Government of Barbados

How to Login & Navigate the Infor CloudSuite Application

User Guide

Version 1.1

Table of Contents

Introduction 3

Supported Internet Browsers 4

Registering and Logging into Infor CloudSuite 4

Saving CloudSuite link as a Shortcut to the Desktop 7

Account Locked 10

Reset Password 11

Account Expired 13

Navigating the Menu Bars 14

Top Navigation Panel 14

Homepages Infor Logo 14

App Menu 15

Search Bar 15

User Menu 16

- User Settings 16
- Profile Info 16
- Uploading a Profile Picture 16
- Localization Settings 17
- Notifications and Prompt Settings 17
- Security Settings 17
- Apps & Authorizations 18
- Help 18
- About 18
- Sign out 18

Bookmarks 18

The Enterprise Header 19

Toggle Menu 19

Application Switcher 20

My Print Files 20

My Notifications 21

My Inbasket 21
My Reports 22
My Actions 22
Search 23
Home 23
Settings 24
About 25
Help 25
Tips 26
Using Duplicated Windows 26

Introduction

Infor's Cloud Suite Financials and Supply Management System is the Government of Barbados's new financial management system.

The following modules are available for use:

1. Ledger
2. Payables
3. Fixed Assets
4. Purchasing
5. Inventory Control
6. Accounts Receivable
7. Budget Edit.

Separate manuals are provided for each module.

This manual provides information about how to access the system, manage you user account and traverse Cloud Suite (CS).

Supported Internet Browsers

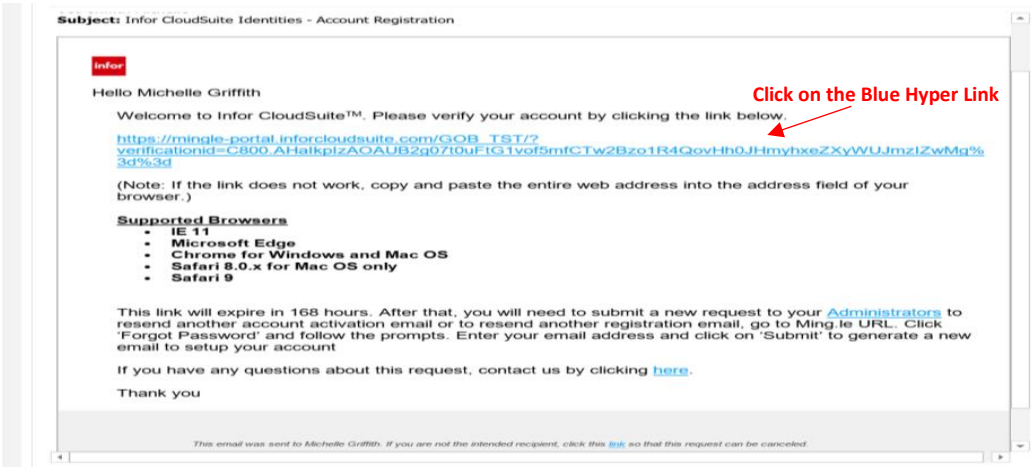
The preferred internet browsers are the following:-

- Chrome for Windows and Mac OS
- Safari 8.0.x for Mac OS only
- Safari 9

Registering and Logging into Infor CloudSuite

Step1. Please locate your registration email in your inbox. The title of the email should be "Infor CloudSuite Identities - Account Registration". Click on the blue hyperlink.

Screenshot Below:-



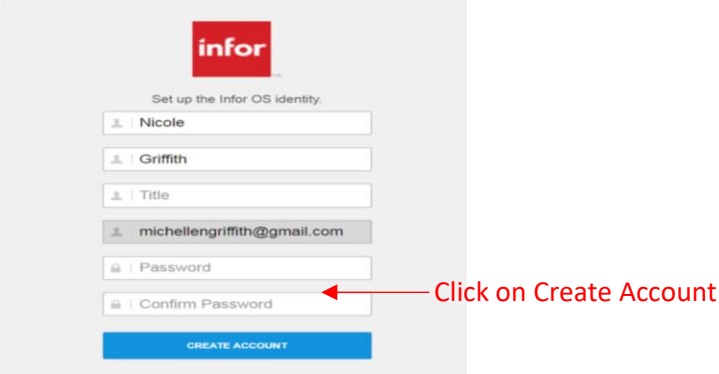
Step2. Enter the following information:-

- Title
- Password
  - Please note that your password should follow the below criteria:-
    - Minimum 8 characters in length
    - One uppercase letter
    - One lowercase letter
    - One number

- One special character] [? / < ~ # ' ! @ $ % ^ & * ( ) + = { } | : " ; , ` _

- Confirm Password
- Click "Create Account"

Screenshot Below:-



Step3. You will be presented with a confirmation message stating that your information has been saved. Click "Continue".

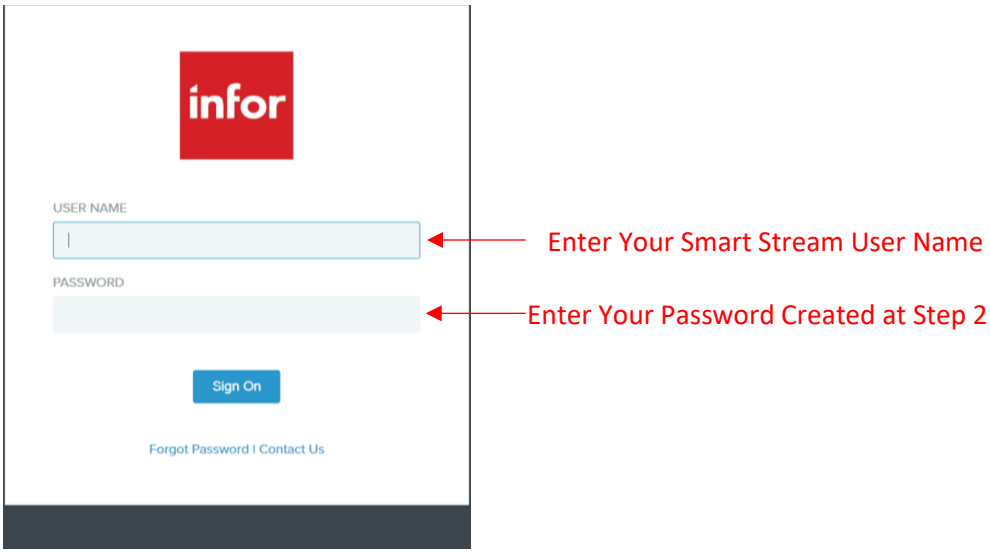
Screenshot Below:-

Step4. You will be presented with the below Infor Login Screen. Enter the following information and click "Sign On":-

- Username – this will be your Smart Stream User Name

- Password – your password created at registration

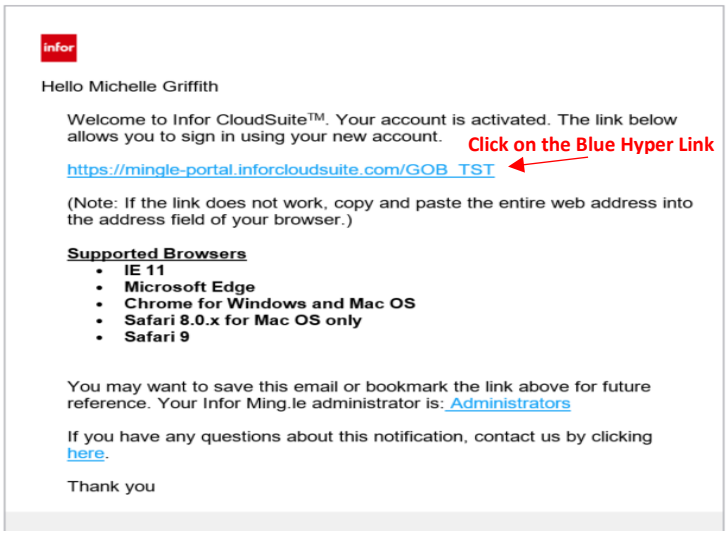
Screenshot Below:-



Step5. A verification email will be sent to your inbox with the title “Infor CloudSuite Identities - Account Verification”. The Blue Hyper Link within the email can be used to access the Login Screen for the CloudSuite Application.

Screenshot Below:-

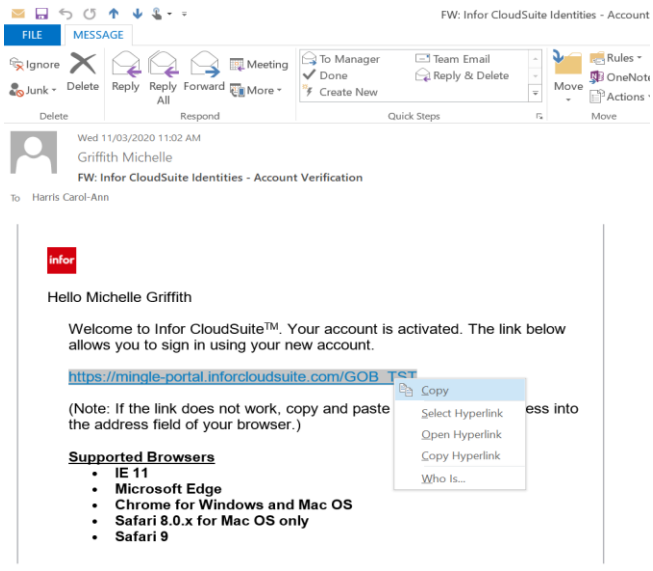
Subject: Infor CloudSuite Identities - Account Verification



