Infor LN Integration Guide
In-Context BI

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Contents

About this guide

This guide includes how to install In-Context Business Intelligence (In-Context BI) reports for Infor LN and details about their contents.

Intended audience

This guide is intended for system administrators who manage the In-Context reports.

Organization

This table shows the chapters of the guide:

Section	Description
Overview	Provides an overview of the complete flow for In-Context reports
Installation and configuration	Provides instructions on how to install the In-Context reports
Reports	Provides information on the In-Context reports' contents

Related documents

You can find these documents in the product documentation section of Infor Xreme Support, as described in "Contacting Infor" on page 6:

- *Infor Workspace Installation and Configuration Guide for Active Directory*
- *Infor Workspace Installation and Configuration Guide for Active Directory Federation Services*
- *Infor Web UI - Installation and Configuration Guide (U8715 US)*
- *Infor Integration 6.2 - Installation Guide (U9018)*
- *Infor Integration 6.2 – System Administrator's Guide (U9042 US)*

- *Infor Enterprise Server ODBC and JDBC Connectors Installation Guide (U9173)*
- *Infor Enterprise Server Extensions - Installation Guide (U9484 US)*

Contacting Infor

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Overview

<div style="text-align: right">**1**</div>

This chapter provides an overview of the information flow when an In-Context report is run. This diagram shows the flow:
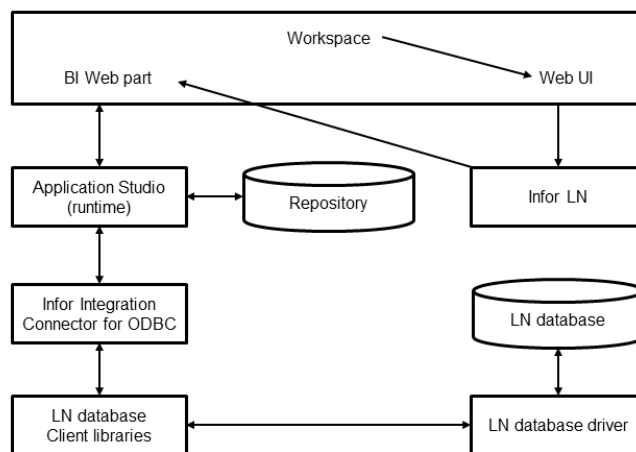
Users run an Infor LN session within Infor Workspace. The session is displayed by using Infor Web UI.

When working in the session, a Web part is triggered to run an In-Context report. A connection is made to Infor ION BI Application Studio to execute the In-Context report. Based on the session, different filters are applied to the report.

These reports require the execution of SQL queries to the LN database. The connection to the LN database is established by using Infor Integration Connector for the ODBC and database client libraries or the JDBC connector.

When a report is executed, the report is displayed in a Web part in Infor Workspace.

Installation and configuration

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This chapter provides the steps to install the In-Context reports.

Because the In-Context reports run in Infor Workspace environment, this section includes specific requirements for LN and requirements for Infor Workspace.

LN requirements

The prerequisites for LN include the following sections:

- Infor LN
- Connectivity to the LN database
- Web UI

Infor LN

These are the prerequisites for Infor LN:

- Porting set version 8.7a02 or later
- The following Infor Xtreme Support KBs:

KB	Title
1365907	After installation of 10.2.1, the In-Context BI web part did not show the graphs anymore.
1369674	Generated In-Context libraries should also send out messages for empty references.
1366163	In-Context BI Content Pack 10.2.1.

Connectivity to the LN database

These are the prerequisites for connectivity to the LN database:

- Infor Integration connector for ODBC, Version 6.2.11 or later
- DB Connector, Porting set version 8.8a02 or later
- The LN database should not run on Informix

Web UI

The Web UI version must be version 10.6 (BL0097) or later.

Infor Workspace requirements

For the Infor Workspace prerequisites, see the *Infor Workspace Installation and Configuration Guide for Active Directory*.

