



**infor**

# Knowledge Transfer Session

What's New with Infor ION 12



# Session Introduction and Launch Plan

- **Session Description**
  - In this session we will discuss new functionality/highlights specifically for Infor Document Management as part of the new Xi Platform 12
- **Recommended prerequisites (knowledge):**
  - What's new with Xi Platform 12
  - Basic knowledge of previous versions of Infor ION
- **This session is applicable for the following industries:**
  - All Industries
- **Target Audience**
  - Pre-Sales, Consultants, Infor Partners
- **Launch Plan**
  - Planned Sales Initiation and GA date: May 2, 2016

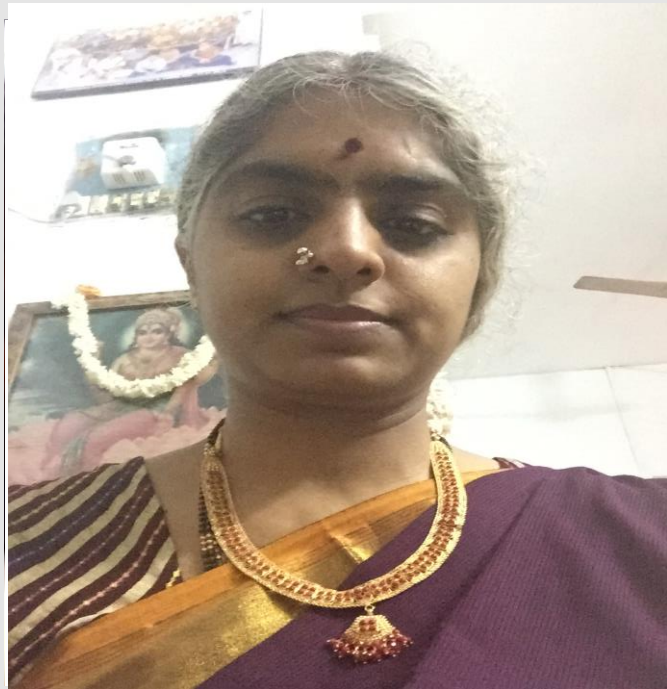


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# Your guide



## **Sarada Vempati** *Sr Product Manager*

- Has been with Infor for 19 years
- Sr Product Manager for Infor ION
- Also manages ION API, ION Grid



# Agenda



## Overview

- Background/Problem
- Solution
- Benefits

## What's New

- New HTML5 ION Desk
- Rich Hybrid Connectors
- Features and Improvements

## Resources

- Key Resources Infor.com
- Key Resources Sales Portal
- Where to Find More Information





**infor** Overview



# Background/Problem

- Legacy Silverlight based ION Desk
- Is not full Open stack
- No mapper for BOD<->XML transformations
- Registry is file based
- Search requires improvements



# Solution

- New HTML 5 desk, completely rebuilt
- With HTML5 Desk, ION is on Open stack.
- A web-based graphical mapper for XML <-> BOD
- Registry as a service
- One view search, now based on Solr
- Grid 12.0, intuitive UI and simple navigation





# Infor ION 12 Connectivity Options onPrem

## INFOR

## LEGACY Apps / 3<sup>rd</sup> Party APPS or MIDDLEWARE

## BUSINESS ADAPTERS

INFOR  
STANDARD

DB CONNECTOR

JMS (e.g. IBM, Tibco, Webmethods, etc.)

MS CRM DYNAMICS

INFOR  
CLOUDSUITE

FILE CONNECTOR

INFOR I/O Box  
CONNECTOR

SALESFORCE.COM

EAM

WEB SERVICES  
CONNECTOR

SAP

XM

MOTION

SYTELINE

SALESLOGIX

ORACLE EBS

CLOVERLEAF

New Amazon-based



# Overview Summary



Xi Platform alignment



Web-based Graphical Mapper



Advanced Solr search



Open source stack



**infor** What's New



# Align ION to the Xi Platform

- Single Xi Platform Installer
- ION Desk is an application in Ming.le
- It can be accessed only through Ming.le
- To access ION, at least one user with Mingle Enterprise role is required
- Activity Deck is no longer bundled with Xi Platform



infor Homepages

EDIT ...

Homepages Infor Ming.le™ Infor ION API

ION Desk Document Manageme ...

000028 created...  
000027 created...