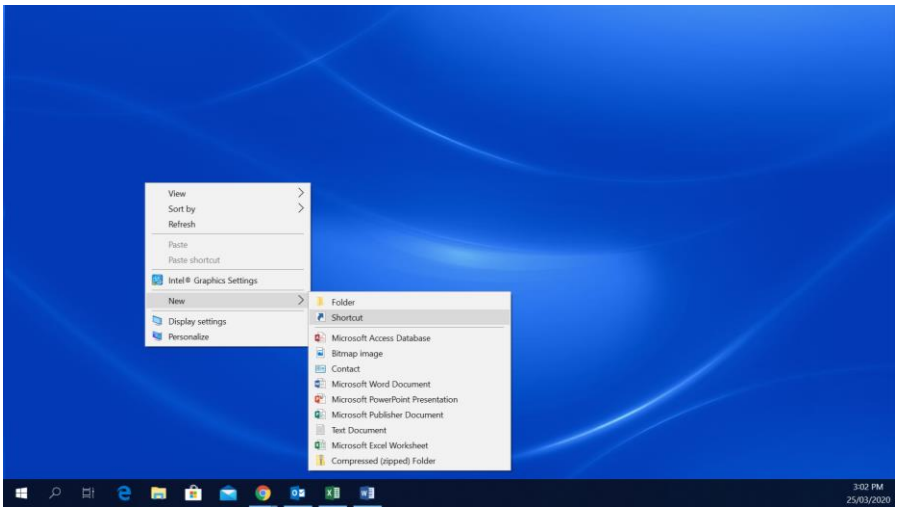
Saving CloudSuite link as a Shortcut to the Desktop

This Blue Hyper Link can also be saved as a shortcut to your Desktop by doing the following:-

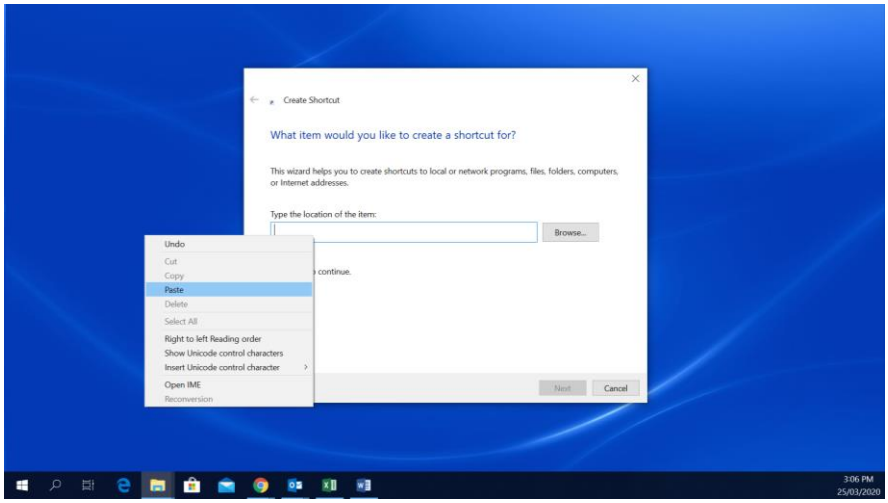
Step1. Copy the Blue Hyper Link by highlighting the link, right clicking on the mouse and selecting “Copy”.



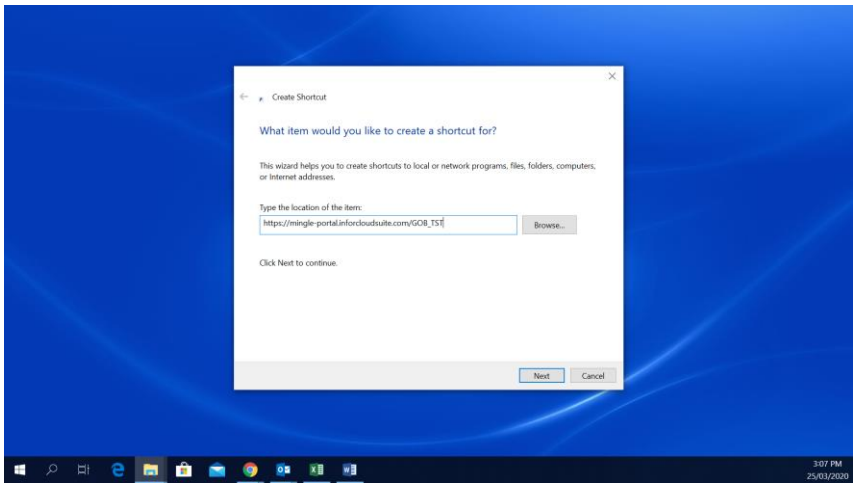
Step2. Right-Click on your Desktop, Choose “New” and select “Shortcut”.



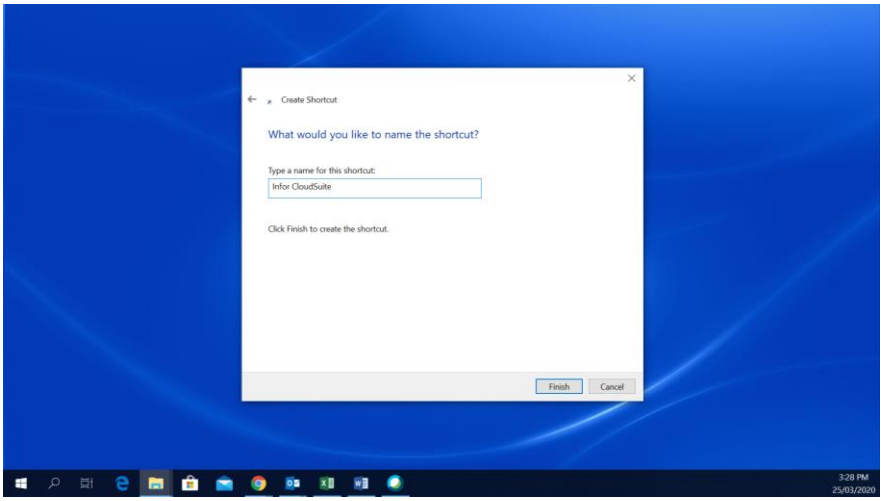
Step3. Right-Click on the Field “Type the location of the item:”



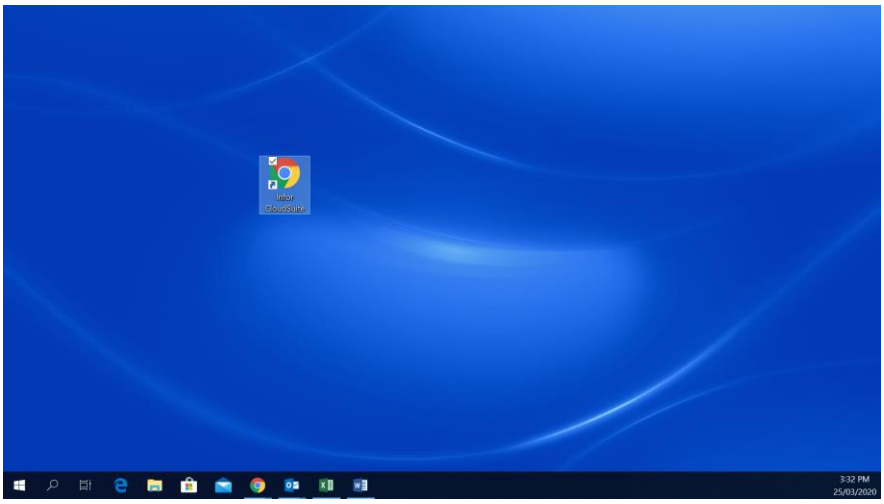
Step4. Click on “Paste” to copy the Hyper Link into the field. Click “Next”.



Step5. Give the Shortcut a name. The screenshot below illustrates the name as “Infor CloudSuite”. Click “Finish”.

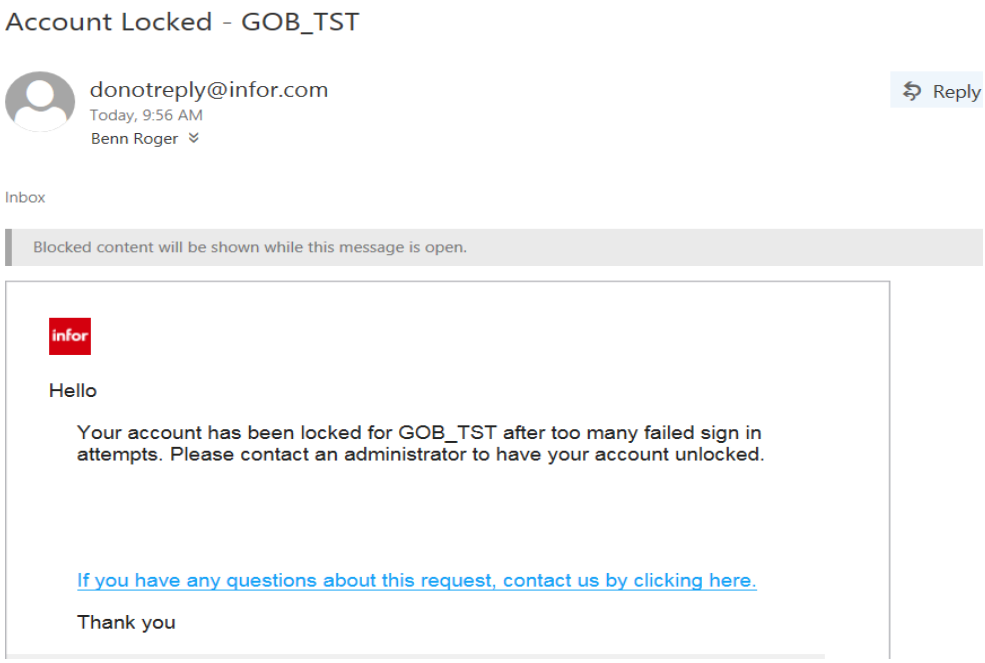


Step6. The shortcut is now saved to your Desktop



Account Locked

The CloudSuite Application permits you 3 failed login attempts before your Account is locked. Your account will remain locked for 15 minutes before you can attempt to login again. You will receive an Account Locked email as illustrated by the screenshot below:-



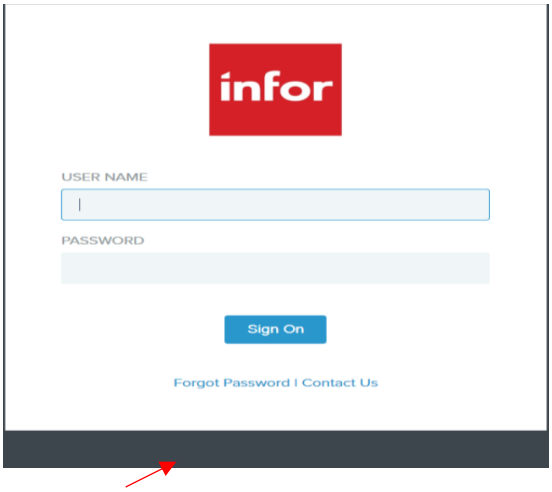
Once receiving this email, you can either wait for the 15 minutes for your account to unlock or you can do a reset password.

