

infor®

Stora Teknikdagen

Extensions med mere

Mathias Andersson



TECHNOLOGY

Agenda

01 News and Highlights

02 Automation – Workflow Design

03 Examples

M3 Workspace uplift

Uplift of important M3 Workspaces to the new Infor standard providing improved visibility on important KPI's and updates without delving into detailed transactional data.

Problem

- Existing Workspaces provide an extensive amount of information that can be daunting to the user and, in most cases require the user to open M3 functions to perform their regular actions



Solution

Uplift the existing and important Workspaces to the latest Infor design standards and latest widgets to simplify the workspace layout and interactions. Workspaces include:

- Warehouse Manager
- Production Manager
- AR Controller
- Rental Depot Manager
- GL Controller
- Quality Manager
- Service Management



Benefits

- Streamlined use with better user interaction
- Clearer indication of important KPI using the new 'On Your Radar' widget, with drill-down capabilities



CloudSuite(s)	All M3 CloudSuites	Potential Business /Tech.Impact	Moderate / Moderate
Decision maker	All Roles	Architecture	MT
			2024.10

Accounts payable monitors

- Suppliers to approve (status 10) 22
- Stopped supplier invoices 4
- Unapproved supplier invoices 100
- Invoices past due > 30 days old 5
- Unapproved and Due (this year) 39

Number of supplier invoices due for payment this week

Supplier	Due date
ADC_SUPP	1
345102	2
USLLL001	1
USJD01	1
US321987	3
USCAT02	2

Division Top 100 Largest Inv...

Supplier	Percentage
ACPROD	5%
26-S001	39%
AC-UK	4%
CAT-UK	39%
GBS04002	4%
BD01	9%

M3 Editor Supplier Approval

Supplier: TH321986
Supplier name: ManuMo Ltd
Status: 10
Supplier type: 0

Alert List

- Item SP0105 on PO 2013924 has been receive... 11/3/2023, 8:11:54 AM
- Customer BD Industrial Supplies Limited in Lo... 10/23/2023, 4:34:20 PM
- New Core Item SP001 created, please check st... 10/21/2023, 11:56:03 AM

Task List

- A new customer 9907000011 with name BAM ... 4/22/2024, 12:16:29 PM
- A new customer DE431222 with name Agratec... 3/20/2024, 2:36:45 PM
- Purchase order 2013992 with net order value ... 1/3/2024, 10:45:16 AM

My regular tasks

- Record supplier invoices
- Payment proposals
- Display supplier transactions
- AP balances

Top Suppliers

Supplier	Total Number of Invoices
ACPROD	2
DE433901	8
ES240100	3
IT012277	2
GBS04002	1
BD01	2
26-S001	10
CAT-UK	24
GB321988	2
AC-UK	1

On Your Radar

- 5 Invoices for review
- 13 New suppliers
- 0 Invoices due for payment
- 0 Stopped invoices

Quick Actions

- Update supplier information

Important Links

- Supplier Rebates
- AP Invoices for Review
- Reports
- Supplier Credit/Debit Notes

Welcome back, Brian

Top 5 Suppliers / Nb of Purc...

Purchase order number	4002511396
Warehouse	001
Supplier	ABS001
Lowest status - purchase order	85
Highest status - purchase order	85
Order date	2024-04-30
Buyer	BARAND0
Purchase order number	4002511397
Warehouse	001

Planned Purchase Orders

Planned Purchase Orders with errors	0
Planned Purchase Orders with Warnings	0
Planned Purchase Orders to release	0
Planned Purchase Orders to reschedule	0
Delayed Purchase Order Proposals	0

Delivery Notes in my Warehouse

Delivery Notes with invalid data	3
Advised for shipment	2
Notified for transport	7
Staged quantity	1
Goods received	61


Claims / Returns

New Claims	0
Approved Claims to be processed	0
In Process Claims	0

Purchase Orders - Actions before...


Orders to print / send	51
Orders to confirm	10
Orders not confirmed and due soon	0
Orders partially confirmed	0
Expected PO Lines	100

Alert List



No Alerts Available

Task List



No Tasks Available

- ### Quick links
- Consignment Stock
 - Delivery Schedules
 - Supplier Delivery Notes
 - Supplier returns
 - Items
 - Suppliers
 - Purchase Agreements

Purchase Orders - Orders not Re...

Preliminary orders	5
--------------------	---

My requested planned POs, POs ...

My PO Requests in my Warehouse	4
--------------------------------	---

Purchased Items

Preliminary Items	100
-------------------	-----

Suppliers

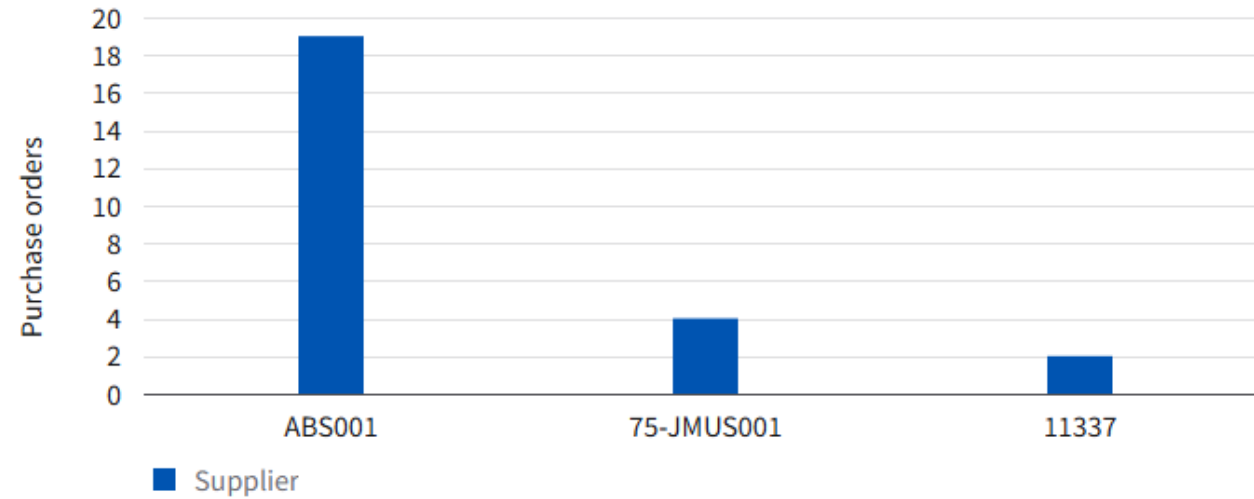
Preliminary Suppliers	54
-----------------------	----

My Day
Tuesday, December 10, 2024



Welcome back,
Mathias

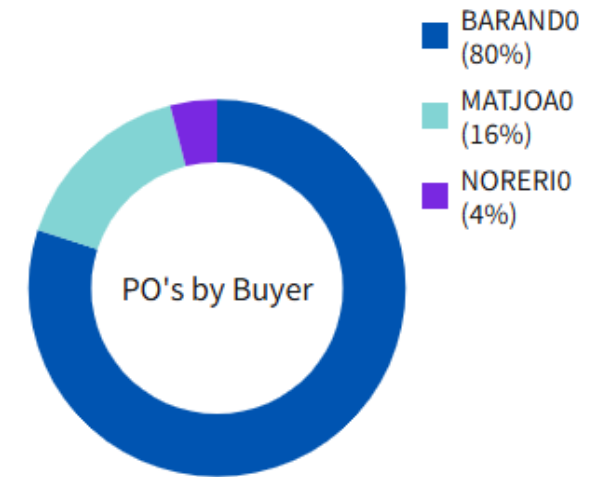
Top Suppliers



[View all](#) [View snooze list](#)

4 Delayed order lines [Review](#)

PO Monitor



Quick Actions

Convenient access to some of the tasks you do most often.

- Create Planned Purchase Order
- Release Planned Purchase Order
- Update Supplier Information
- Receive Purchase Order
- Supplier List Information
- Supplier Creation

On Your Radar

4 Delayed order lines	1 PO Approvals
0 New suppliers	0 Stopped suppliers

Important Links

Purchase Agreements

Updates to M3 Output Management

Enable xtendM3 to customize media logic and export/import functionality for customers own languages

CloudSuite(s)	Potential Business /Tech.Impact
All M3 CloudSuites	Minor
Decision maker	Architecture
	MT

Problem



- Basic flexibility for controlling media options, for example, the delivery mechanism for the printouts, only covered partner media control
- Manual steps when moving customer's own languages for documents between environments

Solution



- Enable xtendM3 to customize media logic, allowing users to control the delivery options for printouts, adding control based on users, in addition to the already existing partner media control
- Enabled the possibility to use export/import functionality for customer's own languages for documents.

