



Infor Primary Admin Onboarding Checklist

Click to start



Table of Content

- 01** Cloud Onboarding Journey
- 02** Welcome and Activate Account
- 03** Explore Resources
- 04** Start up
- 05** Implementation Ready



Cloud Onboarding Journey

Primary Administrator Guide Overview



Welcome & Activate Account

REQUIRED

- [Activate Infor Concierge](#)
- [Activate Infor CloudSuite](#)

Explore Resources

RECOMMENDED

- [Create additional users in Infor Concierge](#)

- [Set product communications preferences in Infor Concierge](#)
- [Activate Infor Global Community](#)
- [Visit Infor Customer Portal](#)
- [Visit Infor U Campus](#)

Start Up

- [Visit CloudSuite Self-Service Portal \(CSSP\)](#)
- [Personalize URLs via CSSP](#)
- [Set cloud communications preferences in CSSP](#)

Implementation Ready

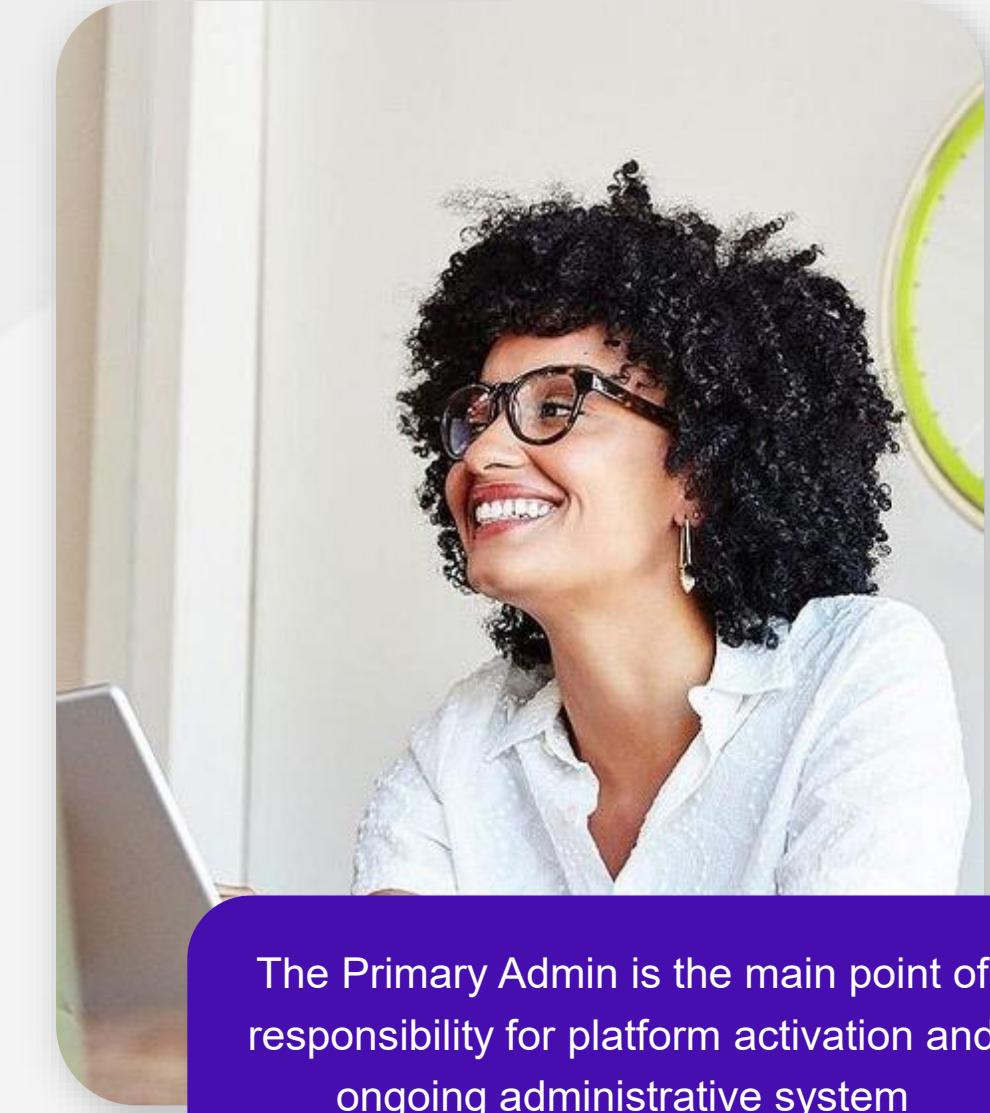
- [Identify your implementation team](#)
- [Add your project team & other admins to Infor CloudSuite](#)

