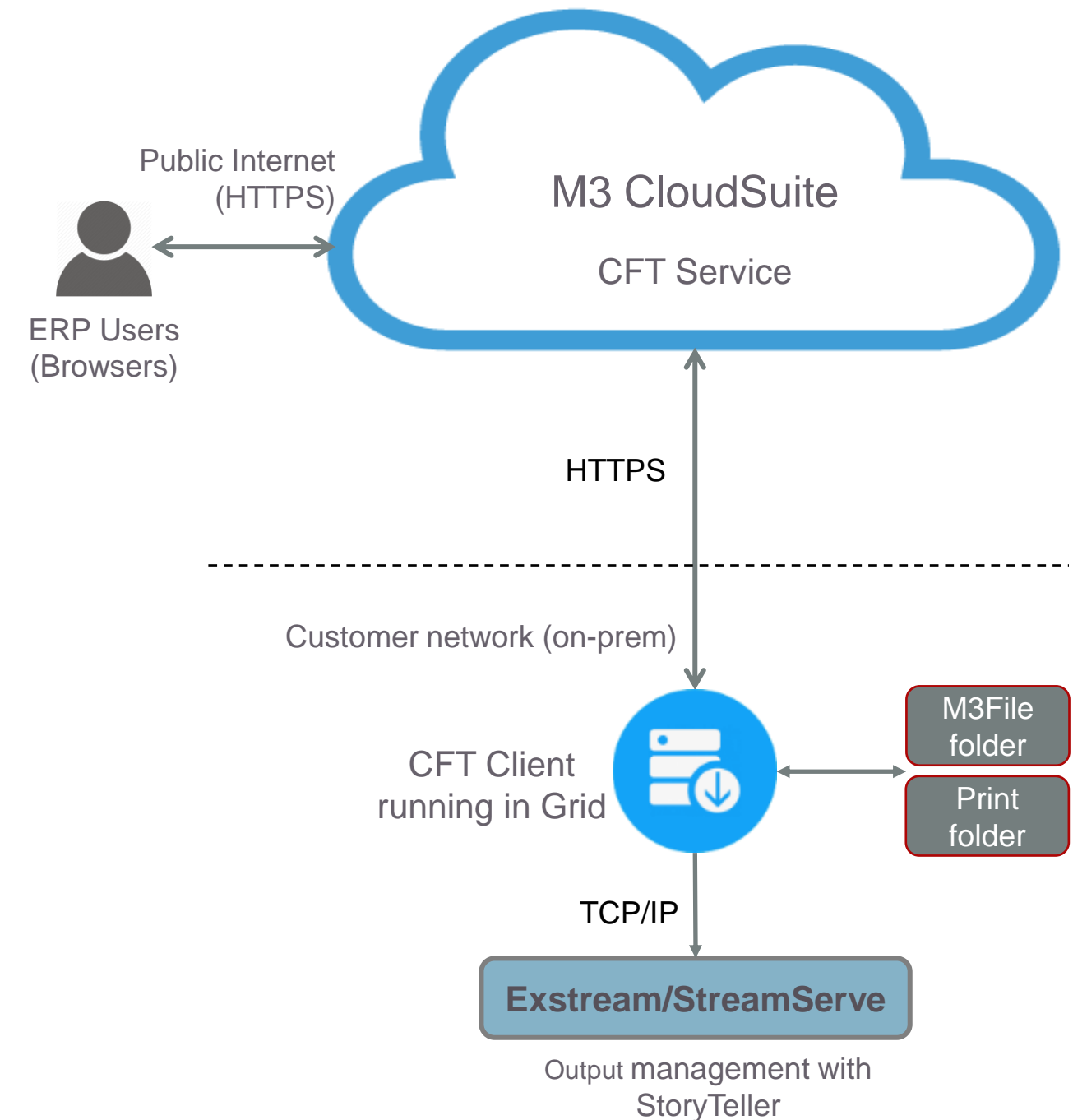
02

CFT Cloud Storage

When was CFT Cloud Storage introduced, retention policy for files saved in Cloud, when is CFT Client still needed.

Move Tenants to Cloud Storage?