Benefits

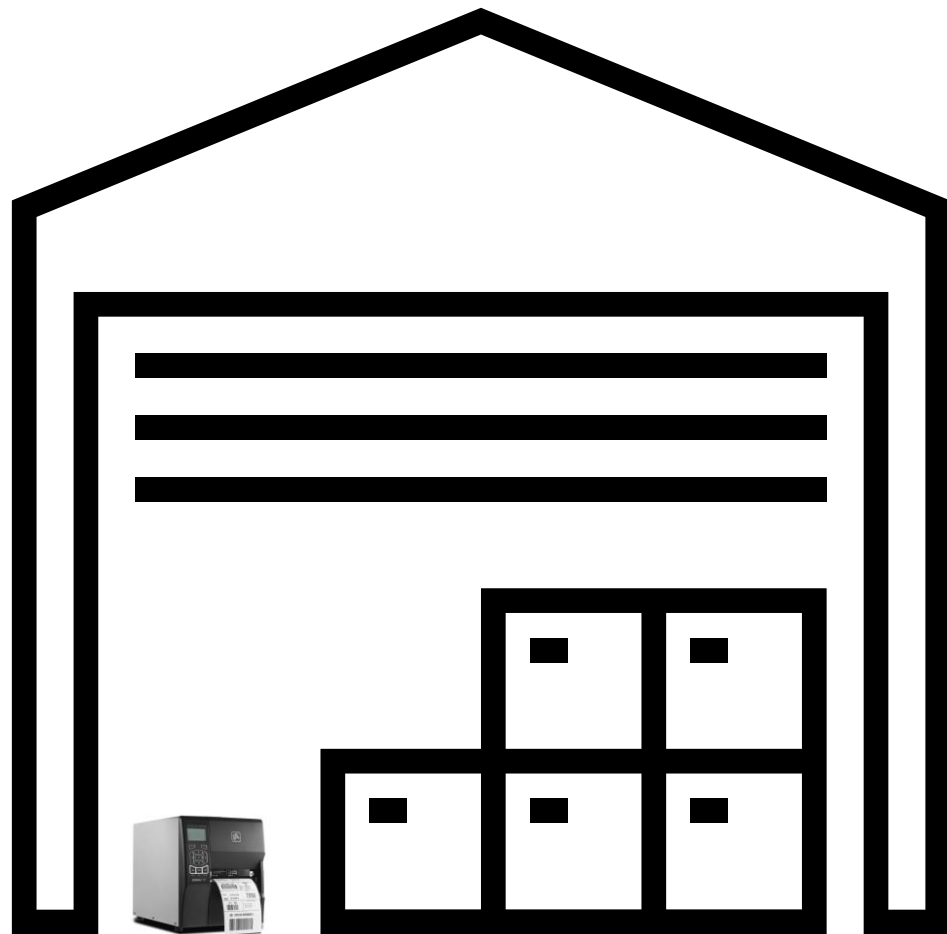


- Creates more flexibility for controlling media options, for example, the delivery mechanism for the printouts can now be based on user
- Customers own languages including custom translations can be moved from a test environment to a production environment, which in turn provides a simpler process, saving time and effort





Good weather?



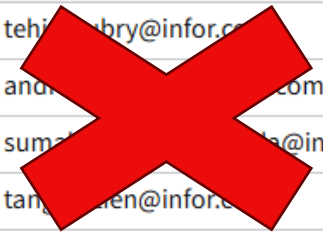
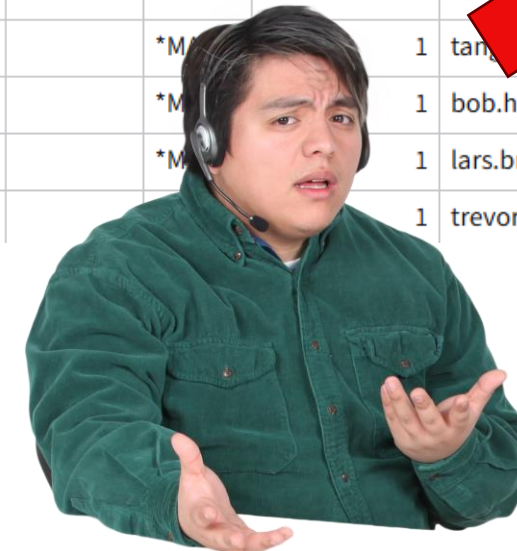
Division

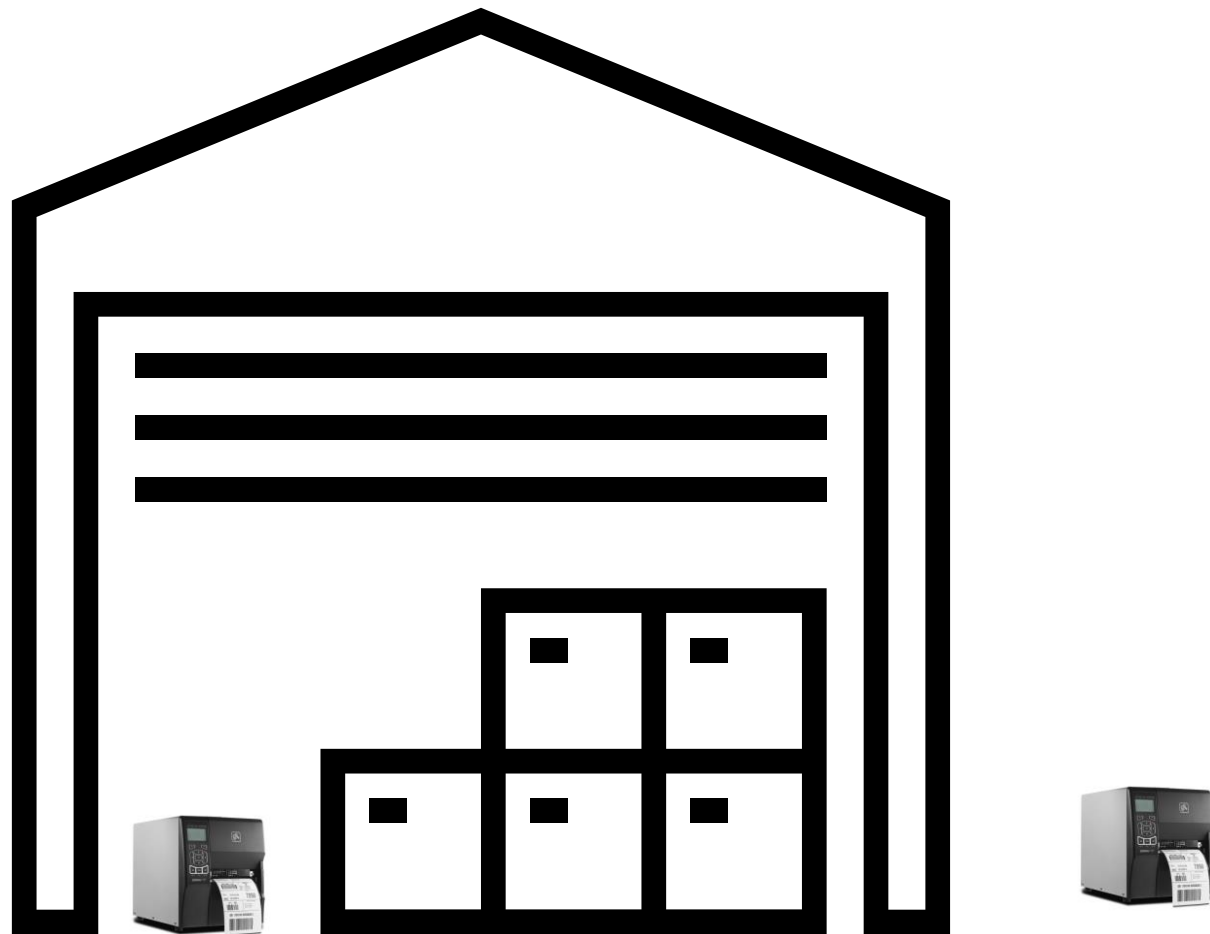
AAA

Apply

MNS205,CRS945 ETC

Printer file	User	Location	Media	Sequence no	To email address
	ANDMAT				
	AUBTEH10		*MAIL	1	tehi@bry@infor.com
	BARAND0		*MAIL	1	and@infor.com
	BIRSUM0		*MAIL	1	sum@infor.com
	BIZTAN0		*MAIL	1	tan@infor.com
	BOBHAR43		*MAIL	1	bob.hartman@infor.com
	BRELAR0		*MAIL	1	lars.bremer@infor.com
	CAITRE0			1	trevor.cain@infor.com





Good weather?

KB2305177



Subscribe

Actions ▾

Extension point for custom partner media control

Revised by Isabelle Gallo-Grosos • 29d ago • 38 Views • ☆☆☆☆☆

Article Information

Description : How to use the XtendM3 for custom partner media control.

