Infor Primary Admin Onboarding Checklist

Click to start

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Table of Content

01 Cloud Onboarding Journey

02 Welcome and Activate Account

03 Explore Resources

04 Start up

05 Implementation Ready

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Cloud Onboarding Journey

Primary Administrator Guide Overview

	Welcome & Activate Account	Explore Resources	Start Up	Implementation Ready
REQUIRED	• Activate Infor Concierge • Activate Infor CloudSuite Grant Implementation Partner Infor Concierge access *(Partner implementations only)*	• Set product communications preferences in Infor Concierge • Activate Infor Global Community • Visit Infor Customer Portal • Visit Infor U Campus	• Visit CloudSuite Self-Service Portal (CSSP) • Personalize URLs via CSSP • Set cloud communications preferences in CSSP	• Identify your key team members • Add project & implementation team to Infor CloudSuite
RECOMMENDED	• Create additional users in Infor Concierge	• Identify an additional Contact Administrator for Infor Concierge • Visit Documentation Central	• Access Infor CloudSuite Applications	• Review Customer Implementation Guide • Identify a Team Lead in Infor U Campus • Explore Developer Portal

Implementation Partner-specific tasks

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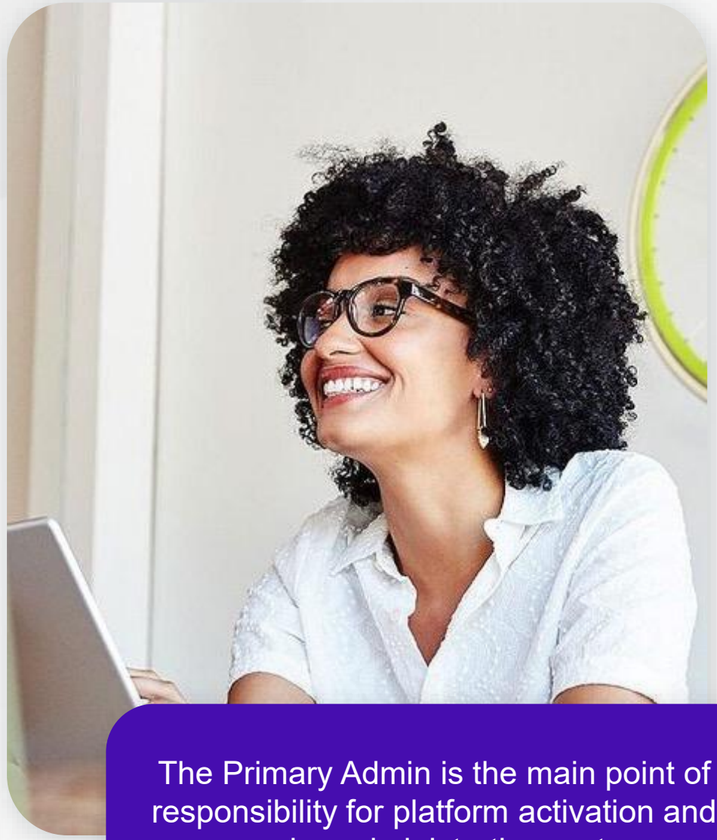
Primary Administrator

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	• Activate Infor CloudSuite product environment access • Receive the secure URLs of cloud environments • Must have technical knowledge to do initial setup tasks • Add implementation team who will configure the environment • Add other end users that will be using the Infor product • Update security roles of users and administer their permissions • Have access to all OS Portal functionality, including managing applications, widgets, workspaces, and general settings	• Activate Infor Concierge access • Add 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 needed • Request 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.

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Welcome and Activate Account