The Infor Workspace and BI Application Studio version must be 10.3.2.

Installation

This section includes these topics:

- LN specific requirements
- Common Infor Workspace requirements
- Content delivery

The minimal required versions described in the prerequisites of this document supersede the minimal versions mentioned in other documents.

LN requirements

Use the instructions in this section to set up and test connectivity to the LN database and to install the Web UI.

Setting up and testing connectivity to LN database

To set up and test the connectivity to the LN database:

1 Install the DB Connector.

- Refer to Infor Xtreme Support solution 22923520 for information about the porting set KBs.

- The LN db protocol scenario must be installed.

- Refer to *Installation Guide for ODBC and JDBC Connectors (U9173 US)* for installation instructions.

2 Install Infor Integration.

- Refer to Infor Xtreme Support KB 22867307 for information about the Infor Integration solutions.

- Refer to *Infor Integration 6.2-Installation Guide (U9018 US)* and *Installation Guide for ODBC and JDBC Connectors (U9173 US)* for installation instructions.

3 Create a Data Source Name (DSN).
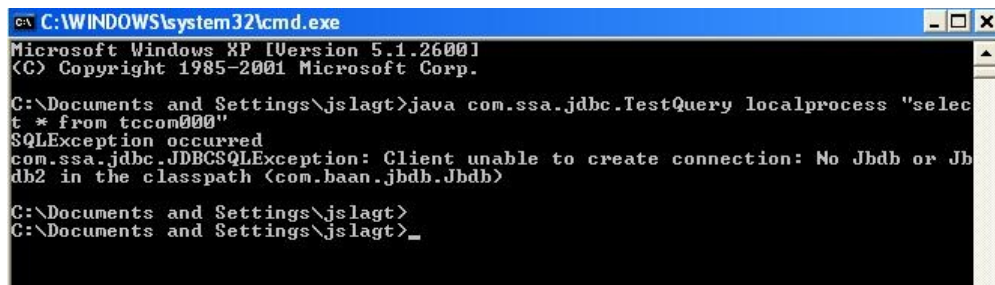
- After installation of the Infor ODBC driver, you must create a DSN. For instructions to set up a DSN, refer to the Infor Integration ODBC help topic in Infor Integration, on how to setup a DSN. Make sure you name the DSN **Infor Erp Enterprise** and specify **Remote Desktop Settings** as your db connector.

4 Test the connectivity.

- To test the database driver, run this command from the command line:

```
java com.ssa.jdbc.TestQuery localprocess "select * from tccom000"
```

- If you encounter the following error, check the Windows system environment variables:

Infor Integration can create a CLASSPATH variable as user variable, as shown in this screen:
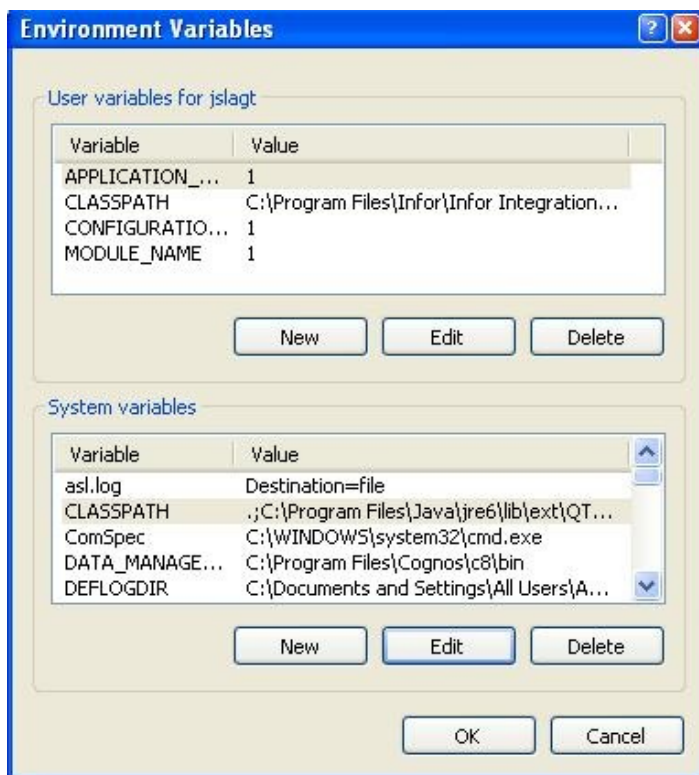
If the CLASSPATH variable was created as a user variable, perform these steps to correct this issue:

