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, ERP

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

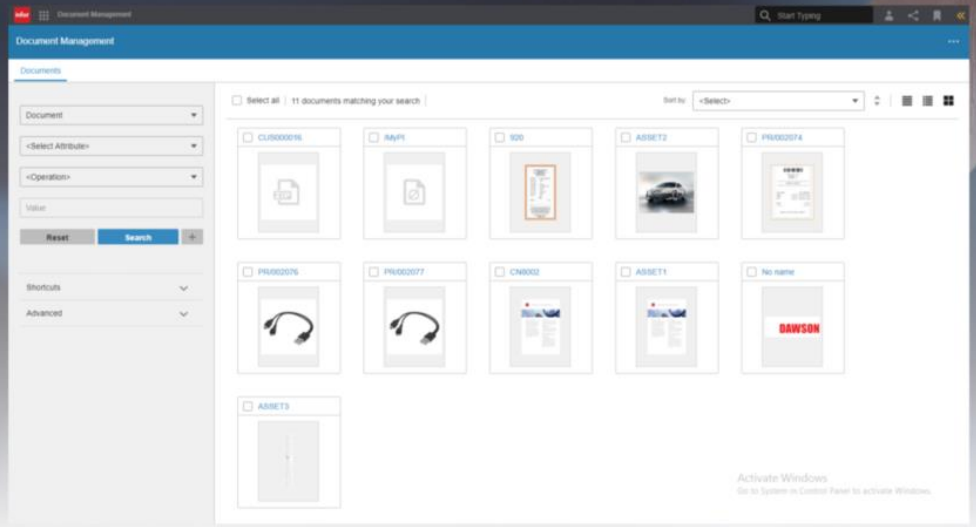
Infor OS Document Management allows the consolidation of documents used by each application.