Activate Infor Concierge

Required Action

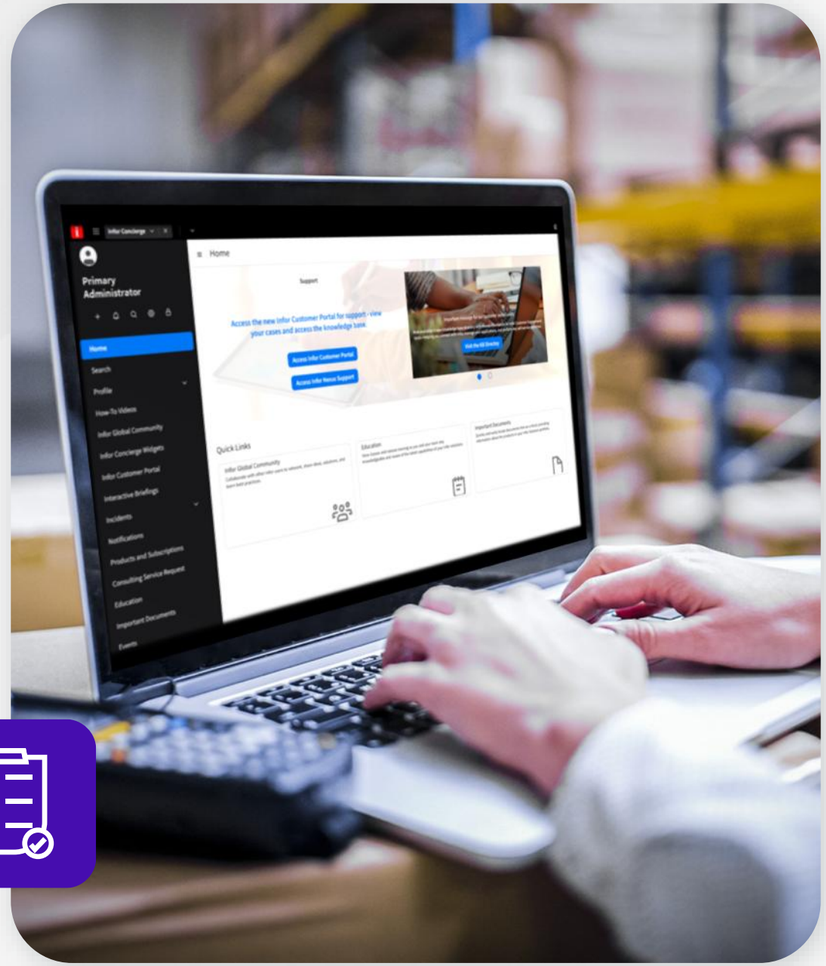
Infor Concierge is a central gateway for all things Infor. It consolidates access to all support-related services. You can find personalized information relevant to your Infor products, services, and solutions.

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



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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

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Give your Implementation Partner access to Infor Concierge

Required Action (Third-party partner-led implementation only)

If you're working with a Partner, they can be granted full access to your organization's support cases. How the Partner is registered depends on your relationship with them. If the system displays an "Authorized" column, follow the applicable Partner registration instructions. If the column is not present, you are considered a Direct Infor customer with a Partner-led implementation — follow Option 2.

Option 1: If you purchased your Infor License through one of our Authorized Business Partners

Contact Administrators can authorize full case access to the partner team via Infor Concierge.

To do so:

1. Navigate to **Infor Concierge**.
2. Go to Contact Management
3. Click **Manage Partner Access for Cases**
4. Tick the box in the "Authorized" column.

This option allows all users from your partner organization to access your support account. Access does not expire and can be revoked at any time.

Watch here

Option 2: Direct Infor customer with Partner-led implementation

Review if your consultant team already has access to your **Infor Concierge** account:

1. Navigate to **Infor Concierge**.
2. Go to **Contact Management**
3. Look if your **partner emails** are listed there.

If the partner team is not there:

1. Submit a **request here** or submit a **Customer Care Inquiry** in the Infor Customer Portal
2. Include: name(s), phone number, email address, and time zone of your consultant.

The Customer Care team will reply with a short security questionnaire.

This option allows specific users from your partner organization to access your support account for one year, with renewal available if needed.

Watch here

Read here

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Create additional users in Infor Concierge

