

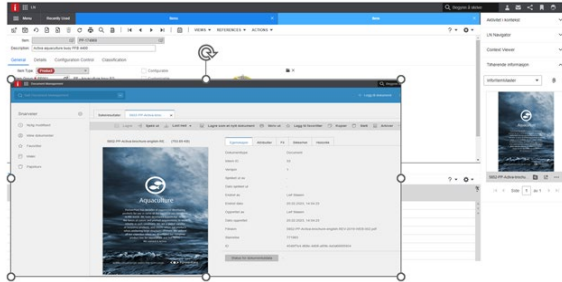
LSP (Localization Services Platform / IDM Integration)

19.03.2025 Tanveer Ahmed

Agenda:

Document Management

- InContext
- Output Management
- Version Controlled



Infor Document Management (IDM)

Key Concepts & Definition

IDM	Shorthand for Infor Document Management IDM is a full-fledged document management system within Infor OS that can manage the entire document lifecycle of business documents, including creation , versioning, storage, retrieval, distribution, archiving, and purging.
DOM	IDM's ability to create templates for document creation, the distribution of documents through email, and the ability to cloud print with IDM's Enterprise Print feature.
Contextual Applications	The related information contextual application provides the ability to display relevant documents stored within IDM alongside their corresponding business records. This is not limited to read-only access. Users can download, print, email, sign, or upload documents to IDM via the related information contextual application.
Document Types	An envelope for a document file and its metadata/attributes. Users can create any custom document type with any attributes needed such as height, weight, approval status, color. Flexible enough to cover all possible customer needs, a document cannot exist outside of a document type. Some applications provide default document types mapped specifically to their application record types.
Attributes	Defined by the creator of a document type to store a characteristic. Can be used to create a reference between a document in IDM and a record in an Infor application. Can store: metadata, values, properties. Ex: item ID, supplier number, invoice number, purchase order number
ACL	Shorthand for access control list. Consists of users, user groups, and privileges associated with each. These are applied to document types, permitting and restricting users' actions on them. By default there are 2 types of ACL, public and private. Public is visible to everyone, private only to the last modifier of that document. Custom ACLs can also be created.
Query Builder	Infor's search tool for documents which uses Xquery. Can search for document attributes and properties, search for text within a document, and make your own advanced queries. Searches can also be saved by the user for quick access later.

Core Features

Add New Documents:	Easily upload and store new files.
View Stored Documents	Access and review saved documents at any time.
Edit Documents	Make changes to existing documents as needed.
Download Documents	Save documents locally for offline use.
Search Documents	Quickly locate specific files using search functionality.
Document Output Management	Utilize tools for managing and organizing document outputs.
In-Context Editing:	Modify documents directly within their context for seamless updates and usage of extensibility

Business Case: Automated Document Retrieval and Attachment for Purchase Orders

Problem Statement

Currently, when sending purchase orders to suppliers, employees must manually retrieve associated documents (e.g., drawings) from the IDM system, download them, and attach them to the email. This process is:

- Time-consuming:** Employees spend significant time on repetitive manual tasks.
- Prone to errors:** Manual handling increases the risk of attaching incorrect or outdated documents.
- Inefficient:** Delays in sending purchase orders can impact customer satisfaction and operational timelines.

Proposed Solution

- When a purchase order is generated, the system identifies the associated document (e.g., drawing) in the IDM system.
- The document is automatically retrieved from the IDM system.
- The document is attached to the purchase order email.
- The email is sent to the customer without manual intervention.

As a result:

Automate document retrieval: Seamlessly fetch documents from the IDM system based on the purchase order.

Automate email attachments: Attach the retrieved documents to the purchase order email without manual intervention.

Improve efficiency: Reduce the time and effort required to send purchase orders.

Enhance accuracy: Ensure the correct and most up-to-date documents are attached.

Business Case Demo

Localization Service Platform (LSP)

Infor Localization Services adoption

Infor LN is adopting the Infor Localization Services products (GEMS, LSP and connectivity tools) in the following areas:

LSP

E-Invoice

- Electronic sales invoices that can be sent directly to customers.

Tax reporting

- Electronic submission of tax data (invoices, cost reporting, journals, transport documents)

Auditing

- Reports used for auditing, data verification, and reconciliation.

GEMS

Purchase invoice imports

- Supplier e-invoices can be consumed by LN

Banking

- Electronic messages: payments, direct debits, electronic statements

Intrastat

- Conversion of the LN proprietary Intrastat file into country-specific formats

What is LSP?