Resolution :

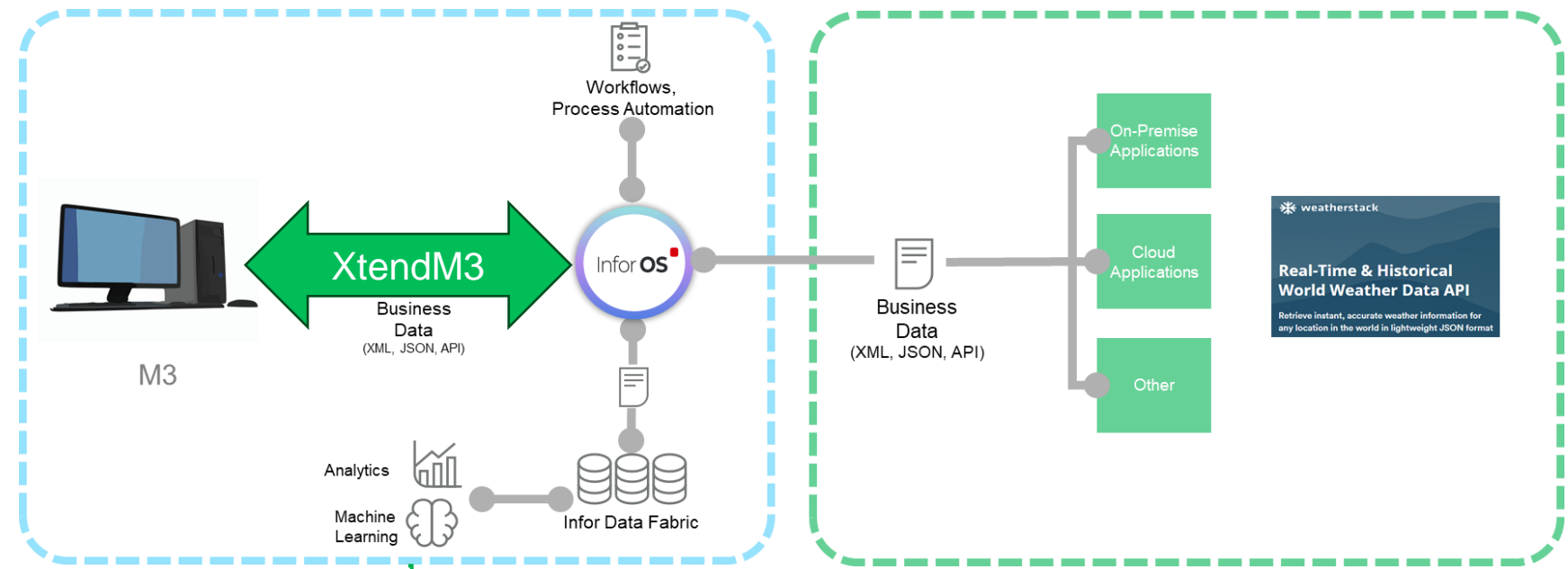
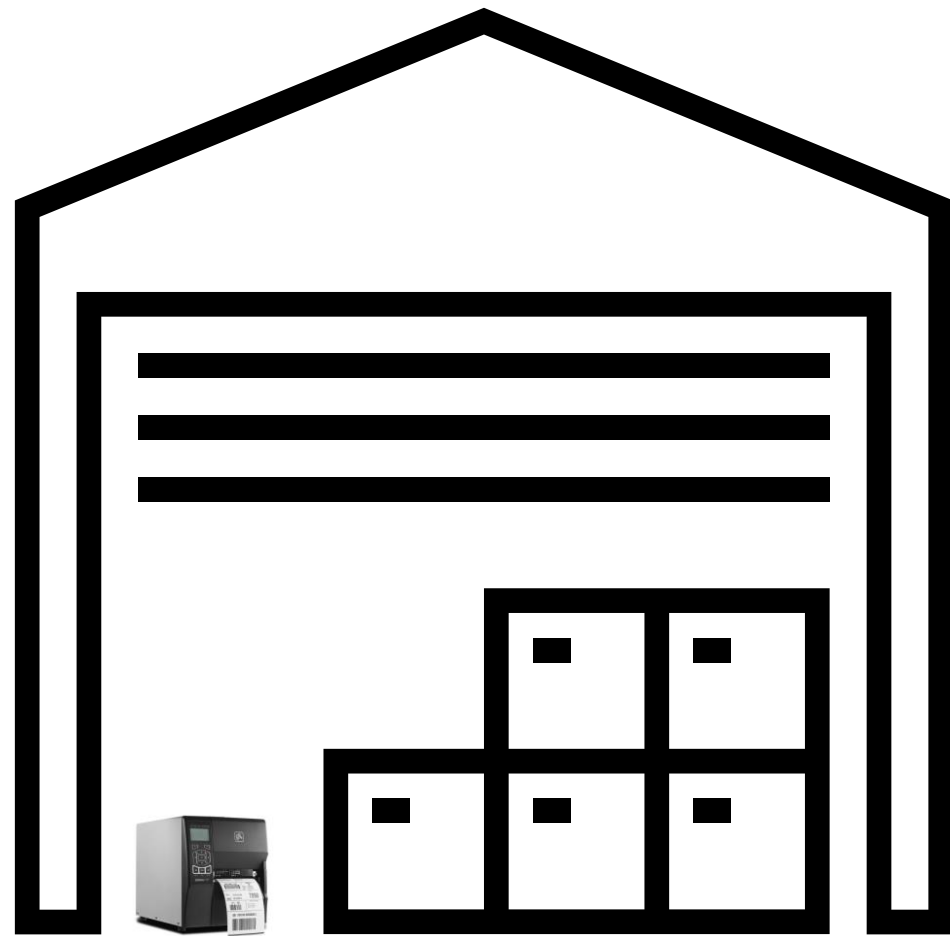
Create an XtendM3 extension

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





Good weather?

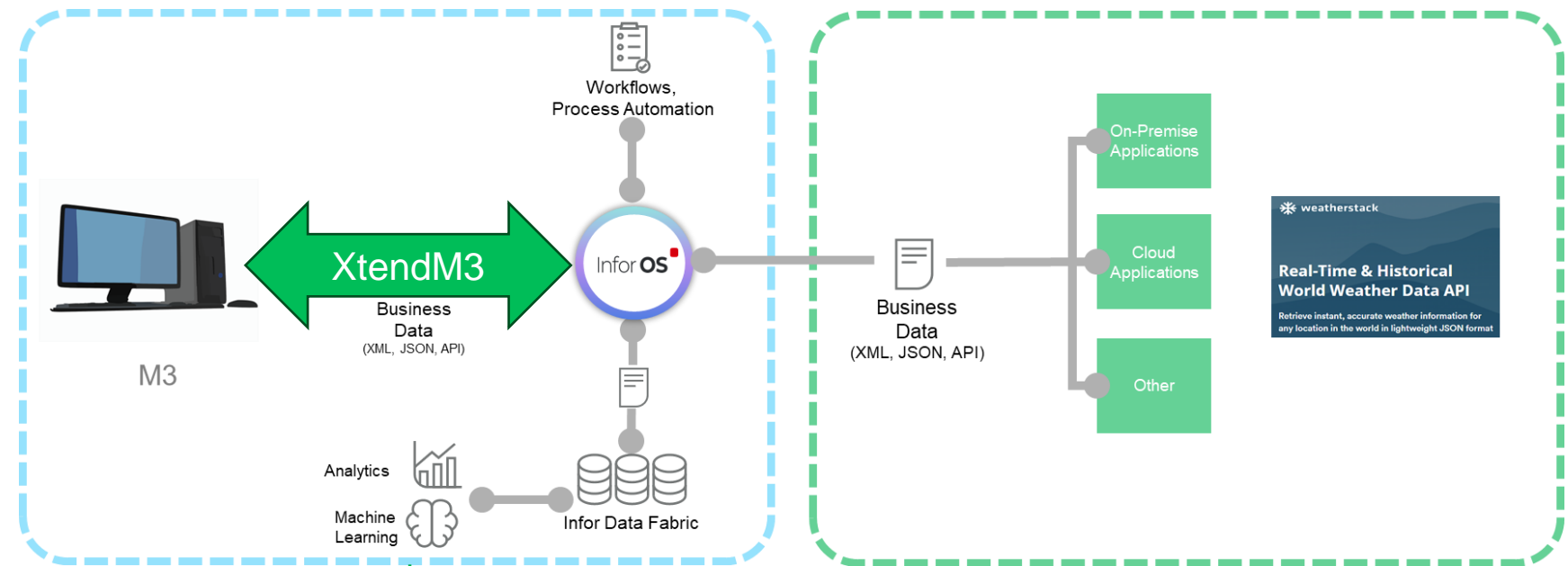


Yes





Good weather?



Doubtful...

Marketplace

What is Marketplace And How To Use

Infor Marketplace offers an enterprise software ecosystem aimed to make it simple for customers to discover and deploy industry and micro vertical solutions that integrate with Infor's portfolio of business software

Partner Apps/Extensions: Partner developed applications and content that meet certain niche industry requirements.

