Infor Partner Management eXchange ("IPMx") Partner Admin User Training

November 10, 2016

Specialized by industry.
Engineered for speed.

About this training

This training is designed for persons who have been designated as a "User Admin" for a Partner Company. The training includes:

- Overview of what IPMx is and how it is used internally and by Partners
- How to create or deactivate a User
- How to request Systems Access to the enables systems
- How to request a password reset for a User

Types of Partners included in this initial launch include:

- IPN Channel
- IPN Channel Public Sector
- IPN Alliance

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What is IPMx?

What is IPMx ?

- ❖ IPMx stands for Infor Partner Management eXchange
  - Also referred to as IPMX or IPM in some contexts
- ❖ IPMx is both a database to manage Partner information as well as business application to manage Partner Users & System Access
  - Single repository which will contain information on all Infor Partners when rollout is completed
  - The business application provides Partner self-service
  - Improve speed for Partners to gain access to Infor systems
  - Integration to other business systems

Business Challenges (why create IPMx?)

- In 2012, there were 300+ partners with access to Infor systems. Today there are 700+ partners with access to Infor systems and many more being added with the launch of new systems.

- Over 10,000 Partner Uses with access to one or more Infor Systems.

- Nearly 2,000 active Partners to be managed across all the different types of relationships - IPN, Alliance, Delivery, Solution (Product), Support, Education, Legacy Channel, etc.

- Launch of CPQ and the need to build partner margins into the configuration engine and for "Net" partners to calculate margin in the CPOF (Channel Partner Order Form).

Two Components of IPMx

❖ Partner Self-Service User Management

- Provide partners with Self-service tool to create user accounts & system access
- Decrease the wait time from 3-5 business days to 1 business day or less for access to Infor systems
  - Enables partners to complete their training and certifications immediately.
- Allow partners to fully manage their own users
  - Eliminate the need for the SARF (System Request Access Form) and decrease touch points

❖ Contract Management

- Create central repository of all Partner Data (previous focus was on IPN & Alliances only)
- Replace the manual Company spread sheets & Rate Sheet
  - Partner Data Warehouse only covered <50% of partners
  - Old process subject to inaccuracies of data interpretation and spread sheet management
- Needed a system that can feed Partner Contract Data into the Customer contracting systems (CPQ now and CLM in the future)

IPMx Data structure and limitations

❖ How is the data structured and what is the scope that will an User Admin see?

- An IPMx record has been set-up for Company/Agreement combination
- A Partner who has 3 active Agreements with Infor will be set-up as 3 separate records in IPMx
  - Example - a company has a 2PN Agreement, 2PG Agreement & Alliance Agreement
- An Agreement with a Subsidiary Addendum may have 2+ IPMx Records
- **Most Partners have 1 relationship with Infor and 1 IPMx record**
- Why can't all the Agreements be under 1 record in IPMx?
  - The limitations in other Infor systems has required that IPMx is structured this way
  - There is work underway to look at modifications in this area for all our systems
- IPMx is currently structured such that a User Admin can only see the Users for a single IPMx record (hence multiple User Admins will be required)

Launch Schedule

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IPMx Phased Go-live

- Phase 1a – Functions Enabled for Internal Use (1 May 2016)
  - Load Contract data for all IPN Channel, IPN Alliance and Non-IPN Channel Partners
  - Partner Contract data feed into CPQ
  - Use by the Global IT Help Desk for managing systems access and for testing self-service functions

- Phase 1b – Partner Access (**17 November 2016**)
  - Load User data for IPN Channel and IPN Alliance Partners
  - Self-Service User Management for Partners (Elimination of SARF)

Types of Users

Types of Users

❖ Partner "User Admin"

- A Person who has been designated to manage other Users for the Partner Company

- Typically at least 2 persons for each Partner, but can be more than 2

- Identified in FY17Q2 through email communication with the Partners

❖ Partner "User" (a standard User)

- User records created and managed in IPMx

- Standard User does not have the ability to access IPMx

❖ Internal Infor Users

Accessing IPMx

Accessing IPMx

❖ After the Launch Date, each "User Admin" will access IPMx using their Active Directory Account Information

