

Infor M3 Integration Guide for HxGN EAM

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About this guide

This document describes the integration of Infor M3 and HxGN EAM.

It explains the integration requirements, configuration tasks, and troubleshooting information. This document also describes how to publish Business Object Documents (BODs), load your data, and verify that the integration is set up correctly.

Intended audience

This guide is for the system administrator or consultant who configures the integration between Infor M3 and HxGN EAM.

Before you read this guide, ensure that you are familiar with the other guides listed in *Related documents*.

Required knowledge

To integrate Infor M3 and HxGN EAM, you must have knowledge in these areas:

- Understand the BOD concepts and how these concepts relate to each of the products in this integration. For more information, see these topics:
 - "Overview" and "BOD Overview" sections in the *Infor M3 Configuration Guide for Infor ION*
 - "Overview" in the *HxGN EAM Configuration Guide for Infor ION*.

Related documents

This table shows the types of documents that are related to ION integrations and their purpose:

Section	Description
<i>Infor M3 Configuration Guide for Infor Local Technology Runtime or Infor OS</i>	These guides provide configuration and implementation information for the BOD-based integration of one Infor application with ION when ION is used to exchange data with another Infor product or third-party product.
<i>HxGN EAM Configuration Guide for Infor ION</i>	They list the business events or user actions in the product that send BODs to connection points that are used in the integration.ION Connect.
<i>Infor M3 Outbound BOD Mapping and Descriptions</i>	For each BOD that is supported by Infor M3, this document provides the source and definition of the data in each BOD element that is sent from Infor M3 through ION. The document also provides details about the data that is published.
<i>Infor M3 Inbound BOD Mapping and Descriptions</i>	For each BOD that is supported by Infor M3, this document provides details on how Infor M3 receives or processes information from the inbound BOD.
<i>Infor M3 to HxGN EAM Cross BOD Mapping and Descriptions</i>	This document provides integrated end-to-end BOD mapping details for the BODs that are exchanged between Infor M3 and HxGN EAM. It describes the exceptions and the requirements for handling the individual elements on a per-element basis.
<i>Infor M3 Workflow and Alert Content Examples for Infor ION</i>	This document provides information on the event monitors and workflow models that have been created for the BODs that are published by Infor M3. It includes recommendations on how to adapt the Infor ION standard content to your requirements.

Not all of these documents are required to set up this integration. For a list of documents that are required for this integration, see *Integration checklist*.

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://concierge.infor.com/> and create a support incident.

For the latest documentation, go to Documentation Central at docs.infor.com. We recommend that you check this website periodically for updated documentation. If you have comments about Infor documentation, contact documentation@infor.com.

Requirements

Ensure that all requirements and prerequisites are met.

Required products

Ensure that you have provided, installed and configured the required hardware and software for these components:

- Infor ION Connect release 12.0 or later. The server where you install ION must have access to the servers where you install Infor M3 and HxGN EAM.
- Infor M3 13.4:
 - M3 Business Engine 15.1.4, including all prerequisites. See *M3 Business Engine BODsRelease Notes* for the list of additional MCEs required for integrations.
 - M3 Business Engine BODs 15.5.0.0_4 or later
- HxGN EAM 11.3 patch 201708 or later:
 - Databridge must be enabled.
 - Partner and INFOR-ONRAMP partner must be enabled on the EAM Databridge Partner screen.

Required information

This table shows the installation parameters that you must provide to integrate the products mentioned in *Required products*:

Installation parameter and value	Description
MULTIORG=YES	
ASSETASS=R	Associate an asset during receipts (R) or during creation of PO (P).
PDRCPITO=EVENT	EVENT-direct material received against WO, STORE-direct material will first be received in store.
PRICELEV=S	Indicates whether price updates should take place at parts (P) or stock (S) level
EXRTUPDT=NO	Get the exchange rate from HxGN EAM when the Purchase Order is imported into HxGN EAM. This step is required because the exchange rate is not present in the SyncPurchaseOrder message.
@IGNLOC=Y	<p>HxGN EAM 11.3 is modified to include the location as part of transactional entity identifier which conforms to the Infor messaging standard for transactional BODs. The modification is applicable to transactional BOD Document IDs and the IDs are also referred to other BODs.</p> <p>Before the modification to the HxGN EAM 11.3, (TRANID1,AE1,LOC1) and (TRANID1,AE1,LOC2) are considered as the same transaction ID because location was trivial. After the modification, the transaction IDs are identified distinctively. For existing implementations where Location is not consistently used for different BODs, application can be reverted to previous activity by adding/setting the optional installation parameter @IGNLOC to Y.</p>

Integration checklist

Follow this checklist to integrate the products.