Primary Administrator

Roles and Responsibilities



		Infor CloudSuite Infor product(s) and tech platform that are being used in your business processes	Infor Concierge System that supports your licensed Infor product/s and end users that use the product/s
Title / Permissions	System Administrator	Contact Administrator	
Definition	A System Administrator has access to all OS Portal functionality and responsibility for initial user access management.	A Contact Administrator is responsible for contact management in Infor support systems.	
Responsibilities	<ul style="list-style-type: none">Activate Infor CloudSuite product environment accessReceive the secure URLs of cloud environmentsMust have technical knowledge to do initial setup tasksAdd implementation team who will configure the environmentAdd other end users that will be using the Infor productUpdate security roles of users and administer their permissionsHave access to all OS Portal functionality, including managing applications, widgets, workspaces, and general settings	<ul style="list-style-type: none">Activate Infor Concierge accessAdd implementation team access and update their roles to Infor Concierge and other support systems (CloudSuite Self-Service Portal and Infor U Campus)Request to add additional Contact Administrators, if neededRequest access for third party consultants (if a partner is doing implementation)Handle support cases and work with Infor support teams	



The Primary Admin is the main point of responsibility for platform activation and ongoing administrative system management prior to project kickoff.



Welcome and Activate Account



Activate Infor Concierge



Required Action

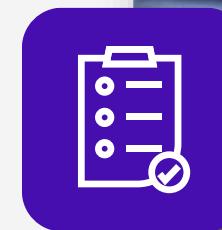
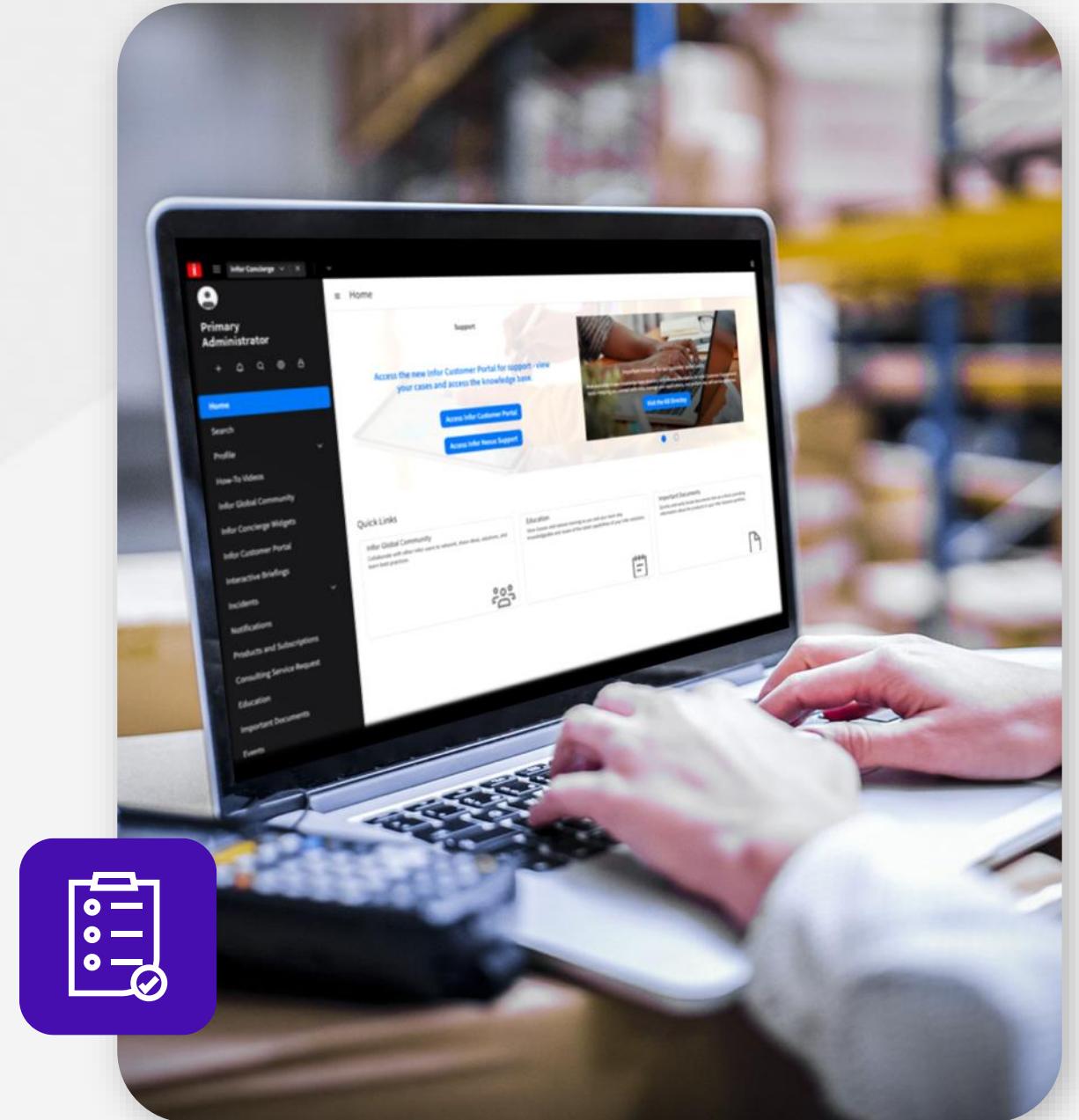
Infor Concierge is a central gateway for all things Infor. It consolidates access to all support-related services. You can find personalized information relevant to your Infor products, services, and solutions.