Recommended Action

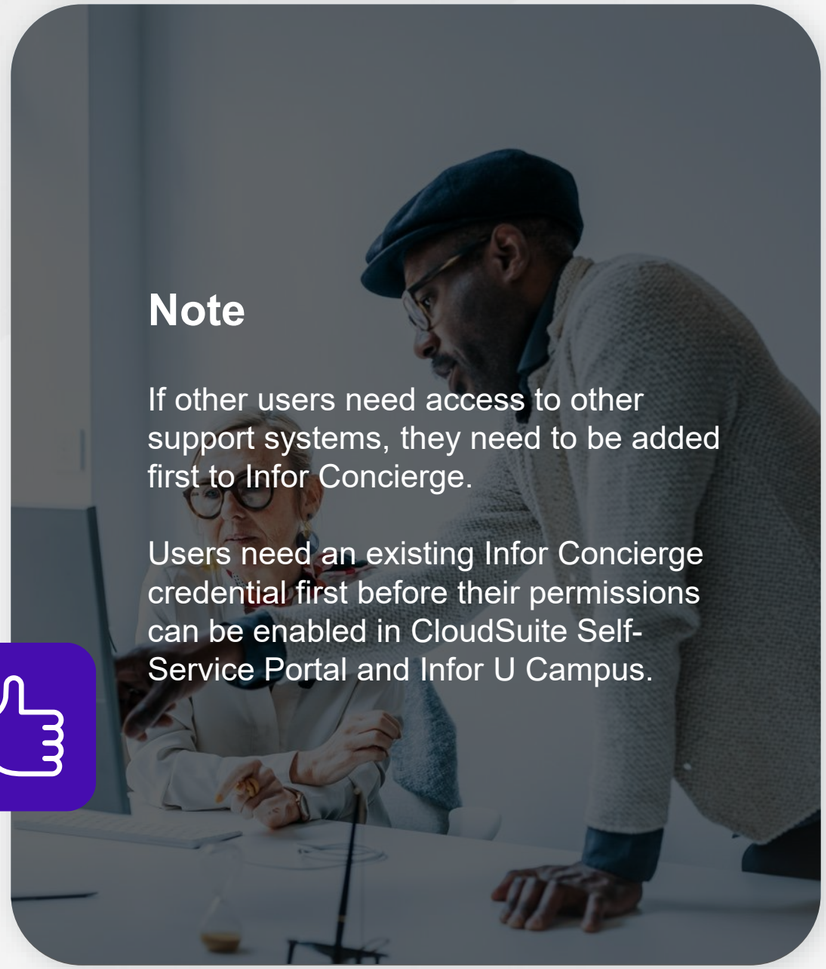
As the Contact Administrator in Infor Concierge, you can add new users by following the steps below:

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



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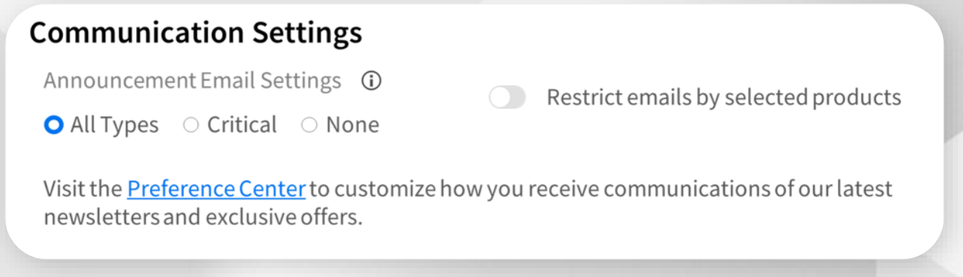
Explore Resources

