AUTHENTIC introduces

infor User eXperience



How to ?	Create a credit manager homepage in InforOS
Prerequisite	Knowledgments in search query with IES and API
Steps	<pre>#01 - Create a new homepage #02 - Add a widget "Menu" #03 - Configure the widget "Menu" #04 - Add a widget "Tasks" #05 - Add a widget "M3 Information Monitor" #06 - Configure the widget "M3 Information Monitor" #07 - Add a widget "M3 Information Viewer" #08 - Configure the widget "M3 Information Viewer"</pre>
Versions	M3BE 15.1.4 MCP5 Infor OS 12.0.30

This tutorial aims to help a credit manager to create his own homepage. This one will contain:

- shortcuts for accessing M3 programs,
- assigned tasks from workflows,
- indicators,
- graph...

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#01 – Create a new homepage

In this section, we will create a new empty homepage. It will contain multiple widgets that we will add and configure in next steps. Note: each widget can be retitled and resized when added on the homepage.



#02 – Add a widget "Menu"

In this section, we will create a menu. It will be customized in next section by adding shortcuts.

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	Business Intelligence
	Business Process Statistics & Usage
	Social
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	My Recent
Search for "Menu" widget and click on	+ Menu +
Tips: you can find widget by using the s bar on left top of the widget catalog	Search Customize the Menu Widget using links
Q X Close	favorite pages.



Click on "Save"

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The widget is added on the homepage

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#03 – Configure the widget "Menu"

In this section, we will add in our menu some links from bookmarks. Bookmarks have been previously created (see "Additional information" at the end of this tutorial). Note: links can be standard URLs as http://www.authentic-grp.com/.

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Menu	+ …
Customers	

These steps can be reproduced for adding other links from existing bookmarks.

#04 – Add a widget "Tasks"

In this section, we will add a widget "Tasks". This widget will resume workflows notifications assigned to the credit manager. No specific configuration is required on this widget.

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Select "Widget Catalog"	Q Start Typing 🔒 < 🖡	
	Edit	
	Edit Page Layout	
	Widget Catalog	
	Page Settings	
	Remove Page	
	New Page	
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	My Pages	
	About	
Select "Business Process"		





The widget is added on the homepage

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Menu + Customers Blocked customers Blocked orders Ageing balance Credit limits analysis	Today	

#05 – Add a widget "M3 Information Monitor"

A monitor is an indicator. In our context, we will create indicators showing number of invoices overdue by range of days.





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#06 – Configure the widget "M3 Information Monitor"

In this monitor, we'll configure an API call for retrieving number of invoices that should have been paid since 10 days. Knowledge in API calls and IES search queries are required.

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These steps can be reproduced for adding other monitors by adjusting query.

#07 – Add a widget "M3 Information Viewer"

A viewer is used to display information returned by an API. It can be a list or graph.

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Application	3	M3 Information	M3 Information +	M3 Menu	+
Business Intelligence		Monitor	Viewer		
Business Process					
Statistics & Usage		A widget that lets you create monitors for M3 information you use frequently	View customers, suppliers, items, and other M3 information you use frequently	Locate and launch M3 progra tools jobs and reports	ams, forms,
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Utilities					

Click on "Save"



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M3 Information Viewer Q ····			
i The widget is not configured.			

#08 – Configure the widget "M3 Information Viewer"

In this viewer, we'll configure an API call for retrieving invoices to be paid in the coming months. Knowledge in API calls and IES search queries are required. Note: A custom list MI (CMS015) has been created for that purpose but will not be described here in this tutorial.

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M3 Information Viewer		
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Select "Configure" Select a delay for refreshing data	Configure Widget	
Select "Configure" Select a delay for refreshing data Select the API "CMS100MI"	Configure	
Select "Configure" Select a delay for refreshing data Select the API "CMS100MI" Select your own transaction	Configure 2 Search Refresh Change Input About About Journated and and and and and and and and and an	



These two last steps can be reproduced for adding same widget in "list" mode with your own API and/or transaction as you can see in final result.

Additional information



When M3 returns records, save the bookmark by clicki	the button 🔲
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And that's it!

Need help or more information ? Reach us now A contact@authentic-grp.com