

# Infor Document Management

## Key concepts and definitions

<b>IDM</b>	Shorthand for Infor Document Management IDM is a full-fledged document management system within Infor OS that can manage the entire document lifecycle of your Infor CloudSuite business documents. IDM encompasses creation, versioning to storage, retrieval, distribution, archiving, and purging of documents.
<b>Document Output Management</b>	IDM's ability to create templates for easy document creation, distribution of documents through email, and the ability to cloud print with IDM's Enterprise Print feature.
<b>Output Management Templates</b>	The capability to combine application data with customized templates to produce business documents. Templates can be created or modified using the Microsoft word add-in included with IDM.
<b>Contextual Applications</b>	The related-information contextual application provides the ability to display relevant documents stored within IDM alongside their corresponding business records. This is not limited to read-only access. Users can download, print, email, sign, or upload documents to IDM via the related information contextual application.
<b>IDM Capture</b>	IDM capture provides optical character recognition (OCR) to transform unstructured content into meaningful data. Typically used for automating the AP invoice process but must be certified with the ERP.
<b>Document Type</b>	An envelope for a document file and its metadata/attributes. Users can create any custom document type with any attributes needed such as height, weight, approval status, color. Flexible enough to cover all possible customer needs, a document cannot exist outside of a document type. Some applications provide default document types mapped specifically to their application record types.
<b>Attributes</b>	Defined by the creator of a document type to store a characteristic. Can be used to create a reference between a document in IDM and a record in an Infor application. Can store: metadata, values, properties. Ex: item ID, supplier number, invoice number, purchase order number.
<b>ACL</b>	Access Control List. Consists of users, user groups, and privileges associated with each. These are applied to document types, permitting and restricting users' actions on them. By default, there are 2 types of ACL, public and private. Public is visible to everyone, private only to the last modifier of that document. Custom ACLs can also be created.
<b>Infor ION</b>	Infor ION is an enterprise messaging system that integrates Infor products with each other and with non-Infor products. Transactional and master data is passed between products as business object documents (BODs) that are routed through Infor ION. Infor ION also enables customers to set up workflows, design and activate business event monitors, and manage tasks and alerts across products.
<b>Query Builder</b>	Infor's search tool for documents which uses Xquery. Search for document attributes and properties and/or search for text within a document through custom queries. Searches can also be saved by the user for quick access.

## Resources

Product Overview	YouTube	Documentation	Education	Dev Portal	User Community

**IDM Tools**

<b>IDM Utilities</b>	The IDM Utilities tool is a self-contained executable JAR file containing multiple functions allowing you to import, export, and update data in IDM. Very useful for tech savvy users and for handling large amounts of documents.
<b>Microsoft Outlook Add In</b>	Users can upload email attachments directly into IDM from Outlook.
<b>Microsoft Word Add In</b>	Users can develop a template in Microsoft Word to be used in IDM Output Management. Users can also search for images in IDM and insert into templates.
<b>Infor Mobile App</b>	Utilize IDM capabilities on a mobile device, allowing the user to view, upload, search, and manage documents.
<b>DocuSign</b>	Combines DocuSign’s capabilities with IDM, allowing users to lock documents, create DocuSign templates, and distribute documents to be signed and sent back.
<b>Enterprise Print</b>	Users can register locations and associated printers to send IDM documents to be printed. Allows for print jobs to be sent through the cloud.

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