Complete	Task	Reference
<input type="checkbox"/>	Download the documents that are required for configuration from the Infor Customer Portal.	<ul style="list-style-type: none"> • <i>Infor M3 Configuration Guide for Infor ION</i> • <i>HxGN EAM Configuration Guide for Infor ION</i> • <i>Infor M3 to HxGN EAM Cross BOD Mapping and Descriptions</i>
<input type="checkbox"/>	Ensure that all requirements and prerequisites are met.	<i>Requirements</i>
<input type="checkbox"/>	Review the description of this integration.	<ul style="list-style-type: none"> • <i>Overview</i> • <i>Features not included in this integration</i>
<input type="checkbox"/>	Verify that the Infor M3 instances you plan to use are connected to Infor ION. If they have not been configured, then configure the connection.	<i>Configuring Infor M3 in the Infor M3 Configuration Guide for ION</i>
<input type="checkbox"/>	Verify that the HxGN EAM instances that you intend to use are connected to Infor ION. If they have not been configured, configure the connection.	<i>Configuring HxGN EAM in the HxGN EAM Configuration Guide for Infor ION</i>
<input type="checkbox"/>	Perform the additional configuration of Infor M3 specific to this integration.	<i>Configuring Infor M3</i>
<input type="checkbox"/>	Perform the additional configuration of HxGN EAM specific to this integration.	<i>Configuring HxGN EAM</i>
<input type="checkbox"/>	Download and import the solution model XML file for this integration.	<i>Connecting to ION</i>
<input type="checkbox"/>	Configure and activate the ION document flows between these products.	<i>Activating a document flow</i>
<input type="checkbox"/>	Publish BODs.	<i>Publishing BODs</i>
<input type="checkbox"/>	Verify the integration.	<i>Verifying the integration in the Infor ION Connect Administration Guide</i>
	Perform ongoing business processing tasks.	<i>Performing ongoing business processes</i>

Overview

This section describes the integration between Infor M3 and HxGN EAM.

Terminology

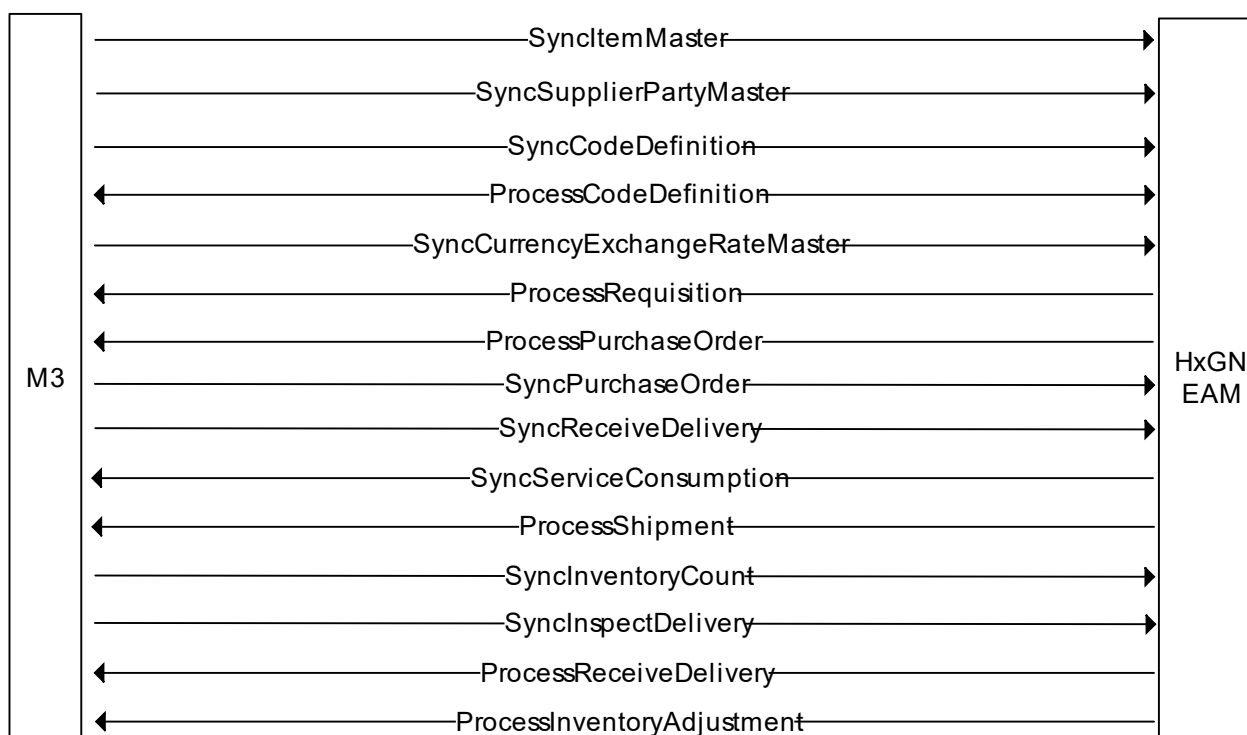
The terminology between M3 and HxGN EAM differs in some areas. To explain the process and communicate steps clearly, BOD terminology is used. This table shows an overview of the M3, HxGN EAM, and BOD terminology:

Infor M3 term	HxGN EAM term	BOD term
Item	Part	ItemMaster
MRO Service	Trade	Service
Warehouse	Store	Location
Cost Center	Cost Code	CodeDefinition for Cost Centers
PO Receipt	PO Receipt	ReceiveDelivery
Shipment	Issue Parts	Shipment
Stock location	Bin	Not used in standard BOD terminology

See the appropriate configuration guide for Infor ION to review definitions of ION and BOD terms.