Set product communications preferences in Infor Concierge

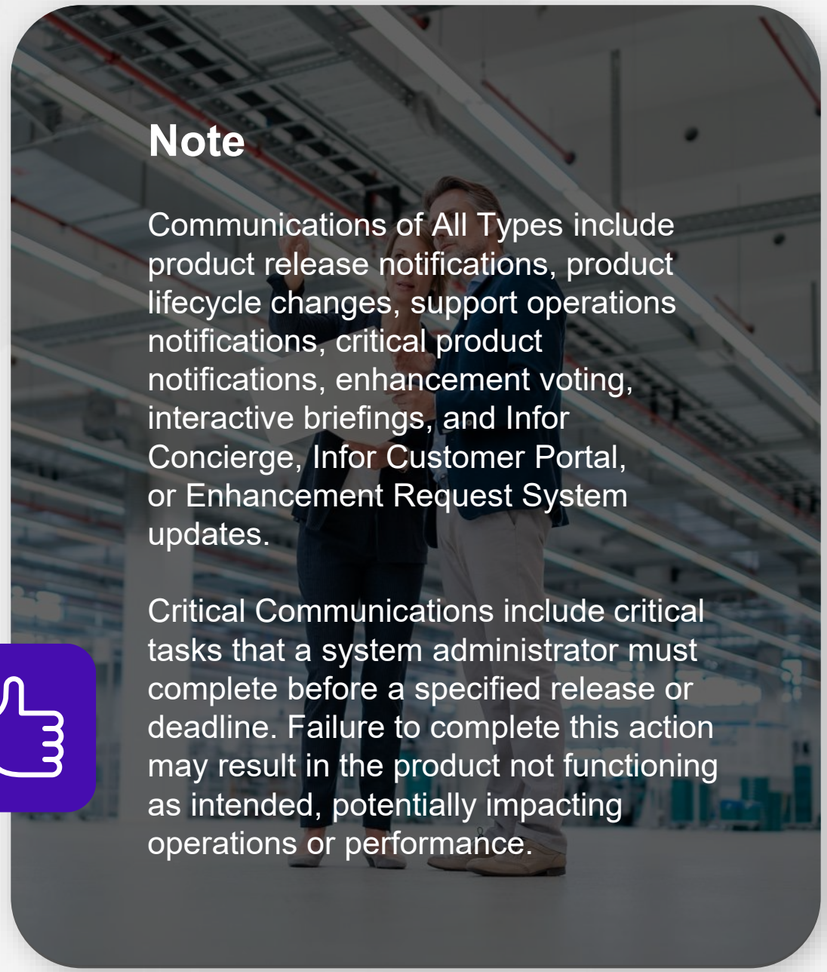
Required Action

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.



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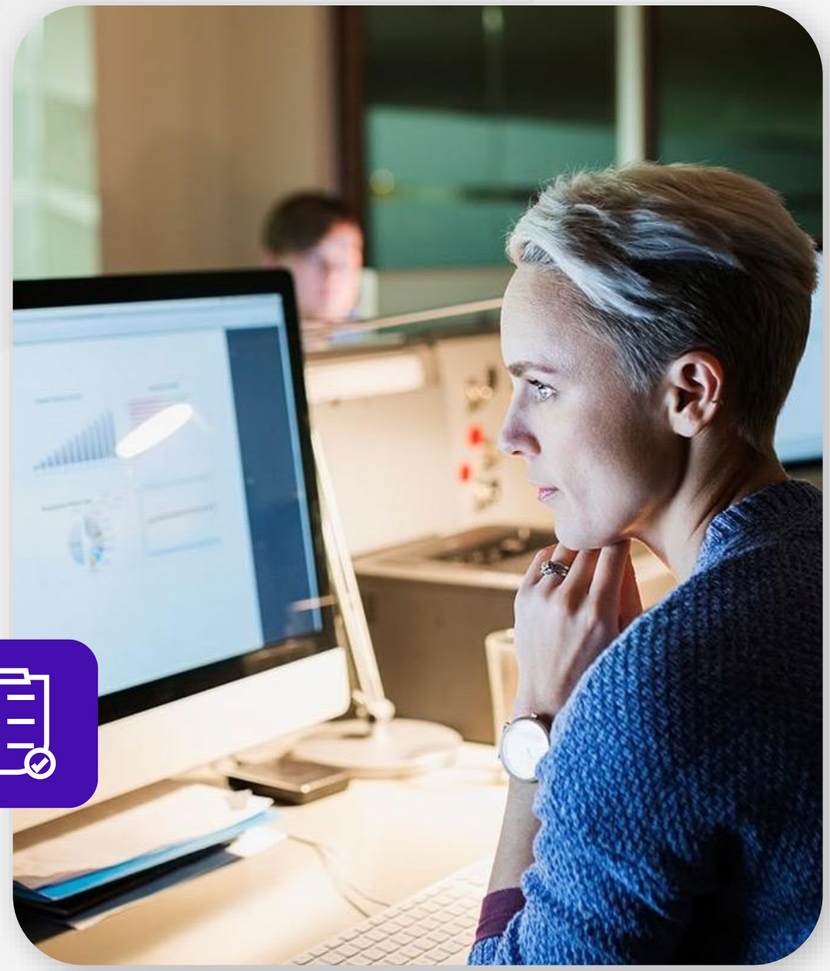
Activate Infor Global Community

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.



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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.