Cloud File Transfer

- Move of print files to CFT Client
  - CFT Client send prints to Exstream/StreamServe
    - Configuration for print server and port is set in M3 BE
    - Saving printouts marked with option "save" in M3 BE

- Move of M3 files in cloud to and from CFT Client
  - MVX File Transfer
    - AdHoc reports
    - Excel sheet for the EVS100 to consume
    - GLS850 "FIM Interface" related files (other M3BE programs create/read files)
    - …
  - Data Management (Export/Import)
  - Configuration Data
    - Files exported via M3BE programs, for example CMS010
  - FAT Exports

Public Internet
(HTTPS)

M3 CloudSuite

CFT Service

ERP Users
(Browsers)

HTTPS

Customer network (on-prem)

CFT Client
running in Grid

M3File folder

Print folder

TCP/IP

Exstream/StreamServe

Output management with StoryTeller

CFT Client – Good to know

- 2023.11 – Updated instructions for upgrading old CFT Client Grid versions
  - Upgrading from Grid versions where source and target versions are more than a year apart requires intermediate upgrades
  - Due to changes in the Grid delivered with M3CEPack 2023.11, upgrades from versions older than a year will not be possible
  - See the attached document in KB 2309921 for instructions on how to step up the upgrade using intermediate versions
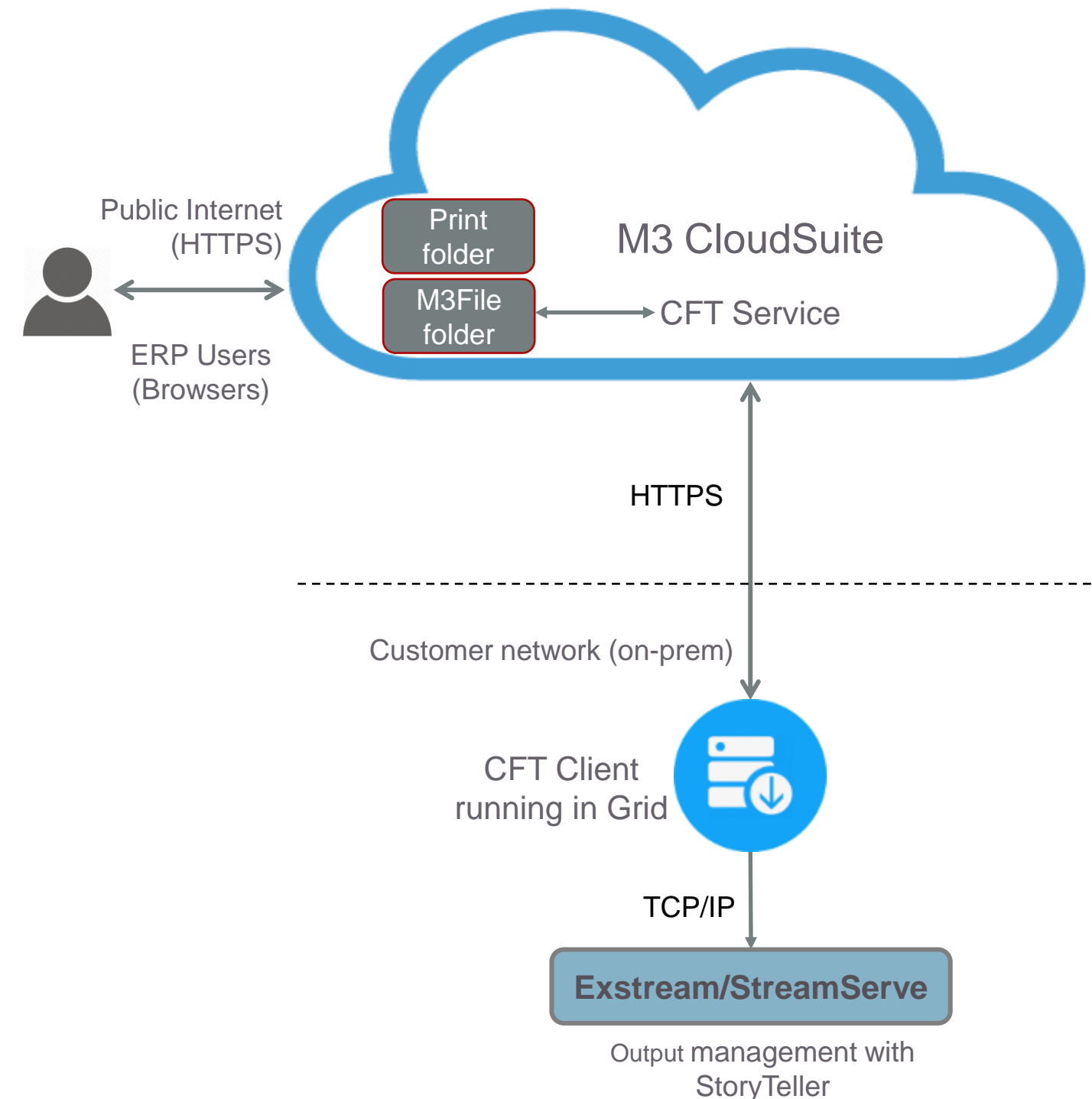
CFT Cloud Storage (2023.03)