### Tasks

- Create Expense forTravelled for busin...  
3/29/2016 5:35:38 PM
- Please Review order SOR000043  
3/29/2016 5:20:20 PM

### Tasks Execution Time

No data available

### Tasks by Status

No data available

### Workflow Activity Locator

ExpenseReport(Workflow ID: 5)

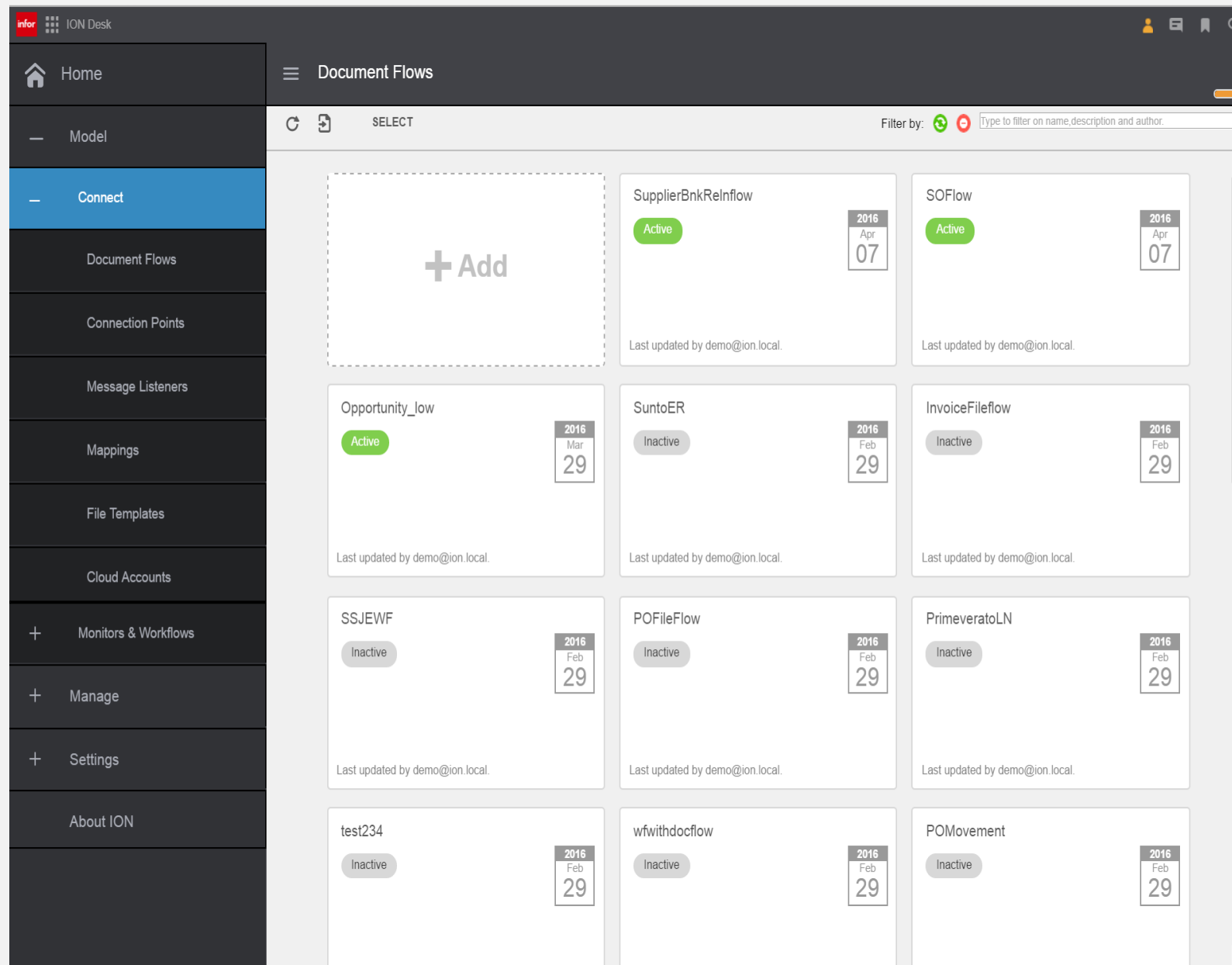
```
graph LR; Start(( )) --> CreateExpense[CreateExpense]; CreateExpense --> End(( ));
```

www.infor.com Menu + ... IDM Documents ...





