



Webinar

Infor Document Management (IDM)

Apr 2020

Who am I?

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- Experience in deploying various applications related
Integrated Platform, Finance, Performance Management,
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Agenda

1. Comparison
2. Overview IDM
3. Conclusion
4. Questions and Answers

Comparison

- Computer's hard disk
- Email's attachment
- Cloud Storage (Google drive, One Drive, Dropbox, etc)
- Application's attachment

Document management

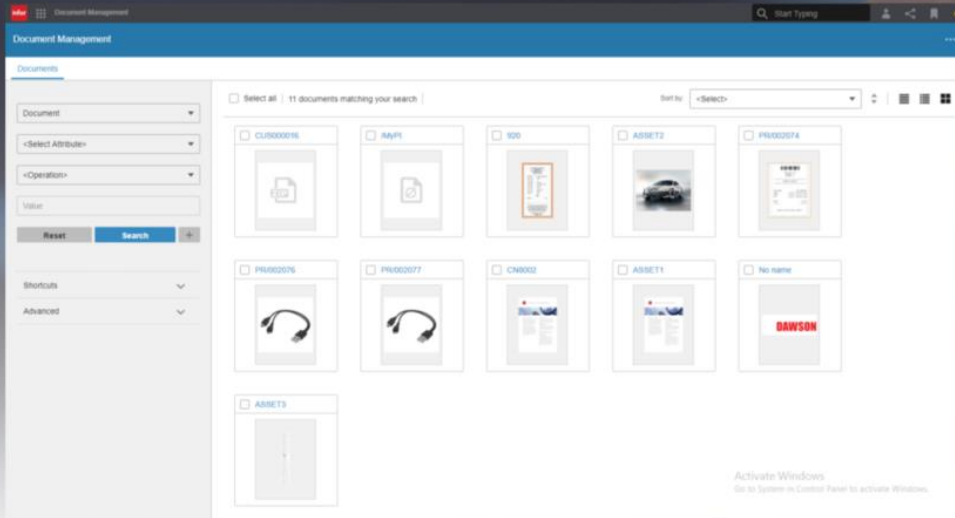
Infor OS Document Management allows the consolidation of documents used by each application.

Automatic and manual storage of various types of documents

Work with workflows to manage documents approvals

Link with ERP data with in context documents and information

Flexible Document Search

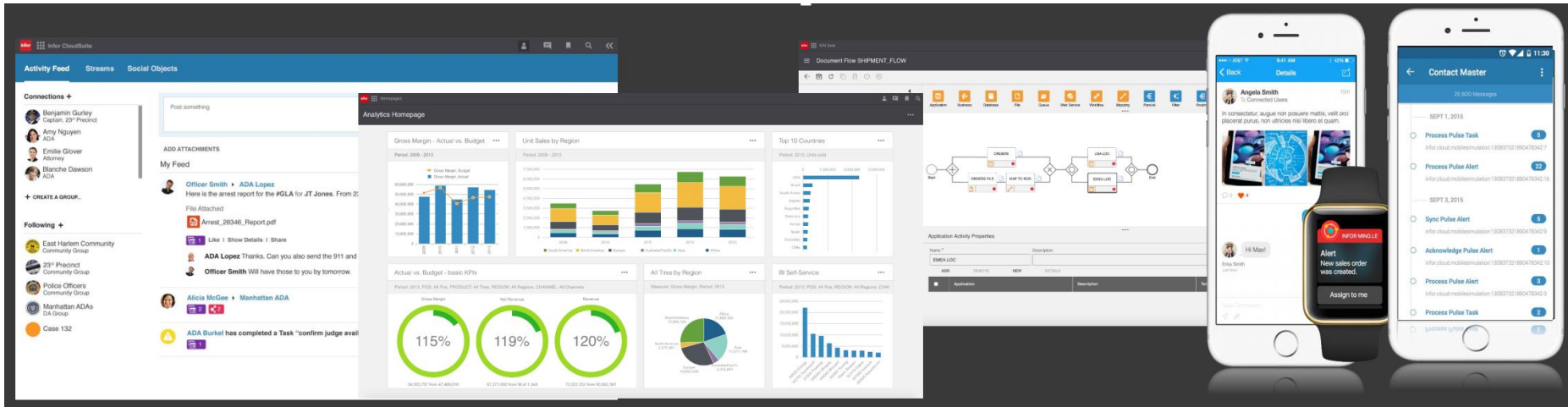


IDM Features

- Infor Document Management (IDM) is a central cloud storage application for your business documents
- IDM base on Infor OS platform
- The document is stored with type, attributes, flexible search, secure access control and history version.
- IDM can integrated to work with SunSystems, ION Alert, Approval workflow, Ming.le, etc...