- CFT Cloud Storage developed based on customer feedback

- CFT Client will no longer be used to store M3 Files, instead they will be stored in Cloud

- Retention policy for the files is 30 days
  - Log files 100 days
  - Export BE Data Templates will be kept permanently

- Roll out in two steps
  - First step is for new Tenants that are created after 2023.03 (auto configured)
  - Second step will be for Tenants created before 2023.03

- Note that CFT Client will still be used for printing to local Exstream/StreamServe, or other local options

- Message if Cloud storage is configured
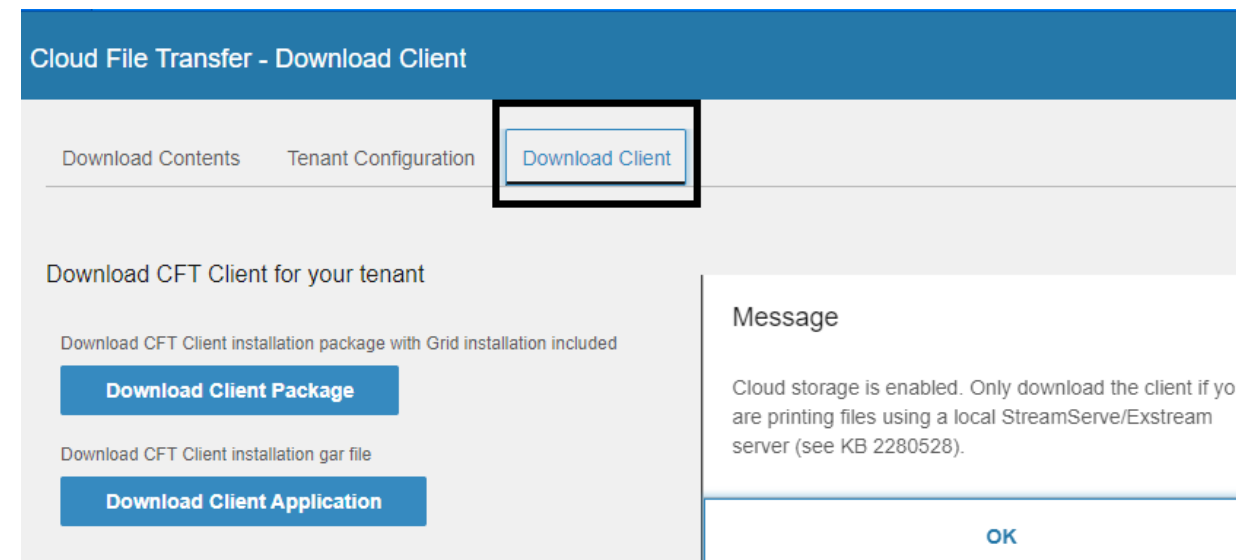
CFT with Cloud Storage

- M3 files stored in cloud
  - MVX File Transfer
  - Data Management (Export/Import)
  - Configuration Data
  - FAT Exports

