



Infor CloudSuite Industrial (SyteLine) *Technology*

LOGICDATA[®]

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CloudSuite Industrial (SyteLine)

Infor Mongoose Framework

Infor CloudSuite Industrial are built with extensibility from the ground up. The Infor Mongoose Framework gives you the ability to adapt the system to your business, rather than requiring you to force your business to fit the software. The Infor Mongoose Framework model makes it possible to adapt the application to new business requirements without incurring the high cost and delays involved in modifying or writing new code. This, in turn, makes it feasible to rapidly adapt the system to your business, while continuing to receive new features and fixes.

In most competitor ERP applications, adaptability is provided as a separate layer over the base application, so your ability to extend and build new functionality is limited. The changes you need to make will inevitably involve modifying the base application logic and which means modifying code. But the Infor Mongoose base application is built with the same metadata-driven approach provided to customers, so your capabilities to extend and adapt the application are virtually unlimited.

To meet these objectives, the Infor Mongoose Framework uses a model defined by metadata (data defining the application behavior, stored in rows and columns in databases); for the user-interface (forms), the business objects (IDOs, or Intelligent Data Objects); and business processes (Application Event System). In the metadata approach, changes can be kept separate from the base application and your changes automatically upgrade.

The Infor Mongoose Framework makes it possible to perform the following changes without programming

- Extend any portion of any screen: By using the same tools as those used to build the base application, you can extend any portion of any screen, including new tabs, new fields, validation logic, and enabling logic. You can even embed controls you write in technologies like Silverlight in any CloudSuite Industrial form.
- Extend any business process: Using the Application Event System (AES), you can define rules that execute whenever an insert or update occurs to any business object (order, item, etc.) in the application or when

trigger conditions you define become true. These event actions include updating any data in the application, automating any process provided by the application, prompting a user or group of users to approve the change, integrating to an external application, or simply notifying users of the change. Defining these types of actions is all done without writing code.

- Extend any business object: You can extend any of the Intelligent Data Objects (IDOs) to create new relationships to other IDOs in the base application, add new calculated fields, add new tables, and publish their properties on the IDO. You also can create your own IDOs over your tables. All of these are done without writing code, although if you want you can write your own .Net classes and have that logic incorporated in the IDO processing as well.
- Add completely new functionality: You can build new functionality, such as new tables, IDOs, and forms as required by processes unique to your business. These are automatically deployed with the base application and automatically take advantage of other framework functions, such as translations, Web Service access, and the Application Event System.
- Build forms for use as standalone web pages, like your own vendor portal, which can also adapt to alternative layouts for various devices like smart phones.
- Introduce workflow, automation, or other business process-level changes using the Application Event System, without writing code. With drag-and-drop editing, you can construct rules that can, for example, query, update and execute functions on any IDO, notify or prompt users, or invoke web services from external applications. You can have your rules executed on a wide variety of events, including trigger rules you specify (e.g. item quantity on hand is below safety stock), or whenever data on an IDO is updated in various ways.

This ability to extend and tailor the application helps you to lower the cost of your IT ownership and increase productivity for your business.

Sql Tables

Table Name

1 itemloc_mst

Attributes

Schema: dbo

Table Name: itemloc_mst Multi-Site

Columns... Update Current Table Apply Database...

Modify Constraint... New Constraint... SQL Data Types...