We sent you an email with steps to activate your new Infor Concierge account. Can't find the email? No worries! Here's what to do:

1. Navigate to [Infor Concierge](#).
2. Click "Reset/Forgot Password" then enter your registered email and fill in the code.
3. Check your inbox and follow the instructions to set up a new password. If you do not see the email in your inbox, please **check your spam folder**.

Once you have signed in, your Infor Concierge credentials work as a Single Sign-On for other support tools.

Contact us for questions about Infor Concierge activation here



Activate Infor CloudSuite



Required Action

Infor CloudSuite is a comprehensive, industry-specific cloud Enterprise Resource Planning (ERP) solution that integrates core business processes into a single, scalable platform.

Let's make sure you have access to your Infor CloudSuite environments. To do this, you will need to log in to Infor OS Portal, where you will find your Infor CloudSuite applications.

1. As the initial system administrator, you will receive an email from subscription@infor.com, which **will contain all your unique URLs to your Infor CloudSuite environments.**
2. Click one of the URL links and complete your access. Don't have a password yet? Click "*Forgot Password*" to set up a new one.
3. Check your email for confirmation you have access to your Infor CloudSuite environments.
4. Keep your credentials to log into the rest of your environments.



Contact us for questions about Infor CloudSuite activation here

Create additional users in Infor Concierge



Recommended Action

As the Contact Administrator in Infor Concierge, you can add new users by following the steps below:

1. In Infor Concierge, go to the "Manage Contacts" section in the left-hand side menu panel.
2. Click "Add new contact" and fill in the required contact information.
3. Determine the appropriate role to apply for each new contact.

Watch the video and read the article for more information.

[Watch here](#)[Read here](#)

Note

If other users need access to other support systems, they need to be added first to Infor Concierge.

Users need an existing Infor Concierge credential first before their permissions can be enabled in CloudSuite Self-Service Portal and Infor U Campus.