1 Remove the User variable entry, and click **OK**.

2 Re-run the driver test command from a new command line box.

If the database driver is successful, test the ODBC connection. From the command line, specify **odbctest** *DSN*. For example, if the name of your DSN is **Infor Erp Enterprise**, specify **odbctest Infor Erp Enterprise**. This screen is displayed.
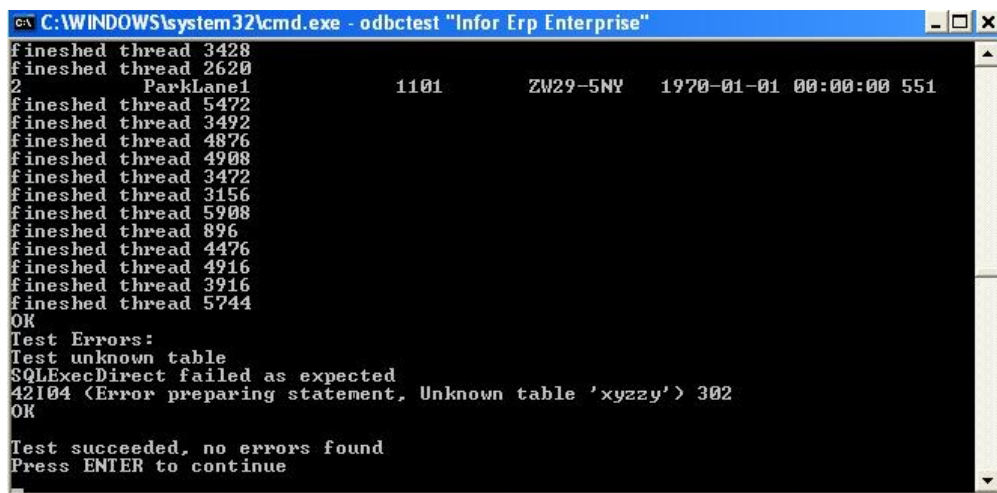
If these tests are successful, the connectivity is correct.

Web UI

Install Infor Web UI 10.6 (BL0097). For the installation instructions, refer to *Infor Web UI - Installation and Configuration Guide (U8715 US)*.

Infor Workspace requirements

The In-Context BI Web part and Infor ION Business Intelligence are included in the Infor Workspace installation. See the appropriate version of the *Infor Workspace Installation and Configuration Guide for Active Directory* mentioned in "Related documents" on page 5. The BI Application Studio version must be 10.3.2.

Content delivery

To install the repository database, use the installer in KB 1366163:

1 Extract the InContextBI_Installer.zip.
2 Run Setup.exe as administrator.
3 The Welcome page of the Infor LN Content 10.2.1 for In-Context BI – Installation Wizard is displayed.
4 Click **Next**. The Custom Installation page is displayed.
5 To install the Repository Database, click **Next**.
6 On the Database Server page, specify the SQL Server Database Server and sa password. Installation on an Oracle database server is not supported.
7 Click **Next**.
8 On the Ready to Install the Program page, click **Install**.
9 On the Installation Wizard Completed page, click **Finish**.

Setting up Infor Workspace

To display the reports in Infor Workspace, add the Web Part and connect to the new repository database:

1 Start Infor Workspace as an administrator.
2 If the In-Context BI is not visible yet, select the Web Parts Manager.
3 Specify the In-Context BI Web Part and click **Save**.
4 On the In-Context BI Web Part Menu (the triangle in the upper right corner), select **Edit My Web Part**.
5 Select the new Repository and click **Save**. If the new repository is installed on another system, be sure that a dedicated DSN is available.