Constraint Type	Constraint Name	Unique	Clustered Index	Description
1 Primary Key	PK_itemloc_mst	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	site_ref, whse, item, loc
2 Index	IX_itemloc_mst_RowPointer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	RowPointer, site_ref
3 Index	IX_itemloc_mst_loc	<input checked="" type="checkbox"/>	<input type="checkbox"/>	whse, loc, item, site_ref
4 Index	IX_itemloc_mst_item_loc_wc_w...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	item, loc, wc, whse, site_ref
5 Index	IX_itemloc_mst_item_wc_whse_...	<input type="checkbox"/>	<input type="checkbox"/>	item, wc, whse, rank, site_ref
6 Index	IX_itemloc_mst_whse_item_rank	<input type="checkbox"/>	<input type="checkbox"/>	whse, item, rank, site_ref
7 Foreign Key	FK_itemloc_mst_lbr_in_proc_ac...	<input type="checkbox"/>	<input type="checkbox"/>	(lbr_in_proc_acct, site_ref) REF ch...
8 Foreign Key	FK_itemloc_mst_out_acct_unit1...	<input type="checkbox"/>	<input type="checkbox"/>	(out_acct_unit1, site_ref) REF unitc...
9 Foreign Key	FK_itemloc_mst_lbr_in_proc_ac...	<input type="checkbox"/>	<input type="checkbox"/>	(lbr_in_proc_acct_unit4, site_ref) R...
10 Foreign Key	FK_itemloc_mst_fovhd_in_proc_...	<input type="checkbox"/>	<input type="checkbox"/>	(fovhd_in_proc_acct_unit2, site_ref)...
11 Foreign Key	FK_itemloc_mst_fovhd_in_proc_...	<input type="checkbox"/>	<input type="checkbox"/>	(fovhd_in_proc_acct_unit1, site_ref)...
12 Foreign Key	FK_itemloc_mst_inv_acct_unit3...	<input type="checkbox"/>	<input type="checkbox"/>	(inv_acct_unit3, site_ref) REF unitc...
13 Foreign Key	FK_itemloc_mst_vovhd_acct_un...	<input type="checkbox"/>	<input type="checkbox"/>	(vovhd_acct_unit3, site_ref) REF u...
14 Foreign Key	FK_itemloc_mst_inv_acct_site_ref	<input type="checkbox"/>	<input type="checkbox"/>	(inv_acct, site_ref) REF chart_mst(...

IDO Properties (Linked)

Property Name	Property Attributes
1 CreatedBy	Property Name: CreatedBy
2 UpdatedBy	Property Class:
3 CreateDate	Property Type: Bound to Column
4 RecordDate	Description:
5 RowPointer	IDO Name: LD_Programs
6 NoteExistsFlag	Column Table Alias: ld_pgm LD_Program
7 InWorkflow	Column Name: CreatedBy
8 ProgramID	Sequence: 1 <input type="checkbox"/> Pseudo Key New Property...
9 ProgramDesc	
10 StartDate	
11 EndDate	

Add new tables and IDOs through a simple interface.

CloudSuite Industrial (SyteLine)

Multi-Company/Multi-Site Operations

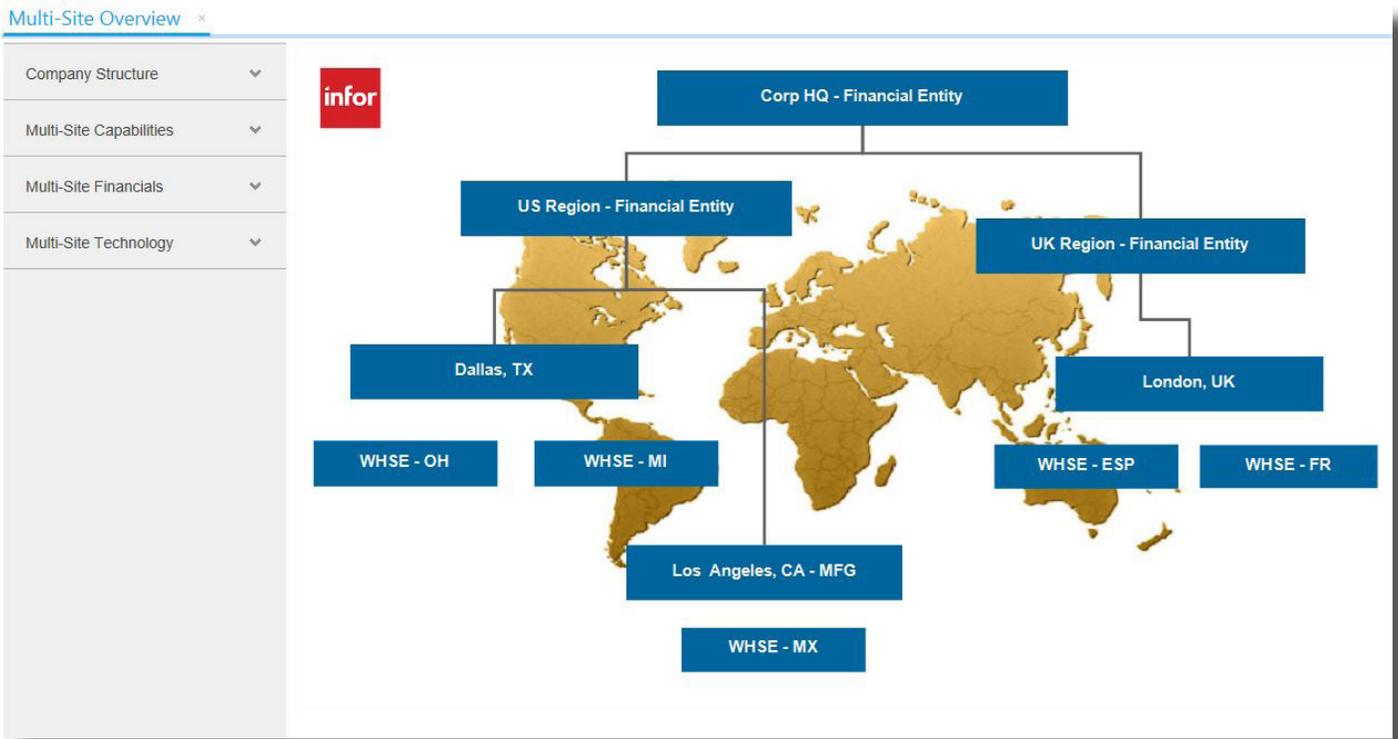
Infor CloudSuite Industrial are inherently multi-company, multi-site, multi-lingual and multi-currency solutions. CloudSuite Industrial allows your companies to work together or separately based on your requirements. A “site” or organization/company represents any place where work is done. As such, a “site” may correspond to company headquarters, a manufacturing plant, or a distribution center.