Explore Resources



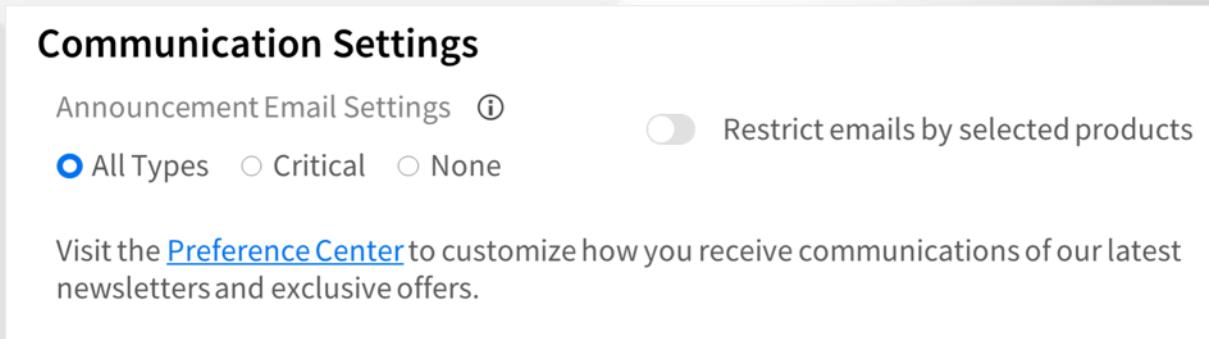
Set product communications preferences in Infor Concierge



Required Action

In this step, you will set up your communication preferences. It is important that at least one person in your organization is subscribed to Critical communications.

1. In Infor Concierge, navigate to "Profile" in the left-hand side menu.
2. Select "Settings" and scroll to the Communication Settings section.



3. Set up your communication preferences.
4. Save your settings.

Note

Communications of All Types include product release notifications, product lifecycle changes, support operations notifications, critical product notifications, enhancement voting, interactive briefings, and Infor Concierge, Infor Customer Portal, or Enhancement Request System updates.

Critical Communications include critical tasks that a system administrator must complete before a specified release or deadline. Failure to complete this action may result in the product not functioning as intended, potentially impacting operations or performance.



Activate Infor Global Community



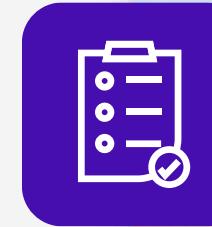
Required Action

[Infor Global Community](#) is a modern, intuitive space designed to help you connect, collaborate, and grow with other Infor users.

1. [Sign up](#) at Infor Global Community.
2. Navigate and explore the Community Hubs and/or discussions relevant to your industry or CloudSuite.



We recommend joining the Onboarding Hub, where you'll find all the information relevant to your onboarding journey.