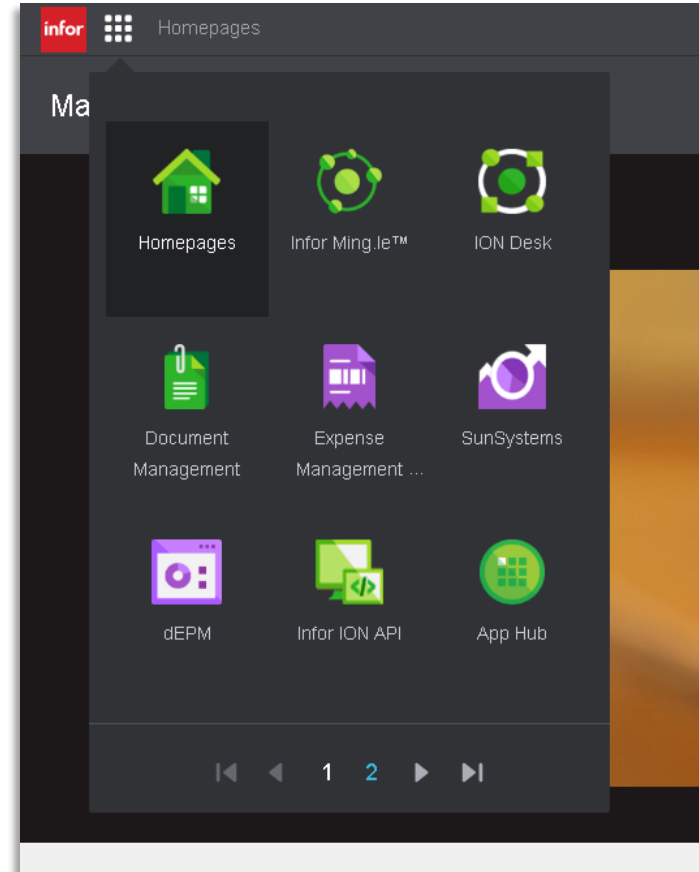
Infor OS platform

- Infor OS runs as web application and also available as mobile applications.



Infor OS platform

- Include out of box components as
Homepages/Dashboards,
Document Management,
ION
(Alert/Workflow/EDM) ,
etc



Infor OS platform

- Infor OS Homepages act as the dashboards across your applications

The screenshot displays the Infor OS homepage dashboard. At the top, there is a navigation bar with the Infor logo, a search bar labeled "Start Typing", and user profile icons. Below the navigation bar, the main content area is titled "Data History HO and GM" and features a grid of report cards. On the left side, there is a sidebar with a "Dashboards" menu and a "Daily status" chart showing revenue trends. The report cards are organized into two rows and four columns:

- Row 1:**
 - Jumat Berita:** Three report cards for "JUMAT BERITA" with dates 051019, 230919, and 140919. Each card shows the report type, creation date, and author (Tofano Daryanto).
 - Traffic Light:** Three report cards for "AHG-OPS-TRAFFIC LIGHT" with dates Novem, Octobe, and Septer. Each card shows the report type, creation date, and author (Tofano Daryanto).
 - Weekly GM:** Three report cards for "AKB-OPS-Weekly GM Repo...", "Weekly GM Report 20 Dec.xlsx", and "ABD Weekly GM Report 2019.xlsx". Each card shows the report type, creation date, and author.
 - STR Flash:** Three report cards for "ASM-FIN-REVENUE-STR Report Ji", "APL-FIN-REVENUE-STR Report Je", and "APK-FIN-REVENUE-STR Report Ja". Each card shows the report type, creation date, and author (Tofano Daryanto).
- Row 2:**
 - Mystery Shopper:** One report card for "AHG-OPS-MYSTERY SHOPPER-H" showing the report type, creation date, and author.
 - Guest satisfaction template:** One report card for "AKB-OPS-PFS Report 201219.xlsx" showing the report type, creation date, and author.
 - Weekly sales call:** One report card for "Sales Activities Weekly Report 05 -" showing the report type, creation date, and author.
 - Budget:** One report card for "Business Plan 2020 - AKB updated." showing the report type, creation date, and author.