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Visit Infor U Campus

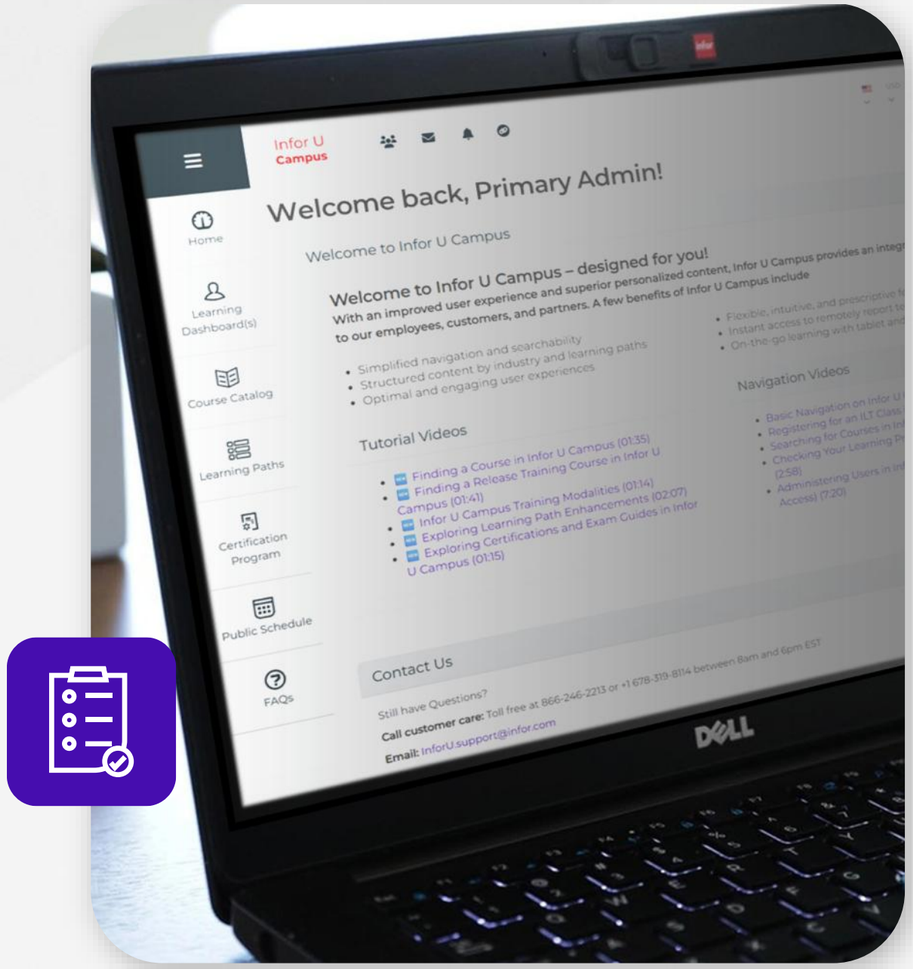
Required Action

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



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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.

Watch here

Read here

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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

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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.

Important: *Do not complete the steps below until you have received confirmation that provisioning is complete and have received your provisioning email with access details.*

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

* Gov Cloud customers do not have access to CSSP and must contact Support directly. Support contact information available here.

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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.

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

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Set cloud notifications preferences in CSSP