# Improved ION Desk



- Tiled View
- Filter on Overview pages by
  - Name
  - Description
  - Active
  - Inactive
- MEC Mapper is not bundled
  - New Graphical mapper in place.



# Graphical Mapper

The screenshot shows the Infor Graphical Mapper web interface. The sidebar on the left contains navigation options: Home, Model, Connect, Document Flows, Connection Points, Message Listeners, Mappings (highlighted), File Templates, Cloud Accounts, Monitors & Workflows, Manage, Settings, and About ION. The main content area displays a grid of mapping cards. Each card includes a title, status (Inactive), a date stamp (e.g., 2016 Mar 23), a description of the mapping, and the last updated user (demo@ion.local). A '+ Add' button is visible in the top left of the main area.

- **New Web based graphical mapper**
- **Smart Matching**
- **Provides out of box functions**
  - Data-type casting
  - Date-time, String etc
  - User-area properties (Infor BOD specific)
- **Ability to define custom functions**
- **Generates XSL 2.0**
- **Uses Saxon Home Edition**



# Graphical Mapper

The screenshot displays the Infor Graphical Mapper web interface. The main window shows a mapping configuration for a field named "MySO\_SO". The source is "Sync.MySalesOrder" and the target is "Sync.SalesOrder". The mapping is configured with "Data Type Casting" and "Smart Matching" options, both of which are checked. A "Min. Probability" slider is set to 100%. The interface also shows the user "demo@ion.local" and the last update time "Mar 3, 2016, 11:22:13 AM".

- New Web based graphical mapper
- **Mapping Configuration**
  - **Smart Matching**
  - **Data-type casting**
- Provides out of box functions
  - Date-time, String etc
  - User-area properties (Infor BOD specific)
- Ability to define custom functions
- Generates XSL 2.0
- Uses Saxon Home Edition



# Graphical Mapper

The screenshot displays the Infor Graphical Mapper interface. On the left, a sidebar lists various function categories: Comparison, Data Type Casting, Date and Time (with sub-items like Adjust Date and Time to Time Zone, Adjust Date to Time Zone, Adjust Time to Time Zone, Current Date, Current Date and Time, Current Time, Format Date, Format Date and Time, Format Time), Logical, Math, String, and Template Functions (with sub-items like create-property, fill-property, get-first-item, get-first-value). The main workspace is split into 'Source' and 'Function' panes. The 'Source' pane shows a tree view of 'SyncMySalesOrder' with sub-elements: languageCode, releaseID, systemEnvironmentCode, versionID, ApplicationArea, and DataArea. The 'Function' pane shows a mapping configuration for 'XSLT'. It includes a 'Source: Sync.MySalesOrder' block with a dropdown menu for 'orderID' and a 'string' input field. A 'Function: Cast to Normalized String' block is connected to the source, with 'anySimpleType' and 'normalizedSt' as parameters.

- New Web based graphical mapper
- Mapping Configuration
  - Smart Matching
  - Data-type casting
- **Provides out of box functions**
  - **Date-time, String etc**
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# Improvised Search

The screenshot shows the Infor OneView search interface. At the top, there's a search bar with a 'Date and Time Range' dropdown set to 'All', a 'Document Type' dropdown, and a 'Document ID from message content' field. A 'Handled in Activation Policy' dropdown is also visible. The 'Display View' is set to 'Timeline'. There are 'SUBMIT' and 'RESET' buttons. Below the search bar, a 'Documents' section displays a list of results. A dropdown menu is open, showing 'HANDLED IN' options: 'Handled in Connection Point', 'Handled in Mapping', 'Handled in Message Listener', 'Handled in Monitor', and 'Handled in Workflow (document flow)'. The main results area shows several document cards with counts in blue circles: 1, 2, 1, 1, 3, 2, 2, 2, 8. The cards include details like 'infor.file.supplie...', 'DUB\_OP10000...', 'SCA000415', 'SCA000419', 'SCA000420', 'SCA000421', and '100000055'. The interface also shows 'Sort By: Document Type' and 'Ascending' options.