Reports

3

Understanding report translations

The reports are translated into nine languages. The language in which a report is shown depends on the user language that is specified in Infor Workspace. To see the report translations in a different language, specify one of these languages:

- English
- German
- Dutch
- French
- Italian
- Japanese
- Portuguese
- Chinese-Simplified
- Spanish

The Infor Workspace language defines the translation of the report only. For example, the X axis and the Y axis are shown in the browser language. However, report data such as the business partner name depends on the language of the LN user who executes the query.

Using In-Context reports

When multiple records are selected in an LN session, no graph is shown.

When data is changed in an LN session, the In-Context report is not updated.

When an LN session is closed, the In-Context report is not closed.

Available In-Context reports

The following In-Context reports are available:

Business object	In-Context BI report name
Customer	Lost Opportunities by Reason
Customer	Sold-to Win/Loss Ratio
Customer	Won Opportunities by Reason
Inspection	Inspections
Item Master Data	Complete Delivery
Item Master Data	Invoice Accuracy
Item Master Data	On Time Delivery
Item Master Data	Planned Available
Item Master Data	Quality
Item Master Data	Response Time
Item Master Data	Vendor Rating
Territory Planning	Capacity (Travel from Center)
Territory Planning	Capacity (Travel from Location)
Work Center	Load by Work Center

Sessions with In-Context reports

The following sessions include In-Context reports:

Session code	Session name
tccom4110s000	Sold-to Business Partner
tccom4510m000	Sold-to Business Partners
tdipu0103m000	Purchased Item 360
tdipu0110m000	Items - Purchase Business Partner
tdipu0110m200	Approved Supplier List
tdisa0501m000	Items - Sales
tdisa0601m000	Item - Sales
tdpur1502m000	Request for Quotation Lines
tdpur2502m000	Prepare Conversion Purchase Requisition Lines

Session code	Session name
tdpur2502m100	Purchase Requisition Lines
tdpur4101m000	Purchase Order Lines
tdpur4101m200	Purchase Order Lines Details
tdpur4101m300	Purchase Order Lines Quantities and Dates
tdpur4101m700	Potential Purchase Back Orders
tdsls1500m000	Sales Quotations
tdsls1501m000	Sales Quotation Lines
tdsls1600m000	Sales Quotation - Lines
tdsls4100m000	Sales Orders
tdsls4100m900	Sales Order - Lines
tdsls4101m000	Sales Order Lines
tdsmi1110m000	Opportunities
tdsmi1500m000	Customer 360
tdsmi1610m000	Opportunity
tibom1110m000	Bill of Material
tiipd0101m000	Items - Production
timfc1501m000	Work Center 360
tisfc0101m100	Production Order
tisfc0101s000	Production Orders
tisfc0110m000	Production Planning
tisfc0501m000	Production Orders
tscfg3100m000	Inspections
tscfg3110m000	Maintenance Notifications
tscfg3600m000	Inspections
tsspc4100m000	Territory and Preferred Engineer Planning
tsspc4110m000	Required Capacity
tsspc4110m100	Capacity Allocations
tsspc4600m000	Territory and Preferred Engineer Planning

Report specifications

This section describes the various In-Context reports and related specifications.