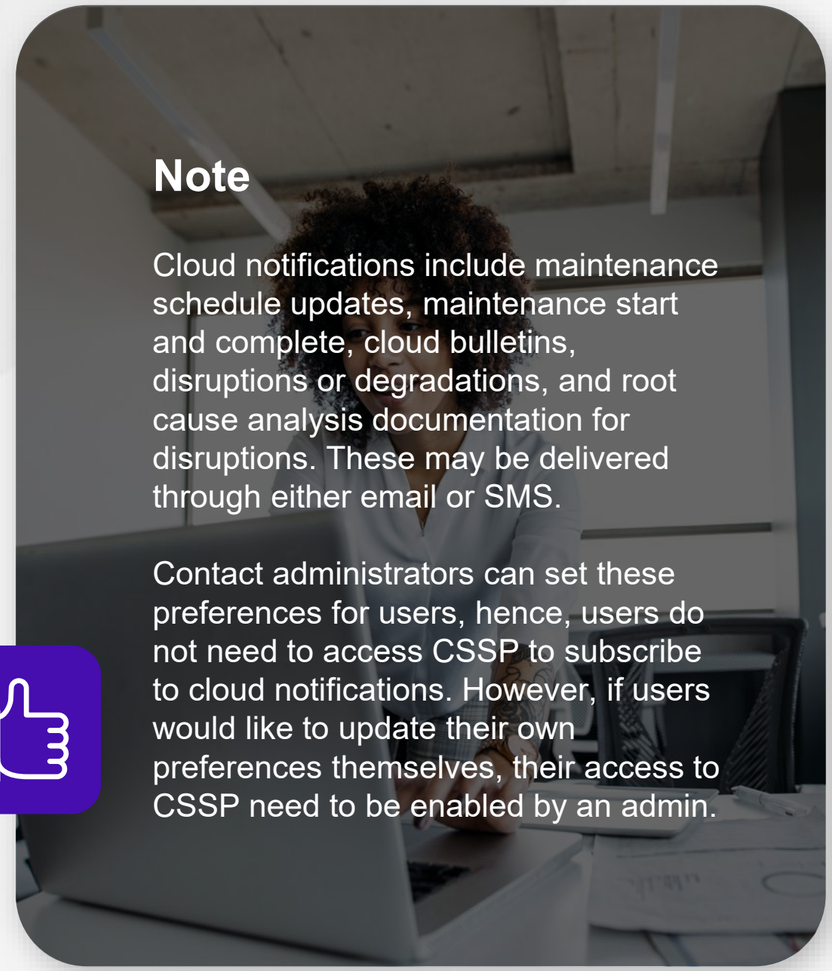
Required Action

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



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Access Infor CloudSuite Applications

Recommended Action

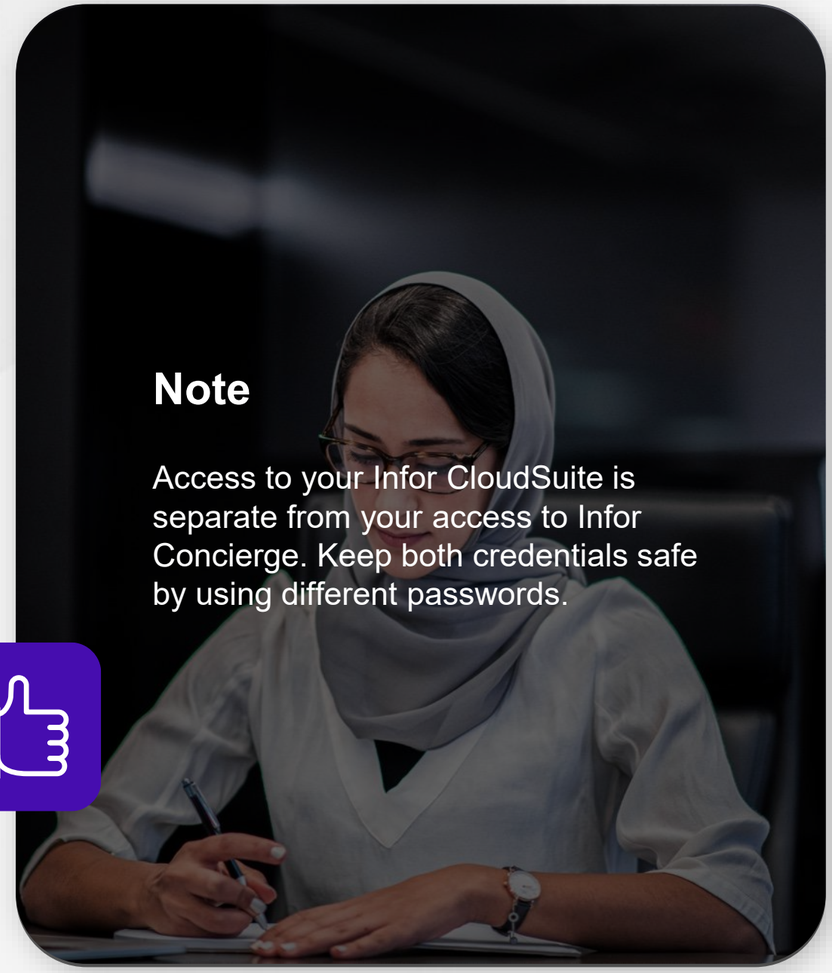
Now that you have updated your URLs, let’s check that you can log into your Infor Cloud applications in Infor OS Portal.