- One view search based on Solr
- Search by
  - Documents Handled In
    - Monitors
    - Activation Policies
    - Etc
  - Document Status





# Grid 12.0

The screenshot displays the Infor ION Grid Management web interface. The browser address bar shows the URL: `https://iondemo.ion.local:9543/grid/ui/soho/index.html#/home`. The navigation menu includes Home, Hosts, Applications, Nodes, Monitoring, Security, and Configuration. The main content area is divided into three sections:

- Notifications:** A list of 18 notifications, including "Host router on host IONDEMO died unexp..." and multiple "Failed to bind fixed port" messages.
- Hosts:** A table showing the status of the IONDEMO host.
- Applications:** A table showing the status of various applications.

Host	Node Co.	CPU	Memory
IONDEMO	11	5%	76%

Application	Node Count	Status	Errors
c4ws		❌	0
DocumentArchive	2	✅	0
Homepages	1	✅	0
IONDesk	1	✅	0
IONSearch	1	✅	0
IONService	2	✅	0
SAMLSessionProvider	2	✅	0
WindowsSessionProvider		⚪	

- **Intuitive Admin UI**
  - New summary view
  - Key User actions – one click away
  - Hot Keyes support
- Notifications
- WAR deployment support
- Host Agnostic



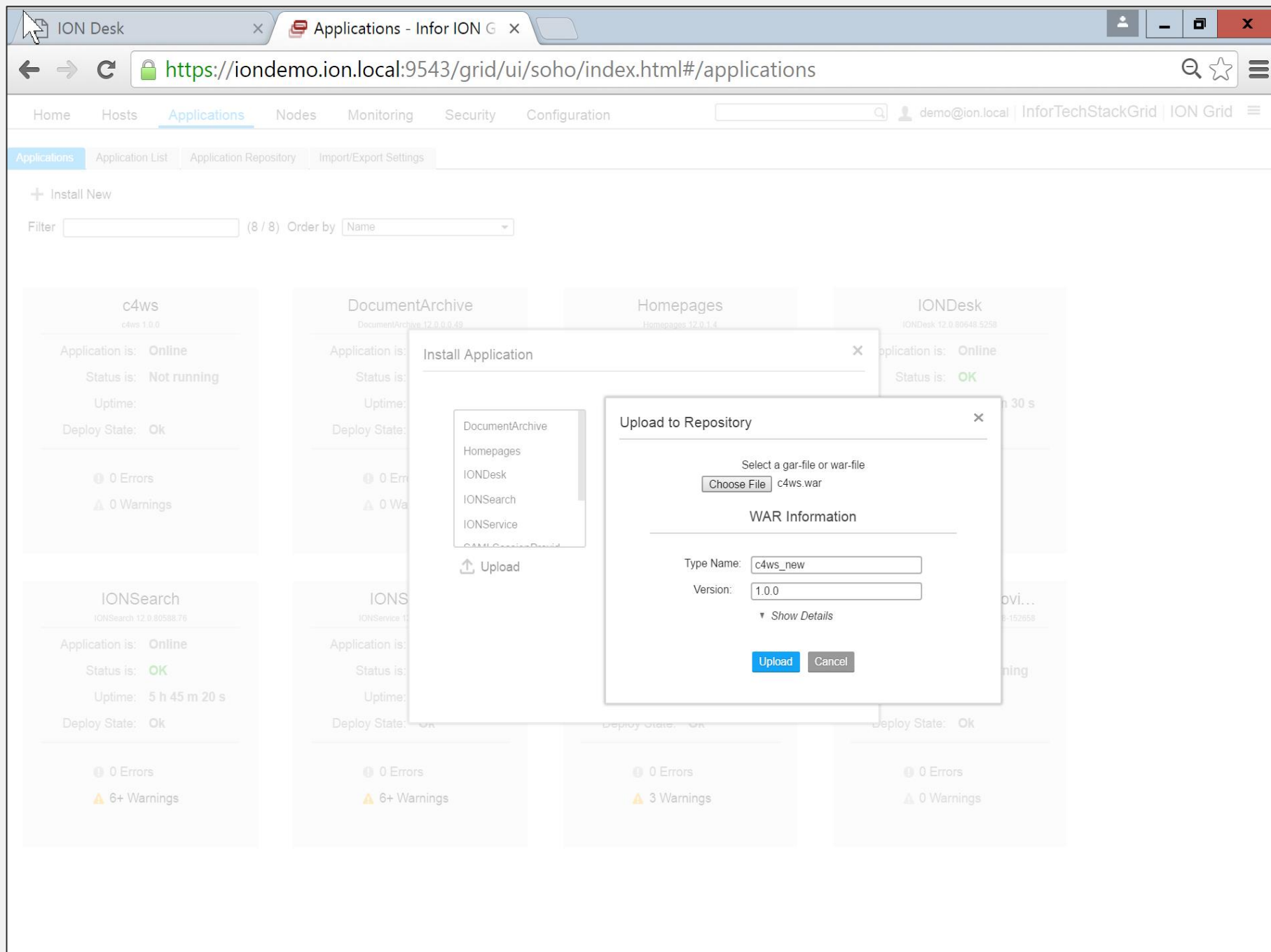
# Grid 12.0

The screenshot displays the Infor Grid 12.0 Monitoring interface. The browser window shows the URL `https://iondemo.ion.local:9543/grid/ui/soho/index.html#/monitor`. The navigation bar includes links for Home, Hosts, Applications, Nodes, Monitoring (active), Security, and Configuration. The Monitoring sub-menu includes Grid Monitor, Log Files, Log Levels, Log Archiver, Diagnostics, Alarms, Notifications, and Status Report. The main content area is divided into three columns: Application Event, Application Status, and Heap Usage. Each column contains a summary card for 'IONSearch' and 'IONService' with status indicators (Enabled/Disabled), recipient counts, and triggered counts.

- Intuitive Admin UI
  - New summary view
  - Key User actions – one click away
  - Hot Keyes support
- **Notifications**
  - **Standard**
  - **Custom/configurable**
- WAR deployment support
- Host Agnostic