Integration of solution components

This diagram shows the BOD flow between the products:



See the appropriate configuration guide for ION for the complete list of BODs available for each product and for a list of the events that generate each BOD.

Features not included in this integration

This table shows the features that are not included in this integration:

Area	Restriction
Items	Non-stock items must be connected to a warehouse to be transferred to HxGN EAM
Items - parts	Purchase order lines with parts must be received from M3.
Items - services	Purchase order lines with services (HxGN EAM trades) must be received from HxGN EAM.
Warehouses	<p>Use the specified warehouses in M3 for this integration.</p> <p>The processes associated with Issues and receipts for these warehouses must only be executed from HxGN EAM for the synchronization of the inventory figures.</p> <p>Warehouse information for non-inventory item is not supported in SyncReceiveDelivery BOD.</p>

Data mapping

Use the *Infor M3 to HxGN EAM Cross BOD Mapping and Descriptions Guide* if you must determine the source location and target location of the integrated data and the conversions that are possibly performed between the source and target.

Product description

Capital-intensive M3 businesses in fashion, food, chemical and distribution industries require on-going maintenance activities. The M3ION integration with HxGN EAM provides a best-of-breed solution for this business requirement, with M3 Financials taking over normal budgetary control over the associated maintenance expenditure.

Process overview

This integration supports cross-over sales activities and provides M3 customers in the non-equipment industry with a solution for enterprise asset maintenance and financial control over their repair and maintenance expenditure.

Master data

Items, suppliers, units and cost centers (cost codes) are maintained in M3.

The available stock of an item can be adjusted in HxGN EAM, either by manually changing the on-hand quantity on the Parts page or by creating an adjustment on the Physical Inventory page.

Requisition process

This requisition flow is used to replenish the maintenance, repair, and operating (MRO) inventory warehouse and to order materials, services, or both for a maintenance job:

Note: The employee in HxGN EAM who is entered in the **Requested by** field must also exist as an M3 user. The user identities must be the same.

1. A requisition is entered and approved in HxGN EAM.
2. The requisition is created in M3 and can be viewed in **PPS180** or in **PPS170**, or it is directly transformed into a purchase order depending on how the requisition partner agreement is configured.
3. The requisition is released to a purchase order in M3 by the user.
4. The purchase order is synced to HxGN EAM when printed
5. The purchase order is created in HxGN EAM.

Limitations:

The requisition cannot be changed once it has been transferred to M3. If changes are required in HxGN EAM, the requisition must be cancelled in both systems and a new requisition must be entered in HxGN EAM.

The requisition can be changed in M3, but then the change is not reflected in HxGN EAM. The changes are transferred to HxGN EAM in the PurchaseOrder BOD.

Purchase order receiving process

Parts

- Purchase order receipt transaction of items or parts is performed in M3.
- When the receipt is registered, it is synced to HxGN EAM.
- HxGN EAM records the receipts of the MRO parts.

Services

- MRO services are received by HxGN EAM through a work order (Book PO labour).
- When the receipt is registered, it is synced to M3 through the SyncServiceConsumption BOD.
- M3 records the receipt of the service.

Inventory transactions process

Inventory transactions occur when parts are issued or returned to a work order in HxGN EAM. Issue transactions initiate a ProcessShipment BOD to M3, and return transactions initiate a ProcessReceiveDelivery BOD. Inventory transactions are transferred with the ProcessInventoryAdjustment BOD. They are created when the stock quantity or bin of a part is changed on the Stock tab and when a physical inventory count is performed.

Work order issuing or return

1. A work order (WO) is created in HxGN EAM.
2. One or more activities are added to the work order.
3. Parts are issued or returned to the work order:
 - On the Parts tab, one or more parts are issued to the work order.

The ProcessShipment BOD is sent to update the M3 stock to the HxGN EAM level.

- On the Parts tab, one or more parts are returned to the work order.

The ProcessReceiveDelivery BOD is sent to update the M3 stock to the HxGN EAM level.

Configuring Infor M3

In Infor M3 you must complete these configuration tasks that are specific to this integration.

See the *Infor M3 Configuration Guide for Infor ION* for the configuration of tenant ID, logical ID, accounting entity, and location setup.

M3 Business Engine settings

Partner for stock transactions

Configure HxGN EAM as a partner in '**M3 Stock Msg Partner.Open**' (**MMS865**)

This table shows the required setup in **MMS865**:

Field	Value
Partner	EAM
Message Type	BOD
Message Direction	I

Purchase

In '**Settings - Purchasing**' (**CRS780**), the 40 Accounting dimension for cost center parameter must be set if cost centers are to be used for requisitions and purchases.