Reset Password

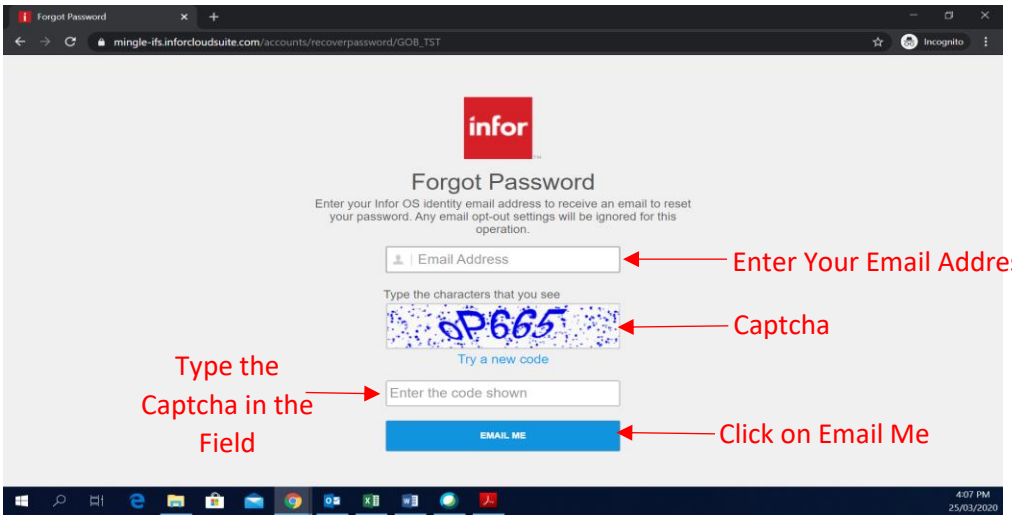
A reset of your password can be done via the following steps:-

Step1. Navigate to the login screen using either the Blue Hyper Link from your Account Verification email or clicking on your Infor CloudSuite shortcut on your Desktop.

Step2. Click on “Forgot Password” as illustrated by the screen shot below:-

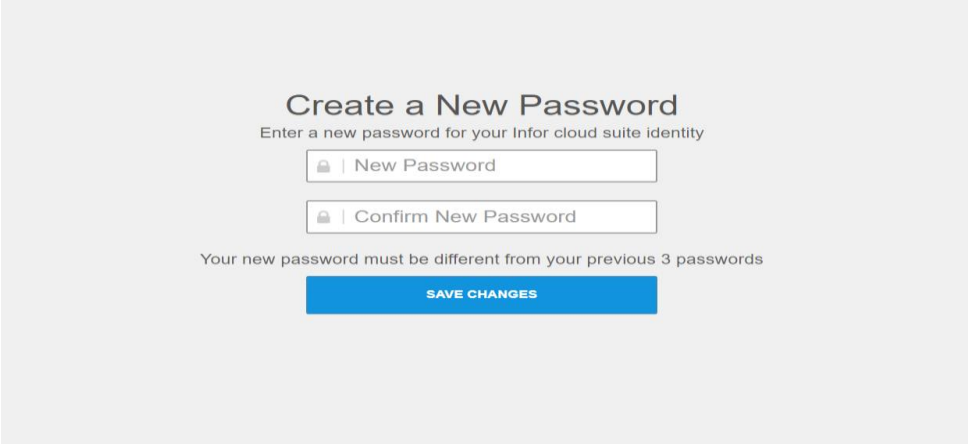


Step3. You will be navigated to the Forgot Password screen as illustrated by the screen shot below. Enter you email address and the Captcha displayed in Blue. Click on “Email Me”.

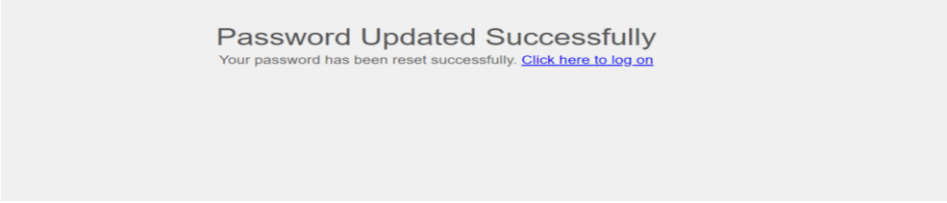


Step4. After you click on “Email Me”, you will be navigated to a screen to create a new password, as illustrated in the screen shot below. Enter your new password following the password criteria. Enter the password again in the “Confirm New Password” field.

Step5. Please note that your password should be different from your last 3 passwords as highlighted in the screen shot below. Click on “Save Changes”.



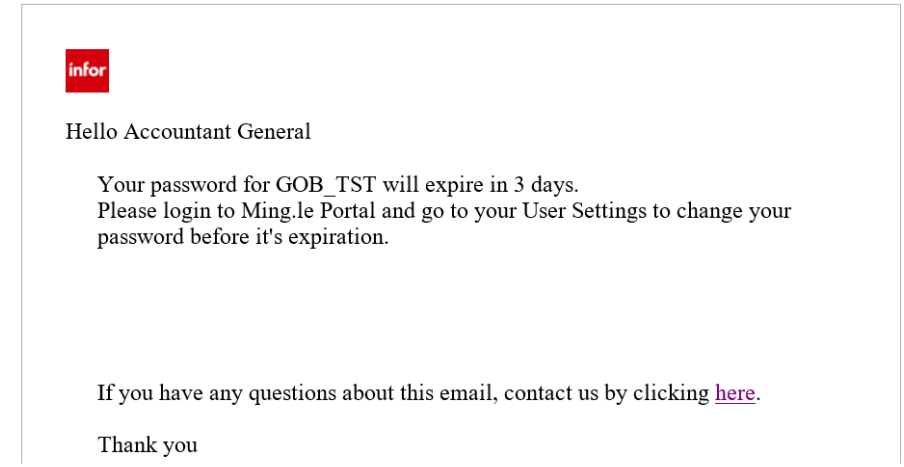
Step6. You will now be navigated to a screen stating that your password was updated successfully, as illustrated by the screen shot below. Click on the blue hyperlink to navigate to the login screen to log into the application:-



Account Expired

Your password will expire after 90 days. Expiration emails will be distributed to users at 14, 7 and 3 day intervals. Users will be prompted to navigate to “User Settings” using the “User Menu” icon to change their password. An example of an expiration email is illustrated below:-

Subject: Your password is about to expire - GOB_TST.



Navigating the Menu Bars

There are two areas in CloudSuite that a user needs to become familiar with, which will assist in navigating and accessing your modules. These areas are called:-

- Top Navigation Panel
- The Enterprise Header

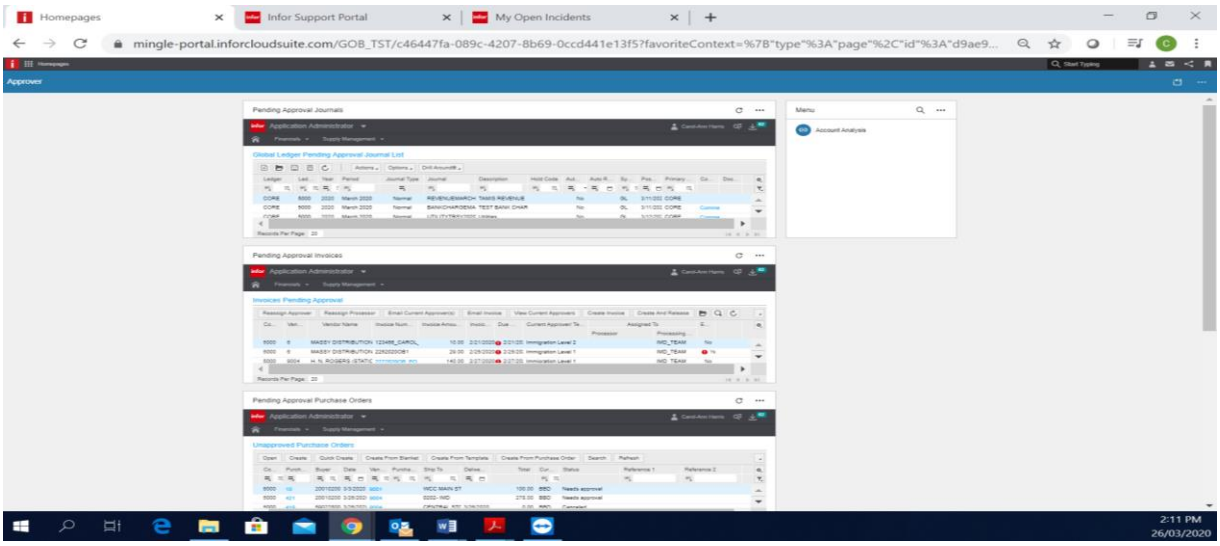
Top Navigation Panel

The top navigation panel has the following components:

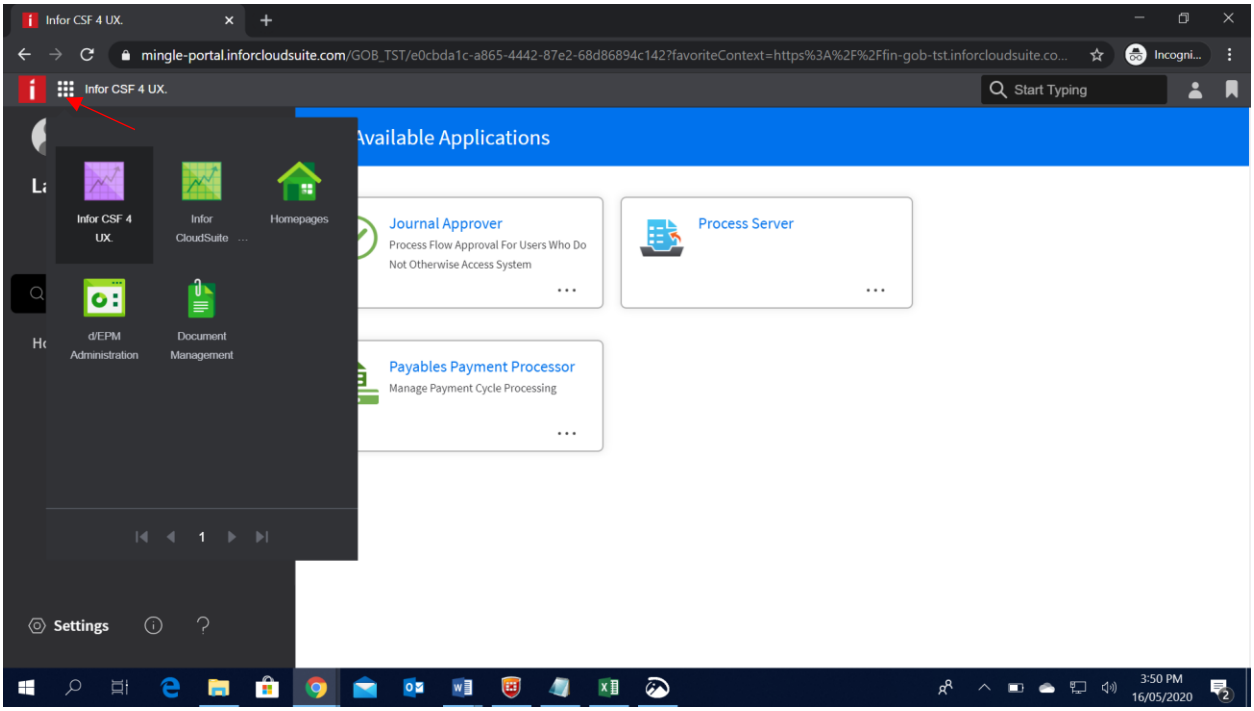
- Homepage Infor Logo
- App Menu
- Search Bar
- User Menu
- Bookmarks

Homepages Infor Logo

Clicking on this icon allows a user to navigate to their Homepage. Homepages are designed to easily provide you with insights, call exceptions to your attention and provide direct links to the areas within the Infor CloudSuite applications, where you do most of your daily work. An example of a Homepage is illustrated by the screen shot below:-



App Menu



This icon displays a list of all the applications a user has authorization to view. From this expanded mode, you can change the selection of the application icons that are displayed, by rearranging the order of the icons. This can be done by clicking and holding on the application and dragging and dropping the application to its new location. This allows that application to be your default application when logging into Infor CloudSuite. To the right of the authorized application icon, the name of the application that you are actively using is displayed.

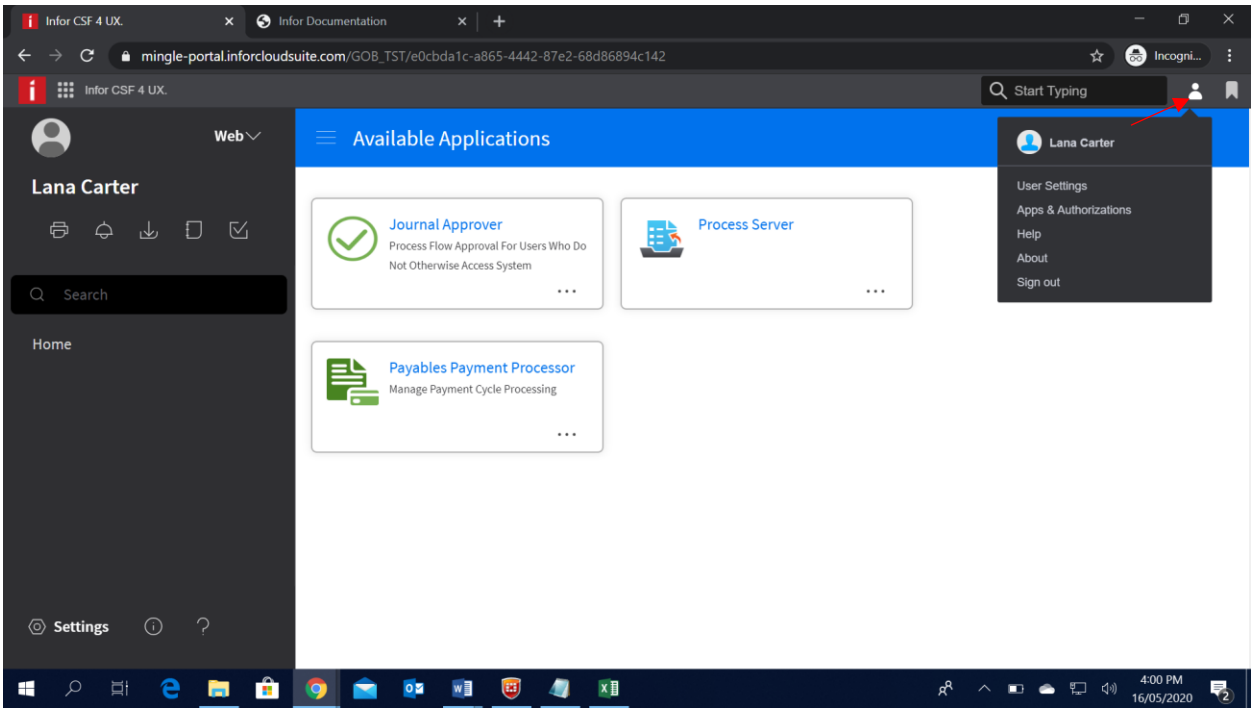
Search Bar

The search bar allows you to search for posts, users, groups and objects.

- For posts, user-added tags are searched. The body of the post is searched, depending on if the Infor CloudSuite administrator has configured them to be searched.
- For Infor CloudSuite users, first and last name and department from the user profile are searched.
- For Infor CloudSuite groups, the group name, description, and skills from the group profile page are searched.
- For Infor CloudSuite streams, the stream name, tags, steps, and description of public streams are searched.

- For Infor CloudSuite templates, the template name, tags, steps and description of public templates are searched.

User Menu



The User Menu icon has the following components:

1. User Settings
2. Apps & Authorizations
3. Help
4. About
5. Sign out

- **User Settings**
  Click the User Settings menu option to view or edit your profile.

- **Profile Info**
  You can add information such as a nickname, location, and your skills and expertise. You can also upload a profile picture or use the default profile picture.

- **Uploading a Profile Picture**
  Step1. Click “Edit Photo” under Profile Photo.
  Step2. Select “Change Photo” and find a picture you want to use.
  Step3. Click “Open”. The Profile Photo section displays the picture you selected.
  Step4. To set the position of the picture:

i. To zoom in, move the zoom slider to the right.
ii. To zoom out, move the zoom slider to the left.
iii. To reposition, drag the picture up, down, left, or right.

Step5. Click “Save” to save this picture as your profile picture.

- **Localization Settings**

  You can personalize your language, locale, and time zone settings. The language and locale settings can be different. For example, you can set the language to English (en-US) but set the locale to Swedish (sv-SE) to apply a yyyy-MM-dd date format.

  If your language and regional settings are not supported, Infor CloudSuite is displayed in the language and regional settings set by the administrator.

  If you change your browser language and regional settings, you must sign out and sign back in to Infor CloudSuite before all of the site content that supports translation is displayed in the selected language.

- **Notifications and Prompt Settings**

  Notifications can be sent within the Infor CloudSuite application or by email if your administrator has enabled the email feature. In this section is a list of events for which you can receive notifications. Events include receiving a user request or receiving comments from a user about information you share with the user.

  By default, you receive notifications for all event types. Changing the notification settings in the user profile affects:

  i. What notifications are displayed when you click the notifications icon, when you view the Notification Summary list, and when you view the notifications page, and
  ii. What notification emails are sent to you.

  You also have the option to receive an activity summary email that summarizes activity in alerts, tasks, posts, and notifications. You can configure how often this summary is sent to you.

- **Security Settings**

  1. **Account Management**

     This section allows a user to change their password by entering their current password and creating new password.

  2. **Client Access Grant**

     This tab displays information about the different clients that this user has used to access Infor CloudSuite. You can revoke access from a particular client, if needed.

- **Apps & Authorizations**
  This displays a variety of mobile and desktop applications for a number of platforms that can be downloaded from the Google App Store.

- **Help**
  Gives you access to Infor Ming.le Cloud Edition Online Help.