# Grid 12.0



## Intuitive Admin UI

- New summary view
- Key User actions – one click away
- Hot Keyes support

## Notifications

- Standard
- Custom/configurable

## WAR deployment support

- **Simple WARs**
- **Not a J2EE container**
- **Leverage SAML SP for security**

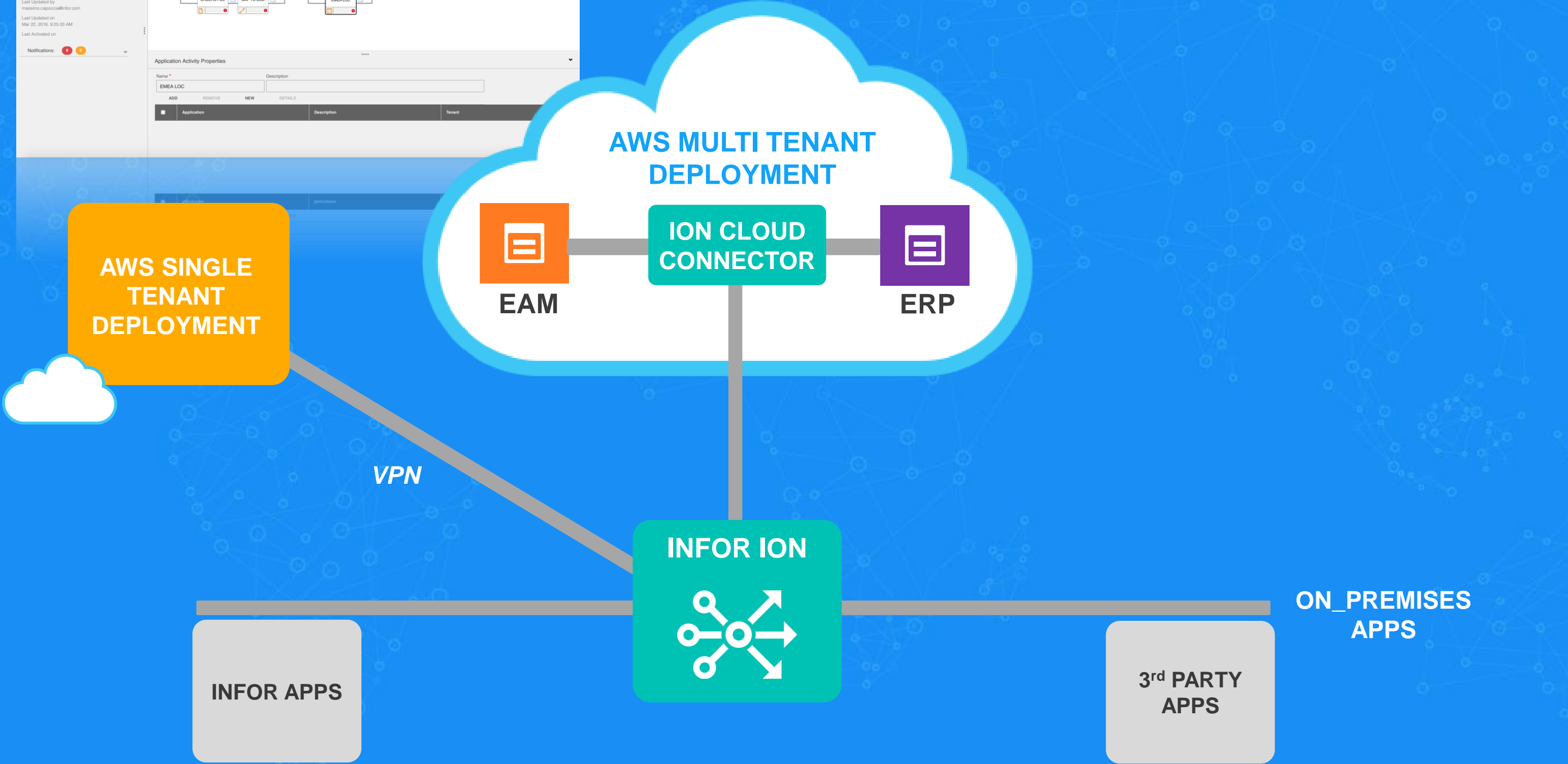
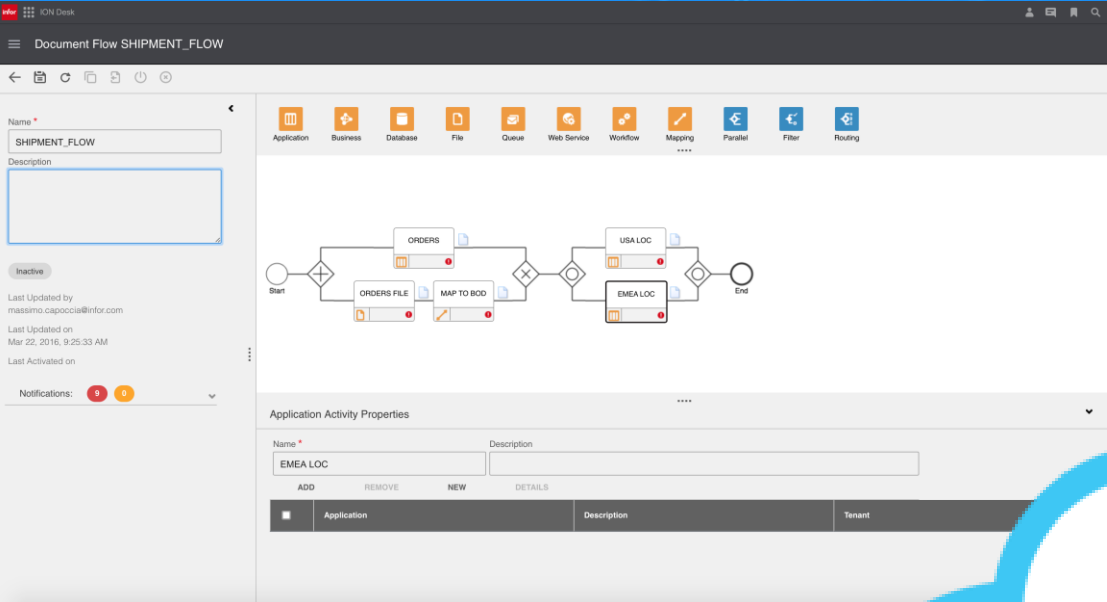
## Host Agnostic