IDM's Document type

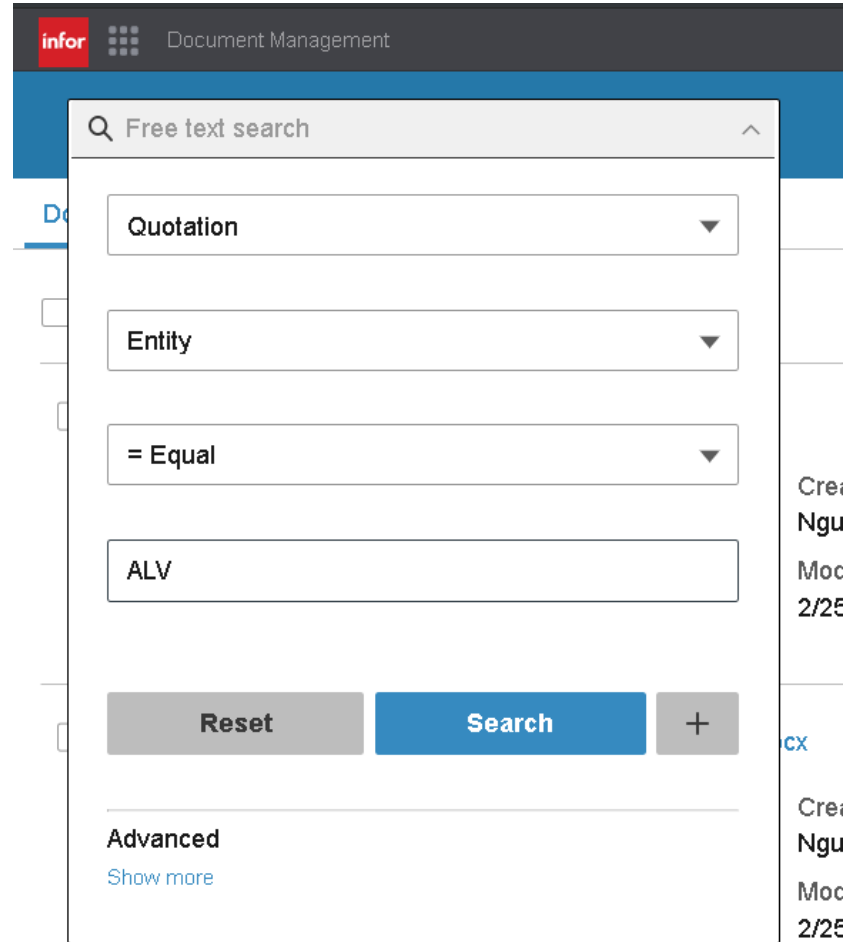
- The document is stored with type, attributes,

The screenshot displays the Infor Document Management interface. On the left, a sidebar lists various document types, with "(Report) Revenue M" selected. The main area shows a document titled "Profit & Loss Statement 201..." with a thumbnail image of a financial statement. Below the document, a table lists its attributes:

Properties	Attributes	File	Security	History
Final Status		Approve		
General Manager		Approve		
Cluster Financial Controller		Approve		
Director of F&B		Approve		
Director of Sales&Marketi...		Approve		
Financial Manager		Approve		
Document Classification *		Others		
Document ID *		Testing		
Document Status *		Approve		

IDM's Search

- Document search provides comprehensive search that pulls from documents document types and attributes



The screenshot shows the Infor Document Management search interface. At the top, the Infor logo and 'Document Management' are visible. The search area is titled 'Free text search' and contains several input fields: a dropdown menu set to 'Quotation', another dropdown set to 'Entity', a third dropdown set to '= Equal', and a text input field containing 'ALV'. Below these fields are three buttons: 'Reset', 'Search', and a plus sign '+'. At the bottom of the search panel, there is a section for 'Advanced' search options with a 'Show more' link. On the right side of the interface, there is a vertical sidebar with text including 'Crei', 'Ngu', 'Moc', '2/25', and 'cx'.

IDM's Access Control List

- Physical files are encrypted
- Customized levels by Access Control List what actions to take on a certain document
- ACL for Document Type, and ACL Rule for Attribute

The screenshot shows the IDM interface for configuring an Access Control List (ACL) for a document. The document title is '(Report) Revenue Meeting Minute'. The interface includes a search bar, a list of document types, and a table for defining ACL rules for different roles.

Document Title: (Report) Revenue Meeting Minute

Actions: Copy, Delete

Secure attributes: [gear icon]

Roles list: [gear icon]

	Read	Edit	Create	Delete	CheckIn	CheckOut	ChangeAcl	Force Undo	CheckOut	Secure Attributes	Archive
HO_HeadOffice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Hotel ABD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

IDM's Version and Archive Control

- Previous versions with the ability to view, revert back, and copy
- Retention Policies to archive

The screenshot displays the Infor Document Management interface. At the top, there is a search bar with the text "Search Document Management" and a search icon. To the right of the search bar are icons for user profile, share, bookmark, and refresh. Below the search bar is a blue navigation bar with the text "Documents" and a breadcrumb "SS300 - Account Allocation.d...".

Below the navigation bar is a grey toolbar with the following actions: Save, Check Out, Download, Download as PDF, Save as new document, Print, and a menu icon (three dots). The main content area is divided into two sections:

Document Preview: On the left, a document preview is shown. The title is "Standard Operational Procedure". Below the title is a blue-bordered box containing the text "SS300 Account Allocation (Applicable to All Finance)". At the bottom of the preview, there is a "Version Control" table.