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



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Implementation Ready

Identify your key team members

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 to Infor tools and CloudSuite environments. Please identify someone for each of these roles:

Role	Description
Primary Admin	Main point of contact for Infor CloudSuite and Infor Concierge setup and activation.
Executive Sponsor	Main stakeholder, provides executive oversight and champions project success.
Project Manager	Leads implementation and coordinates with Infor throughout delivery.
Support Lead	Partners with Infor Support to manage issues and cases.
Learning Manager	Ensures teams are trained and ready to use the solution.
Implementation Team	Infor Global Professional Services or Partner

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Add your project & implementation team to Infor CloudSuite

Required Action

Primary Administrator (System Administrator) Responsibilities

Create user accounts and grant access for your project and implementation team. You may also assign additional system administrators in Infor CloudSuite.

Option 1: Add users yourself

1. Log into Infor CloudSuite
2. Navigate to **OS → Security**
3. Click **“+”** (top left)
4. Enter user details and click **Save**
   - Users will receive an access email

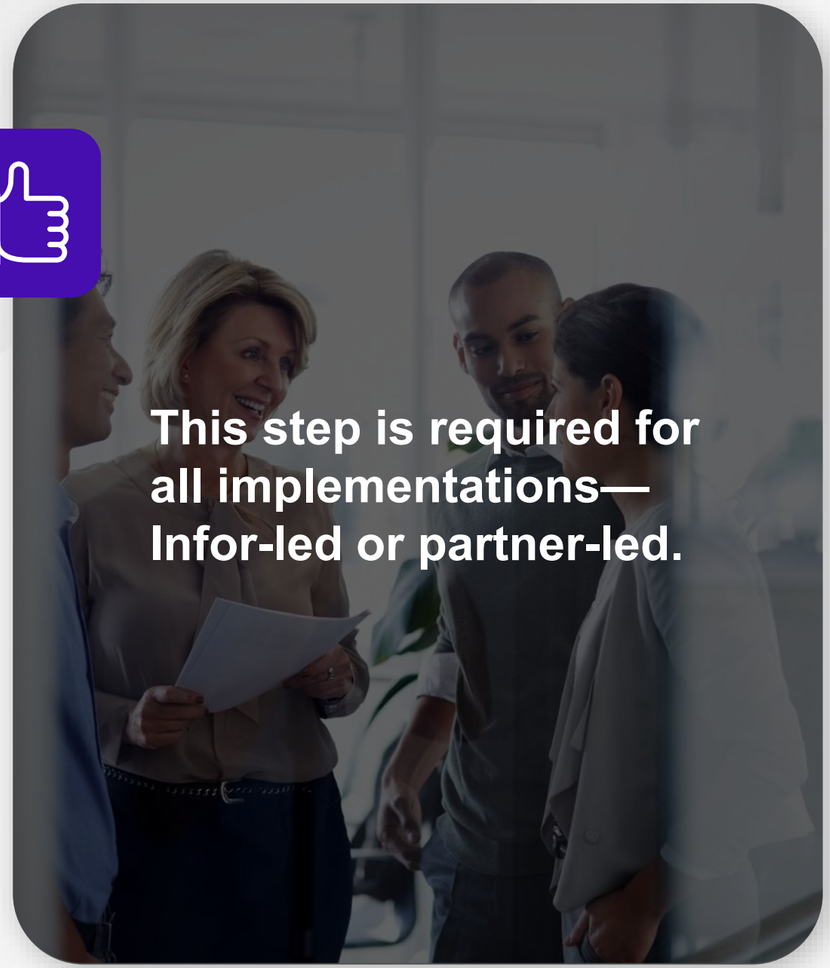
To add an administrator: follow the same steps and update Security Roles to administrative roles.

Option 2: Request Support

Email CloudLaunchServiceTeam@infor.com with names and email addresses.

Watch here

Watch the video to follow the steps.



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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