Stock locations

'**Stock Location. Open**' (**MMS010**) records in M3 and bins in HxGN EAM must have the same name, which must be synchronized manually between the systems.

Suppliers

Supplier contacts can be qualified to be synced to HxGN EAM by adding references to suppliers with the reference type 10 in '**M3 Supplier. Connect Reference**' (**CRS623**).

To sync addresses with HxGN EAM, an address with address type 01 or 02 must be available in '**M3 Supplier. Connect. Address**' (**CRS622**).

Note: Only the first address that is specified is transferred through the BOD. It is added to HxGN EAM as mail address, delivery address, and invoice address.

Transaction reason

A transaction reason is required for HxGN EAM transactions. Specify the transaction reason STT (stock transactions) in '**Transaction Reason. Open**' (**CRS103**).

UOM

Configure the unit of measures to be used in the integration in both HxGN EAM and M3.

Users

Ensure that '**Users.Open**' (**MNS150**) has users corresponding to the employees in HxGN EAM that are going to request parts or services through HxGN EAM requisitions.

Warehouses

Use dedicated warehouses in M3 for the HxGN EAM integration. Issues and receipts for these warehouses should only be made from HxGN EAM, otherwise the inventory figures will be out of sync.

In 'Warehouse. Open' (MMS005/H) in the Integration parameters section:

- Select the **Rcpt/Pick lists** check box.
- Select the **Stock trans** check box.

Defining part items

Part items must be connected to an integration-specific warehouse and have the **MROSERV** custom field set to Y.

To define service items:

1. Open 'Item. Open' (MMS001/B).
2. Specify this information:

Name

Specify a descriptive name.

Make/buy code

Specify 2.

Item type/Itemcategory (/G)

The item type must have these item categories:

- 04: Tool
- 05: Fixed machine
- 07: Repairable item

Note: Item categories per item type are defined in CRS040.

3. Connect the item to an integration-specific warehouse.

Defining custom field for service items

Items that are to be used as trades in HxGN EAM must be defined by a custom field. To assign a custom field to an item, it must belong to an item group that is connected to a user-defined field group, which in turn is connected to the custom field.

Custom field, custom field group and item group(s) are one-time configurations, and each service item must be connected to an item group that includes the custom field.

1. Create the MROSERV custom field:
 1. Open 'Custom Field. Open' (CMS470).
 2. Specify MROSERV as the custom field name and select **Options > Create**.
 3. Specify this information:

Description

Specify Service indicator for MRO.

Name

Specify `MROSERV`

Heading

Specify `MRO Service`.

Field type

Specify `A-Alphanumeric`.

Field length

Specify `1`.

No. of dec places

Specify `0`.

2. Create a custom field group:
 1. Open '`Custom Field Group. Open`' (`CMS471`).
 2. Specify `BOD` as the name for the custom field group.
 3. Select **Options > Create**.
 4. Specify a name and a description.
3. Connect the field to custom field group:
 1. Open '`Custom field group. Connect Field`' (`CMS472`).
 2. Select Custom fld grp `BOD`, specify Seqno `10` then **Create**.
 3. Select Custom field `MROSERV` and click **Enter**.
4. Connect the custom field group to an item group:
 1. Open '`Item Group. Open`' (`CRS025`).
 2. Create an item group for service (eg: `BOD`) or use an existing applicable item group.
 3. Right-click on the item group and select **Related > Conn u-d fld gr**.
 4. Specify Seqno `10` in '`Connect Custom Field Group. Open`' (`CMS473`) and click the `Create` option .
 5. Select Custom fld grp `BOD` and click **Enter**.
5. Connect the item group to items:
 1. Open '`Item. Open`' (`MMS001/B`).
 2. Select your item and select **Options > Change**.
 3. Connect the item to the applicable item group in the '`Item. Open`' (`MMS001/E`).
6. Define an item as an MRO service:
 1. Open '`Item. Open`' (`MMS001/B`). Select the item and select **Related > Custom Field**.
 2. Set MRO Service to `Y` in '`Custom Field. Update`' (`CMS474`).

Defining service items

Service items must be connected to an integration-specific warehouse and have the **MROSERV** custom field set to `Y`.

To define service items:

1. Open '`Item. Open`' (`MMS001/B`).
2. Select `Create` (`CTRL + 1`).
3. Specify this information:

Name

Specify a descriptive name.

Inv accounting

Specify 0

Make/buy code

Specify 2.

Basic U/M

Specify hours.

4. Connect the item to an integration-specific warehouse.
 1. Open 'Item. Connect Warehouse' (MMS002/B).
 2. Specify a warehouse and click **Create**.
 3. Specify all mandatory fields in (MMS002).
 4. Click **Close** to return to (MMS001).
 5. Right-click the item and select **Related > Item/Facility**.
 6. Set **Inv acc method** to 0 - Zero Cost in 'Item. Connect Facility' (MMS003/E).
5. A service item must have the MROSERV custom field set to Y.