- This is your externals account UserID and Password
  - EXTERNALS\user_account
  - Same account used to access the Sales Portal at salesportal.infor.com/partners
- IPMx URL :

  http://ipmx.infor.com/IPM/ListUsers.aspx

❖ Partners should see a pop-up when they access this URL:

Authentication Required

Enter username and password for http://ipmx.infor.com

User Name: EXTERNALS\my_userid

Password: •••••••••

Cancel   OK

Possible Login Issues and step to resolve

1. Trying to connect to the wrong URL
   - Use the URL - http://ipmx.infor.com/IPM/ListUsers.aspx

2. Incorrectly typing your name or password
   - Try re-entering the correct userid in the form EXTERNALS\my_userid
   - Re-enter your password

3. You are an User Admin and you tried your login on the above URL but it was not authenticating your user ID on the IPMx URL
   - Make sure you are including the domain name: EXTERNALS\my_userid
   - Test if you can you log into the Sales Portal? If yes, then go to #4
   - If you cannot log into the Sales Portal, submit an Xtreme Incident requesting an Externals Active Directory User ID and that they set you up as an IPMx User Admin

4. You received a message "You are not a valid IPM user, please contact administrator"
   - Submit an Xtreme Incident requesting to become an IPMx User Admin

Managing Existing Users

Managing Existing Users

❖ As an User Admin, you have the ability to perform the following actions:

- Change a User's profile including upgrading from standard User to User Admin & update the role, job title, phone number, city, or country
- Inactivate a User
- Change a User expiration date
- Request an "Externals" Active Directory Account be set-up for a User that does not have one.
- Make a Systems Access Request for yourself or any other user in your company
- Request a password reset
- Add a User

Initial Screen when an User Admin logs in

Infor Partner Management®   Mo Storin

Home   Requests ▾   About ▾

Add User | Access Request

Company: Bullpad Consulting Test Company

Edit	View	User Type	First Name	Last Name	Email Address	Phone	City	Country	Status ▲	⚙
✎	📄	User Admin	Ob	Storin	obstorin@comcast.net		Marietta	United States	Active	
✎	📄	User	TestUser10	TestUser10	TestUser10@test1.com		hyd	India	Active	
✎	📄	User	John T.	Doe	veena.boguda@test2.com		Hyderabad	India	Active	
✎	📄	User	Dummy	User	my.test@comcastzzzzzz.net		Marietta	Albania	Active	
✎	📄	User Admin	Mo	Storin	mostorin@comcast.net		Miami	United States	Active	

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Initial Screen when an User Admin logs in

"Home" Tab

"Requests" Tab

Your name

"About" Tab

infor Infor Partner Management®

Mo Storin

Home   Requests ▾   About ▾

Function Buttons – will vary based on navigation (Home Tab provides 2 buttons)

Add User | Access Request

Company: Bullpad Consulting Test Company

Your company's name

Edit	View	User Type	First Name	Last Name	Email Address	Phone	City	Country	Status ▲
✎	🗋	User Admin	Ob	Storin	obstorin@comcast.net		Marietta	United States	Active
✎	🗋	User	TestUser10	TestUser10	TestUser10@test1.com		hyd	India	Active
✎	🗋	User	John T.	Doe	veena.boguda@test2.com		Hyderabad	India	Active
✎	🗋	User	Dummy	User	my.test@comcastzzzzzz.net		Marietta	Albania	Active
✎	🗋	User Admin	Mo	Storin	mostorin@comcast.net		Miami	United States	Active

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Click "View" icon

Table showing all users for this IPMx record (a record is a Company + Agreement)

View User

![infor]

Home   **Requests** ▾   **About** ▾

Click "Edit" button to modify this user's profile

[Edit] | Company Users | Access Request | Reset Password

User Details - Mo Storin
← First Name and Last Name

User Information ⌃

Name: Mo Storin

Expiration Date: 6/30/2017

Country: United States

AD Login Name: mstorin2

mostorin@comcast.net ← Email address

Active

Job Title:

City: Miami

Type: User Admin ← User Type ("User" or "User Admin"

If there is an "AD Login Name", then the user has an EXTERNALS Domain UserID

Partner Information ⌃

Partner: Bullpad Consulting Test Company:

Region: NA

Partner Level: N/A

Partner Manager: Mo Storin

Partner Type: Non-IPN Channel

Infor Manager: Dino Daddona

Table Showing Access Requests for this user

User Access Requests ⌃

Request ID	Infor System	Requested Date	Roles	Products	Status
965	CPQ	7/11/2016	Representative		Ready to be Processed

Example of prior systems access request for CPQ

Edit a Users Profile

Edit User

User Information

You can modify the data in the text fields except for email address which is read-only

*First Name: Mo

*Last Name: Storin

*Email: mostorin@comcast.net

*Expiration Date: 6/30/2017

Job Title:

Phone:

*City: Marietta

*Country: Select Country

Repub|

Central African Republic
Czech Republic
Dominican Republic
Iran (Islamic Republic of)
Korea, Dem. People's Republic
Korea, Republic of
Lao People's Dem. Republic of
Moldova, Republic of
Slovakia (Slovak Republic)
Syrian Arab Republic
United Republic of Tanzania

*Status: Active

*Type: User Admin

Select Type
User
User Admin

For the "Country" drop down, typing any portion of the country name will begin to limit the choices shown in the drop down

Expiration Date must be between today and 2 years from today.

User Type Drop down

Edit a Users Profile

You can modify the data in the text fields except for email address which is read-only

User Role drop down

Click "Save" button to save changes (or "Cancel" to discard changes)

Select "Inactive" for a user who has left the company or no longer needs access to any Infor System, then set Expiration date to current date.

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Customize the User List Table

Infor Partner Management®   Mo Storin

Home   Requests ▾   About ▾

Add User | Access Request

Company: Bullpad Consulting Test Company

Edit	View	User Type	First Name	Last Name	Email Address	Phone	City	Country	Status ▲	⚙
✏	📄	User Admin	Ob	Storin	obstorin@comcast.net		Marietta	United States	Active	
✏	📄	User	TestUser10	TestUser10	TestUser10@test1.com		hyd	India	Active	
✏	📄	User	Veena	Hos	veena.boguda@test2.com		Hyderabad	India	Active	
✏	📄	User	John T.	Doe	my.test@comcastzzzzzz.net		Marietta	Albania	Active	
✏	📄	User Admin	Mo	Storin	mostorin@comcast.net		Miami	United States	Active	

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Customize the User List Table

Type any part of value you want to search for inside the column.
No wildcards necessary.
Then hit enter key

Click on a field name to change the sorting

Drag and drop a field name to move a column

Customize the User List Table

Click the settings icon

Then click on "Column Personalization"

You can hide or unhide standard fields

View a different User Profile

Click "View" icon

User without an Infor EXTERNALS Domain UserID

Edit | Company Users

Click "Edit" button to modify this user's profile

User Details - John T. Doe

User Information ⌃

The "AD Login Name", is blank, therefore the user **does not** have an Infor EXTERNALS Domain UserID

Name:	John T. Doe		...stzzzzzz.net	Job Title:
Expiration Date:	12/31/2016			City:	Marietta
Country:	Albania	Status:	Active	Type:	User
AD Login Name:		AD Account GUID:	N/A	

Partner Information ⌃

Partner:	Bullpad Consulting Test Company:	Partner Level:	N/A	Partner Type:	Non-IPN Channel
Region:	NA	Partner Manager:	Mo Storin	Infor Manager:	Dino Daddona
SmartStream Vendor ID:					

User Access Requests ⌃

Request ID	Infor System	Requested Date	Roles	Products	Status

There should be no systems requests when the user does not have an EXTERNALS Domain UserID

No Records Found

Option to create an Externals AD account for User

Home   Requests ▾   About ▾

Edit User

The screen is very similar to the last User we looked at

User Information   ⌃

*First Name: [John T.]   *Last Name: [Doe]   *Email: my.test@comcastzzzzz.net

*Expiration Date: [12/31/2016   📅]   Job Title: [   ]   Phone: [   ]

*City: [Marietta]   *Country: [Albania   ▾]   *Status: [Active   ▾]

*Type: [User   ▾]   ☐ Externals AD account required?

                                          [Save] [Cancel]

Except, there is a new field that appears that allows you to create the
Externals Active Directory ("AD") account for this person.