Sites and Entities: Sites have relationships with each other. They combine to form financial entities, supply each other parts, Ship-to common customers, and share administrative functions.

Sites may report to financial reporting units called “entities.” An “entity” has a specific currency, a chart of accounts, and the ability to produce financial statements. The entity is the highest-level organizational component. For financial reporting purposes, you can group sites under a particular entity. However, sites can belong only to one entity.

Sites can be set up in multiple databases, or you can define multiple sites within a single CloudSuite Industrial database. You can also utilize a combination of both – a hybrid model.

- **Inter-Site/Warehouse Transfers**—CloudSuite Industrial provides functionality for any one site to enter a Multi-Site Quantity Move or Transfer Order for items to be RECEIVED at that site from an additional shipping site. CloudSuite Industrial also provides functionality for any one site to enter a Multi-Site Quantity Move or Transfer Order for items to be SHIPPED to an additional receiving site.
- **Centralized and Decentralized Order Entry**— Any site can originate a multi-site order, and line items can be shipped from any site. Credit checking and inventory visibility are provided from site to site. In Multi-Site order entry, you can enter an order that spans across sites. In decentralized environments, you can enter an order at any site.
- **Centralized Purchasing** — Any site can set up a PO that encompasses purchase orders to be created remotely at multiple target sites. A multi-site purchase order can take advantage of quantity breaks from the vendor for items that are required at multiple sites. Items being purchased may be subject to a Master Buy Agreement. This option accumulates quantities of like items from one vendor, to determine the best quantity break available. You can create printed documentation that groups purchase order information from various sites. Cross site vendor maintenance can also be done.
- **Multi-Site Linked MRP and APS** — CloudSuite Industrial supports site-based, linked MRP and APS. When you run the Planning activity in Global mode, the activity regenerates the plan at each site in order of site priority (defined on the Planning Parameters form). The activity generates planned transfer orders for Transfer items across sites.
- **Multi-Site Transfer Accounting** — Multi-Site Transfer accounting automates inter-company financial transactions and inter-company financial consolidation. CloudSuite Industrial provide parameter set-up for profit/cost eliminations, and offers separate account tracking for inter-company profit, cost, Accounts Receivable, Accounts Payable, sales, and cost of sales.
- **Manual Voucher Builder** — The Manual Voucher Builder allows you to quickly create a voucher in one or more sites for a single vendor’s invoice. On any site, you can specify the portion of the vendor invoice amounts to allocate. You can enter all or some subset of the vendor invoice amounts and use the originating site as the To Site.
- **Multi-Site Journal Processing** — The Multi-Site Journal Processing activity allows for the creation of a single



journal processing form that will distribute transactional information into each site's respective MS Journal.