To define the item as an MRO service:

1. In 'Item. Open' (MMS001/B), select **Related > Custom field**.
2. Set **MRO Service** to Y in 'Custom Field. Update' (CMS474).

If the **MRO Service** field is missing, see *Defining custom field for service items*.

Configuring placeholder M3 items for parts and services

Note: This task is applicable only when stock is handled exclusively in HxGN EAM.

Placeholder M3 item properties must be defined in 'Item. Open' (MMS001)..

To define placeholder items for parts:

1. Open 'Item. Open' (MMS001/B).
2. Specify this information:

Name

Specify a descriptive name. Make a note of the name, you must specify it in the document flow configuration. Defined in **MMS001**.

Inv accounting

Specify 0.

Make/buy code

Specify 2.

Item type/Item category

The item type must have the item category 04, 05 or 07. Item categories per item type are defined in **CRS040**.

3. Connect the item to an integration-specific warehouse. Select your item and select **Related > Item/Facility**.
4. In (MMS003/E), set **Inv acc method** to 0 - Zero cost.

See *Defining custom field for service items* for how to define a corresponding service item.

Note:

Make a note of the service item name. You must specify it in the document flow configuration. See *Configuring the document flow between M3 and HxGN EAM for the NoM3Stock variant*.

M3 business message data translations for HxGN EAM

The business message data translation definitions in **CRS881** that are required for this integration are created during the initial M3 configuration for ION.

For more information, see "Specifying or editing translation data" in the *Infor M3 Configuration Guide*.

The values for data translation are specified in the **CRS881** and **CRS882** functions. **CRS881** is based on the imported translation definitions. The values in **CRS882** can require an update during the ongoing business processes.

Note: To activate new translation values defined in **CRS881** and **CRS882** for the next set of business messages to be processed, you must reload Datatranslator in **Infor Enterprise Collaborator Server > Management Pages > Utilities**.

Note: The translations for the different types of data for this integration in **CRS882** can all be defined on the division level or company level. Translations that are defined on the division level are primarily selected. If no translation exists on the division level, a translation on the company level is considered by the BOD.

Business message: InventoryAdjustment

Field	Value
Msg standard	ION
Business msg	InventoryAdjustment
Parent elements	Sender
In/Outbound msg	I
Data element	LogicalID
Message data (Value - In)	EAM
M3 data (Value - Out)	Product Specific

Business Message: ReceiveDelivery

Field	Value
Msg standard	ION
Business msg	ReceiveDelivery
Parent elements	Sender
In/Outbound msg	I
Data element	LogicalID
Message data (Value - In)	EAM
M3 data (Value - Out)	Internal Stock Transactions

Business Message: Shipment

Field	Value
Msg standard	ION
Business msg	Shipment

Field	Value
Parent elements	Sender
In/Outbound msg	I
Data element	LogicalID
Message data (Value - In)	EAM
M3 data (Value - Out)	Internal Stock Transactions

Infor Enterprise Collaborator settings

For instructions on how to install BODs and applicable software components and on how to set up correct agreements, rules, and translations, see the *Infor M3 Configuration Guide for Infor ION*.

This integration requires an additional configuration in the Infor Enterprise Collaborator Partner Admin tool.

Specify warehouse interface process property for agreements

1. In the Infor Enterprise Collaborator Partner Admin tool, navigate to the M3_Shipment_Process_In agreement.
2. Create a control property:

Control property	Value
m3beWarehouseInterfaceProcessFlag	*EXE

3. Repeat the process for each of these agreements:
 - o M3_ReceiveDelivery_Process_In
 - o M3_InventoryAdjustment_Process_In
 - o M3_ServiceConsumption_Sync_In

Enable validating requisitions before purchase orders are created

When requisitions are created by HxGN EAM, they are added to M3 with the 60 status by default because the requisition has been approved in HxGN EAM.

Requisitions in M3 having the 60 status will automatically create purchase orders. In many cases, this is not the preferred practice, and changes or additions to the requisition are required before creating the purchase orders.

To demote the requisition status to 20:

1. In the Infor Enterprise Collaborator Partner Admin Tool, navigate to the M3_Requisition_Process_In agreement.
2. Create a control property:

Control property	Value
m3beStatusOverride	20

Initial load settings

See the triggering table in *Sending the initial data load from Infor M3*.

Configuring HxGN EAM

In HxGN EAM you must complete configuration tasks that are specific to this integration.

See the *HxGN EAM Configuration Guide for Infor ION* for the configuration of the logical ID, tenant, accounting entity, and location setup.

Other HxGN EAM configurations

HxGN EAM configurations that are not associated with a particular BOD:

- Verify that Partner and INFOR-ONRAMP partner are enabled on the Infor EAM Databridge Partners screen.
- When creating the HxGN EAM organization, set the default currency to match default currency of the corresponding accounting entity in M3.