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

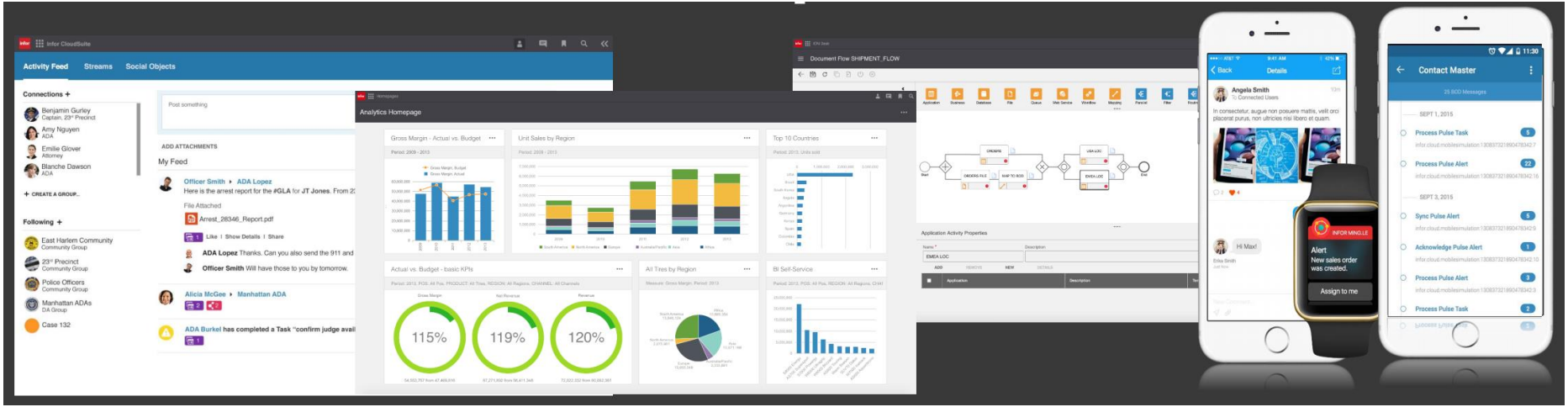


IDM Features

- 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…

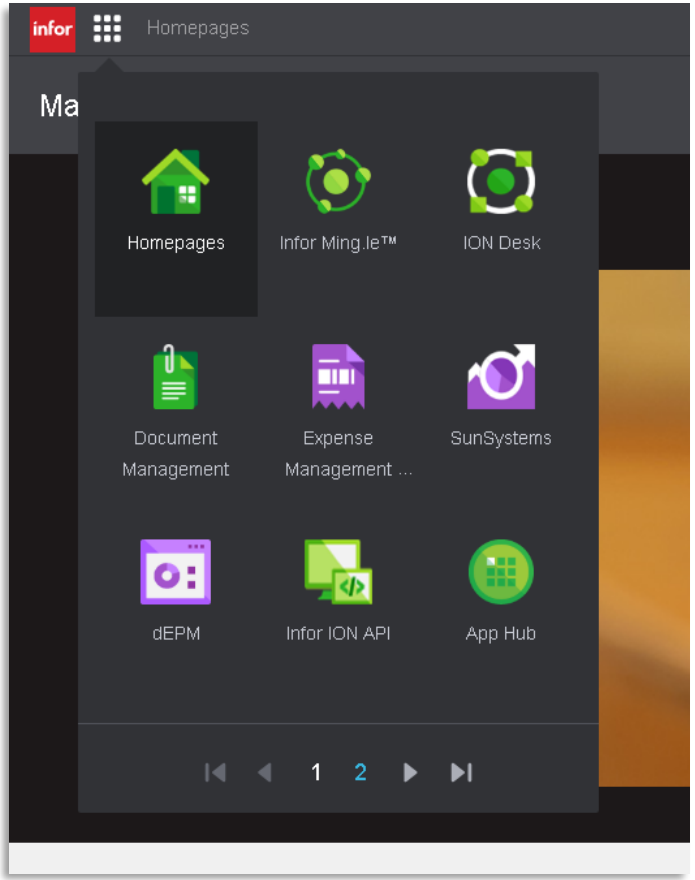
Infor OS platform