- Multi-Site Items, Customers, and Vendors — Allows you to set up Items, Customers, and Vendors at a master site and copy these records to other sites.
- Multi-Site copy of Bills of Materials — Allows you to copy Bills of Materials from one site to other sites.
- Multi-Site Vouchering — Multi-Site Vouchering functions enable a single user to create a cross site voucher based on PO generated receipts.

CloudSuite Industrial (SyteLine)

System Manager

You manage and administer Infor CloudSuite Industrial using various end-user tools built into the product. Some of the management tools available within both applications include

- CloudSuite Industrial Configuration Wizard — Allows administrators to create and configure new environments.
- User Maintenance Screens — Set up new users and administer security settings and user privileges in compliance with US government FedRAMP security requirements.
- License Management Screens — Manage licensed modules and administer user/module privileges.
- Session Management — Monitor and manage user sessions.
- Background Task Administration — Create, monitor and manage background system tasks.
- User Audit Tracking — Monitor user activity with user audit trails which can be set to field level capturing time stamped previous and new values.

- User Extended Tables Administration — Change the schema of the database to add fields that may be required to provide specific user functionality securely and safely.
- Electronic Signature Administration — Assign users electronic signature authorization and determine which tasks require electronic signatures.

SQL tools are designed to aid administrators with the common tasks involved with managing SQL databases.

- Enterprise Manager—Provides centralized view of SQL databases with access to all common administration tasks.
- Query Analyzer—Create, parse, and execute T-SQL queries with ease.
- SQL backup and restore—Create automated online backup routines and maintenance plans to automatically protect your data.
- Query Optimizer built-in tool to analyze and maximize the performance of T-SQL queries.

Set up new users and administer user settings through the User Maintenance Screen.

Users x

User

User ID: crandall Super User

User Description: Cole Randall, Vice-President, Sales & Marketing

User Password: [REDACTED]

Confirm Password: [REDACTED]

Workstation Domain/ID: csgdelcrandall

Editing Permissions: Site Developer

Groups Additional Info Login Information E-mail Address Source Control

	Group Name	Group Description	Primary Group
1	MGR - Order Entry	MGR - Order Entry Group	<input type="checkbox"/>
2	Mobile Executive	Mobile Executive Group	<input type="checkbox"/>
3	sysadmin	System Administrators	<input checked="" type="checkbox"/>

Application Event System

The Infor CloudSuite Industrial Application Event System is a key element in providing an organization with the means for automation of business processes.

Event-driven functionality is rapidly becoming a fundamental core desktop technology, as important and omnipresent as eMail, spreadsheets, databases, intranets and the internet.

