



# ION Workflow



NAVCI.TE

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# Who we are

# NAVCI:TE

Small company feeling - Big company experience



2008

Startade i Luleå

2019

Etablerade vårt andra kontor i Västerås

 18

2021

Etablerade kontor i Linköping

 30

2022

Etablerade kontor i Göteborg & Helsingfors

 45

2024

Etablerade kontor i Borlänge, Karlskrona & Stockholm

 75

2025

Infor Gold Reseller Partner

 85

# Our employees



**Project Managers**



**Solution Architects**



**Integration Architects**



**Technical Consultants**



**Senior Consultants**



**Consultants**



**Developers**

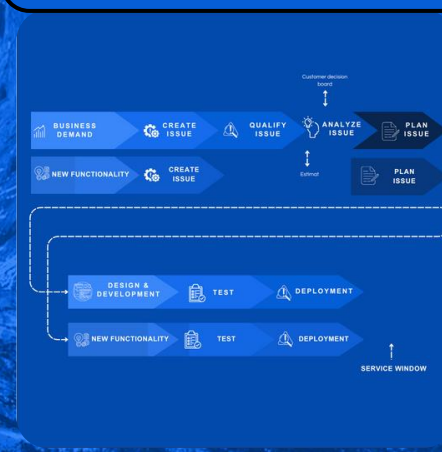
A man with glasses and a green sweater is sitting at a desk, smiling and looking at a laptop. A woman with blonde hair and glasses is sitting next to him, also smiling and looking at the laptop. They are in an office setting with a window in the background. The text "What we do" is overlaid on the image.