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



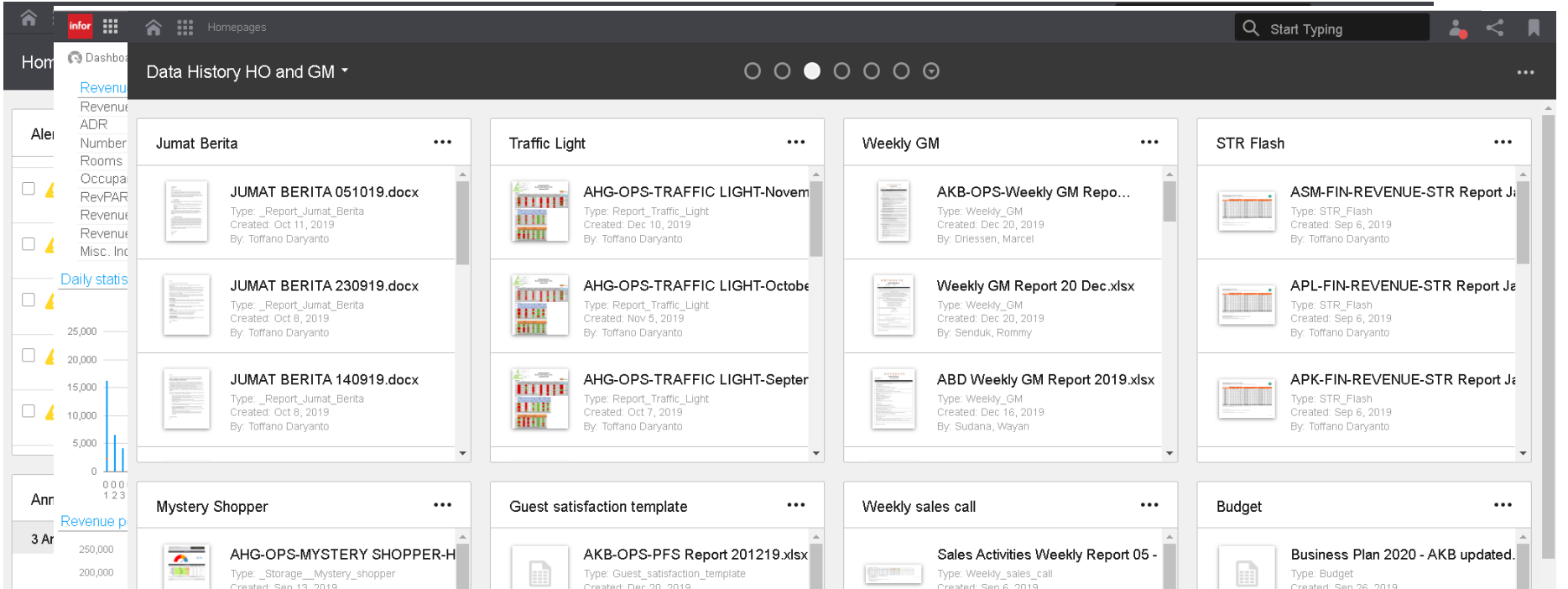
Infor OS platform

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



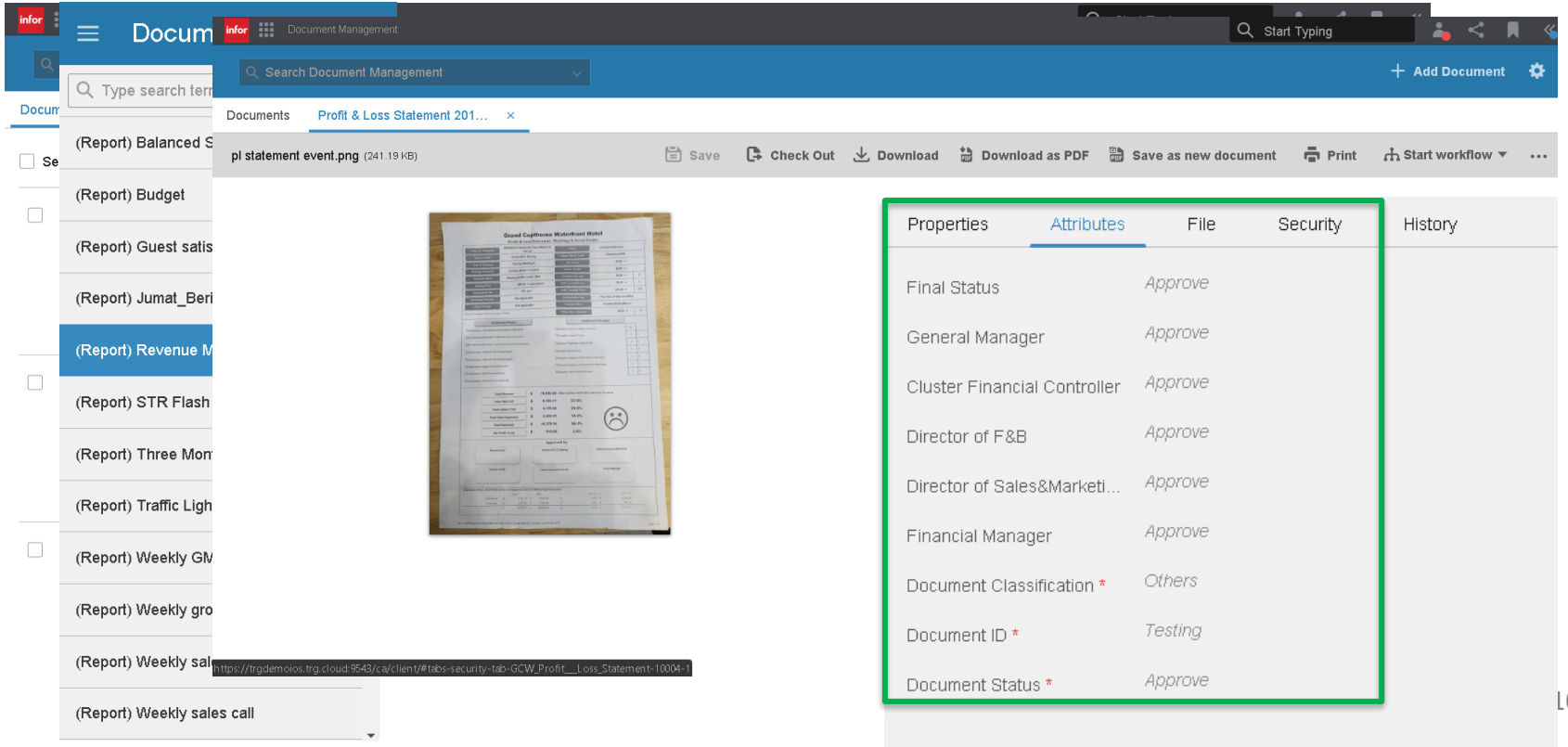
Infor OS platform