In-Context reports (customer)

Lost Opportunities by Reason

Introduced in	LN FP7
Purpose	Shows a bar chart with the number of lost opportunities for a specific customer, ranked by reason.
Conditions	Only opportunities with the status **Lost** are included.
Required input/ entity type	InforCustomerPartyMaster
Data table	Opportunities (tdsmi110)
Available in	Sold-to Business Partner (tccom4110s000)
	Sold-to Business Partners (tccom4510m000)
	Sales Orders (tdsls4100m000)
	Sales Order - Lines (tdsls4100m900)
	Opportunities (tdsmi1110m000)
	Customer 360 (tdsmi1500m000)
	Opportunity (tdsmi1610m000)

Sold-to Win/Loss Ratio

Introduced in	LN FP7
Purpose	Shows a pie chart with the percentage of won opportunities relative to the percentage of lost opportunities for a specific customer.
Conditions	Only opportunities with the statuses **Lost** and **Won** are included.
Required input/ entity type	InforCustomerPartyMaster

Data table	Opportunities (tdsmi110)
Available in	Sold-to Business Partner (tccom4110s000)
	Sold-to Business Partners (tccom4510m000)
	Sales Orders (tdsls4100m000)
	Sales Order - Lines (tdsls4100m900)
	Opportunities (tdsmi1110m000)
	Customer 360 (tdsmi1500m000)
	Opportunity (tdsmi1610m000)

Won Opportunities by Reason

Introduced in	LN FP7
Purpose	Shows a bar chart with the number of won opportunities for a specific customer, ranked by reason.
Conditions	Only opportunities with the status **Won** are included.
Required input/ entity type	InforCustomerPartyMaster
Data table	Opportunities (tdsmi110)
Available in	Sold-to Business Partner (tccom4110s000)
	Sold-to Business Partners (tccom4510m000)
	Sales Orders (tdsls4100m000)
	Sales Order - Lines (tdsls4100m900)
	Opportunities (tdsmi1110m000)
	Customer 360 (tdsmi1500m000)
	Opportunity (tdsmi1610m000)

In-Context reports (inspections)

Inspections

Introduced in	LN 10.2.1

Purpose	Shows line plots for the measured and expected historical trend values, expressed in the measurement unit, for multiple inspections.
Conditions	Only inspections with the status **Measured** are included.
Required input/ entity type	InforERPEnterpriseServiceMeasurementType InforERPEnterpriseServicePosition InforItemMaster SerialNumber
Data table	Inspections (tscfg300)
Available in	Inspections (tscfg3100m000) Maintenance Notifications (tscfg3110m000) Inspections (tscfg3600m000)

In-Context reports (item master data)

Complete Delivery

Introduced in	LN FP7
Purpose	Shows a bar chart with the top-five suppliers who have the best delivery performance for a specific purchased item.
Conditions	The rating is based on data for the current period. Users can specify whether they want to view all suppliers or suppliers with 5, 10, 25, or more orders. The criteria type **Quantity** is used.
Required input/ entity type	InforFinancialCalendarPeriod InforItemMaster
Data table	Item Purchase - BP (tdipu010) Vendor Ratings (tdpur802)
Available in	Purchased Item 360 (tdipu0103m000) Item - Purchase Business Partner (tdipu0110m000) Approved Supplier List (tdipu0110m200)

Purchase Request for Quotation Lines (tdpur1502m000)

Purchase Requisition Lines (tdpur2502m000)

Prepare Conversion Purchase Requisition Lines (td-pur2502m100)

Purchase Order - Lines (tdpur4101m000)

Purchase Order Line Details (tdpur4101m200)

Purchase Order Line Quantities and Dates (td-pur4101m300)

Invoice Accuracy

Introduced in	LN FP7
Purpose	Shows a bar chart with the top-five suppliers who have the best invoicing performance for a specific purchased item.
Conditions	The rating is based on data for the current period. Users can specify whether they want to view all suppliers or suppliers with 5, 10, 25, or more orders. The criteria type **Cost Performance** is used.
Required input/ entity type	InforFinancialCalendarPeriod InforItemMaster
Data table	Item Purchase - BP (tdipu010) Vendor Ratings (tdpur802)
Available in	Purchased Item 360 (tdipu0103m000) Item - Purchase Business Partner (tdipu0110m000) Approved Supplier List (tdipu0110m200) Purchase Request for Quotation Lines (tdpur1502m000) Purchase Requisition Lines (tdpur2502m000) Prepare Conversion Purchase Requisition Lines (td-pur2502m100) Purchase Order - Lines (tdpur4101m000) Purchase Order Line Details (tdpur4101m200) Purchase Order Line Quantities and Dates (td-pur4101m300)