# What we do

## Projects



## Improve & Innovate



## SUPPORT

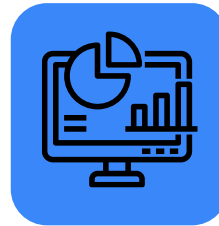


# Business process development

Simplify and digitalize



ERP



Data & Business  
Intelligence



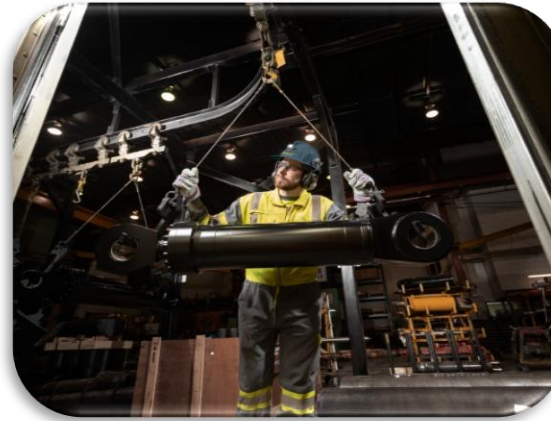
UX & Mobility



Integration &  
Development



**Distribution & Retail**



**Service & Aftermarket**

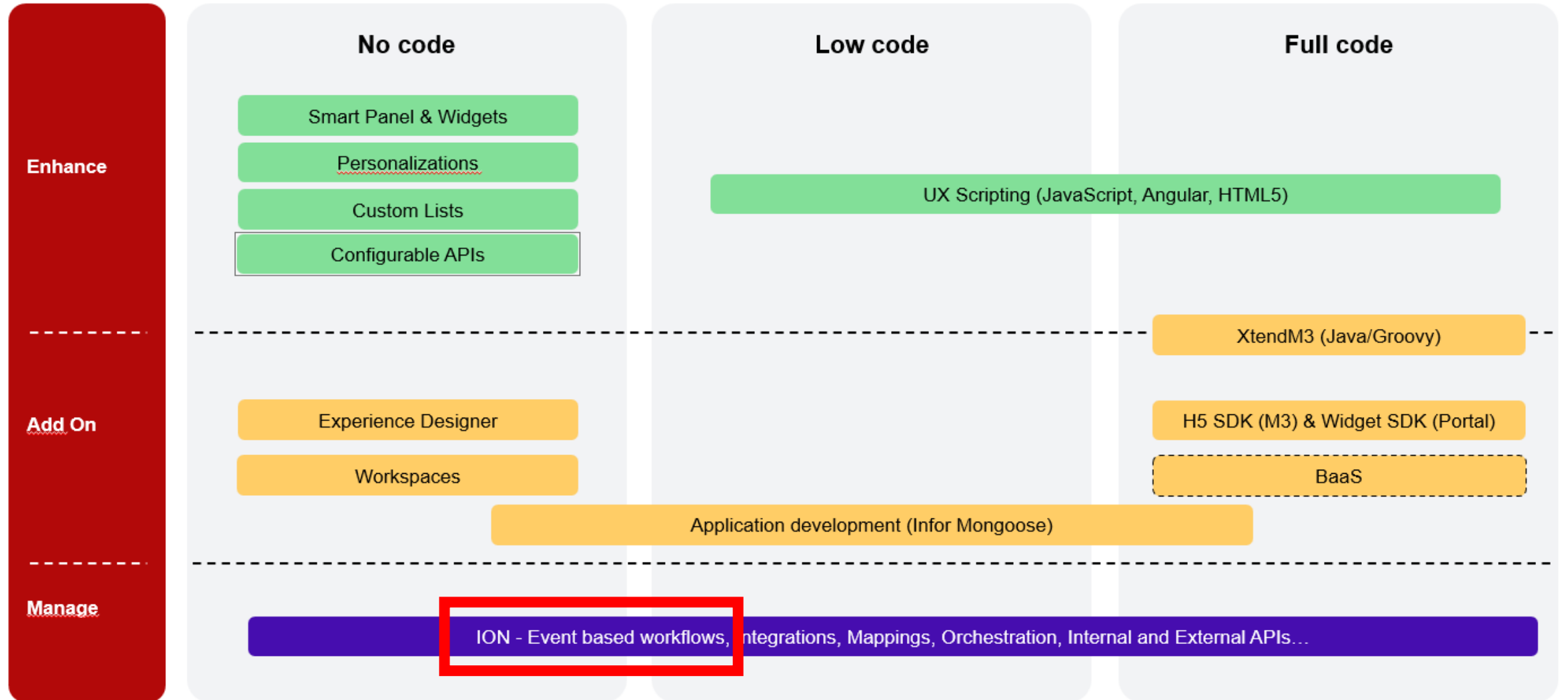


**Industrial Manufacturing**



**Food & Beverage**

# User Experience with Tailoring



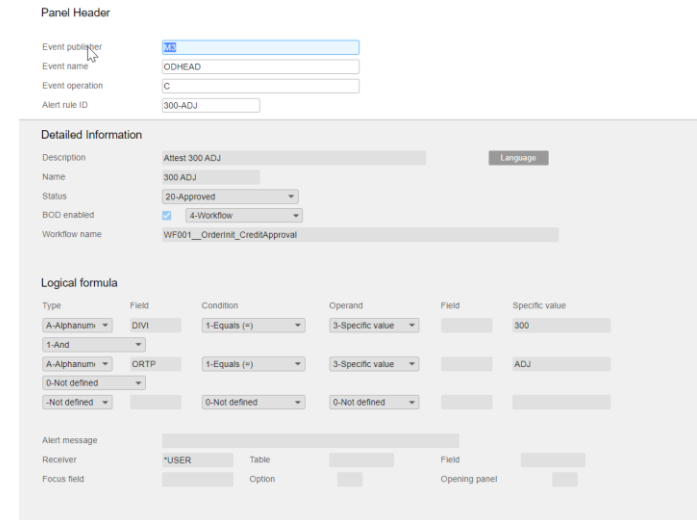
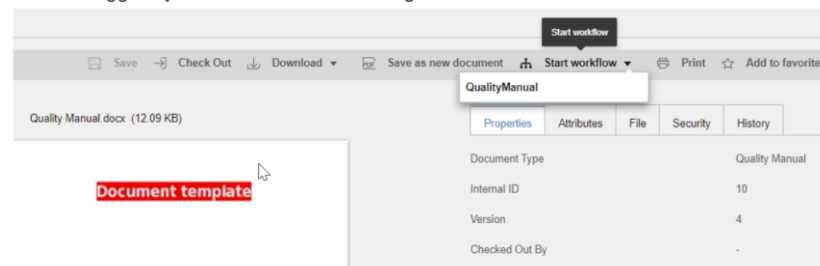
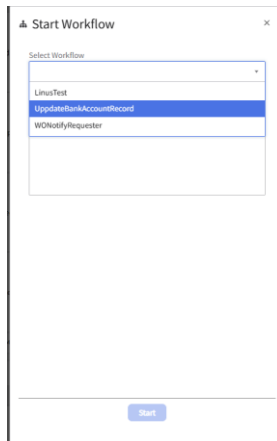