Note - this field will not appear when the Externals Account already exists

System Access Request for a User

You can click the "Access Request" function button from the Company Users Screen
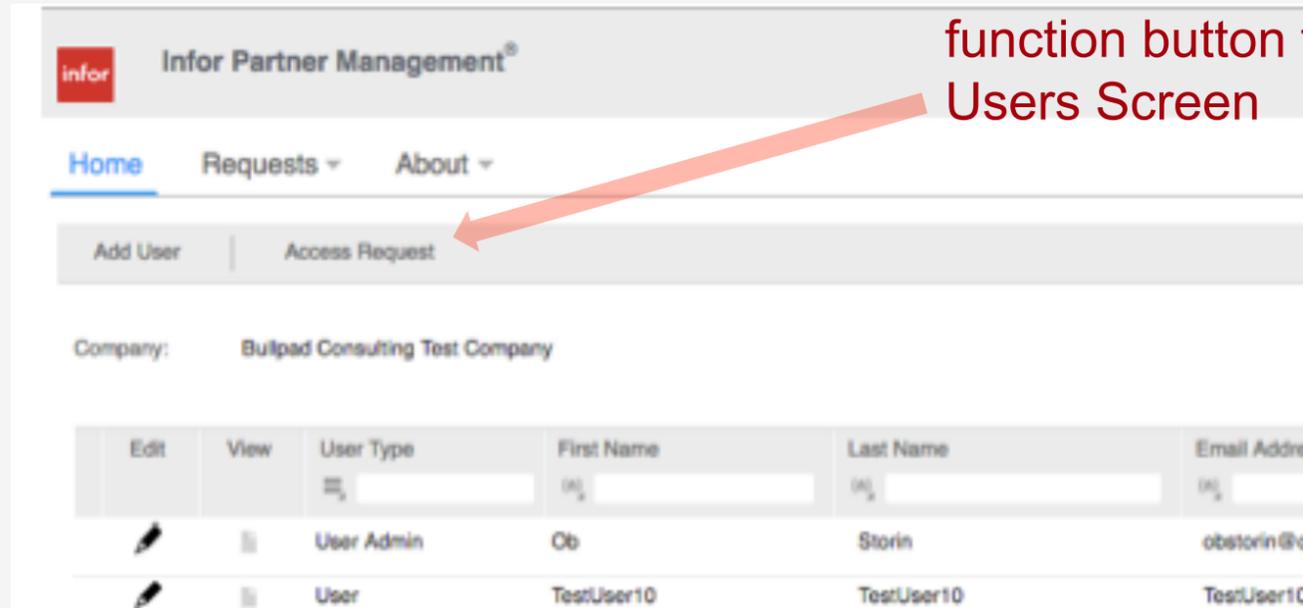
Or click on the "Requests" Drop Down on the list of tabs
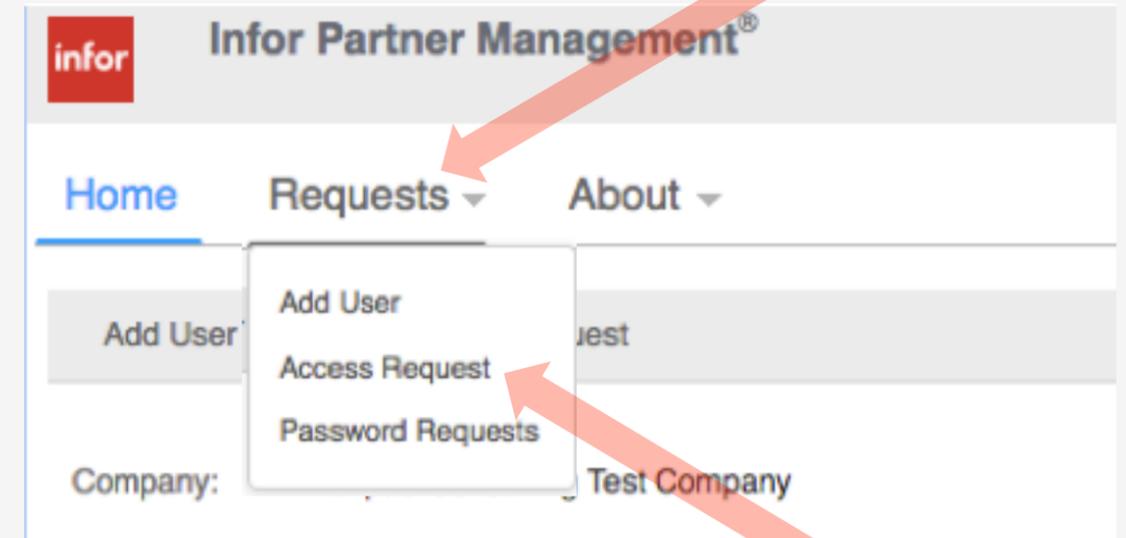
And select "Access Request"