- Infor OS Homepages act as the dashboards across your applications



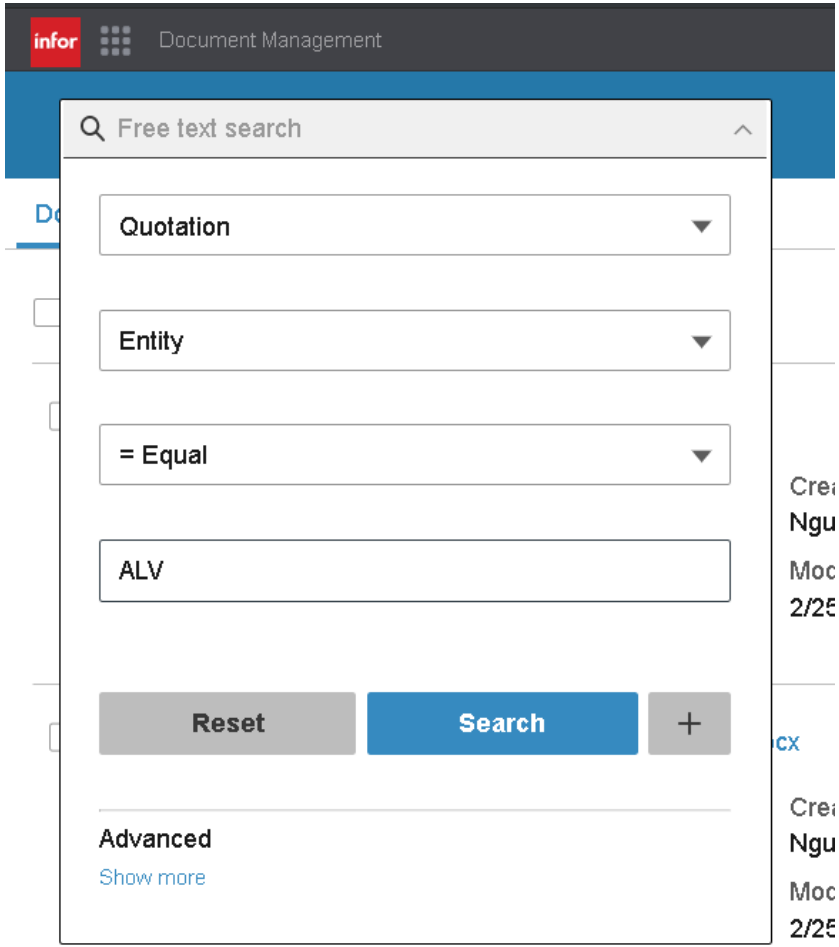
IDM's Document type

- The document is stored with type, attributes,



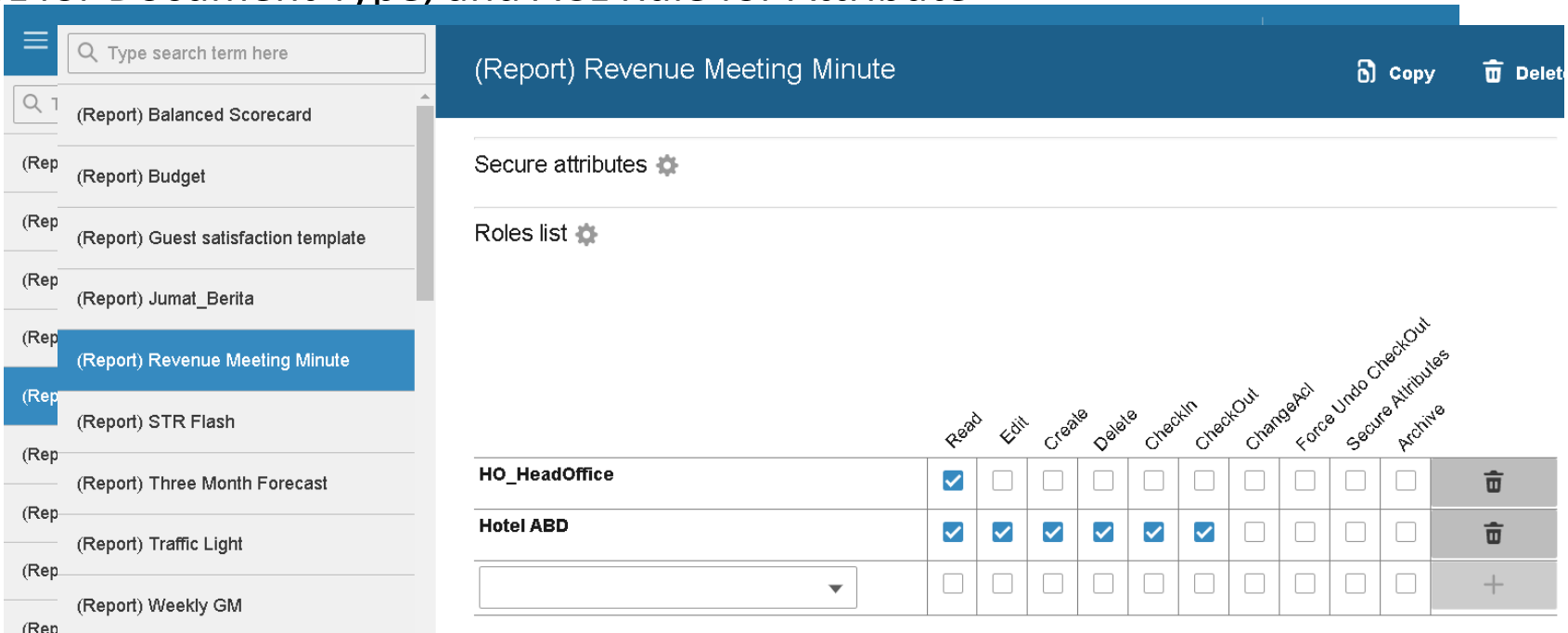