- Move of print files to CFT Client
  - CFT Client send prints to Exstream/StreamServe
    - Configuration for print server and port is set in M3 BE

- Saved printouts stored in cloud
  - Marked with option "save" in M3 BE

Public Internet (HTTPS)

ERP Users (Browsers)

Print folder

M3File folder

M3 CloudSuite

CFT Service

HTTPS

Customer network (on-prem)

CFT Client running in Grid

TCP/IP

Exstream/StreamServe

Output management with StoryTeller

# CFT Cloud Storage – January 2024

- New Tenants provisioned with Cloud storage since 2023.03
  - In addition, several Tenants provisioned before 2023.03 have been approved to switch as well
  - Over 400 Tenants are now configured with Cloud Storage

- Feedback and Questions so far
  - Export/Import of M3BE data, moving zip with no access to file storage?
  - How to get access to files stored in cloud, direct access to files in S3?
  - Saved print files kept for 30 days, can that be prolonged?
  - Is "Tenant external S3 configuration" in CFT Admin page used to enable CFT Cloud Storage?

CFT Cloud Storage – Saved print files

- Roadmap item
  - Retention policy for saved print files will be changed from 30 to 3 days as default
    - In addition, a new option will be introduced in M3 Business Engine to set 14, 30 or 60 days
    - M3 Business Engine will control change in retention policy, and new option to prolong via feature toggle