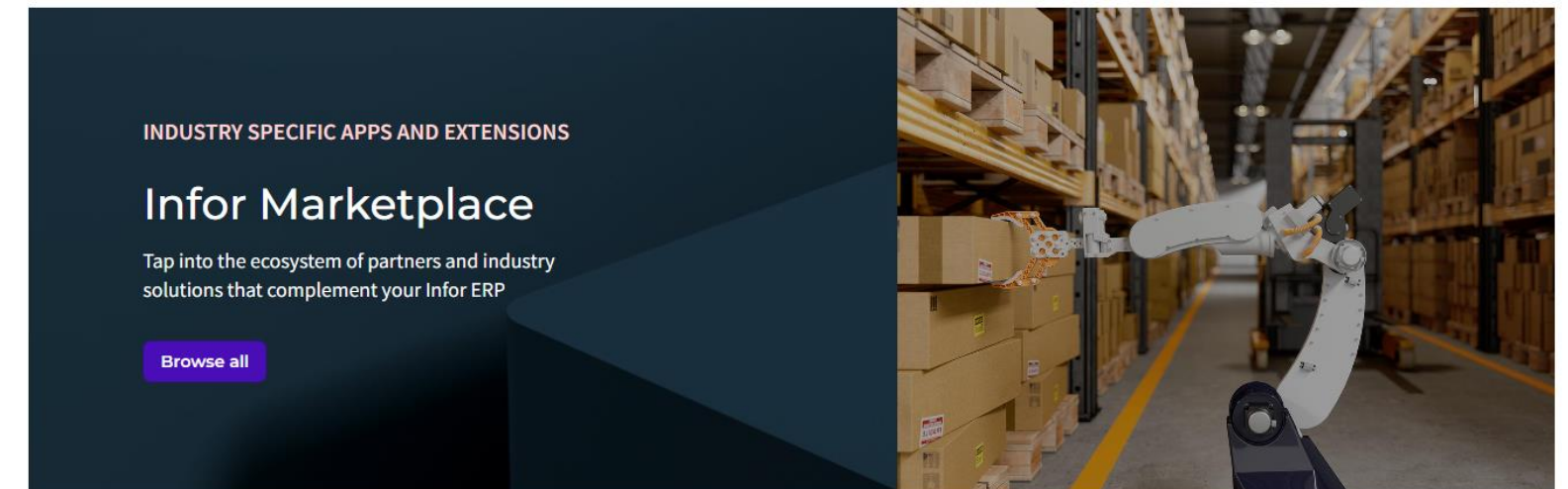
Infor Labs: Examples, samples, templates, and other content that does not belong in standard product but is strategically important to offer publicly. The content is unsupported and offered as educational / promotional material

Infor Software: Solutions that does belong in the standard product but have components that can't be automatically deployed into the Infor eco system. This type of solution is supported and must as such go through full company readiness certification prior posting.

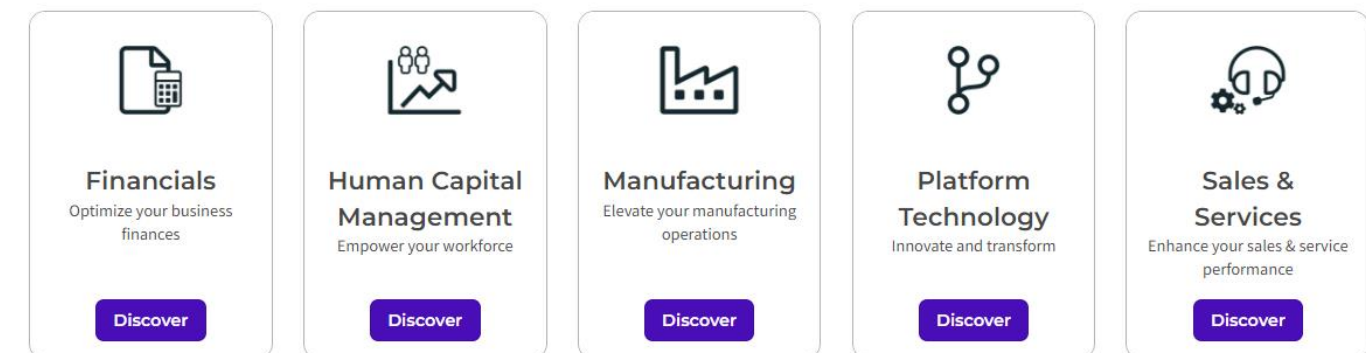
Log In Sign Up

All Products Infor Software Infor Labs Partner Apps/Extensions


Search all products



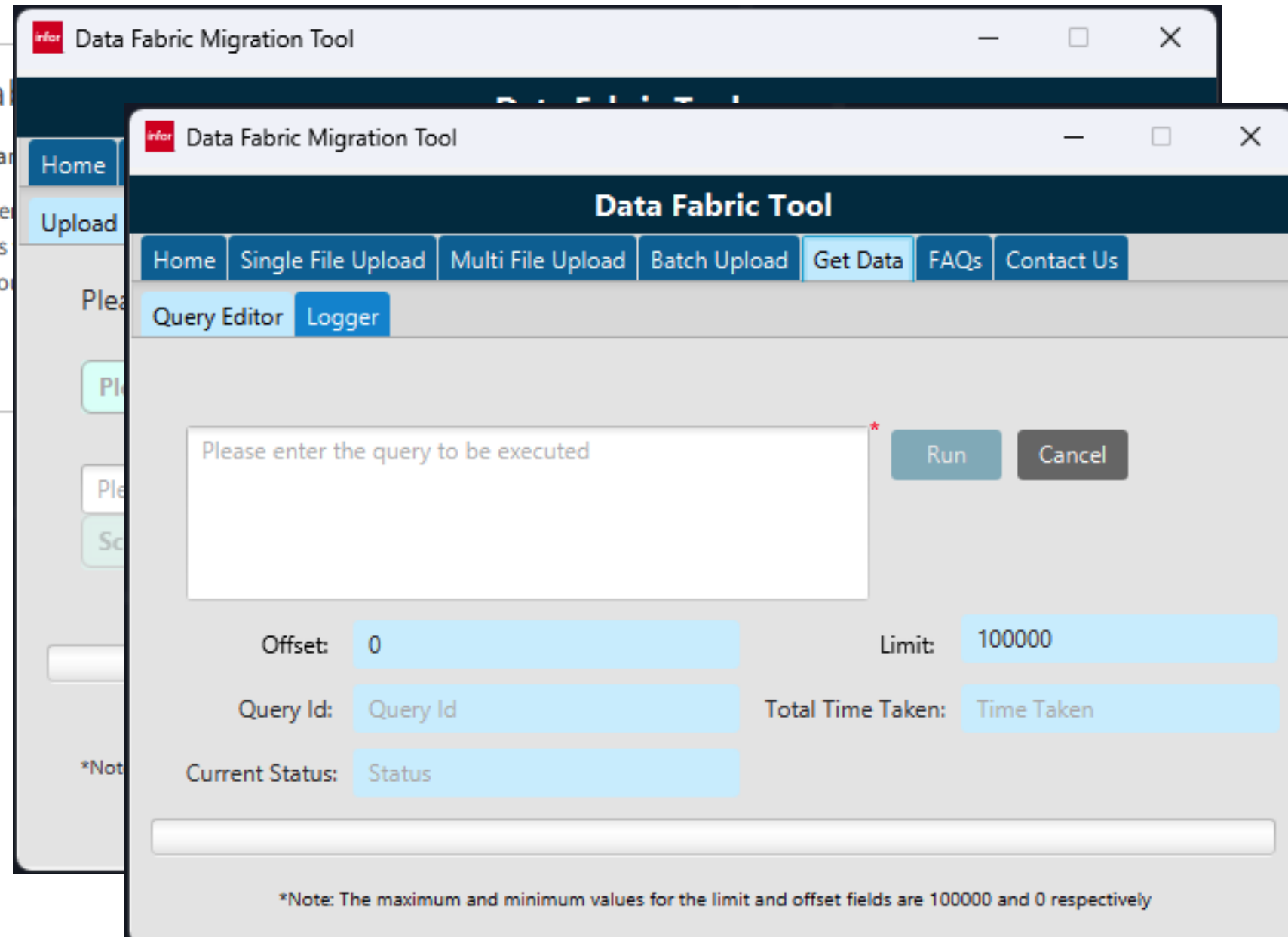
Shop apps by category



Infor Labs on Marketplace



Infor OS - Datafabric
Utility for Datalake uploads and downloads
** New Release for MacOS Users
remarkably user-friendly. This tool is
extracting data to and from your
Provided By Infor Labs



The screenshot shows the 'Data Fabric Migration Tool' interface. The main window has a title bar with the Infor logo and the text 'Data Fabric Migration Tool'. Below the title bar is a navigation menu with buttons for 'Home', 'Single File Upload', 'Multi File Upload', 'Batch Upload', 'Get Data', 'FAQs', and 'Contact Us'. The 'Query Editor' and 'Logger' tabs are visible. The main content area contains a text input field with the placeholder text 'Please enter the query to be executed'. To the right of the input field are 'Run' and 'Cancel' buttons. Below the input field are three input fields: 'Offset: 0', 'Limit: 100000', and 'Query Id: Query Id'. Below these are two more input fields: 'Total Time Taken: Time Taken' and 'Current Status: Status'. At the bottom of the window, there is a note: '*Note: The maximum and minimum values for the limit and offset fields are 100000 and 0 respectively'.

Infor Labs on Marketplace

The image shows a screenshot of the Infor OS marketplace interface. A window titled "Data Fabric Migration Tool" is open, displaying the details for the "Datalake Data Migration Utility v1.1". The utility is described as a "Datafabric Automation utility for Bulk data uploads" that allows users to automatically upload CSV/JSON files in bulk to a Data Lake. The source files must be located on the local system or server. The utility is provided by Infor Labs and includes a "Compare" button.