- **About**
  Displays information about the Infor OS.

- **Sign out**
  This signs you out of Infor CloudSuite and all of the applications that you accessed in this session.

Bookmarks

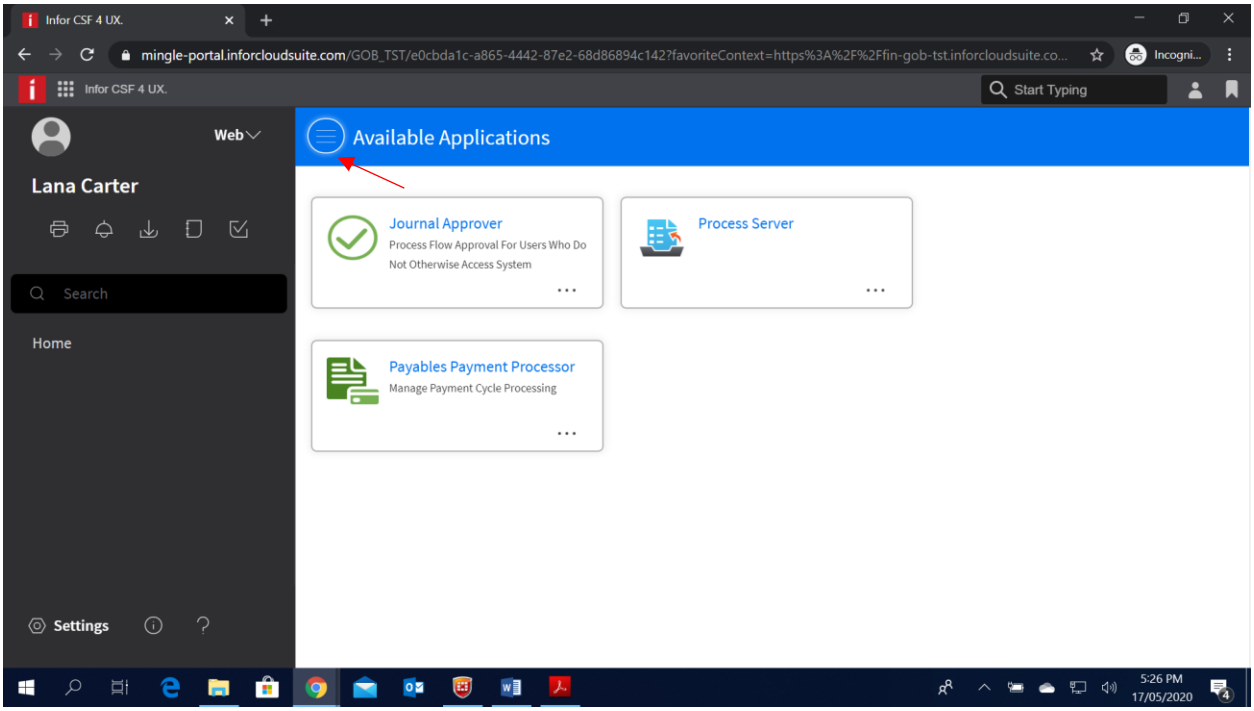
Click the Bookmark icon to display a Bookmark overlay panel consisting of these items:

- Bookmark This Page
- Manage Bookmarks
- List of all bookmarks

The Enterprise Header

The Enterprise Header consists of the following menus and options:-

Toggle Menu

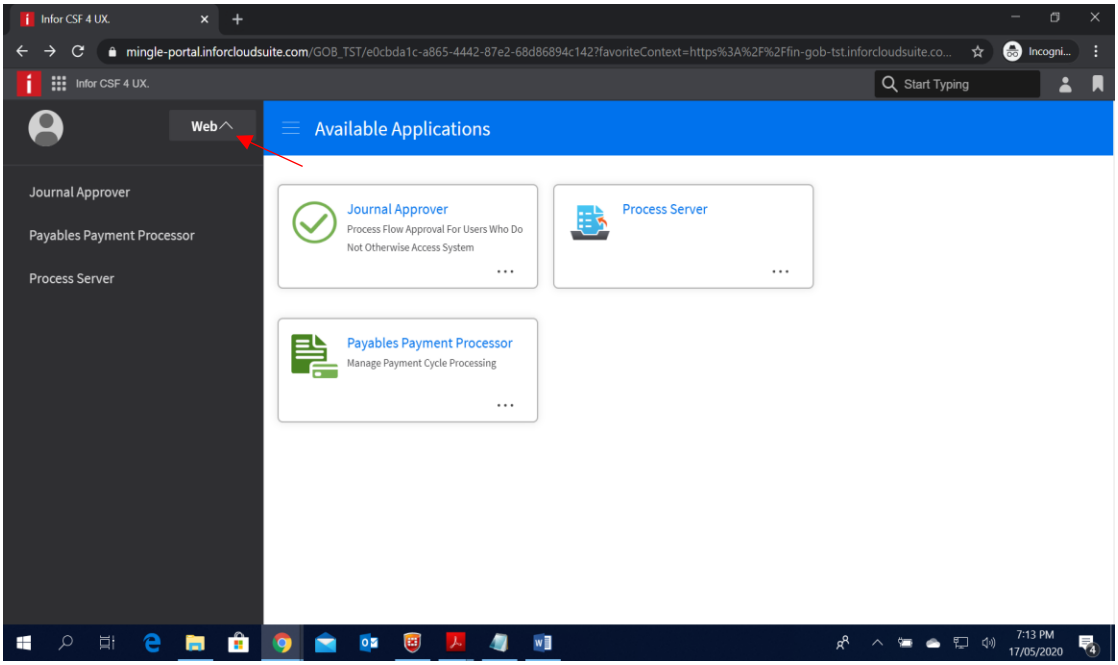


To access the enterprise header, click on the Toggle Menu icon illustrated in the above screen shot which displays the icon on the left hand side of the screen.

The Enterprise Header has the following components:-

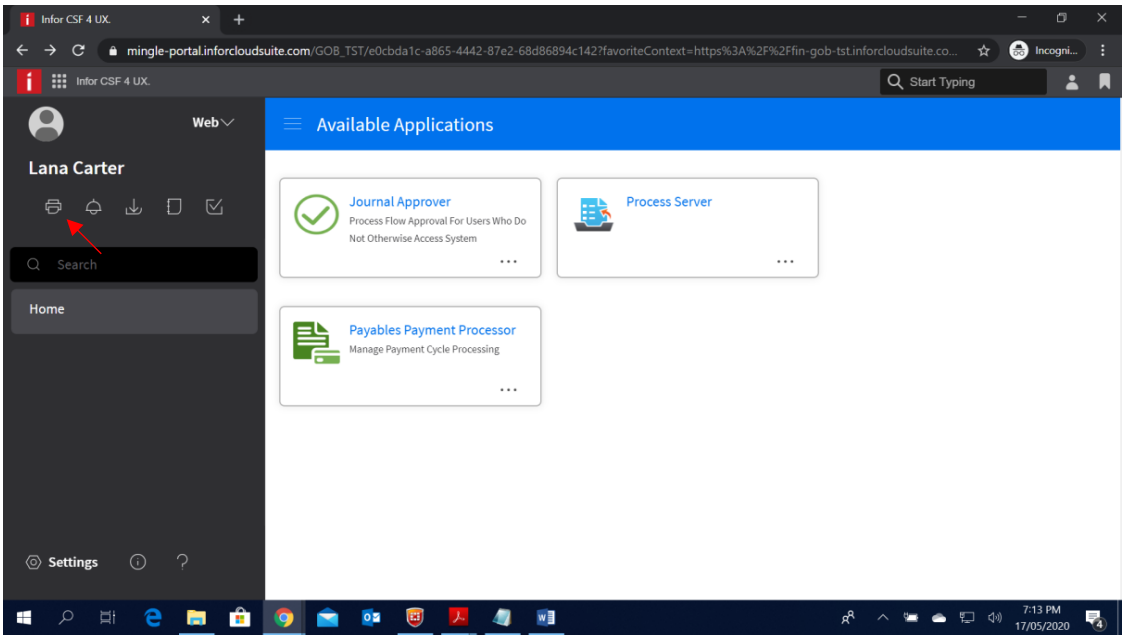
- Application Switcher
- My Print Files
- My Notifications
- My Inbasket
- My Reports
- My Actions
- Search
- Settings
- About
- Help

Application Switcher



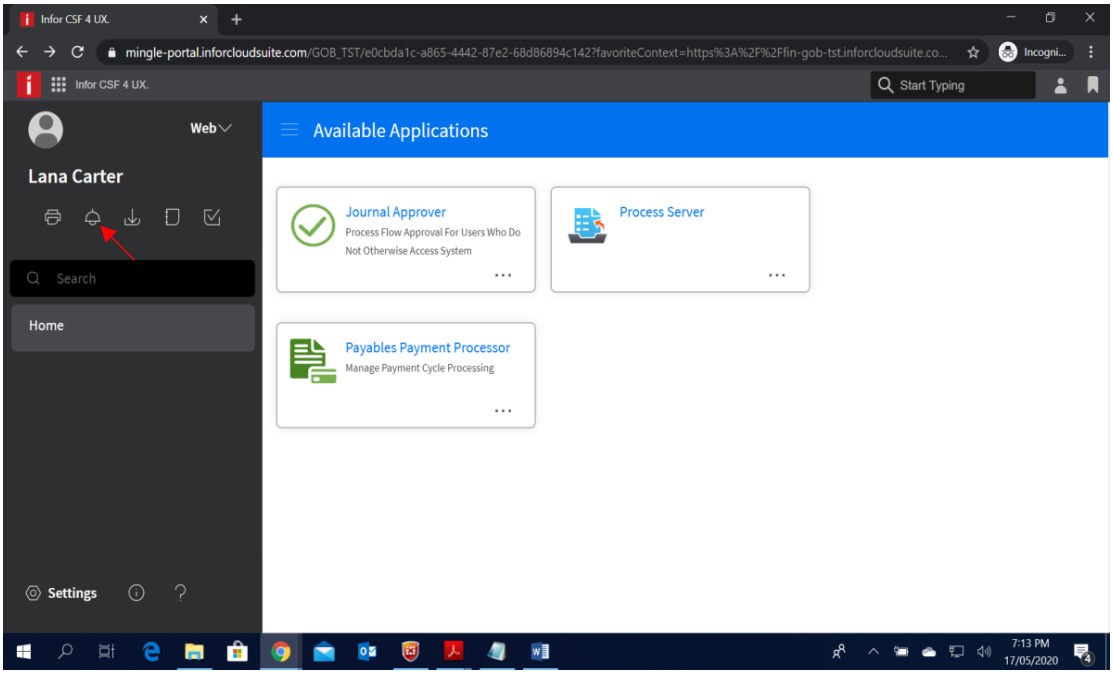
The application switcher gives users access to their role or roles in one place on the menu.