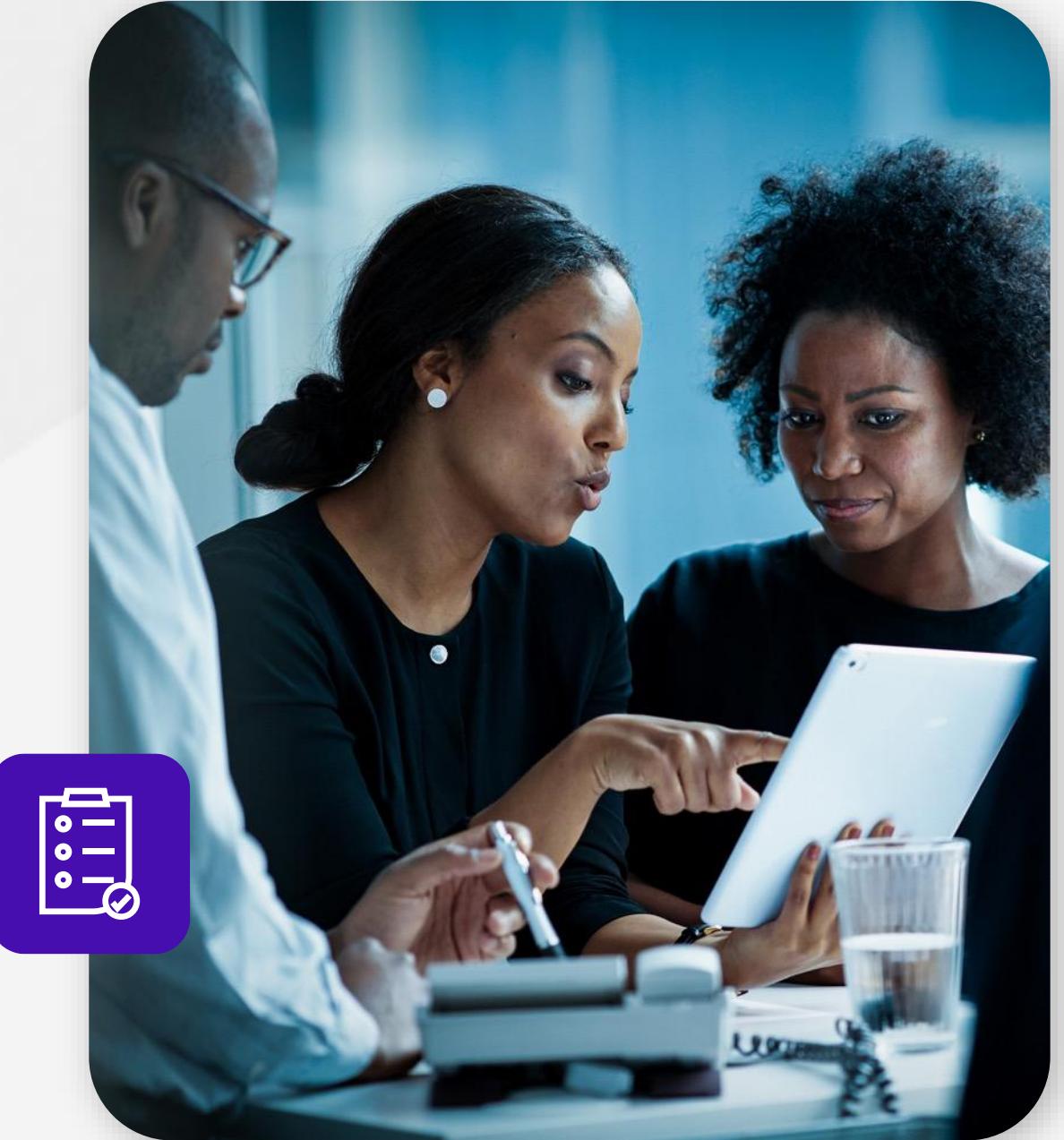
Visit Infor Customer Portal



Required Action

The Infor Customer Portal features a **self-service knowledge base** and a tool for **logging cases** with Infor Support or **creating a Customer Care Inquiry**.

1. In Infor Concierge, navigate to the left-side menu and click "Infor Customer Portal".
2. You will gain access automatically with Infor Concierge Single Sign-On.