Tenants created before 2023.03 – No Client installed

- 2023.11

- Tenants that never had CFT Client installed
  - Button added for update to enable Cloud Storage
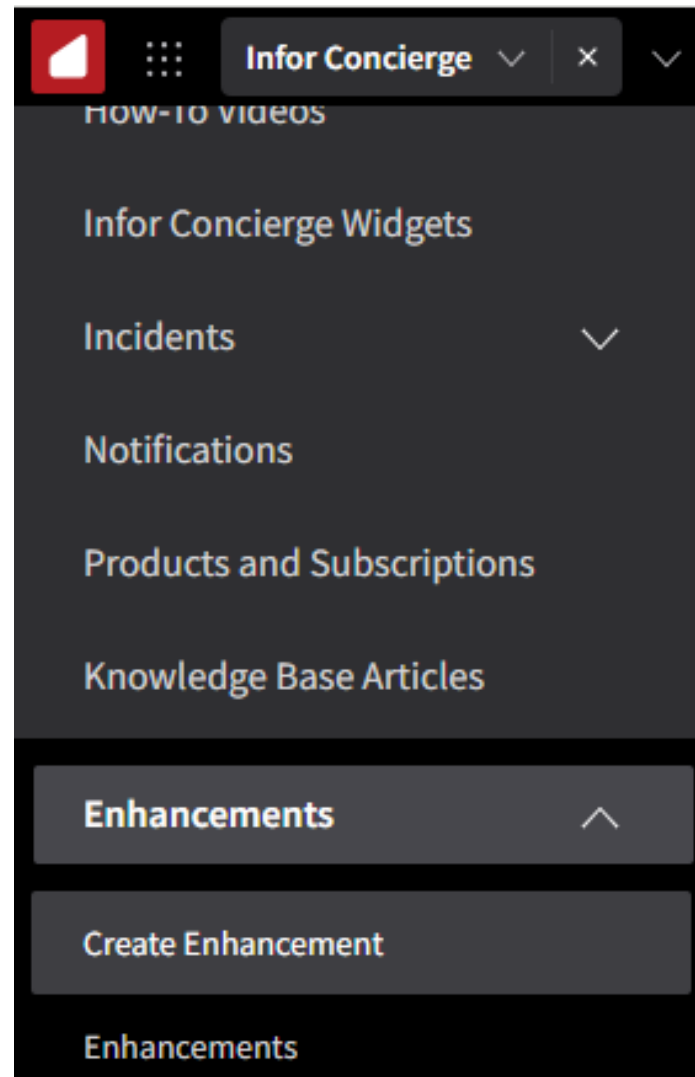 - Tenants can switch at will but be sure to read KB 2280528 first
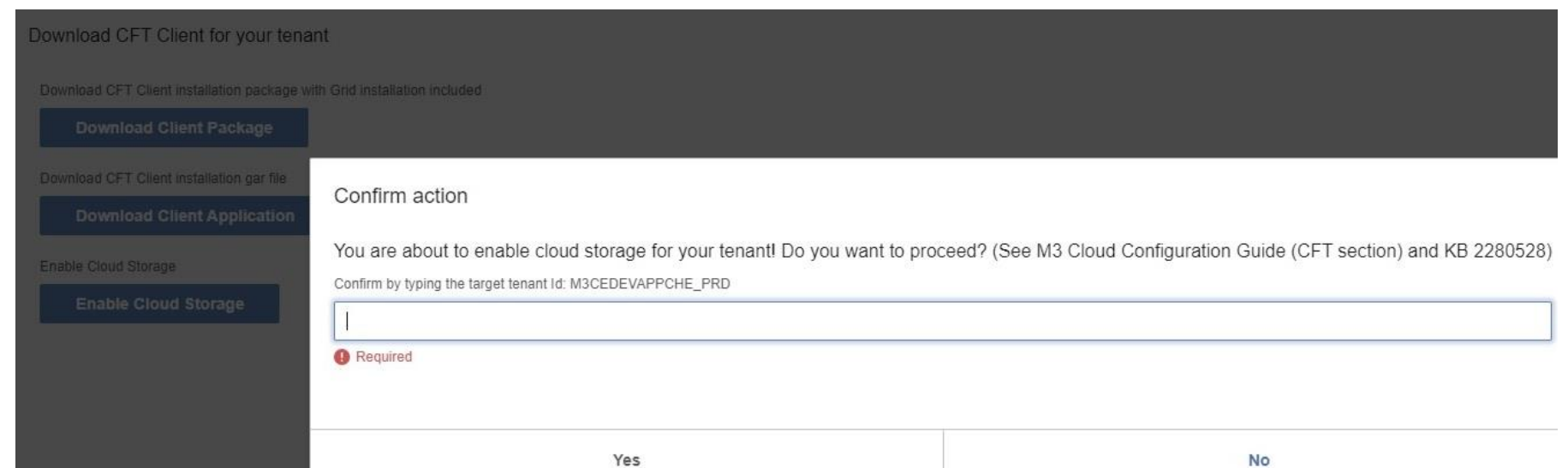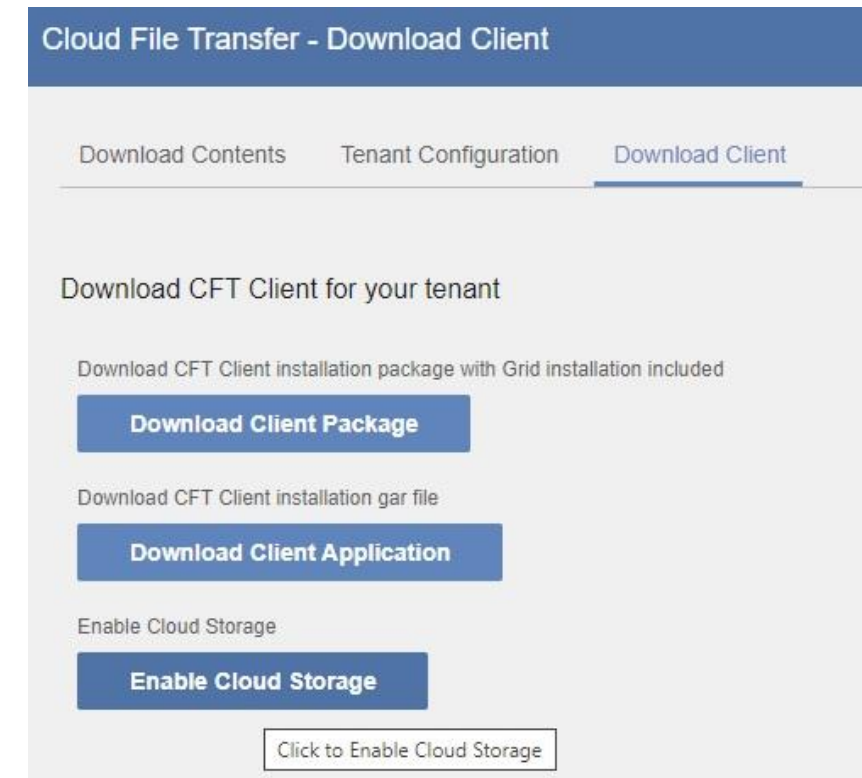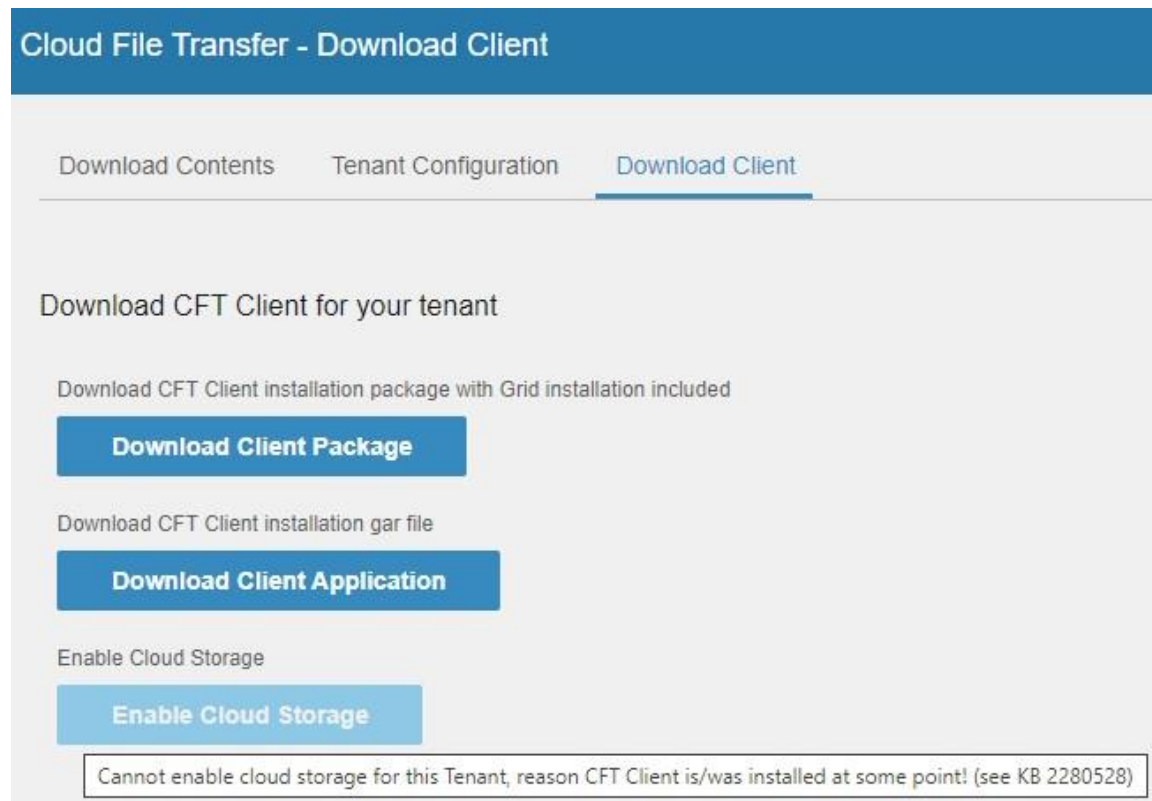
Tenants created before 2023.03 – Client installed

- Tenants that has been configured with a CFT Client
  - Currently under controlled roll out
    - To initiate move to CFT Cloud Storage, create a support ticket "Request to switch to CFT Cloud Storage"
- Additional switch information
  - Files residing on the CFT Client will not be moved automatically to Cloud storage, use BE Files Admin tool to upload
    - Important: There is an exception for saved print files, they cannot be moved from CFT Client to Cloud storage. This will mean that old files will stay on the CFT Client host and files created after switch to Cloud storage will be stored there
  - Switch to Cloud storage is a one-time task, there is no option for customers to switch back to CFT Client Storage

Enhancement Request System

- Add enhancement requests via ER function in Concierge (concierge.infor.com)