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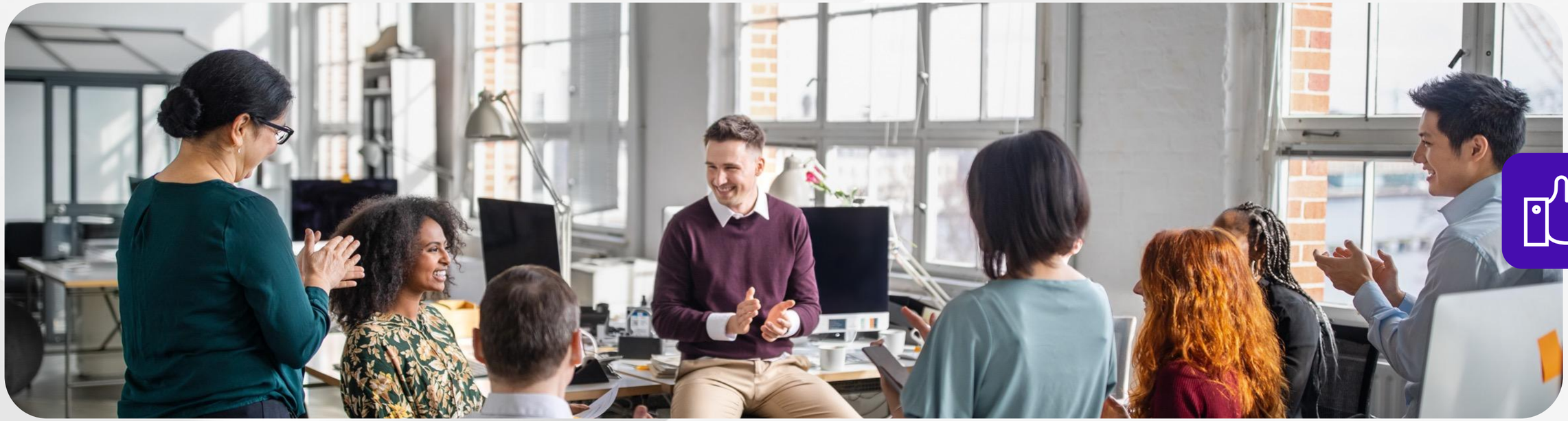
Identify a Team Lead in Infor U Campus

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

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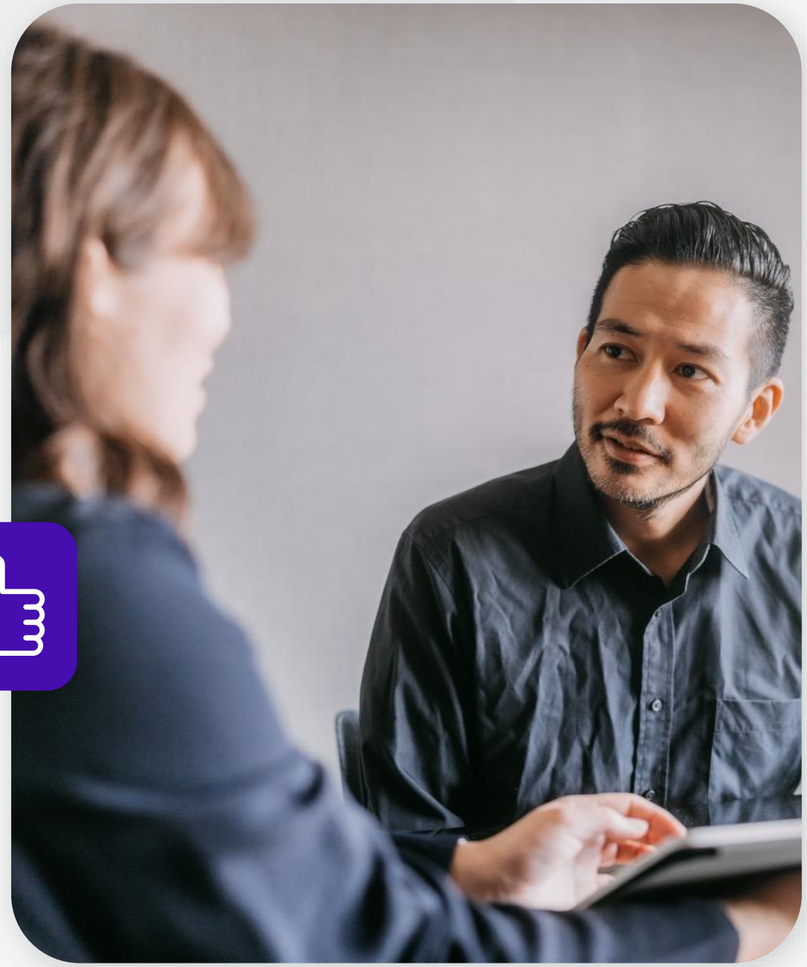
Explore Developer Portal

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



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If you experience any issues or have any questions, contact us here.

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