Below the utility details, a configuration interface is visible with the following fields:

- Offset: 0
- Limit: 100000
- Query Id: Query Id
- Total Time Taken: Time Taken
- Current Status: Status

A note at the bottom of the configuration interface states: "*Note: The maximum and minimum values for the limit and offset fields are 100000 and 0 respectively".

Infor Labs on Marketplace

Infor OS - Datafabric Mig

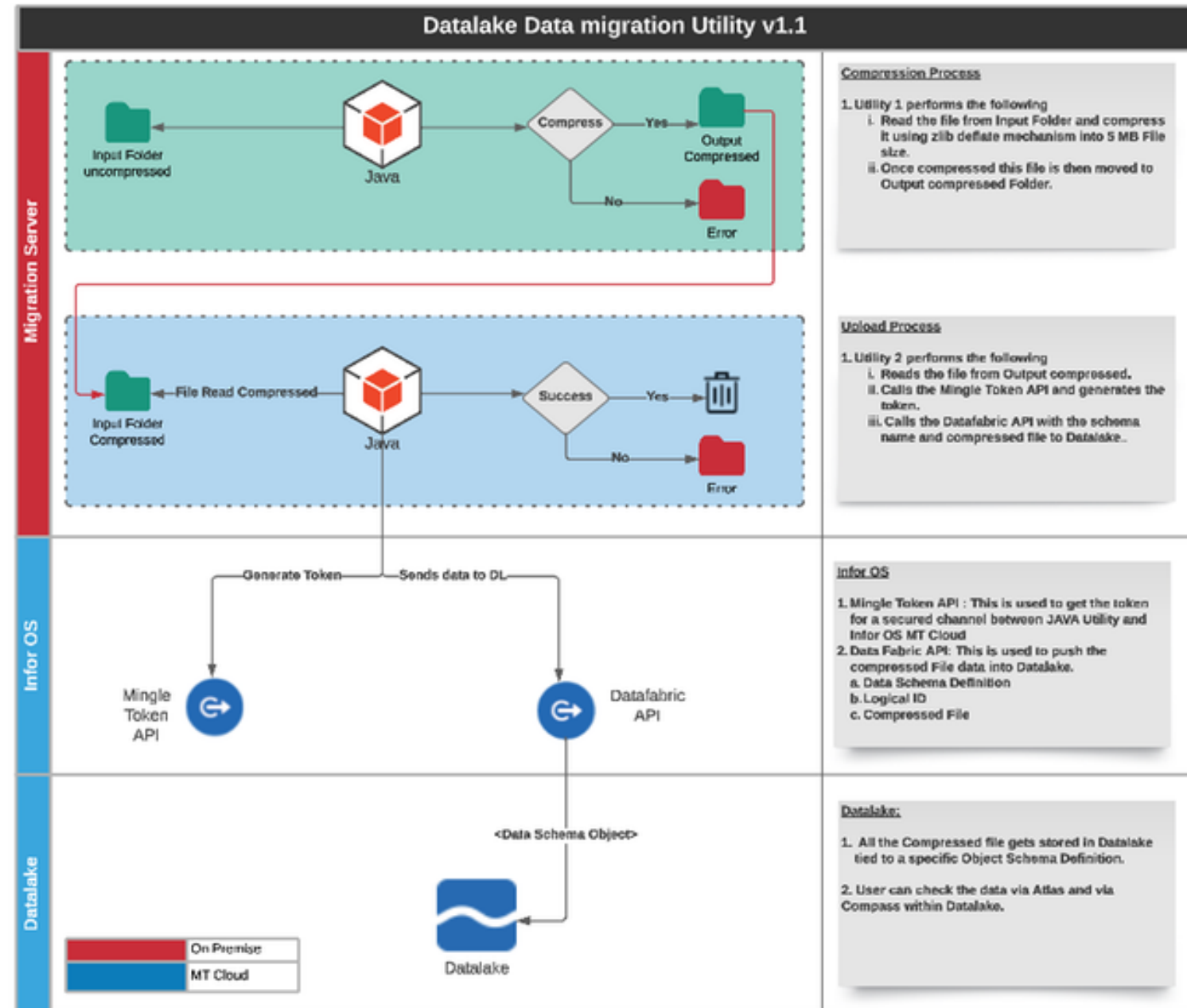
Datalake Data Mig

Datafabric Automation utility for

With the Datafabric Automation U
bulk to Data Lake. The source file

...