My Print Files



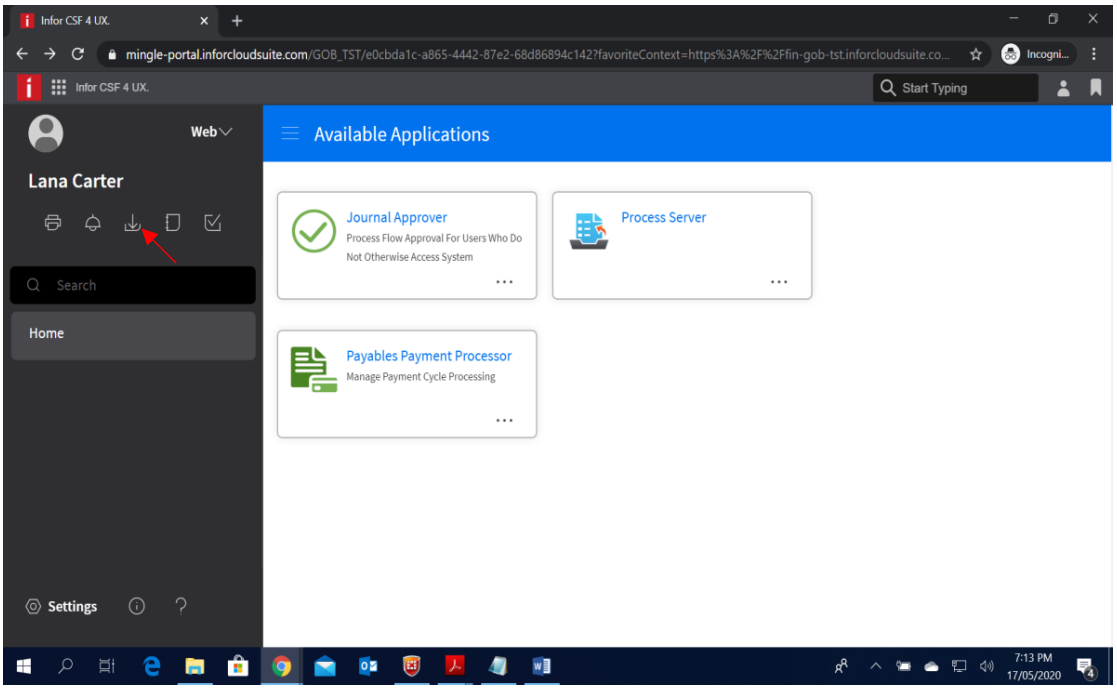
This option displays a listing of documents that a user has generated. These print files can be view and printed.

My Notifications



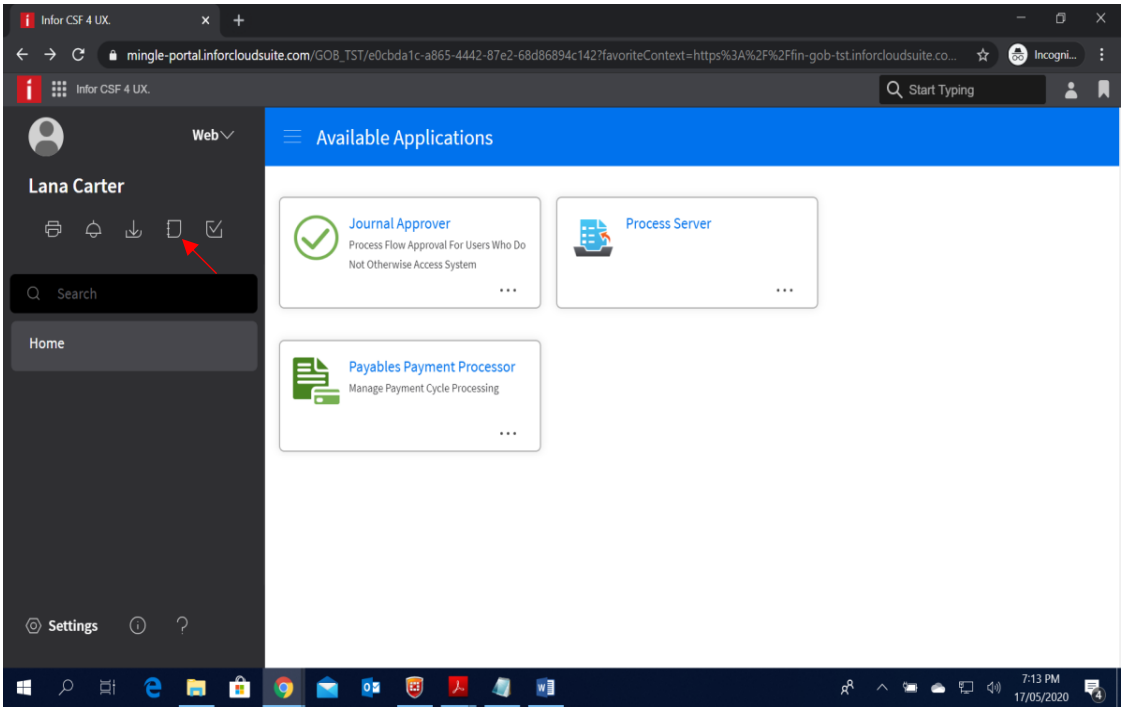
The Notifications icon allows users to view notifications waiting for an approver's action or of print files available.

My Inbasket



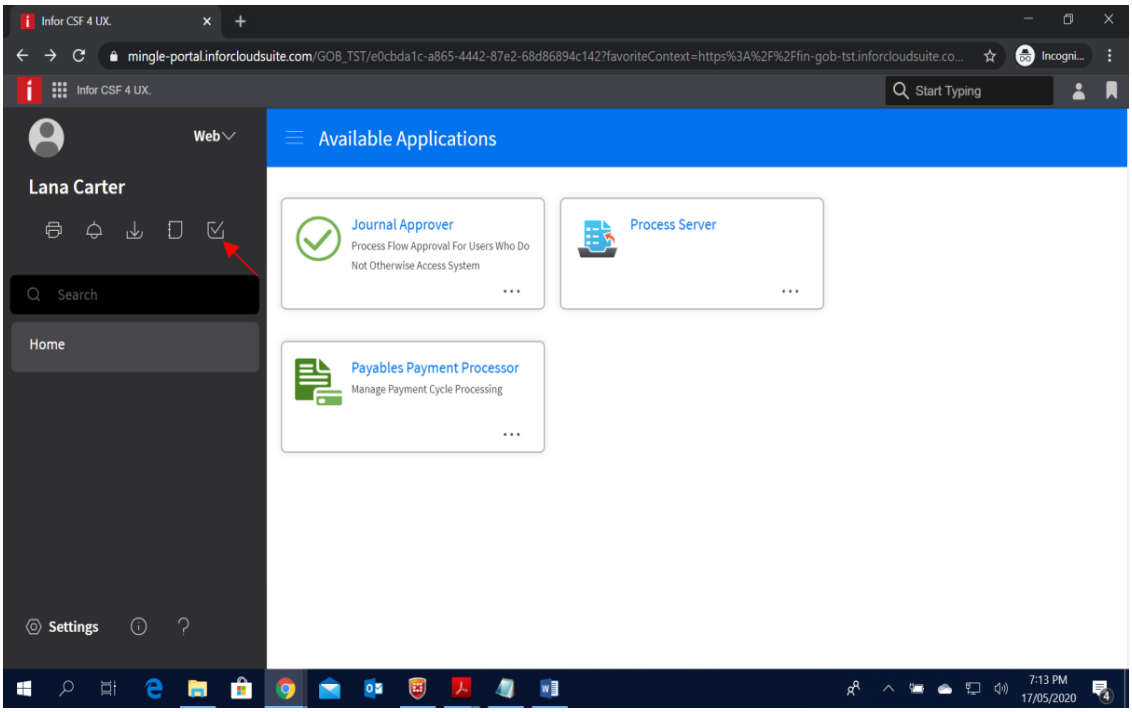
This options displays a list of task that have been assigned to a user. For example an Invoice or a Purchase Order which is waiting for a user to approve.