# Work Flows

- Examples of workflows
  - Item establishment process
  - Customer establishment processes
  - Approval processes such as
    - Stock Take Approval
    - Credit Note Approval
    - Customer Credit Limit Changes
    - Etc
- Workflows typically used when a process requires multiple tasks that is completed by different people
- Workflow tasks is not necessarily connected to M3 processes and events occurring in M3

# Triggering Workflow

- Triggering / Starting a workflow can be done in various ways
- Manual
  - Manually starting via homepage widget "Start Workflow"
  - Manually or automatically started from other systems via ION API call
  - Manually or automatically via IDM (Document Management). For example when saving a document
- Automatically
  - Automatically started from M3 via:
    - M3 standard application messages
    - M3 event based alerts
    - BODs generated by events in M3
    - From SDK App/SDK Homepage Widget via ION API call



# Work Flow Task

- Task distributed via ION (BOD)
  - ION keeps track of workflow and stores result in ION Database
- Task distributed to named user or distribution group (multiple users).
  - Distribution groups defined in IFS (Infor Federation Services) with or without AD integration
- Task visible to user via
  - Inbox in smart panel area
  - Inbox widget on workspace
  - Task widget on workspace
  - Infor Go Mobile App
  - Email - Link
- Escalation rules can be configured
  - If task is not completed within set time frame

The screenshot shows an 'Inbox' interface with a task titled 'Work order for approval. Work Order 10000...'. It includes a 'Show more' link, a timestamp 'YESTERDAY AT 10:52:39', and an 'Assign' button. Below the task details, there are input fields for 'Order' (1000002641), 'Object' (B011010RB001-ABB Robot IRB46001), and 'Position' (->PRODUCTION LINE 1->PRODUCTION->SITE). An 'Actual Finished' field is also visible.

The screenshot shows an email interface with a subject line 'New UserTask Address must be added'. The email is from 'noreply@inforcloudsuite.com' to 'Jens Kleist' on 'Tor 2026-03-12 09:46'. A warning message states: 'CAUTION: External email. Be cautious with links and attachments.' The main content of the email is a task notification with the following details:

ID:	1002
Created:	12 Mar 2026, 09:46:06 Central European Standard Time
Customer Name:	50094 - GABRIEL A/S
Name:	Furnmaster PL FM3
Address:	Gronowa 3
City:	?wiebodzin
Country Code:	PL
Postal Code:	66200
AddressID Reference:	E31
Address ID:	

The email is signed 'Sent by Infor OS'.

# Work Flow Task Approval

- To approve task click on the task and assign to me
  - Possibility to assign to someone else added to the distribution list of the task
- Possibility to add attachment
  - Can be stored in IDM
- Possibility to add notes
  - Stored in ION database
- Possibility to create drillback link to M3 using bookmark from task

Task

Review credit note approval request Karl Jöcker GmbH & Co. KG , credit amount 119 EUR  
02/22/2023 02:31 PM

Assign to me Assign Share Done

Credit Amount: 119  
Currency: EUR  
Payee: Karl Jöcker GmbH & Co. KG

Order Number: 0002727652  
Delivery Number: 101867629  
Order Responsible: Andreas Borgmann

Attachments  
Workflow Progress  
Notes (0)

Task ID: 206 Workflow ID: 432

# Work Flow Homepage Widgets

- Widgets delivered by infor
- For end user
  - Start Workflow
  - Task List
  - Notification List
  - Inbox
  - Workflow Viewer – Connected to Task List
- For admin roles
  - Task Watcher
  - Task Manager
  - Workflow Status
- Authorization
  - What you are able to see within the widgets Start Workflow, Task Watcher, Task Manager are controlled by workflow authorizations in ION Desk. Configuration made on workflow level.