On Time Delivery

Introduced in	LN FP7
Purpose	Shows a bar chart with the top-five suppliers who have the best on time delivery performance for a specific purchased item.
Conditions	The rating is based on data for the current period. Users can specify whether they want to view all suppliers or suppliers with 5, 10, 25, or more orders. The criteria type **Delivery** is used.
Required input/ entity type	InforFinancialCalendarPeriod InforItemMaster
Data table	Item Purchase - BP (tdipu010) Vendor Ratings (tdpur802)
Available in	Purchased Item 360 (tdipu0103m000) Item - Purchase Business Partner (tdipu0110m000) Approved Supplier List (tdipu0110m200) Purchase Request for Quotation Lines (tdpur1502m000) Purchase Requisition Lines (tdpur2502m000) Prepare Conversion Purchase Requisition Lines (tdpur2502m100) Purchase Order - Lines (tdpur4101m000) Purchase Order Line Details (tdpur4101m200) Purchase Order Line Quantities and Dates (tdpur4101m300)

Planned Available

Introduced in	LN FP7
Purpose	Shows a line chart with the planned availability of an item, expressed in the inventory unit, for each day of the week.
Conditions	By default, the current week is shown. The arrow buttons can be used to navigate to another week.
Required input/ entity type	InforItemMaster

Data table	Transactions by Item (whinp100)
	Item Inventory by Warehouse (whwmd215)
Available in	Purchased Item 360 (tdipu0103m000)
	Item - Sales(tdisa0501m000)
	Item - Sales(tdisa0601m000)
	Purchase Request for Quotation Lines (tdpur1502m000)
	Purchase Requisition Lines (tdpur2502m000)
	Prepare Conversion Purchase Requisition Lines (td-pur2502m100)
	Purchase Order - Lines (tdpur4101m000)
	Purchase Order Line Details (tdpur4101m200)
	Purchase Order Line Quantities and Dates (td-pur4101m300)
	Potential Purchase Back Orders (tdpur4101m700)
	Sales Quotation Lines (tdsls1501m000)
	Sales Order Lines (tdsls4101m000)
	Bill of Material (tibom1110m000)
	Items - Production (tiipd0101m000)
	Production Order (tisfc0101m100)
	Production Orders (tisfc0101s000)
	Production Orders (tisfc0501m000)

Quality

Introduced in	LN FP7
Purpose	Shows a bar chart with the top-five suppliers who have the best quality performance for a specific purchased item.
Conditions	The rating is based on data for the current period. Users can specify whether they want to view all suppliers or suppliers with 5, 10, 25, or more orders. The criteria type **Quality** is used.
Required input/ entity type	InforFinancialCalendarPeriod
	InforItemMaster
Data table	Item Purchase - BP (tdipu010)
	Vendor Ratings (tdpur802)

Available in	Purchased Item 360 (tdipu0103m000)
	Item - Purchase Business Partner (tdipu0110m000)
	Approved Supplier List (tdipu0110m200)
	Purchase Request for Quotation Lines (tdpur1502m000)
	Purchase Requisition Lines (tdpur2502m000)
	Prepare Conversion Purchase Requisition Lines (td-pur2502m100)
	Purchase Order - Lines (tdpur4101m000)
	Purchase Order Line Details (tdpur4101m200)
	Purchase Order Line Quantities and Dates (td-pur4101m300)