Note: The organization default currency cannot be changed after the organization is created.

- Add the HxGN EAM organization for the user in **Administration > Security > User Setup**.
- HxGN EAM uses its own codes for the stores. The codes that are used in the BODs must be set in HxGN EAM per store. The **Enterprise Location** field on the EAM Stores page must be populated with the warehouse location that is used in M3.
- Configure the unit of measure to be used in the integration in both HxGN EAM and M3.

Configuring Databridge

1. For the INFOR-ONRAMP partner, open the EAM Databridge partner screen and click the Subscription tab.
2. Enable these events by selecting the **Enabled** check box and click **Submit**.
 - ADDREQUISTN/ProcessRequisition
 - CHANGEREQUISTN/ProcessRequisition
 - PORECEIVESERVICE/SyncServiceConsumption
 - UPDINV/ExportInventoryTransactions
3. On the Databridge Setup page, specify this information:

Enable Add Requisition Outbound

Specify **Yes**.

Enable Change Requisition Outbound

Specify **All**.

Enable PO Receipt Outbound

Specify **Yes**.

Enable Inventory Transactions Outbound

Specify **For Infor ION**.

Connecting to ION

This integration has two solution XML files that are used to set up sample models.

- M3IEAM_M3BE_EAM_Document_Flow_Standard_0110.xml: This file covers all the functionality that is described in this document
- M3IEAM_M3BE_EAM_Document_Flow_NoM3Stock_0110.xml: this is a scaled-down version in which the stock is managed exclusively in HxGN EAM.

When you import a solution XML file in ION Desk, the sample connection points and document flows for this integration are defined in Infor ION Connect.

In this scenario, the stock transaction process does not apply, and consequently these BODs are excluded from the document flow:

- SyncItemMaster
- ProcessShipment
- ProcessReceiveDelivery
- ProcessInventoryAdjustment.

Note:

For this scenario you must define placeholder items in M3, one for parts and one for services, and reference these items in the document flow.

See *Configuring placeholder M3 items for parts and services* and *Configuring the document flow between M3 and HxGN EAM for the NoM3Stock variant*.

Downloading the solution XML file

1. Sign in to the Infor Customer Portal.
2. From the download center for your product, download the applicable M3IEAM_M3BE_EAM_Document_Flow_XXX_0110.xml file to a local folder.

Importing the solution XML file

1. In ION Desk, select **Connect > Data Flows**.
2. Click **Import**.
3. Browse and select M3IEAM_M3BE_EAM_Document_Flow_XXX_0110.xml.
4. Click **Open**. The connections, document flows, and mappings from the file are imported.
5. Optionally, select *Rename the imported mappings* if the document flow exists or if an activity, such as a connection point, mapping, or file template, is already in the target environment. ION renames the model by adding **_1** to the original name. You can specify a different name.

If a document flow already exists, the imported flow is renamed.

If a connection point or mapping already exists, the imported item is renamed. The corresponding activities in the document flow use the new names.

Updating connection points for the standard document workflow

If you imported the standard documentation workflow, use these instructions.

Updating the Infor M3 connection point - standard doc flow

You must update the connection points that were included in the imported solution XML file to use the existing Infor M3 connection point. You have defined this connection point using the steps in the *Infor M3 Configuration Guide for Infor ION*.

1. In ION, select **Model > Connect > Document Flows**.
2. On the Document Flows page, select the sample flow for this integration.

The sample flow has activity boxes that represent the sample connection points. The document icons between the activity boxes list the documents that flow between the connection points.

3. Select the sample box that is labeled with **M3BE_Outbound**. This box represents the connection point of your Infor M3 instance in the document flow. This connection point sends documents to the HxGN EAM connection point.
4. In the Application Activity Properties pane, click **Add**.
5. Select the Infor M3 connection point that you defined using the *Infor M3 Configuration Guide for Infor ION*.
6. In the Application Activity Properties pane, click **Details** for the Infor M3 connection point.
 1. Ensure that the Documents tab includes all the inbound and outbound documents that are required for this integration. Your Infor M3 connection point also includes documents for other integrations.

See the list of inbound and outbound BODs that are required for this integration in *Integration of solution components*.

If a document is missing, add it to the Infor M3 connection point and specify whether it can be sent or received or both.

2. On the Connection tab, click **Test** to verify whether the connection is working. A message is displayed that indicates whether the test was successful. If the test was not successful, correct the connection details and try again.
7. Return to the Document Flow Modeler page. Optionally, click **Yes** to save any changes.
8. When the document flow uses the operational connection points, delete the imported duplicate connection points as described in *Deleting a connection point* in the *Infor ION Desk User Guide*.
9. Select the **M3BE_Inbound** sample box, which represents the Infor M3 connection point for receiving documents from Infor M3.
10. Repeat the steps 3 to 9 for **M3BE_Inbound**.