Visit Infor U Campus



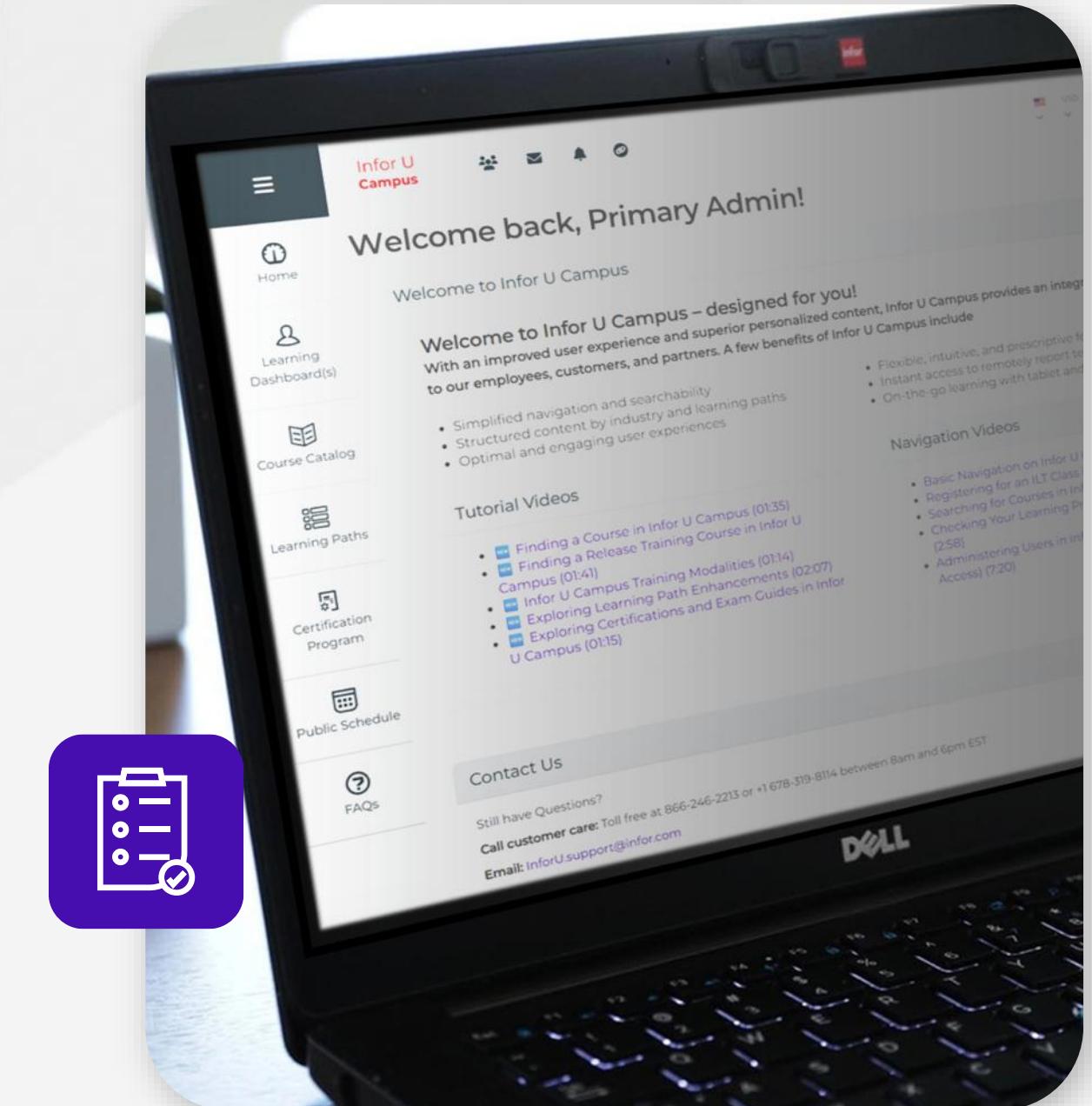
Required Action

Infor U Campus provides training and enablement so you can learn more about your solutions, optimize your infrastructure, and realize the benefits of your Infor solution faster.

1. In Infor Concierge, navigate to the left-side menu and click “Education”.
2. Click “Visit Infor U Campus”.
3. Infor Concierge is the Single Sign-On entry point to Infor U Campus, so there is no need to create a new account.
4. New users to Infor Concierge have to Opt-in to Infor U/Campus

Read the Infor U Campus Onboarding Guide:

[Review the guide here](#)



Identify an additional Contact Administrator for Infor Concierge



Recommended Action

Managing user access in Infor Concierge is important. If you need more than one Contact Administrator, you may request a new one by creating a Customer Care Inquiry.

1. In Infor Concierge, go to Infor Customer Portal.
2. In the “Cases” menu, select “Create Customer Care Inquiry”.
3. Provide the necessary information. In the short description add “New Contact Administrator”.
4. In the “Description” section add the name, email address, phone number, and the confirmation that the new contact admin is an employee of your organization.



Read the article for more information or watch the video to follow the steps.

[Read here](#)[Watch here](#)

Visit Documentation Central



Recommended Action

Infor Documentation Central is the repository for configuration guides and administration guides when you are setting up Infor CloudSuite after provisioning. If you are looking for an Infor product startup guide, this is your resource.

[Explore Documentation Central here](#)





Start up



Visit CloudSuite Self-Service Portal (CSSP)



Required Action

The CloudSuite Self-Service Portal (CSSP) is a tool that enables you to perform certain self-service administrative functions on your Infor Cloud environments. It allows you to change your URL prefix, request for a data refresh, download audit reports, set your cloud notification settings and view configuration packages.

1. In Infor Concierge, navigate to the waffle menu in the top left corner, scroll down to Applications and click “See more”.
2. Click on CloudSuite Self-Service Portal.

Watch the navigation and read the user guide below.

[Watch here](#)[Read here](#)

Personalize URLs via CSSP



Required Action

Infor's URL personalization allows you to customize the web addresses used to access Infor products, making them shorter and easier to remember. Contact Administrators can modify the GUID through the URL prefix function available in our **CloudSuite Self-Service Portal (CSSP)**.