The screenshot displays the NAVC!TE Work Flow Homepage interface. The top navigation bar includes links for Maintenance Planner, Create Work Request, Purchase Requisition, Infor M3, GenM, OS, Security, and Workflow. The main content area is divided into several widgets:

- Start Workflows:** A search bar and a button to start workflows. It currently shows "No Workflows Available".
- Task List:** A list of tasks categorized by "Yesterday" and "Older". Each task entry includes a status (e.g., "Work order for approval"), a work order ID, and object details.
- Notification List:** A list of notifications, each with a bell icon, a status (e.g., "Work order replanned"), a work order ID, and object details.
- Workflow Status:** A summary table showing the status of all workflows. The data is as follows:

Status	Count
Started	425
Now Open	29
Stopped	201
Completed	195
- Workflow Viewer:** A detailed view of a specific workflow (ID: 7255) showing a flowchart with steps like "Work Order Cr..." and "Work Order Fin...".
- Task Watcher:** A widget for monitoring tasks.
- Task Manager:** A widget for managing tasks.

The bottom right corner of the interface shows a "Time to complete" summary: MIN +1 sec, AVG 9 days, MAX 111 days.

# Work Flow Development

- Development is made in ION Desk
- Read documentation from Infor it is well described or ask us.

The screenshot displays the ION Desk Workflows interface. On the left, a sidebar menu lists various workflow categories such as Monitors, Alarm Templates, Activation Policies, and Workflow Schedules. The main area shows a grid of workflow cards, each with a name, status (Active/Inactive), version, and last updated date. A central panel provides details for the selected workflow, 'PurchaseOrderAuthorization\_COPY', including its description, active status, and version information. The right side of the interface features a flowchart diagram of the workflow process, starting with 'AuthorizePurch...' and branching into 'Yes' and 'No' paths, leading to steps like 'GetAuthorizeID', 'ApprovePO', 'GetNextApprover', 'PORejected', and 'SetReadyToExit'. Below the flowchart, the 'Workflow Properties' section includes a table for parameters.

Name	Type	Code Name	Group	Input	Output	Use Initial Value if Null	Initial Value
AURE	STRING						
AUTD	STRING						
AuthorizationStatus	STRING						
CONO	STRING						
ContinueAuthorizatio	STRING						
CostCenter	STRING						



# ION Workflow Examples



# Correction of incorrect data in EDI messages

Involve end users in the correction process

# Sales order in via EDI

- Where we were
  - Customer sending incorrect address specification
  - Sales order stops in integration due to missing data
  - End users do not have the capabilities to adjust and resend messages

# Sales order in via EDI

- Where we are
  - Workflow used to correct data in the incoming message (ION) before sending it through the integration (IEC/MEC)
  - End users receives a task informing about address reference is not found and address details.
  - End user creates address data in M3 or correct the address data in the incoming message via the user task.
  - When completing the task EDI message is submitted to IEC/MEC and sales order is created in M3

# Dataflow validates data in the file send from customer and detects specified problems and starts workflow

**Data Flow TX0201\_EDI\_OrderIn\_v2**

REMOVE CONNECTION POINTS

Name: TX0201\_EDI\_OrderIn\_v2

Description: Now with ADID lookup!!