Updating the HxGN EAM connection point - standard doc flow

You must update the connection points that were included in the imported solution XML to use the existing HxGN EAM connection point. You defined this connection point using the *HxGN EAM Configuration Guide for Infor ION*.

1. In ION, select **Model > Connect > Document Flows**.
2. On the Document Flows page, select the sample flow for this integration.

3. On the Document Flow Modeler page, select the sample box that is labeled with **EAM**. This box represents your HxGN EAM instance connection point in the document flow.
4. In the Application Activity Properties pane, click **Add**.
5. Select the HxGN EAM connection point.
6. In the Application Activity Properties pane, click **Details** for the HxGN EAM connection point.
 1. Ensure that the Documents tab includes all of the inbound and outbound documents that are required for this integration. Your HxGN EAM connection point also includes documents for other integrations.

See the list of inbound and outbound BODs that are required for this integration in *Integration of solution components*.

If a document is missing, add it to the HxGN EAM connection point and specify whether it can be sent, received, or both.

2. On the Connection tab, click **Test** to verify whether the connection is working. A message is displayed that indicates whether the test is successful. If the test is not successful, correct the connection details and try again.
7. Save any changes and return to the Document Flow Modeler page.
8. In the Application Activity Properties pane, select the sample connection point and click **Remove**.
9. Return to the Document Flow Modeler page. Optionally, click **Yes** to save any changes.

Updating connection points for the NoM3Stock document flow variant

If you imported the scaled-down document flow, use these instructions.

Updating the Infor M3 connection point - no M3 stock

You must update the connection points that were included in the imported solution XML file to use the existing Infor M3 connection point. You have defined this connection point using the steps in the *Infor M3 Configuration Guide for Infor ION*.

1. In ION, select **Model > Connect > Document Flows**.
2. On the Document Flows page, select the sample flow for this integration.

The sample flow has activity boxes that represent the sample connection points. The document icons between the activity boxes list the documents that flow between the connection points.

3. Select the sample box that is labeled with **M3BE**. This sample box represents the connection point of your Infor M3 in the document flow.
4. In the Application Activity Properties pane, click **Details**.
5. Select the Infor M3 connection point that you defined using the *Infor M3 Configuration Guide for Infor ION*.
6. In the Application Activity Properties pane, click **Details** for the Infor M3 connection point.
 1. Ensure that the Documents tab includes all of the inbound and outbound documents that are required for this integration. Your Infor M3 connection point also includes documents for other integrations.

See the list of inbound and outbound BODs that are required for this integration in *Integration of solution components*.

If a document is missing, add it to the Infor M3 connection point and specify whether it can be sent or received or both.

2. On the Connection tab, click **Test** to verify whether the connection is working. A message is displayed that indicates whether the test was successful. If the test was not successful, correct the connection details and try again.
7. Save any changes and return to the Document Flow Modeler page.
8. When the document flow uses the operational connection points, delete the imported duplicate connection points as described in "Deleting a connection point" in the *Infor ION Desk User Guide*.

Updating the HxGN EAM connection point - no M3 stock doc flow

Update the connection points that were included in the imported solution XML to use the existing HxGN EAM connection point. You have defined this connection point using the steps in the *HxGN EAM Configuration Guide for Infor ION*.

1. In ION Desk, select **Connect > Data Flows**.
2. On the Data Flows page, select the sample flow for this integration.
3. On the Document Flow Modeler page, select the sample box that is labeled with **EAM_Outbound_SyncServiceConsumption**. This box represents the connection point of your HxGN EAM instance in the document flow.
4. In the Application Activity Properties pane, click **Add**.
5. Select the HxGN EAM connection point that you have defined using the *Infor HxGN EAM Configuration Guide for Infor ION*.
6. In the Application Activity Properties pane, click **Details** for the HxGN EAM connection point.
 1. Ensure that the Documents tab includes all of the inbound and outbound documents that are required for this integration. Your HxGN EAM connection point also includes documents for other integrations.

See the list of inbound and outbound BODs that are required for this integration in *Integration of solution components*.

If a document is missing, add it to the HxGN EAM connection point and specify whether it can be sent or received or both.

2. On the Connection tab, click **Test** to verify whether the connection is working. A message is displayed that indicates whether the test is successful. If the test is not successful, correct the connection details and try again.
7. Save any changes and return to the Document Flow Modeler page.
8. In the Application Activity Properties pane, select the sample connection point and click **Remove**.
9. Select the HxGN EAM **Outbound_ProcessRequisition** box, which represents the HxGN EAM connection point for receiving documents from HxGN EAM.
10. Repeat steps 3-8 for HxGN EAM **Outbound_ProcessRequisition**.
11. Select the HxGN EAM_Inbound box, which represents the HxGN EAM connection point for receiving documents from Infor M3.
12. Repeat steps 3-8 for HxGN EAM_Inbound.
13. Save your changes and return to the Document Flow Modeler page.