Or click the "Access Request" function button from the View User Details screen
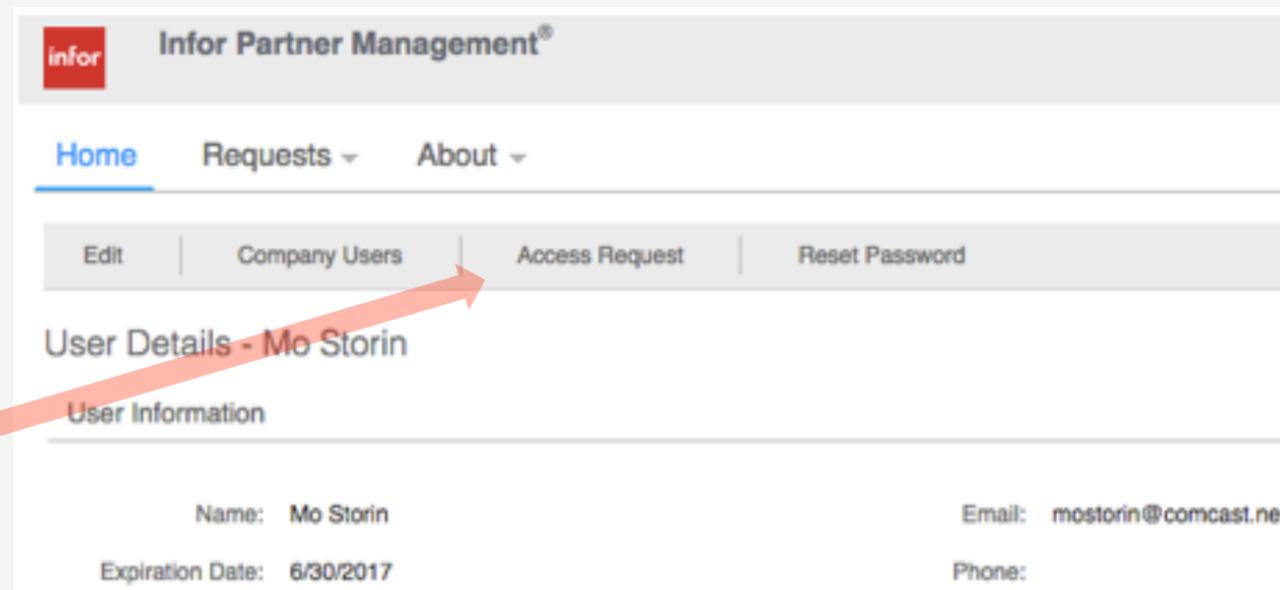
System Access Request – Select User

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Home | Requests ▾ | About ▾

New Request

Click the User drop down and select the User you want to make a Systems Access Request for.

User Information

Company: Bullpad Consulting Test Company

*User: Select User ▾   Email: Phone:

Select User
John T. Doe
Mo Storin
Ob Storin
TestUser10 TestUser10
Veena Hos

City: Country:

Other Inf

*In   *Roles: *Products:
System:

Note: When selecting access to Campus, the Roles and Products selected is only used for determining which exams the User needs to access

Create   Cancel

System Access Request - CPQ

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Home   Requests ▾   About ▾

New Request

User Information

Company: Bullpad Consulting Test Company

* User: Mo Storin   Email: mostorin@comcast.net   Phone:

City: Miami   Country: United States

Click the User drop down and select the User you want to make a Systems Access Request for.