Active

Last Updated by: Daniel Isaksson

Last Updated on: Nov 11, 2025, 1:00:57 PM

Last Activated on: Jan 19, 2026, 3:58:06 PM

Notifications: 0

Show Less

Application, Database, Network, File, API, Message Queue, Kinesis Stream, Kafka, Retrieve, Query, Ingest, Workflow, Mapping, Splitter, Script, Parallel, Filter, Routing, Merge, Wait

```
graph LR; Start((Start)) --> Split1{+}; Split1 --> Node1[ims_to_ion]; Node1 --> Node2[Set AE: 200_S...]; Split1 --> Node3[SE_Pipechain...]; Node3 --> Node4[Set AE: 200_SE1]; Node2 --> Merge1{X}; Node4 --> Merge1; Merge1 --> Node5[MappingSetDo...]; Node5 --> Split2{+}; Split2 --> Node6[LookupCustomer]; Node6 --> Split3{+}; Split3 --> Node7[LoadToProcess]; Node7 --> Node8[AddressIDWor...]; Node8 --> Node9[SalesOrderTo...]; Node9 --> Node10[m3]; Split3 --> Node11[File1]; Node10 --> Merge2{X}; Node11 --> Merge2; Merge2 --> End((End))
```

# Workflow sends task to distribution group. One or multiple end users

Workflow TX001\_AddressID

← 📄 🔄 📌 📤 🔌 🗑️ USAGE

Name \*

Description

Find the correct address using reference number  
 Fill in AddressID

Active ★

Archive Data ⓘ

Send Finished Workflow Data to Data Fabric

Version 33

Last Updated by  
Maria Pusker

Last Updated on  
Oct 20, 2025, 9:13:00 AM

Last Activated on  
Oct 17, 2025, 3:11:50 PM

[Show Workflow Properties](#)

Notifications 0 1

[Show Less](#)

▲ BlankADID  
Parameter is unused in the workflow.

```

            graph LR
            Start((Start)) --> GetAddressID[GetAddressID...]
            GetAddressID --> GetCustomerN[GetCustomerN...]
            GetCustomerN --> SetDrillbackPar1[SetDrillbackPar...]
            SetDrillbackPar1 --> SetDrillbackPar2[SetDrillbackPar...]
            SetDrillbackPar2 --> Decision1{ }
            Decision1 -- Yes --> SetAddressID[SetAddressID]
            Decision1 -- No --> AddAddress[AddAddress]
            SetAddressID --> Decision2{ }
            AddAddress --> Decision2
            Decision2 --> End((End))
        
```