Provided By Infor Labs



Infor Labs on Marketplace

Infor OS - Datafabric Mig

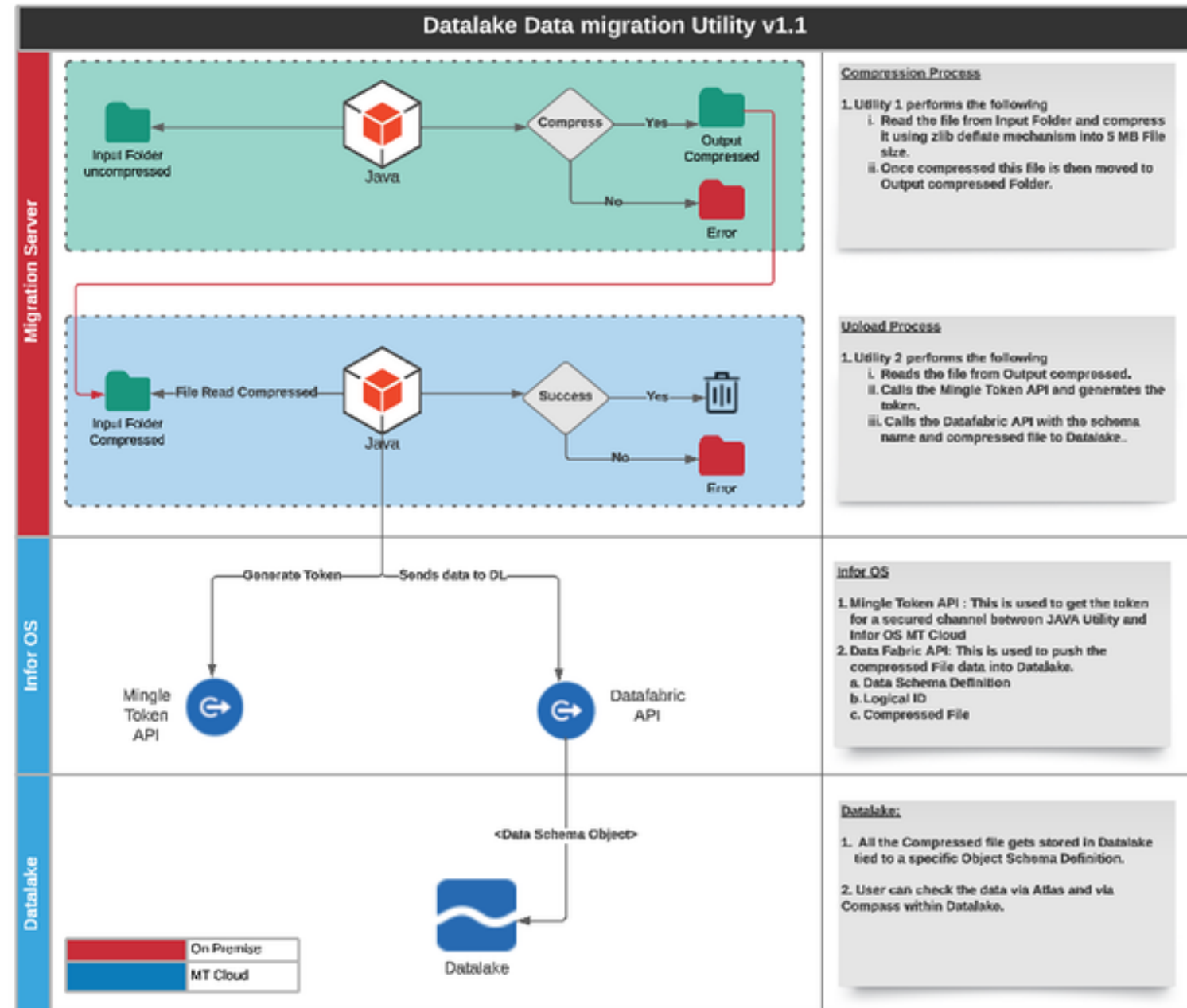
Datalake Data Mig

Datafabric Automation utility for

With the Datafabric Automation U
bulk to Data Lake. The source file

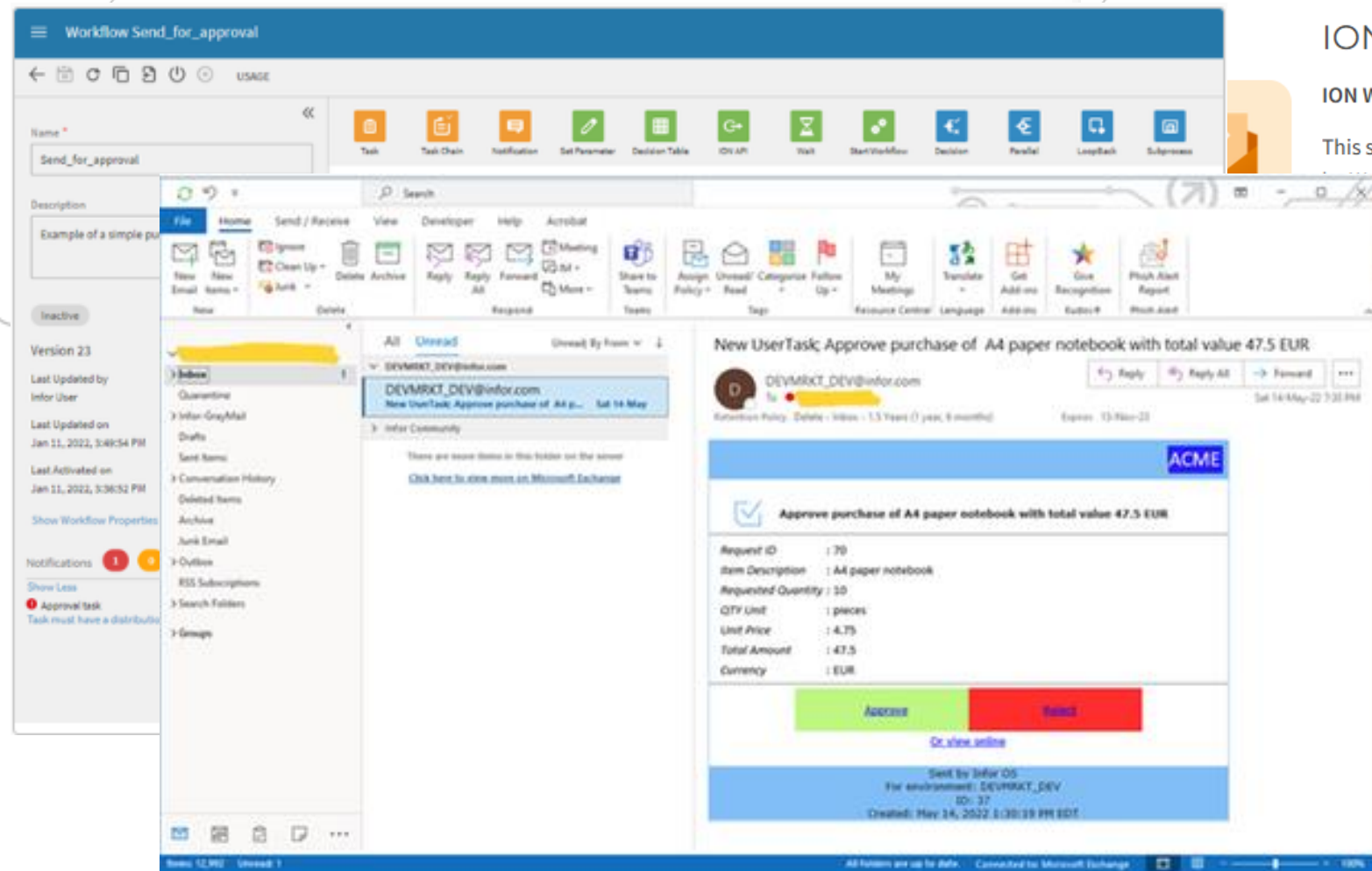
...

Provided By Infor Labs



Infor Labs on Marketplace

Infor OS - Datafabric Migration UI Utility



ION Workflow Email Based Approval

ION Workflow Email Based Approval Template

This solution allows a user to Approve / Reject a Task & notification generated and delegated workflow process from email.

This application generates data and sends it to an Infor ION workflow approval process (Ex:...

Provided By Infor

Compare

Infor Document Management Workflow Approval

This solution allows documents submitted to Infor Document Management with ION Workflow

This example demonstrating integration between Infor Document Management and ION Workflow. Documents add to Infor Document Management can trigger an Infor ION Workflow to send a message to employees for approval. This example shows how to configure the...

Provided By Infor

Compare

M3 Experience Designer: Cash Flow - Credit Control

M3 Experience Designer: Leasing Agreements

Leasing agreements overview in M3

This application gives an overview of your leasing agreements in M3. You can easily see the progress of your planned payments and follow the depreciation of the Right-of-Use Asset.

Provided By Infor



Workflow

Workflow

- How to build
- Examples

Set Up Your Development Workspace

- Workflow Viewer
- Task Manager
- Start Workflows

The screenshot displays the Infor M3 Cloud Suite Workflow Development Workspace. The top navigation bar includes 'Workflow Development Workspace', 'M3 Cloud Suite Start Page', and the user 'Mathias Andersson'. The main content area is split into three panels:

- Workflow Viewer:** Displays a workflow diagram for 'zMA_ItemApproval' (Workflow ID: 10468). The workflow consists of three tasks: 'Set Item', 'Notify' (ID: 49656), and 'Ready?' (ID: 49657, assigned to M. Andersson).
- Task Manager:** Shows a list of tasks with the text 'Tell me when you are done!' and timestamps from yesterday. It indicates '5 Tasks' and 'Last updated 1:09 PM'.
- Start Workflows:** Features a search bar and a list of workflows, including 'zMA_ItemApproval' from yesterday at 9:37:45 PM.

A large 'DEMO' watermark is overlaid on the center of the interface.

Supplier Audit Check

An ION Workflow that, at PO creation time, checks if the Supplier has a valid Audit / Certificate document in IDM. If the expiration date has passed a task is sent to the users on the distribution list, asking to review the Supplier and renew the Audit / Certificate document.

My Feed

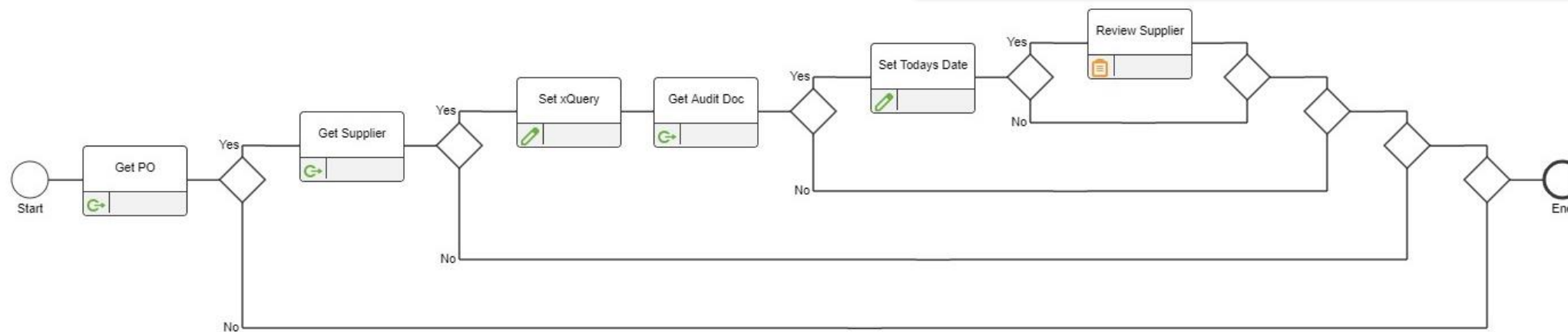
✔ Certificate document for supplier Y91001 expired on 5/31/2019 12:00:00 AM. Please review the supplier and renew the certificate document. Today at 9:21 AM

+ | Show Details | Share | Show all 3 comments

✔ Task was assigned to Peder Westerlund Today at 9:23 AM

✔ Task was completed Today at 9:23 AM

REPLY



Quality Management Documents & Templates
QMdocs

Supplier and Contractor Audit

An Audit conducted in order to assess the cGMP and/or Technical/Quality Contract compliance of an existing supplier (different material or service).

7.1.3 Re-approval Audit (Time Cycle)

A re-approval Audit is an inspection of a previously approved supplier or contract manufacturer, already providing services and/or products. A time cycle Audit is conducted in order to assess the supplier's facility and services continued cGMP and/or Technical/Quality Contract compliance. Re-approval will be conducted pending the material use and the frequency of use.

7.1.4 For Contract Audit

An Audit initiated as a result of a recognized problem in the service or product provided by a supplier or contract manufacturer.

7.2 Audit cycle time

In order to keep a supplier in an approved status, they must be audited on a defined time cycle. Cycle times are based on the level of work performed by the contract firm.