Other Information

* Infor System: Select System   * Roles: * Products:

Note: When selecting access to Campus, the Roles and Products selected is only used for determining which exams the User needs to access

Create   Cancel

System Access Request – CPQ (Configure, Price, Quote)

Infor Partner Management®

Home   Requests   About

New Request

User Information

Company: Bullpad Consulting Test Company

*User: Mo Storin   Email: mostorin@comcast.net

City: Miami   Country: United States

No special role applies to CPQ.

Other Information

*Infor System: CPQ   *Roles: No Roles

Note: When sele...   ...ucts selected is only used for determining which exams the User needs to access

Click "Create" to submit this request
(click Cancel to discard request)

Create   Cancel

Once you click Create, the authorization for this user access CPQ occurs in less than a minute and the User will receive an email with CPQ Login and training information.

Access to Infor Portals

Dear Mo Storin,

You now have access to the Infor CPQ site.

Before you start using Infor CPQ you are required to complete the CPQ online

Start another new System Access Request

Click the User drop down and select the User you want to make a Systems Access Request for.

System Access Request – Campus (Learning Management)

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Home   Requests ⌄   About ⌄

New Request

User Information

When Campus is selected as the System, you will be required to select a keyboard layout for the user

When Campus is selected as the System, you will also be required to add one or more Roles and Product Lines for this User. IMPORTANT: The roles and product lines are only used for entitling Exams within Campus and these fields do not currently limit what courses are available to the user.

If no Role based Exams are required by this user, select "Infor internal systems training" For the Role and select "Standard Exams" for the Product

*Infor System: Campus

*Keyboard layout: Select Layout

Note: When selecting

Select Layout

Dutch-Belgium(nl-be)
English(us)
English(uk)
Finnish(fi)
French(fr)
French-Belgium(fr-be)

*Roles:

Demo
Functional
Infor internal systems training
Sales
Technical

*Products:

BI
CPM
EAM
Expense Management
PLM
Service Management
Standard Exams
SyteLine

User needs to

Note – the list of Products is limited to those Product Lines listed in the partner Agreement

Create   Cancel

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System Access Request – Campus (Learning Management)

Infor Partner Management®

Home   Requests ▾   About ▾

New Request

User Information

Company:

*User: Mo Storin

City: Miami

Other Information

*Infor System: Campus   *Roles: | Sales ✕ | Demo ✕ |

*Kayboard layout: Select Layout

Demo
Functional
Infor internal systems training
Sales
Technical

Note: When selecting access to Campus, the Roles and Producs selected i... ...eer needs to access

*Products: | EAM ✕ | SyteLine ✕ |

BI
CPM
EAM
Expense Management
PLM
Service Management
Standard Exams
SyteLine

Once you click Create, the authorization for this user access Campus or the new Exams requested for Campus occurs in 1 to 2 business days (often the same day) and the user will be notified via email.

To select multiple choices in a drop down, pick one, then click inside the drop down box again to pick the second item. Repeat as needed.

Click "Create" to submit this request
(click Cancel to discard request)

Create   Cancel

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Submitting a Password Reset Request

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Home   Requests ▾   About ▾

Add User

Access Request

~~Password Requests~~

Company:
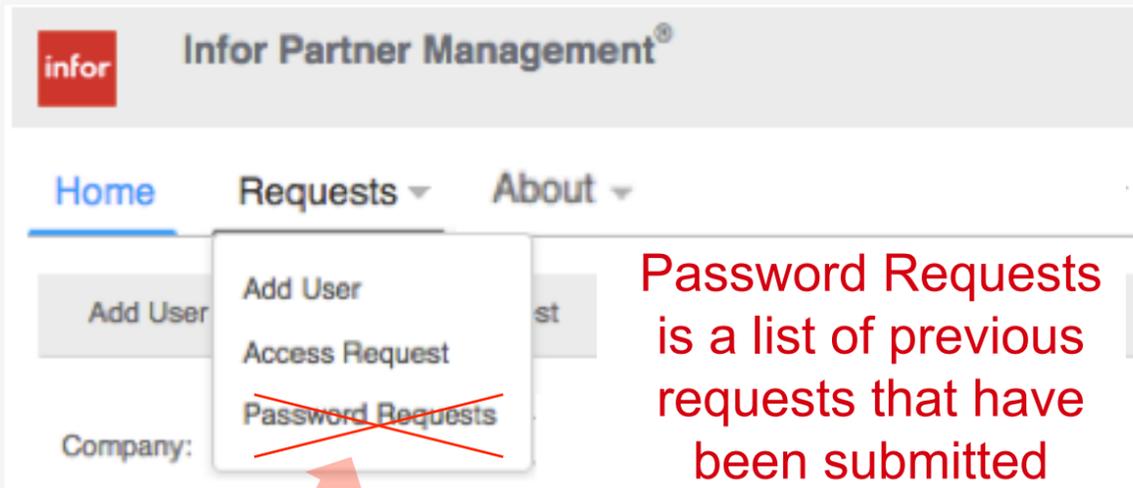
Password Requests is a list of previous requests that have been submitted