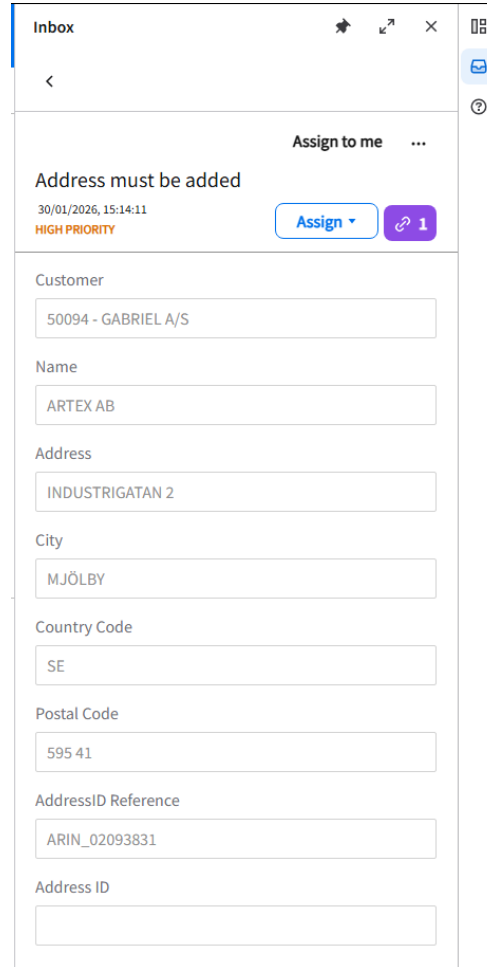
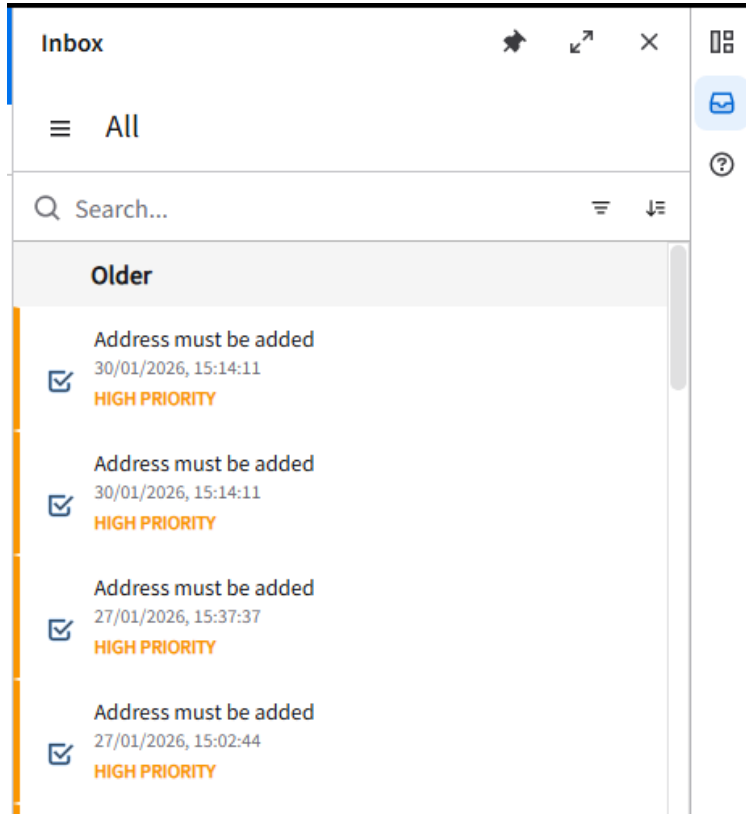
Workflow Properties

[Parameters](#) [Drill Backs](#) [Structures](#) [Authorizations](#) [Service Account](#) [Retention Policy](#)

+





<input type="checkbox"/>	Name	Type	Code Name	Group	Input	Output	Use Initial Value if Null	Initial Value
<input type="checkbox"/>	AccountingEntity	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A
<input type="checkbox"/>	AccountingEntity/DBP arameter	STRING			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	AddressIDReferenceM3	STRING			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	AddressAdded	STRING			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	AddressID	STRING			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	AddressIDReference	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A
<input type="checkbox"/>	AddressLine1	STRING			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A
<input type="checkbox"/>	AddressLine2	STRING			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	AddressLine3	STRING			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	



# Task landing in inbox with adress information that does not exist in M3



## From task drilldown into M3 to search for existing addresses

Inbox


<    

Assign to me ...

Address must be added

30/01/2026, 15:14:11  
HIGH PRIORITY

Assign ▾  1

View Addresses

Customer

50094 - GABRIEL A/S

Name

ARTEX AB

Address

INDUSTRIGATAN 2

City

MJÖLBY

Country Code

SE

Postal Code

Find or create address. Update address ID in the task and finish task. Incoming message in ION updated and the sent to MEC/IEC for processing

CMS100 Custom list

Actions Options Related Tools | + [Icons] | TEXLA TEST TEXLA INDUSTRI AB [Search: ARTEX]

Filter Options ^

Sorting order: 1-Customer View: 1-Customer Address

Customer: 50094 [Apply]

Showing 4 filtered hits on search for ARTEX

Customer	Name	Address	City	Country Code	Postal Code	AddressID Refere...	AddressID
50094	ARTEX AB	INDUSTRIGATAN 2	MJÖLBY	SE	595 41		SE27
50094	SIA ARTEX LATVIA	CELTNIEKU IELA 10	SMILTENE	LV	4729	SIA_02094946	SE54
50094	SIA ARTEX LATVIA	CELTNIEKU IELA 10	SMILTENE	LV	4729	FACTOR_02094857	SE39
50094	SIA ARTEX LATVIA /LANAB	CELTNIEKU IELA 10	SMILTENE	LV	4729	ARTEX_02091039	SE36

Inbox

Address ID added ...