IDM's Search

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



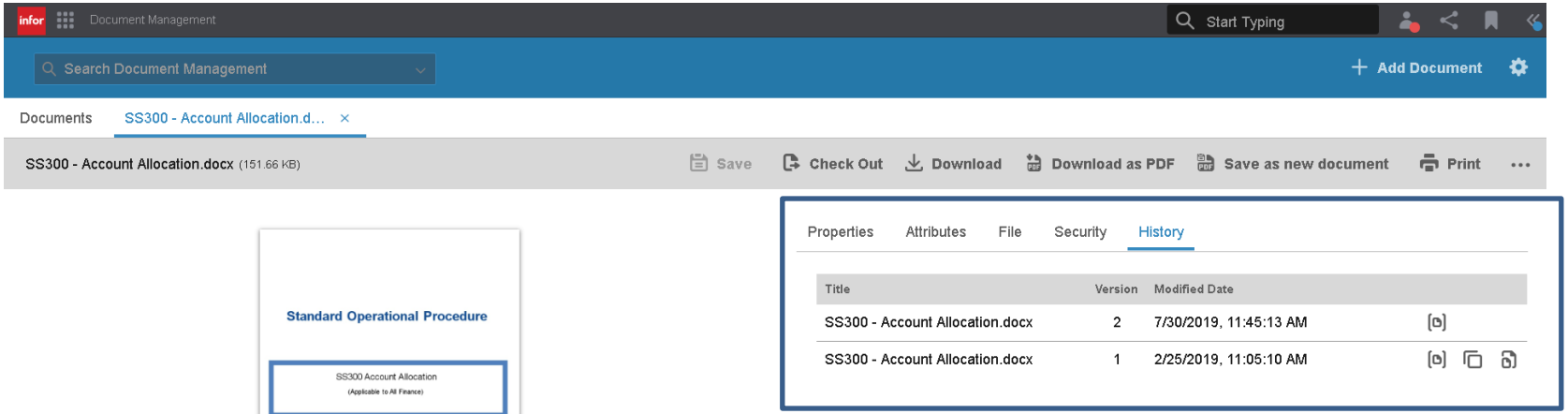
IDM’s Access Control List

- 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



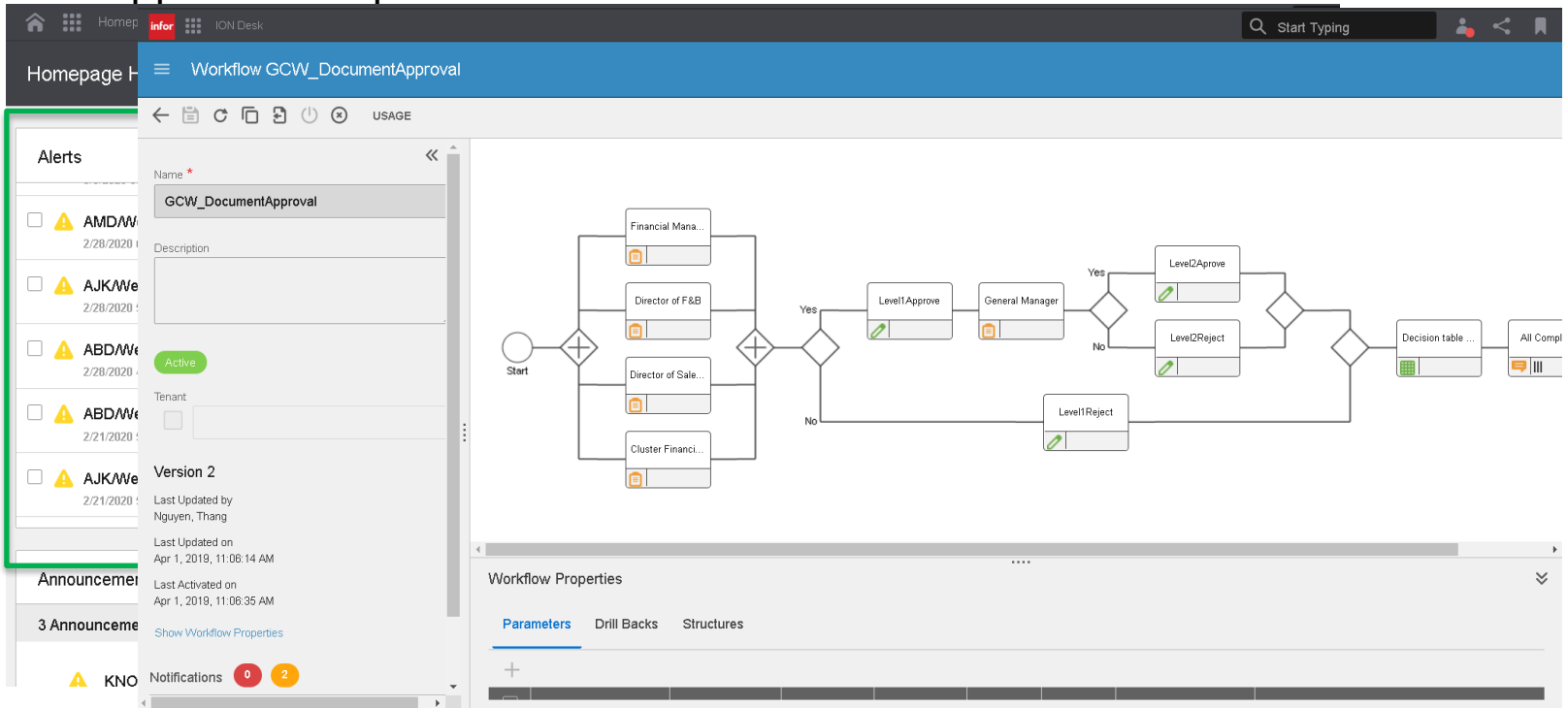