This is NOT where you request a Password Reset

To make a Password reset request, you must navigate to the "View User" screen

Click the "Reset Password" button and the request will be submitted for action

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Home   Requests ▾   About ▾

Edit   Company Users   Access Request   Reset Password

User Details - Mo Storin

User Information

Once you have selected a User, you can view their details

The option to "Reset Password" will not appear unless the User already has an AD Login Name (EXTERNALS Domain User ID)

Name:	Mo Storin
Expiration Date:	6/30/2017
Country:	United States
AD Login Name:	mstorin2

Once you click Reset Password, an email will be generated for this user, usually within 2 hours, with temporary login instructions. The temporary password link is only active for a limited time.

Creating a New User

Creating a new user

You can Add a new User by either Clicking on the "Add User" button on the Home tab or by Clicking the Requests menu and selecting "Add User" there.

Creating a new user

Infor Partner Management®

Mike

Home   Requests ▾   About ▾

Add User

Partner Information   ⌃

Company Name: Bullpad Consulting Test Company   Partner Level: N/A   Partner Type: Non-IPN Channel

Region: N/A   Partner Manager: Mo Storin   Infor Manager: Dino Daddona
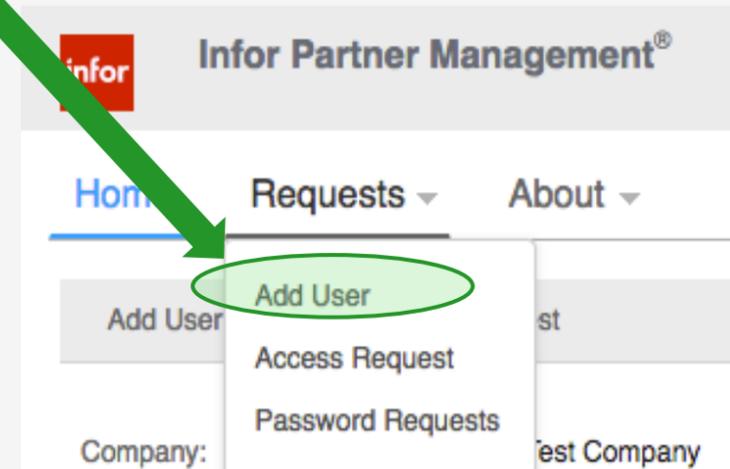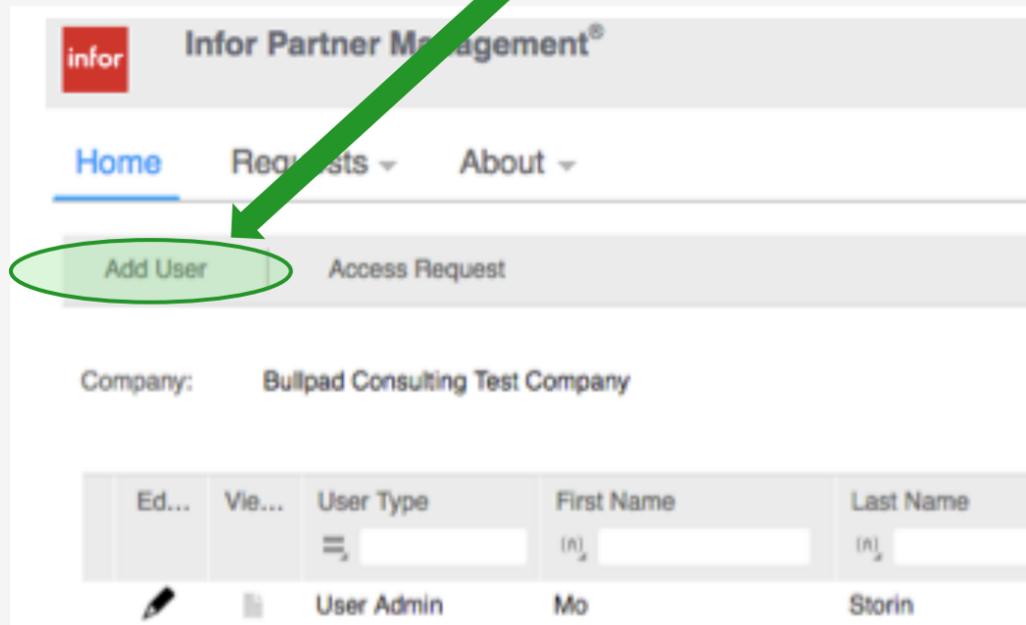
Completing the requested information for a new User is straightforward. Items marked with a red asterisk are required fields.