Address must be added

30/01/2026, 15:14:11 HIGH PRIORITY [Assign] [1]

Customer: 50094 - GABRIEL A/S

Name: ARTEX AB

Address: INDUSTRIGATAN 2

City: MJÖLBY

Country Code: SE

Postal Code: 595 41

AddressID Reference: ARIN\_02093831

Address ID: SE27

# User creation process

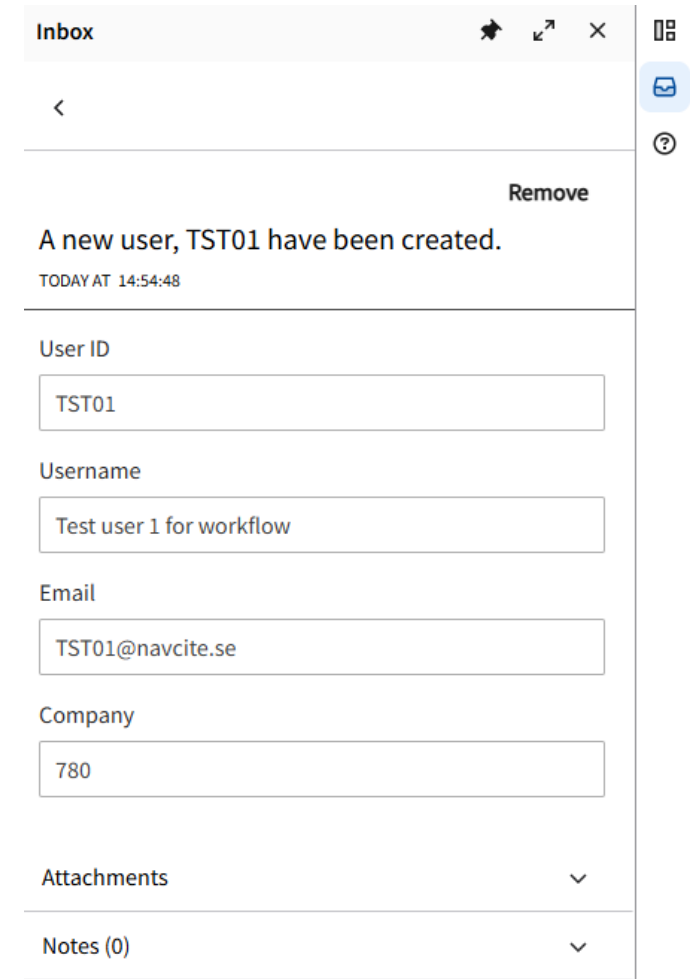
Automatic background workflow to add M3 data required on the M3 user

# User creation process

- Where we were
  - AD integration creates user automatically in M3
  - Roles automatically added making sure access rights are correct both functional access and divisional access. Done thorough SCIM groups in Infor federation services
  - Printout settings and F13 settings needed to be set up manually

# User creation process

- Where we are
  - Workflow used to add printer settings (MNS204/MNS205) depending on role setup
  - Workflow used to add F13 settings copying settings from a template users
  - Automated user creation process
  - Message sent to user and responsible when user creation completed
  - If any error message sent to IT



The screenshot shows an email client interface. At the top, there's a header bar with the word "Inbox" on the left and navigation icons (back, forward, close) on the right. Below the header, there's a back arrow on the left and a "Remove" button on the right. The main content of the email is a notification: "A new user, TST01 have been created." followed by the timestamp "TODAY AT 14:54:48". Below this, there are several fields with their corresponding values: "User ID" with "TST01", "Username" with "Test user 1 for workflow", "Email" with "TST01@navcite.se", and "Company" with "780". At the bottom, there are two expandable sections: "Attachments" and "Notes (0)".

User ID	TST01
Username	Test user 1 for workflow
Email	TST01@navcite.se
Company	780
Attachments	▼
Notes (0)	▼



# Questions



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