Date	Version	Description	Who
Jul 2018	1.0	Creation of Document	TAC

Version History Table: On the right, a table titled "History" is displayed. The table has columns for "Title", "Version", "Modified Date", and a column with icons for document actions. The table contains two rows of data.

Title	Version	Modified Date	
SS300 - Account Allocation.docx	2	7/30/2019, 11:45:13 AM	[📄]
SS300 - Account Allocation.docx	1	2/25/2019, 11:05:10 AM	[📄] [📄] [📄]

IDM's Alert and Approval

- IDM application is integrated with ION:
 - User receive alert when document is uploaded, etc.
 - Approval for upload document

The screenshot displays the Infor ION Desk interface for a workflow titled "Workflow GCW_DocumentApproval". The interface is divided into several sections:

- Alerts Panel (Left):** A list of alerts is shown, including "AMD/W...", "AJK/We...", "ABD/W...", "ABD/W...", and "AJK/We...". The "ABD/W..." alert is highlighted with a green box and labeled "Active".
- Workflow Diagram (Center):** A flowchart illustrating the approval process. It starts with a "Start" node, followed by a decision diamond. The flow then branches into four parallel paths, each leading to a task box: "Financial Mana...", "Director of F&B", "Director of Sale...", and "Cluster Financi...". These paths converge at another decision diamond. From there, the flow goes to "Level1 Approve", then to "General Manager". A decision diamond follows, with "Yes" leading to "Level2 Approve" and "No" leading to "Level1 Reject". "Level2 Approve" leads to another decision diamond, which then leads to "Level2 Reject". Both "Level1 Reject" and "Level2 Reject" lead to a final decision diamond, which then leads to "Decision table ..." and finally "All Compl".
- Workflow Properties (Bottom):** A section for configuring the workflow, with tabs for "Parameters", "Drill Backs", and "Structures".

IDM's Related Information

- IDM in-context widget becomes available called “Related Information” allows to attached documents to other Infor Application. Eg: SunSystems object

The screenshot displays the Infor SunSystems Item Master interface for item code BVG00003. The main form shows the item description as 'BEER BINTANG 330 ML' and status as 'Open'. The 'Item Details' section includes fields for Short Heading (Beverage), Item Type (Goods), and Product Group (BEVERAGE). A 'Related Information' widget is open on the right side, displaying a can of Bintang beer. The widget has a search dropdown set to 'All' and shows the image of the beer can. Below the image, the item code 'BVG00003' is visible. The widget also shows 'Page 1 of 1' and a 'Tasks' section with a notification: 'Hi, your payment of refe...' dated 11/21/2019 2:35:21 PM. A green box highlights the 'Related Information' widget and the 'European Article Number' checkbox in the left sidebar.

IDM's API

The screenshot shows the IDM REST API Documentation web application. The top navigation bar is dark blue with the Infor logo and 'Document Management' on the left, a search bar with 'Start Typing' in the center, and user, share, and back icons on the right. A secondary blue bar below it contains a hamburger menu, the title 'IDM REST API Documentation', and a 'Back to Documents' link. The left sidebar is dark grey and lists various configuration and tool categories, including 'Configuration', 'Business Context Model', 'Document Type Filter', 'ION Configuration', 'Languages', 'Result List', 'Retention Policies', 'MIME Types', 'Document Type', 'Value Set', 'Import / Export', 'Email Configuration', 'Tools', 'Utilities', and 'Development'. The main content area is white and features a table of contents for the API documentation. Each entry in the table includes a category name and three action links: 'Show/Hide', 'List Operations', and 'Expand Operations'. At the bottom of the main content area, there is a text block indicating the base URL and API version.

Category	Show/Hide	List Operations	Expand Operations
Business Context	Show/Hide	List Operations	Expand Operations
Configuration	Show/Hide	List Operations	Expand Operations
Connection	Show/Hide	List Operations	Expand Operations
Datamodel	Show/Hide	List Operations	Expand Operations
Email	Show/Hide	List Operations	Expand Operations
Items	Show/Hide	List Operations	Expand Operations
Templates	Show/Hide	List Operations	Expand Operations

[BASE URL: /ca/api , API VERSION: 12.0.28.0.452]

Conclusion

- **IDM is not only central cloud storage, It is also built to fit your business, user by:**
 - IDM is available Cloud service and on premise server.
 - IDM base on Infor OS platform, and Dashboards
 - Document can integrate to the Workflow, Alert, Dashboard,
 - Document can related to ERP application, document.
 - Integrate to applications.



Q & A

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