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INFOR ERP CONSULTING & TRAINING



# INFOR IDM

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*Administration*

**TECHNICAL USER GUIDE**

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*A screen-by-screen walkthrough of the Administration workspace in the Infor Document Management Control Center — Document Types, Attributes, ACLs, Value Sets, Import / Export.*

PREPARED BY

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*Infor Document Management — Administration Technical User Guide*

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The Administration operations described in this guide — creating and editing Document Types, Attributes, ACLs, ACL Rules, Value Sets, and Import / Export — directly control the content data model and the row-level permissions of every document stored in the IDM repository. Readers are solely responsible for testing any change in a non-production environment first and for following their organisation's change-management and approval processes. In no event shall FullOnBaan, the author, or any contributor be liable for any direct, indirect, incidental, consequential or special damages arising from the use of, or the inability to use, the information contained in this guide.

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# Table of Contents

*Infor IDM — Administration Technical User Guide*

<b>1. Introduction to the IDM Administration Workspace</b>	<b>4</b>
<b>2. The IDM Control Center Home</b>	<b>7</b>
<b>3. The Administration Tile</b>	<b>10</b>
<b>4. Opening the Document Type List</b>	<b>13</b>
<b>5. Document Type — General Tab</b>	<b>15</b>
<b>6. Document Type — Attributes Tab</b>	<b>18</b>
<b>7. Document Type — ACL Tab</b>	<b>21</b>
<b>8. Document Type — Related Documents Tab</b>	<b>23</b>
<b>9. Document Type — ACL Rules Tab</b>	<b>25</b>
<b>10. General Tab Variation — Sales_Invoice</b>	<b>27</b>
<b>11. General Tab Variation — Purchase Order</b>	<b>29</b>
<b>12. General Tab Variation — Invoice (Base Type)</b>	<b>31</b>
<b>13. Value Set — General Tab</b>	<b>33</b>
<b>14. Value Set — Values Tab</b>	<b>35</b>
<b>15. Import / Export</b>	<b>37</b>
<b>Appendix A — Best Practices Checklist</b>	<b>40</b>
<b>Appendix B — Troubleshooting Quick Reference</b>	<b>41</b>
<b>Appendix C — Reference Links</b>	<b>42</b>

# 1. Introduction to the IDM Administration Workspace

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This guide provides a comprehensive, screen-by-screen walk-through of the Administration area inside the Infor Document Management (IDM) Control Center. Infor IDM is the content-services platform that underpins every Infor ERP application in the CloudSuite — Infor LN, Infor M3, Infor Syteline (CSI), Infor Baan and Infor OS itself all rely on IDM to store, classify, retrieve and govern unstructured content.

The Administration workspace is where a tenant's content data model lives. It is where document types are defined, where controlled vocabularies (value sets) are maintained, and where the entire classification framework is exported for promotion between environments. Everything an end-user sees in the IDM viewer, in the Infor Ming.le contextual apps, and in ION-driven document flows is ultimately a by-product of the configuration captured on these screens.

## 1.1 Who should read this guide

- IDM administrators responsible for onboarding new document types for an LN, M3, Syteline, CSI or Baan implementation.
- Infor OS security architects who define ACLs, IDM-Owners-based ownership and role-based access to documents.
- Functional consultants modelling attribute-driven retrieval (indexed attributes, value sets, Business Context attributes).
- Technical consultants who need to promote the content data model between Development, Test, Acceptance and Production environments using the Import/Export facility.
- Auditors and governance leads reviewing how sensitive financial, legal or HR documents are secured through ACL and ACL Rules.

## 1.2 Prerequisites – who can open these screens

Access to Control Center > Administration requires membership of one of the following Infor OS Security Roles:

- IDM-Administrator — full access to every node under Administration, Configuration, Tools, Development, System Health and Document Output.
- IDM-ContentAdministrator — restricted administrator that can maintain Document Types and Value Sets but cannot edit tenant-wide configuration.

- Infor-SystemAdministrator — the platform-wide super-admin role; should be used as a break-glass account only.

Without one of these roles, the left navigation pane in the Control Center will either hide the Administration node or open its children in read-only mode. Role assignment is performed in Infor OS Security Admin (IFS); IDM itself does not grant roles.

### 1.3 Core concepts you should understand first

Concept	What it does
Document Type	The schema for a class of content. Defines the searchable name, the display name, the attributes, the ACL, the bundling rules and the retention behaviour. Every document stored in IDM must be an instance of exactly one Document Type.
Attribute	A metadata field attached to a Document Type. Each attribute has a data type (String, Short, Long, Decimal, Double, Date, Timestamp, Bool, Value Set) and may be marked required, unique, indexed, or tied to a controlled value set.
Value Set	A named, controlled vocabulary (for example Department = {Engineering, Marketing, Sales}). Value sets centralise picklists so that multiple document types can reuse the same list.
Business Context Attribute	A special class of attribute that is synchronised from the Business Context Model (BCM). BCM attributes are the keys that allow ERP BODs to retrieve IDM documents with a single click in Ming.le.
Indexed Attribute	An attribute that is stored in the full-text index for high-performance filtering. Two free indexed attributes are supplied per Document Type by default.
ACL (Access Control List)	A named set of IFS security roles and their permissions (Read, Edit, Delete, CheckIn, CheckOut, ChangeAcl, Force Undo CheckOut, Secure Attributes, Archive). Every Document Type has one default ACL; additional ACLs can be applied to individual documents.
ACL Rule	A conditional expression evaluated at check-in that selects which ACL is applied to a new document. Used when the access profile varies by attribute value (for example different ACLs for Confidential vs Public invoices).
Related Documents (Bundle)	An XQuery-driven rule that automatically attaches related documents (for example every invoice belonging to the same sales order) when the parent is opened.
Import / Export	The configuration-promotion facility. Every Document Type, Value Set, Result List, Business Context Model, Retention Policy, Entity Filter, Language, ION Configuration, MIME Type and Saved Search can be