This section of the URL is known as GUID (Global Unique Identifier). It is generated and assigned automatically.



https://mingle-portal.inforcloudsuite.com/XJKA9381GHE91PGK_PRD

1. Go to CloudSuite Self-Service Portal via Infor Concierge.
2. Locate and click the Multi-Tenant menu.
3. Select “URL Prefix” and click “Update URL Prefix”.
4. Type in the new URL prefix and click “Submit”. A prompt will confirm that the change has been successfully applied.

Follow the steps in the video below.

Watch here



Set cloud notifications preferences in CSSP



Required Action

Any updates to cloud environments, including scheduled maintenance, releases, or disruptions, are communicated via email or SMS. If you would like to get timely updates, subscribe to these communications.

1. In Concierge, go to CloudSuite Self-Service Portal.
2. Go to your user in Contact Management. Select Yes under Subscribe to Email Notifications.
3. If selecting Yes under Subscribe to SMS Alerts, you must have a mobile number specified in your contact information in Infor Concierge. Note that some mobile service providers may carry SMS charges.

Watch the video below to follow the steps.

Watch here

Note

Cloud notifications include maintenance schedule updates, maintenance start and complete, cloud bulletins, disruptions or degradations, and root cause analysis documentation for disruptions. These may be delivered through either email or SMS.

Contact administrators can set these preferences for users, hence, users do not need to access CSSP to subscribe to cloud notifications. However, if users would like to update their own preferences themselves, their access to CSSP need to be enabled by an admin.



Access Infor CloudSuite applications

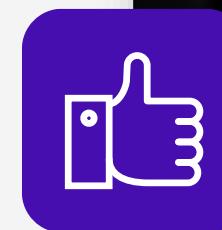


Recommended Action

Now that you have updated your URLs, let's check that you can log into your Infor Cloud applications in Infor OS Portal.

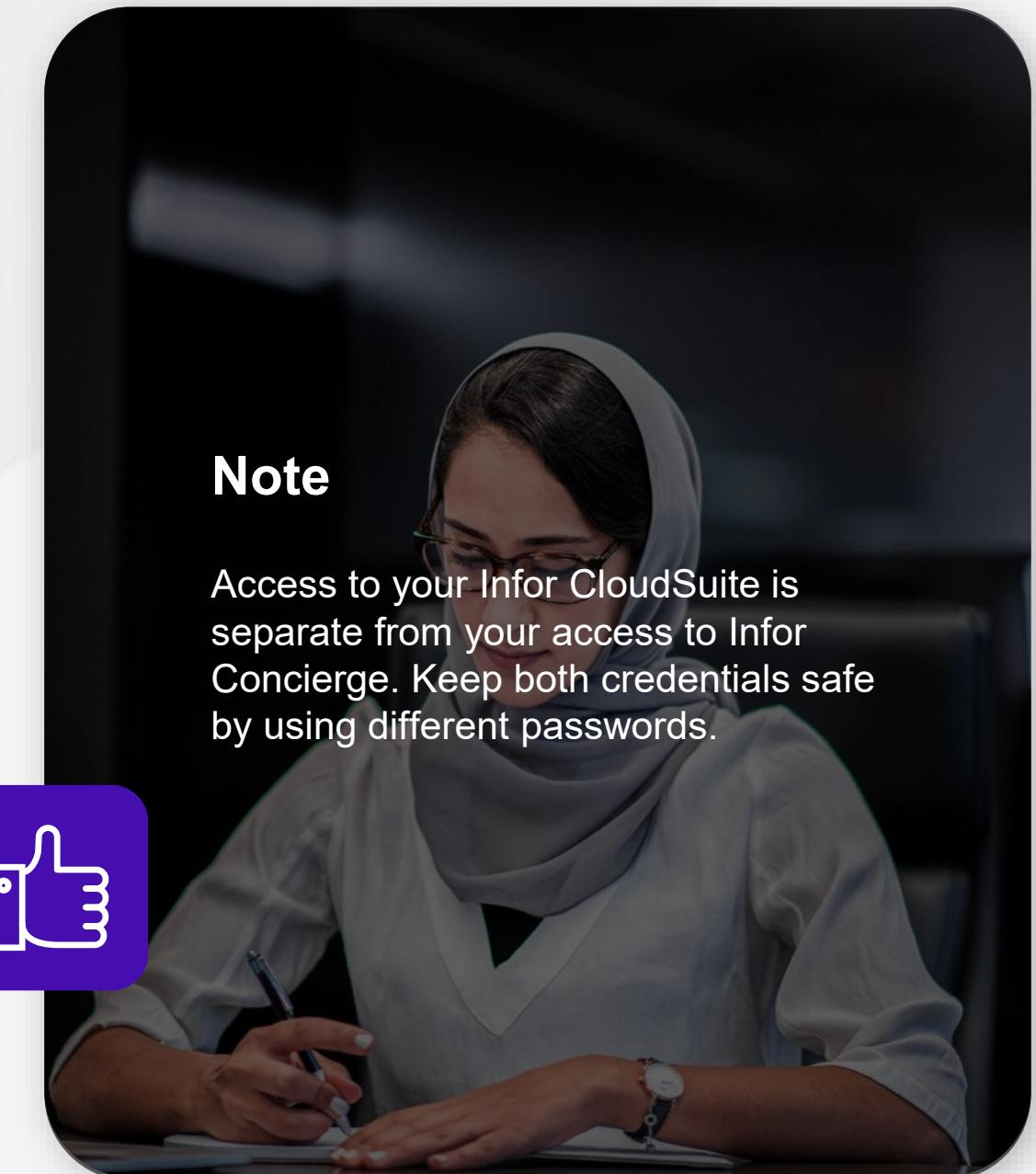
1. Log into your Infor CloudSuite with your Infor CloudSuite credentials.
2. Your applications will appear as icons in the Navigation Menu. Verify that you can access each of the applications by clicking them.