- The Localization Service Platform (LSP) is the ILS product which helps customers meet the local regulatory and statutory requirements, and business habits, of a country.
- It is connected to ERPs through standard Infor BODs
- It uses business knowledge to build the submissions.
- It supports different processes, and types of external connectivity

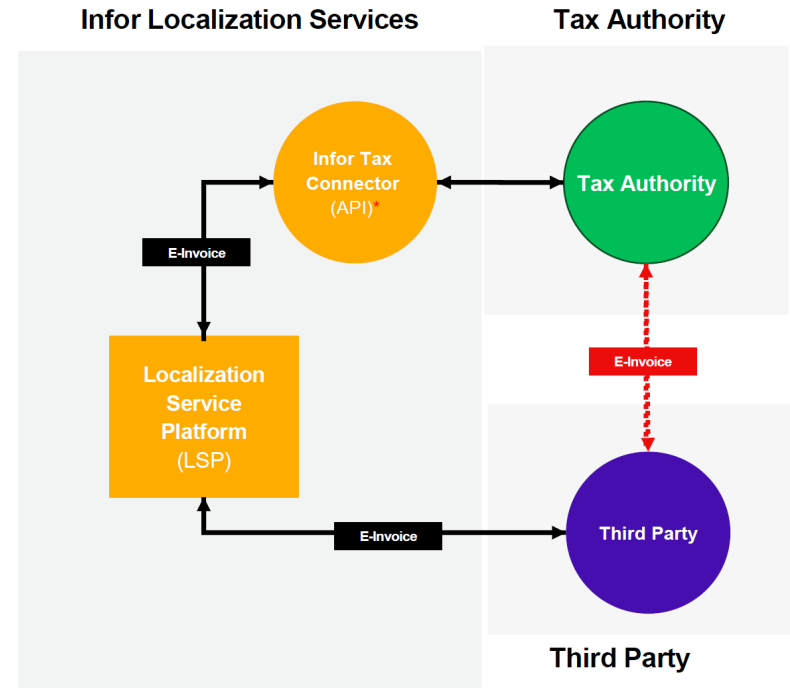


E-Invoicing Models



LN-LSP Integration: connectivity options

- Customers can use the Gateway or the Infor Tax Connector for directly connecting to the Tax Authorities or can use a third party provider on the market for the connectivity services.
- Both possibilities may be available in some countries, where both connectivity types are allowed, like Italy or Colombia.



IDM Outbound, IDM Inbound, IDM Retrieve services

IDM OUTBOUND

- Store Submission files to IDM
- Options:
 - Store document in a zip
 - Submit documents with attachments to IDM

IDMOutbound

Store submission files to IDM

Store document in a zip

Submit document with attachments to IDM

Active

IDM INBOUND

- Store response files to IDM
- Options:
 - Store document in a zip

IDMInbound

Store response files to IDM

Store document in a zip

Active

IDM RETRIEVE

- Retrieve attachment documents from IDM
- Options:
 - Document without attachment if not found
 - Document type specification

IDMRetrieve

Retrieve attachment documents from IDM

Submit document without attachment if not found

Document Type: test

Active

LN-LSP Integration: completed adoptions (status 2025.2)

Country	Requirement						
Multiple Countries	PEPPOL E-Invoicing Access Point / through Storecove: adopted for Australia, Austria, Belgium, Bulgaria, Croatia, Denmark, Germany, Hungary, Japan, Latvia, Lithuania, Netherlands, New Zealand, Norway, Singapore, Sweden						
Colombia	"DIAN E-Invoice". Connectivity through Edicom						
Czech Republic	E-invoice "ISDOC"						
Germany	ZUGFeRD, X-rechnung, CII E-invoicing						
Hungary	"NAV 3.0" E-invoicing						
Israel	ITA Continuous Transaction Control (CTC)						
Italy	"FatturaPA" E-Invoicing and Integration Documents Reporting ("Esterometro")						
Malaysia	E-invoicing						
Mexico	<table border="0"> <tr> <td>MX CFDI eInvoicing 4.0</td> <td>SAT - JournalEntries - PolizasPeriodo (v1.3)</td> </tr> <tr> <td>CFDI 4.0 Payment Receipt</td> <td>SAT - JournalEntries - Auxillier Ctas (v1.3)</td> </tr> <tr> <td>SAT - Chart of Accounts (v1.3)</td> <td>SAT - Trial Balance (v1.3)</td> </tr> </table>	MX CFDI eInvoicing 4.0	SAT - JournalEntries - PolizasPeriodo (v1.3)	CFDI 4.0 Payment Receipt	SAT - JournalEntries - Auxillier Ctas (v1.3)	SAT - Chart of Accounts (v1.3)	SAT - Trial Balance (v1.3)
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Saudi Arabia	ZATCA E-Invoice Phase II						
Slovenia	e-SLOG E-Invoicing						
Spain	TBAI E-Invoicing						
Turkey	Turkish Revenue Administration E-Invoicing. Connectivity through Intecon Tax reporting, Transportation documents reporting. Connectivity through Intecon						

LN-LSP Integration: ongoing projects and on watch countries

Country	Requirement
Argentina	E-invoice
Chile	E-invoice
Egypt	E-Invoice
France	E-invoice and E-reporting (from 2026)
Greece	E-invoice and E-reporting (MyData)
Malaysia	PEPPOL, Tax reporting
Philippines	E-invoice
Portugal	E-invoice, Transportation documents reporting

Country	Requirement
Romania	E-invoice
Serbia	E-invoice
Slovakia	E-invoice (law not yet approved)
Spain	National E-Invoice (pending regulation)
South Korea	E-invoice
Taiwan	E-invoice
Tunisia	E-invoice
UAE	E-invoice (law not yet approved)
Vietnam	E-invoice