Response Time

Introduced in	LN FP7
Purpose	Shows a bar chart with the top-five suppliers who have the best response time performance for a specific purchased item.
Conditions	The rating is based on data for the current period. Users can specify whether they want to view all suppliers or suppliers with 5, 10, 25, or more orders. The criteria type **Order Confirmation** is used.
Required input/ entity type	InforFinancialCalendarPeriod
	InforItemMaster
Data table	Item Purchase - BP (tdipu010)
	Vendor Ratings (tdpur802)
Available in	Purchased Item 360 (tdipu0103m000)
	Item - Purchase Business Partner (tdipu0110m000)
	Approved Supplier List (tdipu0110m200)
	Purchase Request for Quotation Lines (tdpur1502m000)
	Purchase Requisition Lines (tdpur2502m000)
	Prepare Conversion Purchase Requisition Lines (td-pur2502m100)
	Purchase Order - Lines (tdpur4101m000)
	Purchase Order Line Details (tdpur4101m200)

Purchase Order Line Quantities and Dates (td-pur4101m300)

Vendor Rating

Introduced in	LN FP7
Purpose	Shows a bar chart with the top-five suppliers who have the best overall performance for a specific purchased item.
Conditions	The rating is based on data for the current period. Users can specify whether they want to view all suppliers or suppliers with 5, 10, 25, or more orders. The criteria type **Period Rating** is used.
Required input/ entity type	InforFinancialCalendarPeriod InforItemMaster
Data table	Item Purchase - BP (tdipu010) Vendor Ratings (tdpur802)
Available in	Purchased Item 360 (tdipu0103m000) Item - Purchase Business Partner (tdipu0110m000) Approved Supplier List (tdipu0110m200) Purchase Request for Quotation Lines (tdpur1502m000) Purchase Requisition Lines (tdpur2502m000) Prepare Conversion Purchase Requisition Lines (td-pur2502m100) Purchase Order - Lines (tdpur4101m000) Purchase Order Line Details (tdpur4101m200) Purchase Order Line Quantities and Dates (td-pur4101m300)

In-Context reports (territory planning)

Capacity (Travel from Center)

Introduced in	LN 10.2.1

Purpose	Shows a stacked bar chart with the workload of the planned activity and the service order plus any unexpected workload, the travel time from the territory's center of gravity, the availability and the shortage per engineer, expressed in the time duration unit as specified in the General Service Parameters (tsmdm0100m000) session.
Conditions	-
Required input/ entity type	tsspc400 (InforERPEnterpriseServiceTerritoryAndPreferredEngineer-Planning)
Data table	Territory Planning - Required Capacity (tsspc410) Territory Planning - Available Capacity (tsspc420)
Available in	Territory and Preferred Engineer Planning (tsspc4100m000) Required Capacity (tsspc4110m000) Capacity Allocations (tsspc4110m100) Territory and Preferred Engineer Planning (tsspc4600m000)

Capacity (Travel from Location)

Introduced in	LN 10.2.1
Purpose	Shows a stacked bar chart with the workload of the planned activity and the service order plus any unexpected workload, the travel time from the territory's center of gravity, the availability and the shortage per engineer, expressed in the time duration unit as specified in the General Service Parameters (tsmdm0100m000) session.
Conditions	-
Required input/ entity type	tsspc400 (InforERPEnterpriseServiceTerritoryAndPreferredEngineer-Planning)
Data table	Territory Planning - Required Capacity (tsspc410) Territory Planning - Available Capacity (tsspc420)

Available in	Territory and Preferred Engineer Planning (tsspc4100m000)
	Required Capacity (tsspc4110m000)
	Capacity Allocations (tsspc4110m100)
	Territory and Preferred Engineer Planning (tsspc4600m000)

In-Context reports (work centers)

Load by Work Center

Introduced in	LN FP7
Purpose	Shows a bar chart with the used capacity for a specific work center in hours per day. A line plot indicates the available capacity per day.
Conditions	By default, the capacity is shown for the next seven days. The user can switch to a time scale of seven weeks.
Required input/ entity type	InforLocationDepartment
Data table	Work Centers (tirou001)
	Utilization by Day (tisfc012)
Available in	Work Center 360 (timfc1501m000)
	Production Planning (tisfc0110m000)