My Reports



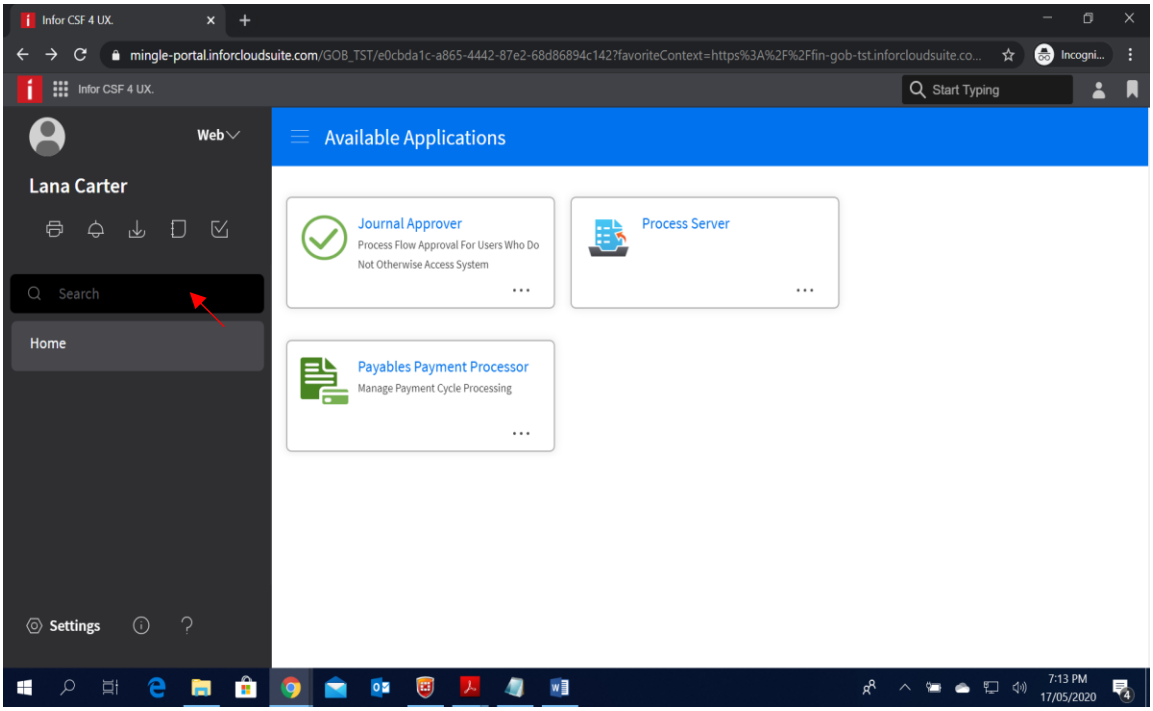
This option displays a listing of the reports which you have created.

My Actions



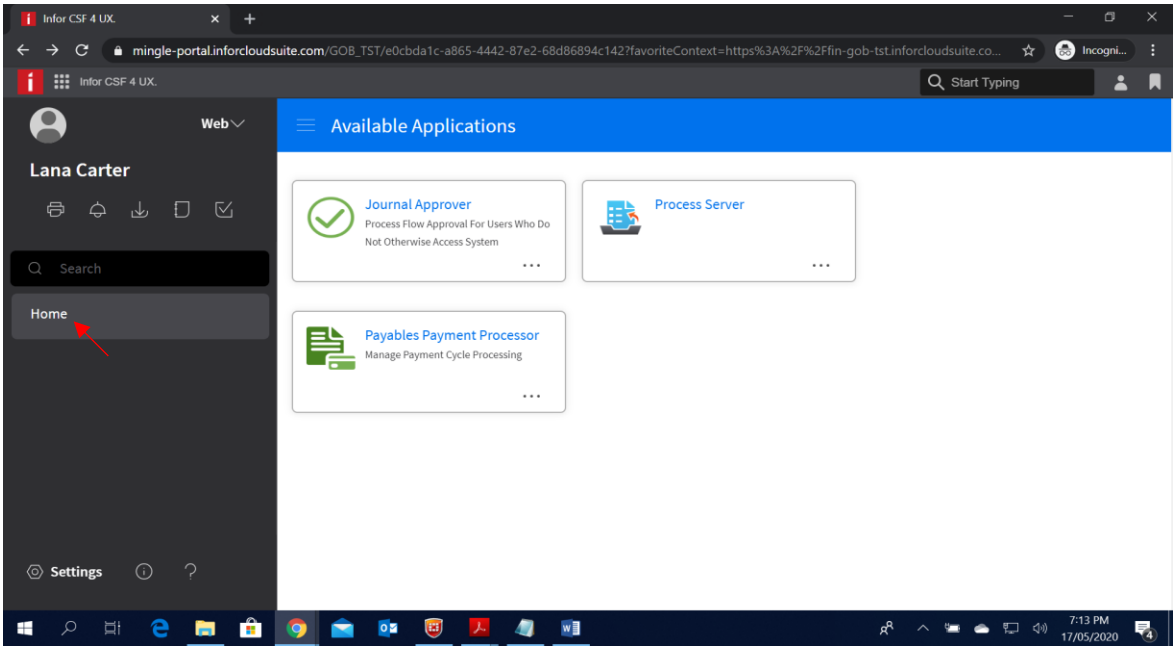
This option displays an audit log of all the tasks you have done.

Search



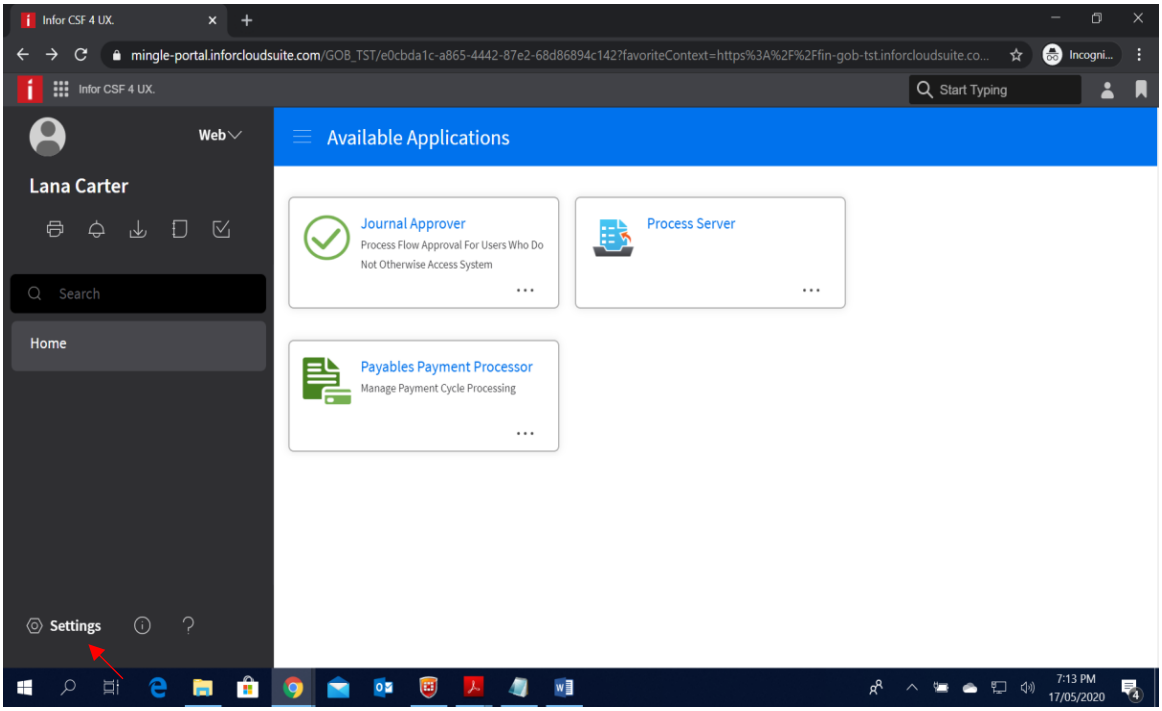
Use the Search field to type the full or partial name of the menu item you want to locate. After you click enter, the forms that contain the string that you have typed are displayed.

Home

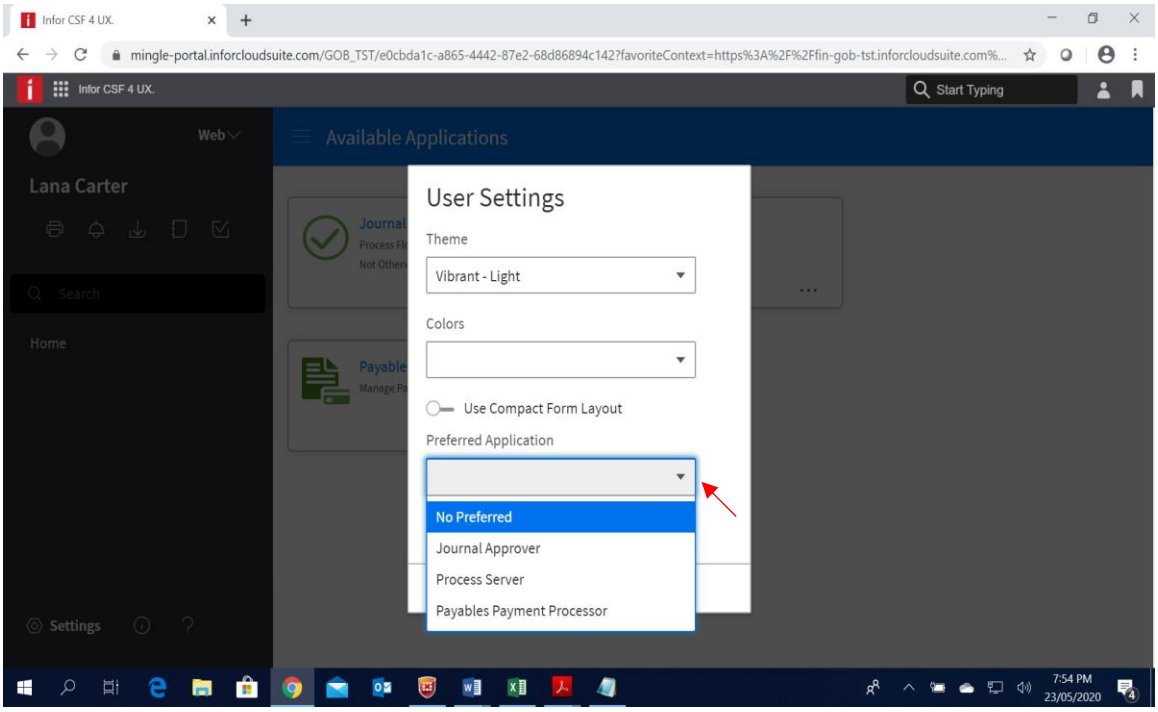


The Home icon gives users access to the homepage for the Infor CloudSuite Supply Management application that is currently active.