Please see the link to a reference link	
Category (A) suppliers must be audited on an annual basis	<ul style="list-style-type: none"> - API supplier - Sterile contract manufacturer
Category (B) suppliers must be audited every two years	<ul style="list-style-type: none"> - Non-Sterile Drug product suppliers - Key raw material and intermediate suppliers - Contract testing laboratories
Category (C) suppliers must be audited every three years	<ul style="list-style-type: none"> - Raw material suppliers - ODM suppliers

7.3 The Audit (preparation) activities

7.3.1 Planning of a new supplier Audit

It is the task of the Lead Auditor to manage all Audit activities. During the preparation phase the auditor ensures that:

- An Audit specific questionnaire concerning the production supplier is created and approved by the team and will be sent to the raw supplier.
- All additional agreements must be made with the vendor (e.g. agreeing of Audit date, Audit year)

7.3.2 Supplier's Response to the Audit Questionnaire

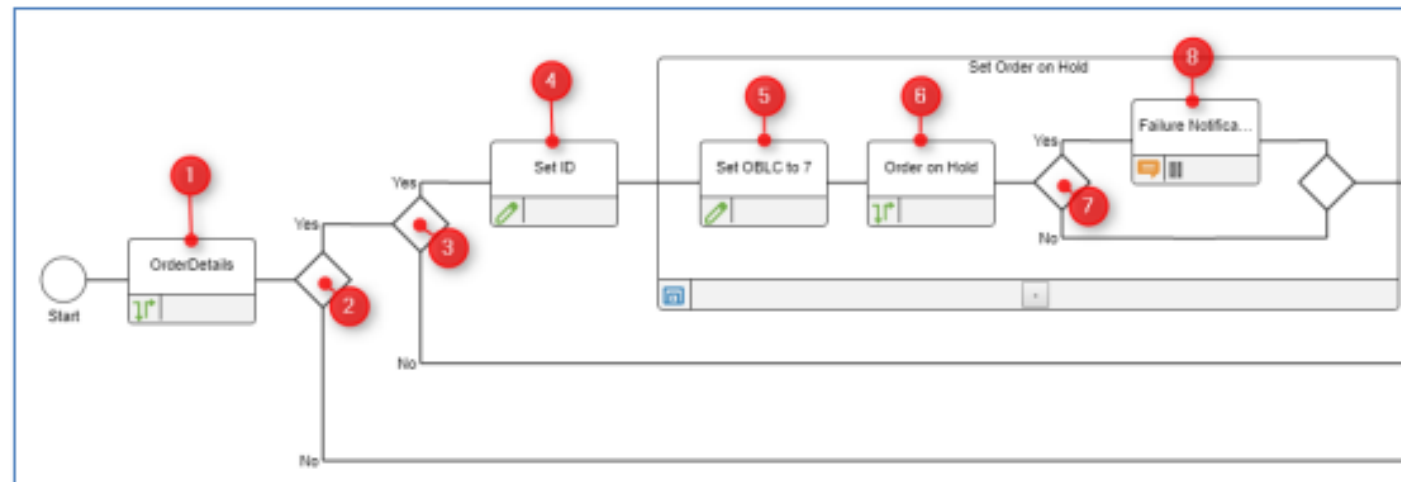
The Lead Auditor ensures that the supplier will answer and on an appropriate time frame before the Audit is performed. BUY NOW click here

Document Type	Document ID	Version	Status	Page
QMP	22_0000_021_0001	1.0	Approved	1/1

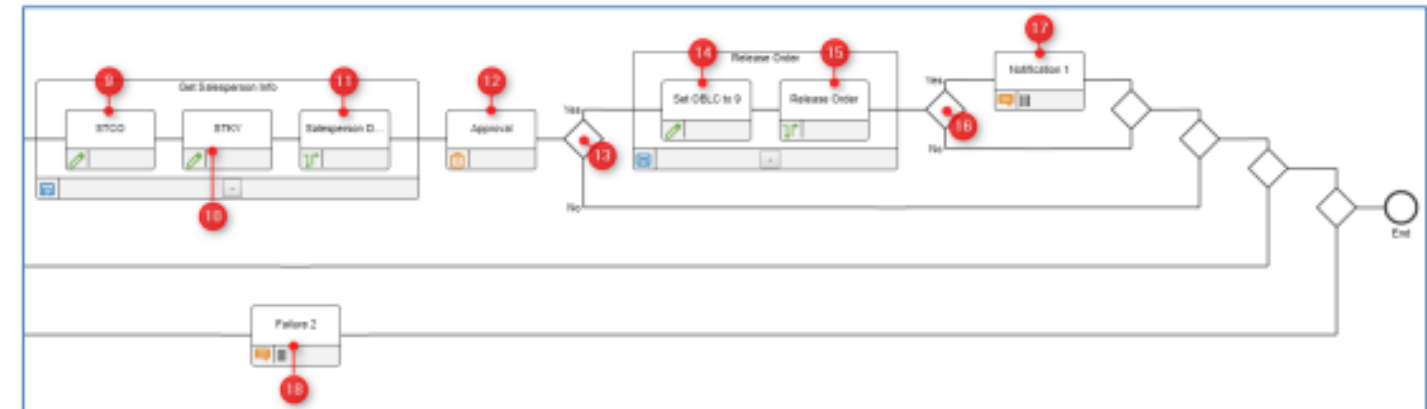
Copyright © 2024 Infor. All Rights Reserved. infor.com

Low Margin Approval

An ION workflow for putting a customer order on hold when the margin is too low, as well as releasing it based on user input.




1. Call OIS100MI.GetHead to get the customer order header details
2. Did the transaction succeed?
3. Is the order already on hold?
4. Set the value of parameter "ID" to value of parameter "M3BEAE"
5. Set the value of parameter "OBLC" to "7"
6. Call OIS120MI/UpdCOStop to set the order on hold
7. Did the transactions fail?
8. Distribute failure notification




9. Set the value of parameter CTSTCO to the value of parameter SMCD
10. Set the value of parameter CTSTKY to the value of parameter SMCD
11. Call the transaction CRS100MI/Get
12. Distribute approval task to order responsible
13. Was the order approved?
14. Set parameter OBLC to "9"
15. Call OIS120MI/UpdCOStop to release order
16. Did the transaction fail?
17. Distribute failure notification
18. Distribute failure notification

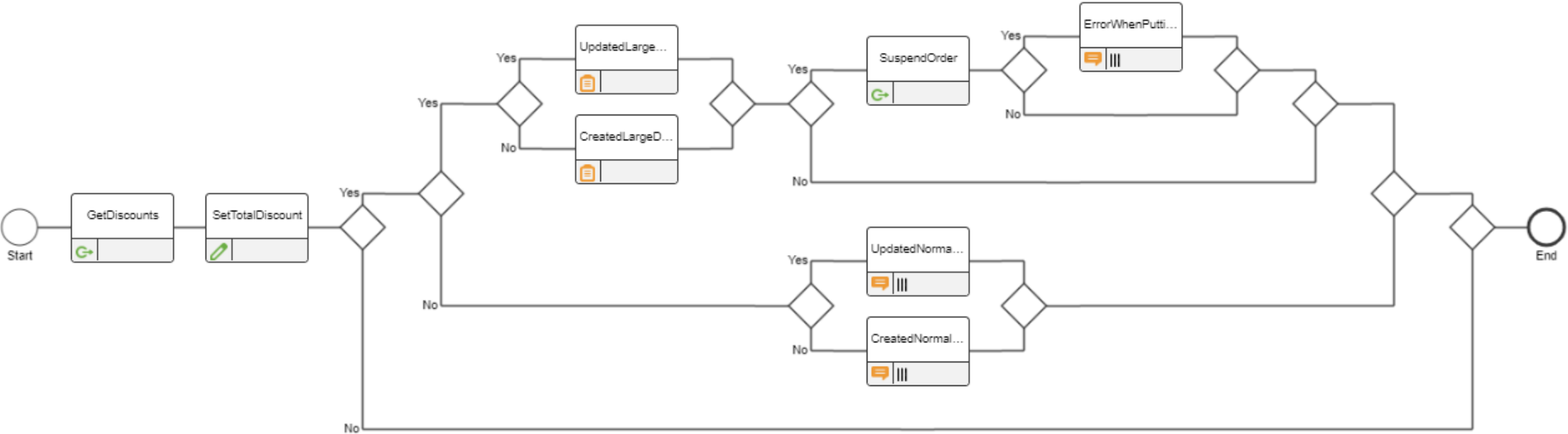
New Sales Order Line With Discount

If the discount exceeds a certain percent limit (10% as default), a task will be distributed with options to approve discount or suspend order.



Order 4003115551 line 1 was created with a Large discount 25.0%. Please review.

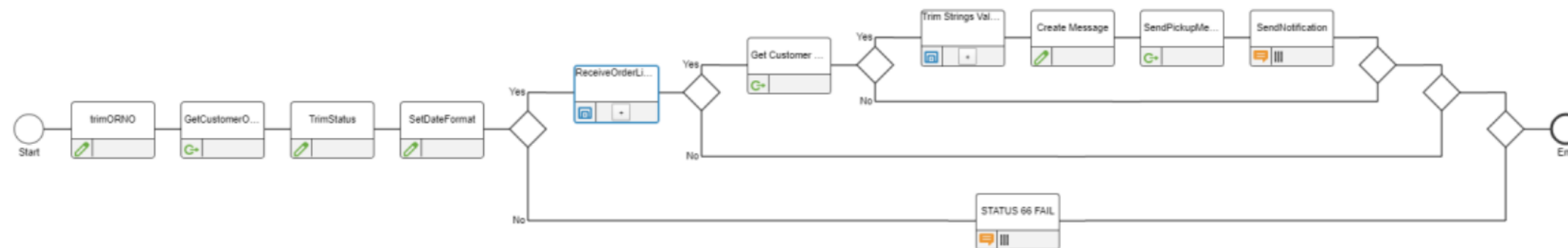
 | [Show Details](#) | [Go to Inbox](#) | [Share](#)



Customer Order Shipped SMS

An ION workflow that will send SMS to customer when customer order has been shipped. Notification will also be distributed.