IDM's Version and Archive Control

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



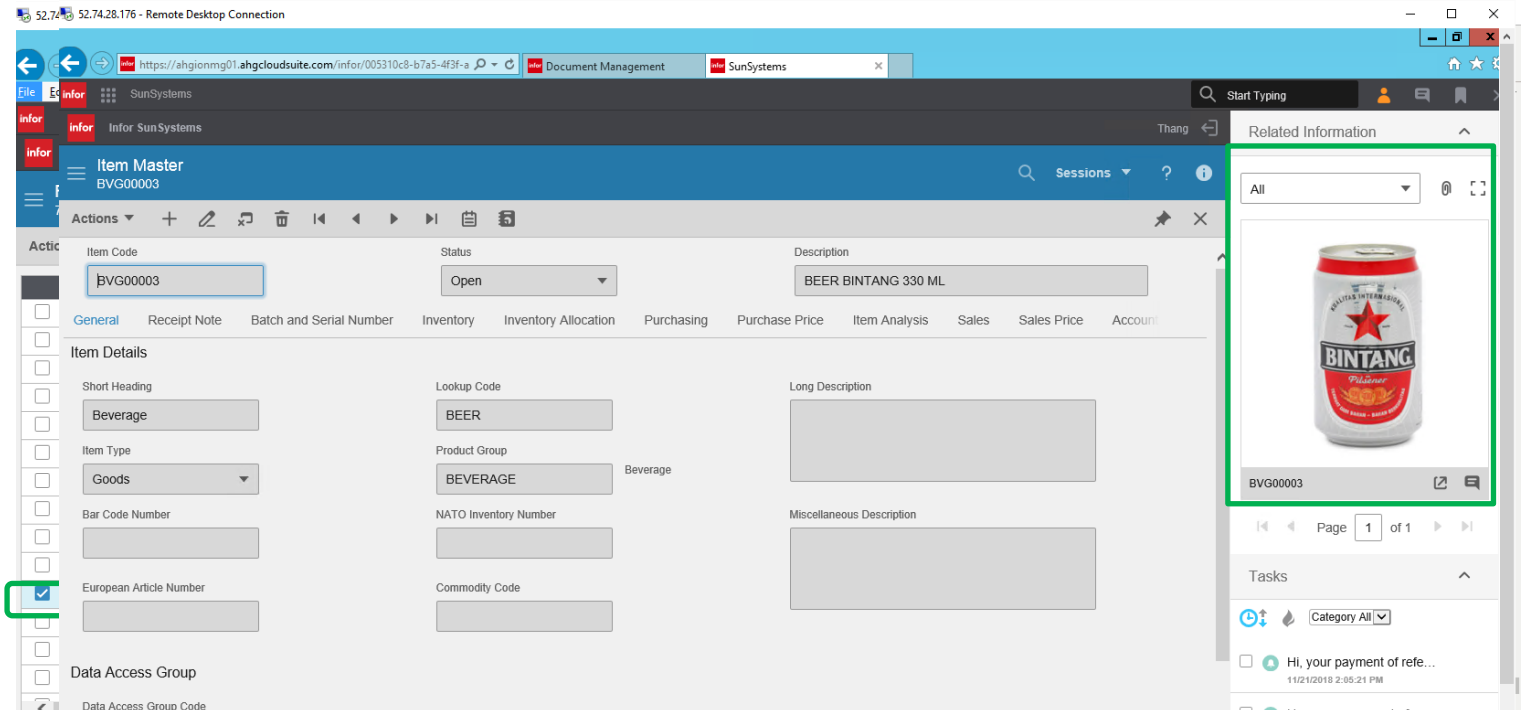
IDM's Alert and Approval

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