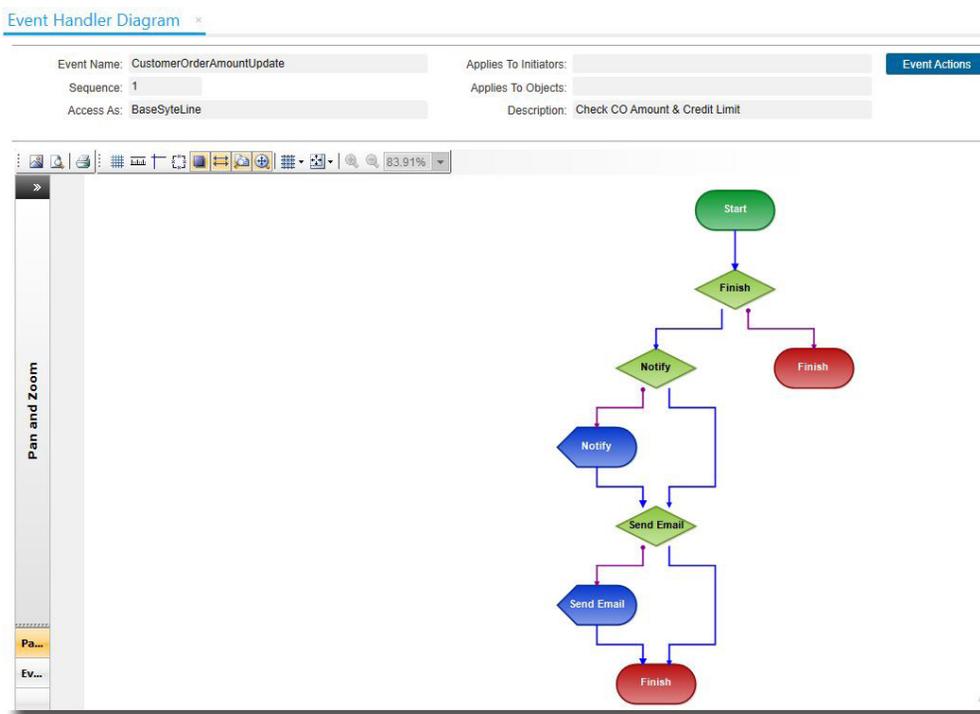
The Application Event System enables the right people to make the right decisions at the right time. The software's eMail and internet-enabled environment provides Infor information access, delivery and work support across organizational dimensions.

The Application Event System streams the flow of work throughout your enterprise, providing complete visibility and routing of all vital documents, notes and data required for each person in the supply chain. This workflow extends from the executive suite to the factory floor and

including suppliers and customers for quick reaction and execution of tasks necessary for adapting to change rapidly and competing more effectively.

You can export and deliver business information to and from CloudSuite Industrial. Triggered by events in both environments, the Application Event System activates tasks and eMails details for subsequent execution by the user. Information is automatically passed to the appropriate participant at the appropriate time according to a set of intelligent business rules.

Open business issues, such as customer credit issues, proposal sign-off, or purchase order approvals are automatically routed to the designated recipient(s) for action. Once a decision has been made or a task completed, the Application Event System processes the new information into moves the process along until the entire process has been completed.



Easy access for user control of all your business processes.

CloudSuite Industrial (SyteLine)

Microsoft Outlook Integration

For many people, especially those in sales and marketing positions, Microsoft® Outlook® is an essential tool for communication and organization. You use Outlook tools to manage your eMail, your calendar, your task list, and your contacts.

Infor CloudSuite Industrial include a user calendar, task lists, and sales contacts that can be tightly integrated with their Outlook counterparts, so you can work with the same information seamlessly in both environments. With the click of a button, you can selectively duplicate contacts, appointments, and tasks from either Outlook or CloudSuite Industrial into the other application.

When you view eMails in Outlook to or from certain customers, the CloudSuite Industrial details for orders made by that customer display along with the eMail. This coordination of information makes for easy reference when you reply to or call that customer. The details of CloudSuite Industrial customer interactions are also available with the Outlook eMail, so you can see all interactions with that customer and refer to ongoing discussions.

You can also add selected incoming or outgoing Outlook eMails to the CloudSuite Industrial Customer Interactions form by clicking a single button in Outlook.

CloudSuite Industrial Application Search (SAS) can also be used to search and access CloudSuite Industrial directly from Outlook. By defining search terms in both environments, then the Office application's research pane dis-

plays the result of the search in the CloudSuite Industrial database. For example, if a user right-clicks on an item, the results could display the item description plus a link to drill down to the related CloudSuite Industrial form, filtered for that item.

By enabling SmartLink in Microsoft Outlook, when a user opens some eMails in Outlook, text in the eMail that matches a search item displays as a link. The user can click the link to open a CloudSuite Industrial form that displays more information about that text.

The CloudSuite Industrial Explorer module in the Microsoft Outlook navigation pane displays folders, subfolders, and link items letting you access CloudSuite Industrial forms (in the web client) directly from Outlook.