Hello [REDACTED], Your order [4003112543](#) has been shipped on 18/03/29. Call customer service if any delays. Regards



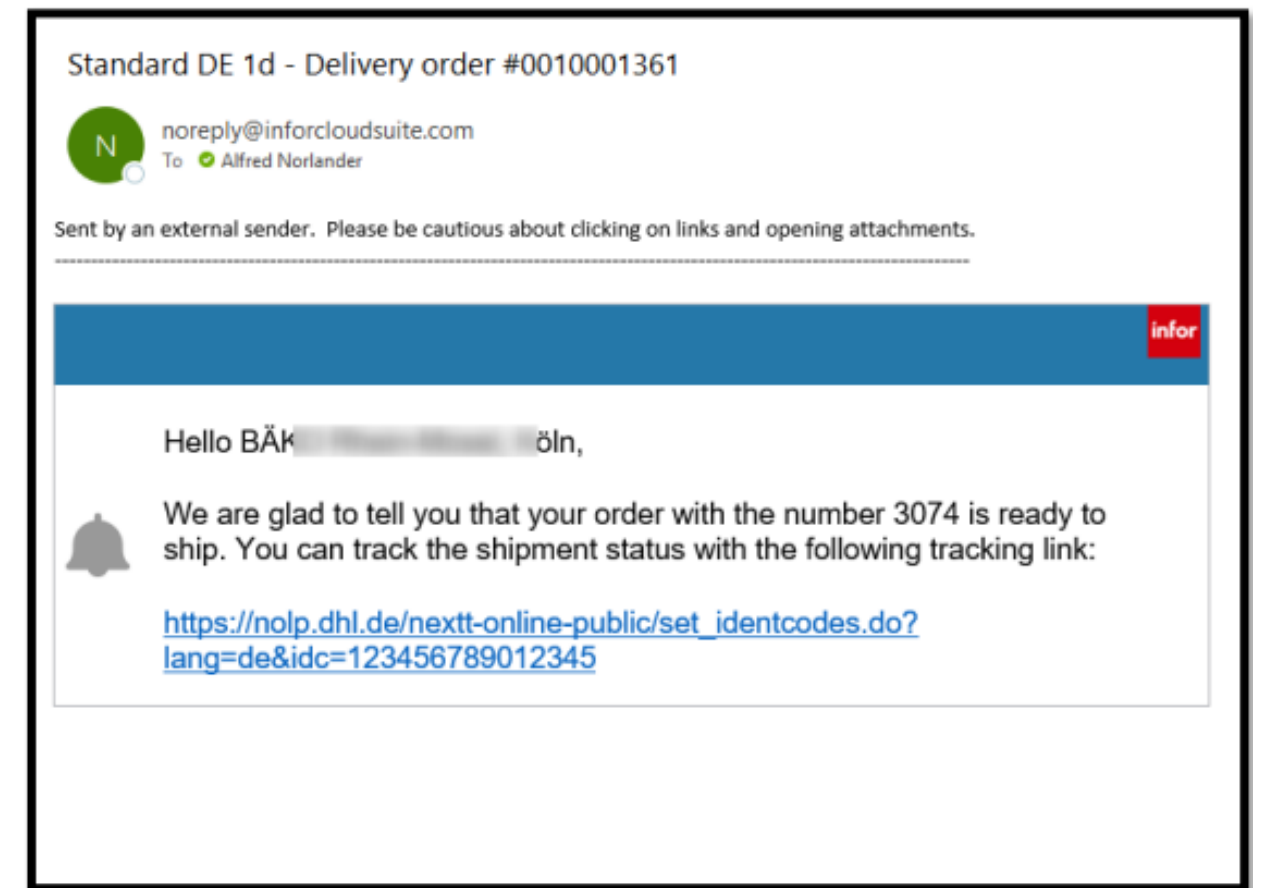
Send Tracking Email

Workflow that sends email to customer with tracking link. The tracking link is created with general carrier URL and delivery ID.

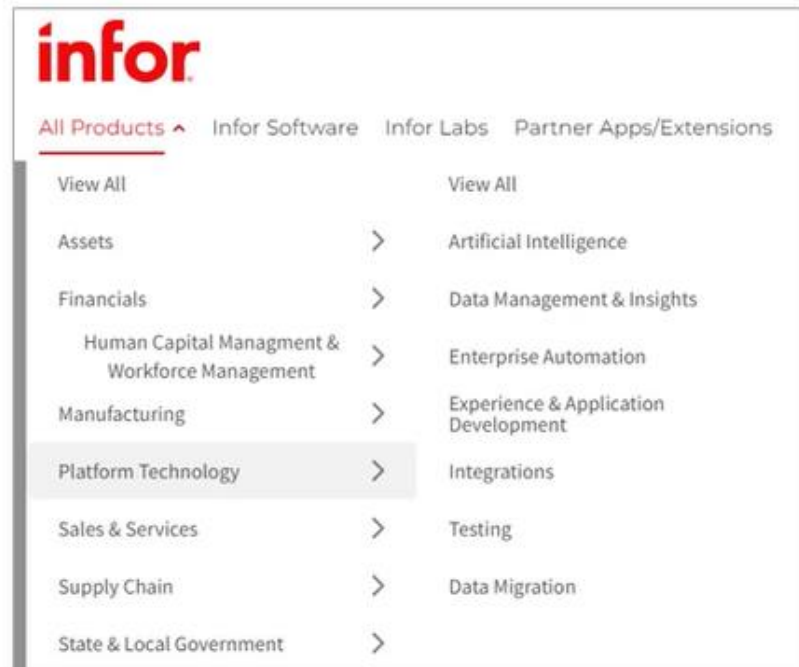


1. Get delivery data (customer, order number, route, external tracking ID)
2. Get customer name
3. Check if route
4. Get route name
5. Get tracking URL for carrier
6. Check if URL
7. Build the URL: base URL + tracking ID
8. Add order number to email message
9. Add customer name to email message
10. Add URL to the email message

11. Set email subject
12. Get contact by customer (consignee from delivery)
13. Get email address for contact
14. Check if email address
15. Send email



Resources



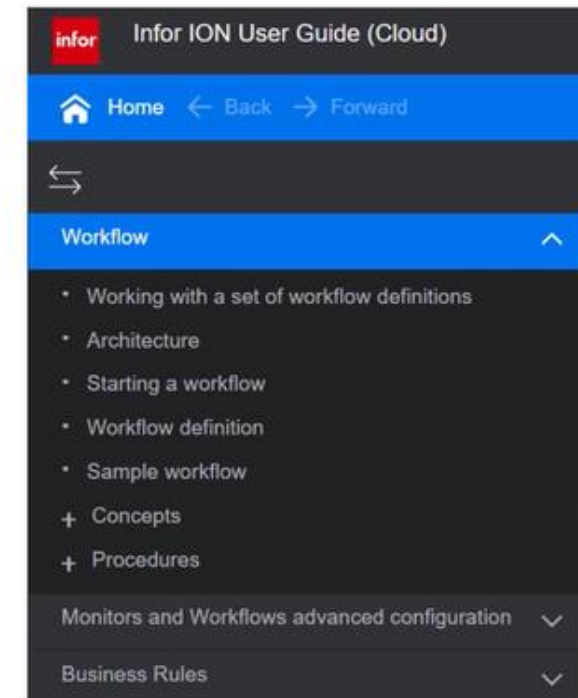
Infor Marketplace

<https://marketplace.infor.com/en-US/home>



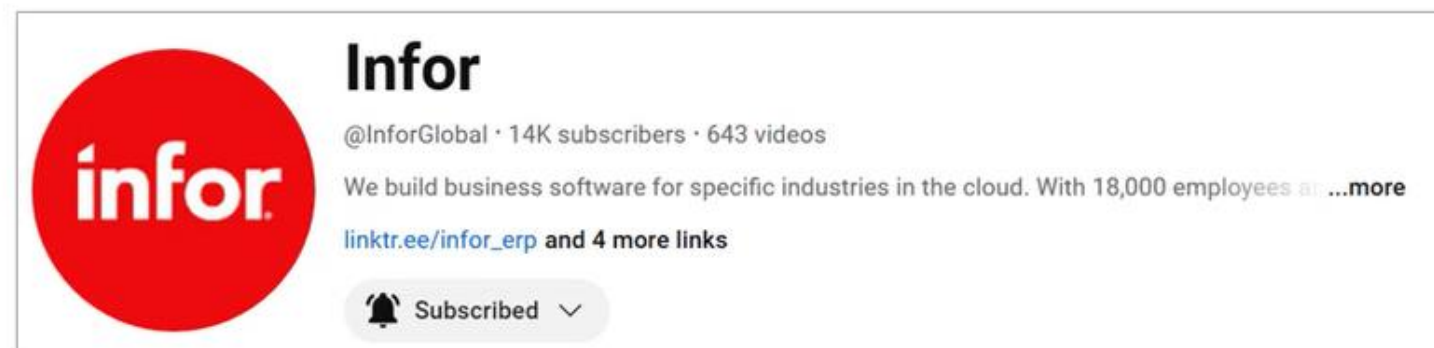
Infor Developer Portal

<https://developer.infor.com/tutorials/>



Infor online documentation

<https://docs.infor.com/en-us>



Infor YouTube Channel

<https://www.youtube.com/@InforGlobal>



infor[®]