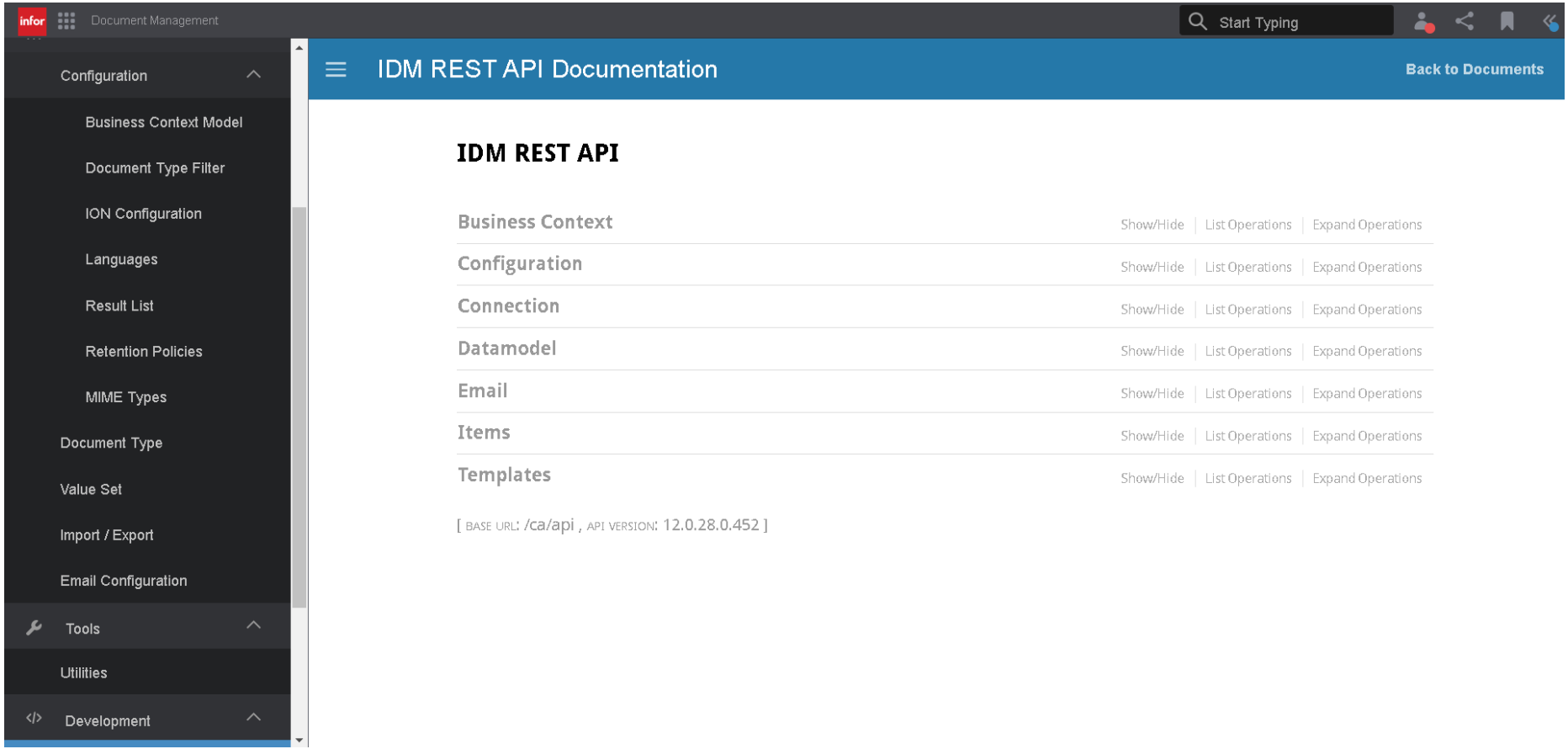


IDM's Related Information

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



IDM's API


Document Management
Start Typing
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
Development
IDM REST API Documentation
Back to Documents
IDM REST API
Business Context
Configuration
Connection
Datamodel
Email
Items
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.

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