Configuring the document flows between Infor M3 and HxGN EAM

1. In ION Desk, select **Connect > Data Flows**.
2. On the Data Flows page, verify that the solution document flows exist.
3. Click the document icons in the flows and verify that they contain the expected documents, as shown in *Integration of solution components*.

Configuring the document flow between M3 and HxGN EAM for the NoM3Stock variant

1. In ION Desk, select **Connect > Data Flows**.
2. On the Data Flows page, verify that the solution document flows exist.
3. Click the document icons in the flows and verify that they contain the expected documents, as shown in *Integration of solution components*, except for these BODs, which are excluded from the NoM3Stock variant:
 - SyncItemMaster
 - ProcessShipment
 - ProcessReceiveDelivery
 - ProcessInventoryAdjustment
4. Click xslEAMSyncServiceConsumption.
 1. In the XSLT mapping properties, click **Details**.
 2. In the XSLT-code, replace EAM-SERVICE with the name defined for your service dummy item.
 3. Click **Save**.
5. Click xslEAMProcessRequisition.
 1. In XSLT mapping properties, click **Detail**.
 2. In the XSLT-code, replace EAM-NSTOCK with the name defined for your part dummy item.
 3. In the XSLT-code, replace EAM-SERVICE with the name defined for your service dummy item.
 4. Click **Save**.

Activating a document flow

A new or changed document flow can be used in Infor ION after it is activated.

To activate a document flow in ION Desk:

Note: If you encounter problems during this setup, you must stop and restart the ION service.

1. Select **Connect > Data Flows**.
2. On the Data Flows page, select the document flow and click **Activate**.
 - If you receive a message that the activation was successful, click **OK**.
 - If you receive a warning message, the model is still activated.
 - If you receive an error message, the model could not be activated.

See the *Infor ION Connect Administration Guide* for detailed information about activation errors.

Setting up ION business events and workflows

You can set up ION events and workflows for Infor M3, for HxGN EAM, and between Infor M3 and HxGN EAM. Use the *ION Process Administration Guide* to create ION events, alerts, and workflows. See the appropriate *Workflow and Alert Content Examples for Infor ION Guide* for examples of Infor ION alerts and events that are available for these products.

Publishing BODs

After the ION connections are configured, BODs must be published for this integration.

Starting products and services

Ensure that these products, services, and processes are running:

- M3
- HxGN EAM
- ION service: Use the ION Grid management user interface to verify that the ION service is running.

See the *Infor ION Connect Administration Guide*.

Infor M3 BOD dependencies

Initial data load

During normal processing, BODs are generated when a user makes a data change or completes a transaction. If you are setting up a new integration with another product, you must manually generate BODs that pass the current set of Infor M3 data to HxGN EAM to synchronize the base systems. The BODs are placed in the message out-box, from which Infor ION retrieves them and passes them on to the other product.

Sending the initial data load from Infor M3

Activate each rule for each triggering table before you run the initial data load:

BOD		Triggering table
SupplierPartyMaster		CIDMAS
CodeDefinition	Cost Centers	FCHACC
	Unit Codes	CSYTAB
ItemMaster		MITMAS

To perform an initial data load of Infor M3 data into BODs that are placed in the message out-box:

See *Instructions for initial load of specific BODs* in *Sending the initial data load* in the *Infor M3 Configuration Guide for Infor ION*.

After the initial data load, Infor M3 sends BOD updates when users change certain data or when certain transactions occur in Infor M3.

For a list of the events that generate BODs, see *Business events that generate outbound BODs* in the *Infor M3 Configuration Guide for Infor ION*.

Sending the initial data load from HxGN EAM

To perform an initial load of HxGN EAM data into BODs that are placed in the message outbox:

After the initial data load, HxGN EAM sends BOD updates when users change certain data or when certain transactions occur in HxGN EAM.

For a list of the events that generate BODs, see *Business events that generate outbound BODs* in the *HxGN EAM Configuration Guide for Infor ION*.

Publishing additional initialization data

The initial data loads from M3 include all the master and initialization data. Additional master data BODs and transaction BODs are generated through M3 and HxGN EAM business events as they occur.

Verifying the integration

After a successful integration, transactions in Infor M3 and HxGN EAM generate BODs that send data to the respective other product through ION.

You must ensure that the integration sends and receives the expected data.

Verifying the data flow

To verify whether the initial data is flowing between the products, check the message in-box and out-box areas in both products to see if the Infor M3 data arrives and if data is retrieved from HxGN EAM.

If data does not flow between the systems, see the *Troubleshooting* section in the *Infor M3 Configuration Guide for Infor ION*.

Verifying business tasks

If multiple instances of the products send BODs, verify that the expected data from each instance is available in the appropriate areas of the other product.

Performing ongoing business processes

You must coordinate any daily or scheduled activities between the integrated products.

Troubleshooting

If data does not flow between the systems, an error may exist in your ION configuration.

See the ION configuration guides for the integrated products.

If you receive any error messages, see the error message descriptions for this integration.

Error messages

For this version, no error messages are specified.