Watch the video on how to navigate or contact us for questions about accessing your Infor CloudSuite.

[Watch here](#)[Contact us for questions here](#)

Note

Access to your Infor CloudSuite is separate from your access to Infor Concierge. Keep both credentials safe by using different passwords.





Implementation Ready



Identify your implementation team



Required Action

To have a successful start to your cloud implementation project, it's important that key team members are identified and have the right access. These are just some of the roles you can expect to be involved in the project and collaborating with Infor in the future.

- Project/Executive Sponsor
- Project Manager
- Support Lead
- Product/Application Manager
- Technical team

Are you working with a partner or third party consultant? Learn how to add them into Infor Concierge here:

[Watch here](#)



Add your project team and other admins to Infor CloudSuite



Required Action

As a System Administrator, it is your responsibility to create accounts and give access to your project team. You can also add other system administrators to manage your Infor CloudSuite.

1. Log into Infor CloudSuite.
2. In the navigation menu, click “OS”.
3. Go to “Security” and click the “+” button that is in the top left corner.
4. Enter the new user’s information and click “Save”. The users will receive an email that provides access to the Infor CloudSuite with their new permissions.

**If you are adding another administrator, follow the same steps above and update their Security Roles to administrative roles.*

Watch the navigation and learn about roles and permissions in Infor OS Portal below.

[Watch here](#)[Learn about roles and permissions here](#)

Review Customer Implementation Guide



Recommended Action



The Customer Implementation Guide helps you understand key considerations before your project kick-off. It supports you in achieving your business outcomes by setting your implementation project on the right path to success.

[Review here](#)

Identify a Team Lead in Infor U Campus



Recommended Action



Make the most of the learning materials available to you. The Infor U Campus Team Lead helps support your organization in achieving its learning objectives, especially during the software implementation period.

Assigning an Infor U Campus Team Lead? Create a case under Training and Education in Infor Customer Portal.

[View Infor U Campus Team Lead Overview Guide](#)



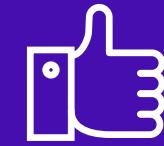
Explore Developer Portal



Recommended Action

Developers on your team can connect with other technical folks who have done it before. The Developer Portal in Infor Global Community offers many resources, whether you're building something, have questions for other members, or just exploring.

[Sign up for the Developer Community](#)





If you experience any issues
or have any questions,
[contact us here.](#)