Don't forget to check the "Externals AD account" checkbox if systems access will be required for this new User (for example for Sales Portal)

*Last Name: [   ]

Job Title: [   ]

*Country: [Select Country   ▾]

☐ Externals AD account required?

Expiration Date: [☐]

*City: [   ]

[Save] [Clear] [Cancel]

*Email: [mike.storin@gmail.com   ❗]

Please do not use public or Infor domain email address

Phone

*Type: [Select Type   ▾]

*User Role: [Select User Role   ▾]

⚠ Duplicate Email   ✕

An account with the email 'mike.storin@comcast.net' already exist.

[Ok]

The system will not allow an email to be used that already exists in the Active Directory, even if the Externals ID account required field is not checked.

A public domain email is not allowed for access to Infor systems.

What is, or is not, managed through IPMx?

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What Systems are managed through IPMx?

- ❖ As of the Launch date, there are multiple systems where access will be entitled through IPMx. There are however 2 different mechanisms in place:

- ❖ Systems which are automatically entitled when a User is created in IPMx
  For Partner companies/agreements that are eligible for access:
  - Infor **Sales Portal** for Partners [salesportal.infor.com/partners]
  - **GDE Portal** Site for GDE deployment information [gde.infor.com]
  - **RequestX** support site for the GDE systems [requestX.infor.com]

- ❖ The Systems where a Systems Access Request must be submitted:
  - **CPQ**
  - **Campus** (requires the role and product line information for Exams)

- ❖ More systems will be incorporated into the IPMx processes in the future
  - Systems like Infor CRM will be added in partner roll-out implementation plan

What is not managed through IPMx?

Any other Infor System not specifically listed are not managed through IPMx, e.g.:

❖ **Xtreme** Support (and the Product Download Center managed through Xtreme)
- Entitlement to Infor Xtreme is by SKU, and the management of these entitlements is handled through a separate Order Entry process. [www.inforxtreme.com]

Third Party managed sites

❖ Typically Partners must register separately for access, often separate ID/password

❖ **Digital Edge Content Syndication** site

❖ **Infor Market Development Fund (MDF)** site

❖ **ValueApps** site

❖ **Infor Certification Program** (webassessor.com)

❖ **Salesforce.com** Partner Portal

❖ **CloudSuite Portal 2.0** GDE
- Site on AWS for Partners to deploy pre-built demo images (not GDE Deployment Information or GDE Downloads)

infor Support

Support for IPMx

- ❖ User Admins are expected to support the other users within their company for the following:

  - Request for a new UserID to the EXTERNALS Active Directory
  - Request new access to an Infor System managed within IPMx
  - Forgot their UserID or password

- ❖ Additional information can be found at
  http://inforpartnernetwork.com and on the Sales Portal.

- ❖ If a User Admin needs assistance with IPMx:

  - Check the Frequently Asked Questions and User Guide for answers.
  - Submit an incident in Infor Xtreme and select "IPN" as product code

- ❖ Contact your Partner Manager for guidance

Questions ?

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