- Outlook Add-In
- eMails added to Customer, Vendor, Prospect, and Sales Contact Interaction Logs with Attachments
- eMails added to CloudSuite Industrial CRM
- Task List associated with Calendar Events
- Sync Contacts and Tasks
- Sync Calendars
- Application Search
- SmartLink
- View the CloudSuite Industrial Explorer

Create User Appointment ×

Subject:	Customer Meeting - Progressive Manufacturing		
Location:	123 Main Street, Costa Mesa, CA 90133		
Starting Time:*	1/29/2016 9:00:00 AM	Remind Date:	1/29/2016 8:00:00 AM
Ending Time:*	1/8/2016 10:00:00 AM	<input checked="" type="checkbox"/> Delete After Reminder	
<div>Meet with Ken Philp regarding new contracts and rates.</div>			
		OK	Cancel

With the click of a button, you can selectively duplicate contacts, appointments, and tasks from either Outlook or CloudSuite Industrial into the other application.

CloudSuite Industrial (SyteLine)

Microsoft Projects Integration

Infor CloudSuite Industrial interface with Microsoft Project®. The interface includes an add-in that adds a CloudSuite Industrial toolbar and menu option to Microsoft Project, similar to the ones in Outlook and Excel. This add-in allows you to pull in data from CloudSuite Industrial into MS Project as well as send data from MS Project to CloudSuite Industrial.

The MS Project add-in is very easy to install and configure. Once the add-in is installed, you can create a CloudSuite Industrial project from within MS Project task data to and from Microsoft Project. If you have MS Project installed on the local machine, import and export buttons appear on the Project Tasks form.

- Sync In, Sync Out, and Enable Auto Sync Out—Sync In and Sync Out synchronize changes on the project between CloudSuite Industrial and the MS Project client.
- Create the following in CloudSuite Industrial using Microsoft Project
 - New projects
 - New estimate projects
 - New project tasks
 - New material resources
 - New work resource (employee, user, etc.)
- Assign existing work resources to different tasks using Microsoft Project

The screenshot shows the 'Project Tasks' form in the CloudSuite Industrial interface. The form is titled 'Project Tasks' and contains the following information:

- Project:** DX00000001
- Status:** Active
- End Date:** 3/30/2012
- Type:** FIX
- Customer:** 12, 0
- Motorin' Mopeds**
- Lake House Cycles**
- Change:** 0
- Task:** 10 Engineering of Motorin' Moped
- Status:** Active
- Task Date:** 10/3/2011
- In Control:**

The form has several tabs: General, % Complete, % Complete Details, WIP, WIP Relieved, Costs, **MS Project**, MS Work Resources, WBS, and User Defined. The 'MS Project' tab is currently selected.

Below the tabs, there are fields for Predecessors, Start Date (9/28/2011), End Date (12/15/2011), and Duration (0.00 Days). There are also checkboxes for 'Firm Start Date' and 'Firm End Date'. At the bottom right of this section are two buttons: 'MS Project Export' and 'MS Project Import'.

At the bottom of the form, there is a 'Parent Task' field and a tree view showing the project structure:

- Motorin' Mopeds
 - Engineering of Motorin' Moped, 10
 - Constructing Motorin' Moped Test Site, 20
 - Manufacture of Motorin' Moped, 30

Personalization

Infor CloudSuite Industrial provides customers with the ability to change the look and behavior of forms without impacting source code.

This provides you the ability to adapt CloudSuite Industrial where required to provide not only a functional fit but more importantly to achieve a business process fit.

CloudSuite Industrial customers are able to take an 'as shipped' form and change its look and behavior to best suit the requirements. These changes are migrated forward in conjunction with patches and upgrades to the base product.

Changes to forms can be made for use by an entire site, a group of users, and individual user level.

Changing forms is a secure activity and the level of personalization that is allowed to a user can be set from 'none' to full control. Customers are able to add and change the position of fields, buttons and labels on a form as required. The default size and shape of a form can also be changed.

Such personalizations are made through the user interface and include copies of forms and form objects, new forms and form objects, and changes to forms and form objects. These changes can automatically be migrated forward in conjunction with patches and upgrades to the base product.

Personalizations can be made to

- Forms
- Variables
- Menus
- Strings
- Validators
- Scripts
- Event handlers
- Property Class Extensions
- Component Classes
- UETs (User Extended Tables, 8000 bytes per table)
- UDFs (User-Defined Fields, 44 predefined per table)