Settings

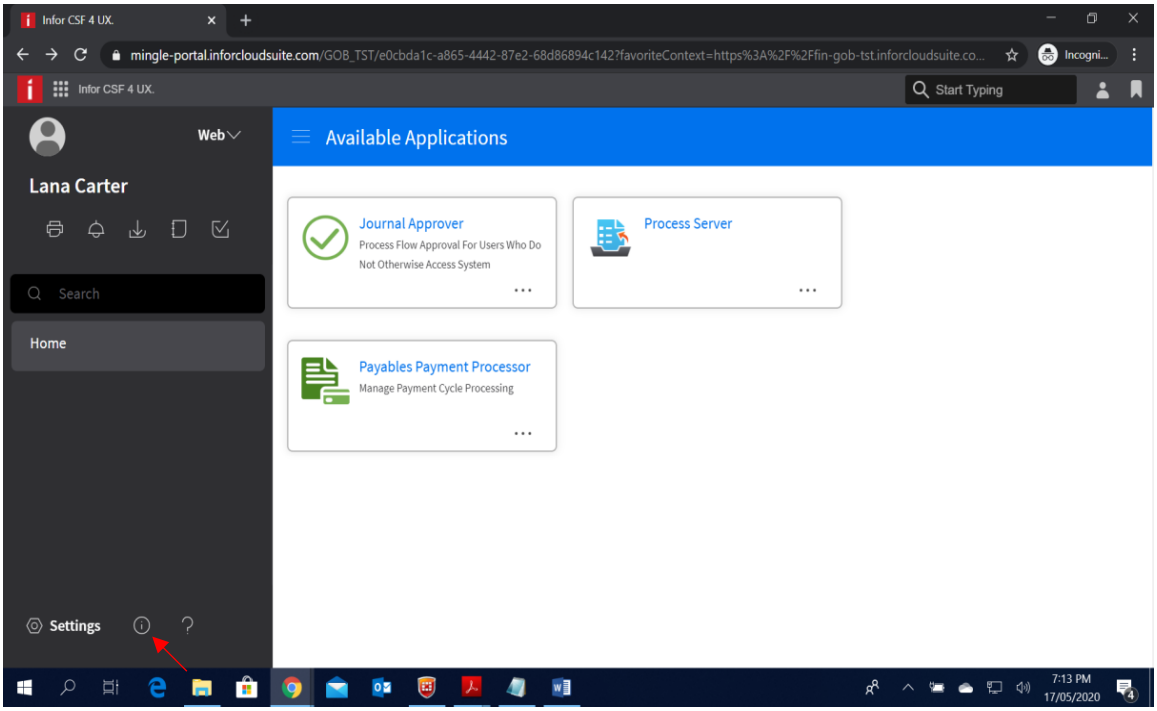


The settings icon displays a User Settings window below that allows you to change the theme, color and menu layout of the application.



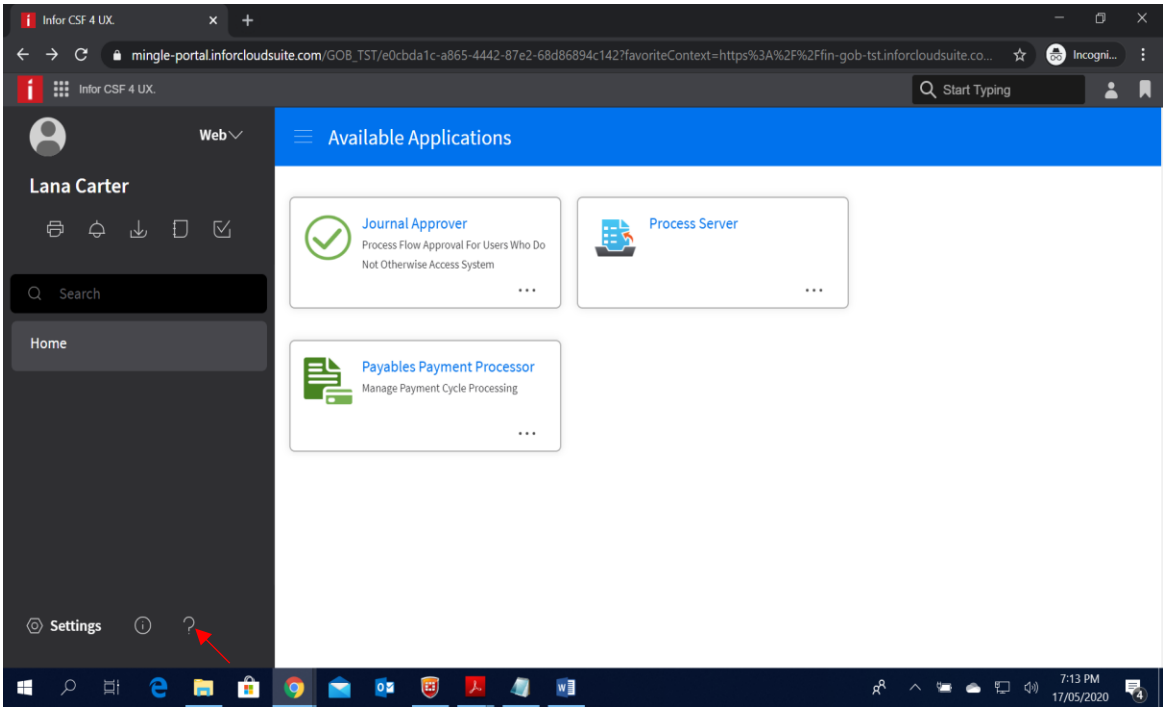
It also allows the user to choose the preferred application to load when the user first logs into Cloud Suite.

About



The About Icon displays a listing of the current Cloud Suite platform versions.

Help

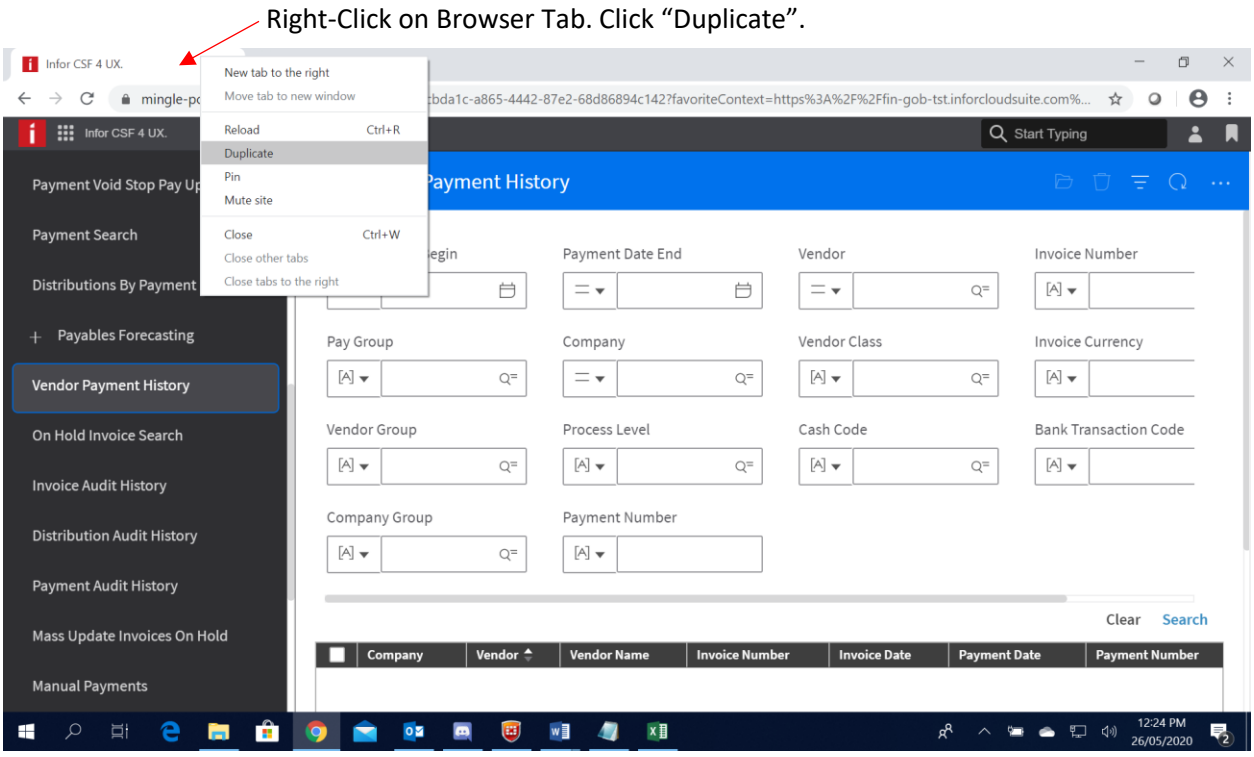


Gives you access to Infor CloudSuite Financials and Supply Management Online Documentation.

Tips

Using Duplicated Windows

You can work in multiple windows at a time by using duplicated windows. This can be done by right-clicking on the browser tab and selecting “Duplicate”.

This create a separate browser tab with the same URL address, which now allows you to work in two windows at a time without having to change menu options.

Screenshot Below:-