# Supported Deployments

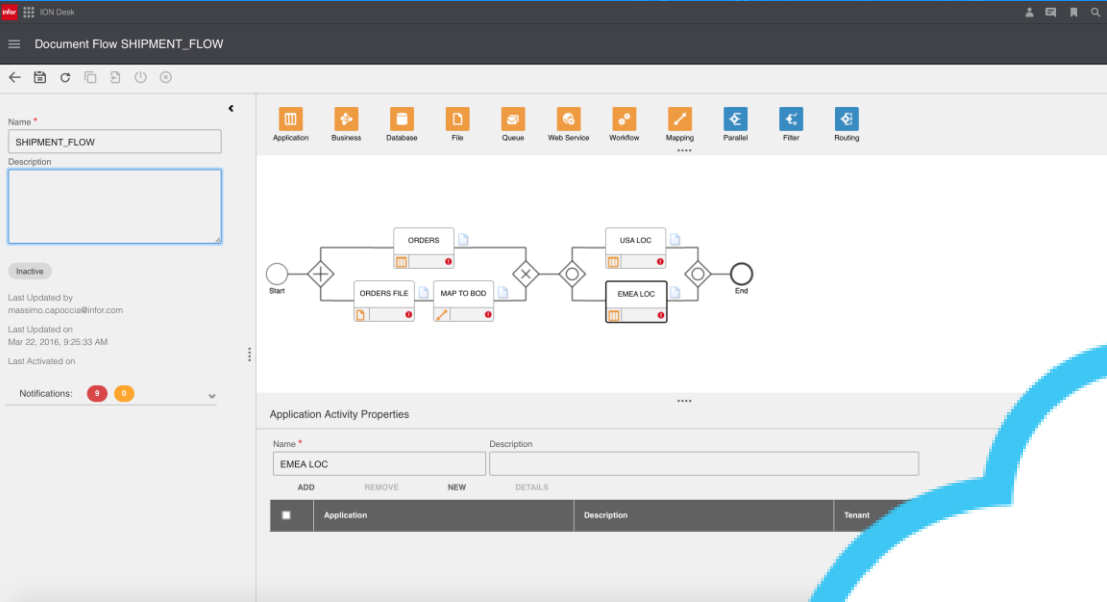


# Hybrid Execution





# Hybrid Execution



**ON\_PREMISES APPS**





# What's New Summary



Xi Platform alignment



Rich Connectivity for Hybrid scenarios



Web based Graphical Mapper



Open source stack

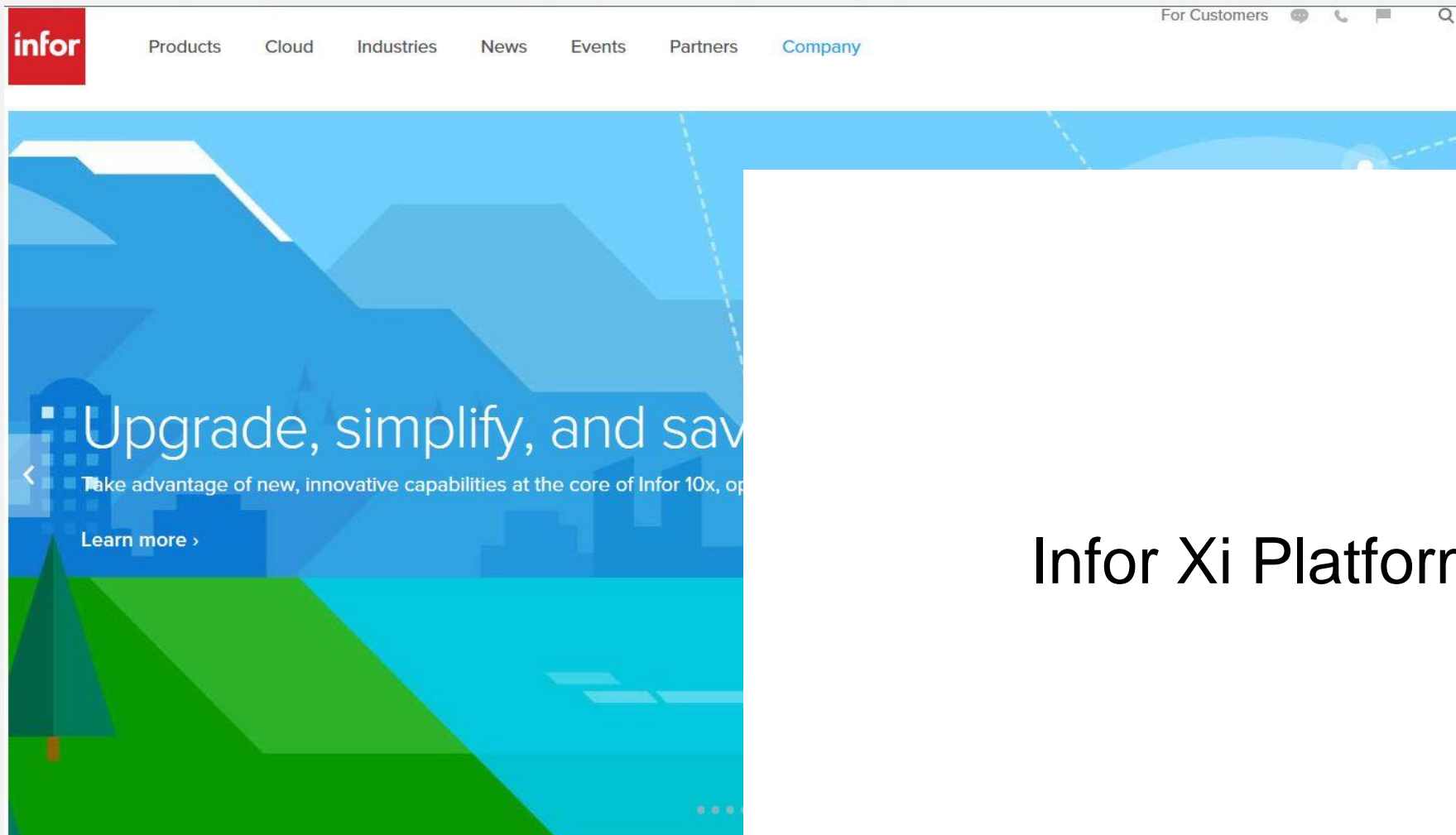
**DEMO**



**infor** Resources



# Key Resources Infor.com



Infor Xi Platform web coming





# Key Resources Sales Portal (internal)



The screenshot displays the Infor Sales Portal interface. At the top, there is a search bar and a navigation menu with categories: Infor Technology, Products, Infor CloudSuite, Industries, Marketing, Operations, Partner Sales, and Services. The main heading is "Infor Document Management". Below this, there is a breadcrumb trail: "Infor Sales Portal > Infor > Technology > Infor Document Management". A "Key Sales Tools" section includes a "Get the Field Pack" button. The page is divided into two columns: "Customer Facing" and "Internal Resources".

Customer Facing	Internal Resources
<ul style="list-style-type: none"><li> Presentations<ul style="list-style-type: none"><li>Executive Overview</li><li>Detailed Presentations</li></ul></li><li> Demos<ul style="list-style-type: none"><li>Demos</li></ul></li><li> Solution Details<ul style="list-style-type: none"><li>ROI Calculator</li></ul></li></ul>	<ul style="list-style-type: none"><li> Collateral<ul style="list-style-type: none"><li>Brochures</li><li>Data Sheet</li></ul></li><li> Customer Details</li><li> Sales Tools<ul style="list-style-type: none"><li>Battlecard</li><li>Sales FAQ</li><li>RFQ/RFP/RFO FAQ for Document Management</li><li>Field Pack Access Guide</li><li>Product Information Wizard</li></ul></li><li> Solution Details<ul style="list-style-type: none"><li>Roadmap</li><li>Geo Readiness Reports</li></ul></li><li> Training<ul style="list-style-type: none"><li>Recorded Presentations</li><li>Training Documents</li></ul></li></ul>

- Access and review:**
1. Presentations
  2. Demo
  3. Sales Tools
  4. Training

Visit the IDM sales portal by navigating to [https://salesportal.infor.com/Infor/Technology/Document\\_Mgmt/Pages/default.aspx](https://salesportal.infor.com/Infor/Technology/Document_Mgmt/Pages/default.aspx)



# Go-to Summary

Location	Link	Target
<b>Infor.com</b>	<a href="http://www.infor.com/solutions/technology/">http://www.infor.com/solutions/technology/</a>	Open
<b>Sales Portal</b>	<a href="https://salesportal.infor.com/Infor/Technology/Document_Mgmt/Pages/default.aspx">https://salesportal.infor.com/Infor/Technology/Document_Mgmt/Pages/default.aspx</a>	Infor and Partners
<b>Sales Portal Xi</b>		Infor and Partners
<b>Infor.com</b> Education Resource Center	<a href="http://www.infor.com/services/education/resourcecenter/">http://www.infor.com/services/education/resourcecenter/</a>	Open



You have completed this session.  
Thank you for watching.