



Infor CloudSuite Business
Configuration and Data Collection
User Guide
Release 9.01.x

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Publication Information

Release: Infor Cloudsuite Business (Industrial) 9.01.x

Publication Date: October 3, 2016

Document code: csbi_9.01.x_csbiipcug_csbusiness_en-us

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Contacting Infor

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If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Configuring Items, Estimates or Jobs

Configuring an Item, Estimate, or Job

You can configure an item from any of the following forms. In some cases, you can also configure an order, estimate, or job. Use the appropriate procedure for each form:

- Customer Orders
See "Configuring a Customer Order" on page 13.
- Customer Orders Quick Entry
For headers, see "Configuring a Customer Order" on page 13.
For lines, see "Configuring an Item from a Customer Order Line" on page 14.
- Customer Order Lines or Customer Order Blanket Lines
See "Configuring an Item from a Customer Order Line" on page 14.
- Estimates or Estimates Quick Entry
See "Configuring an Estimate" on page 15.
- Estimate Lines
See "Configuring an Estimate Line" on page 16.
- Estimate Job Orders
See "Configuring an Estimate Job" on page 8.
- Job Orders
See "Configuring a Job or Item" on page 8.

Note: When you are in a configuration session, the system prevents you from accessing any CloudSuite Business forms or online help.

Configuring a Job or Item

To configure a job or item on the Job Orders form:

- 1 Select the item or enter the job number.

When you save the job, the **Configure** button is enabled.

Note: The selected item must be designated as "Job Configurable" on the Items form, **Configuration** tab. A job must have a status of Firm.

- 2 Click **Configure**.

The configuration user interface (UI) for the item displays. The information you select from the UI can be used to configure the job or item.

- 3 Configure the job or item. See the configuration application's documentation for additional information.

Note: When you are in a configuration session, the system prevents you from accessing any CloudSuite Business forms or online help.

- 4 After the system returns the configured job or item, process it according to your standard procedures. After processing, the system updates the Job Orders form with the configuration information .

Notes:

- Rules can be defined that place an Infor CPQ configuration on hold if, for example, an option in the configuration requires approval. When the original user completes the configuration, the **Configure** button for the line is set to **Configure-HOLD**, and the **Config Hold** field is selected. When a configuration is approved, you can either reconfigure the sourced job or order line to remove the hold in Infor CPQ, or you can select the **Actions > Remove Config Hold** menu option in CloudSuite Business. The button label is updated to **Configure-Complete** and the **Config Hold** field is cleared. The configuration hold extends to any sub-jobs. Those sub-jobs cannot be released until the hold is removed.
- After a job is configured, you can manually change the job order routing from item to co-product. However, if you do this, you cannot reconfigure the line item. Also, normal CloudSuite Business business rules will apply to the job - you must complete the product mix master and operational steps to complete the co-product job.

Configuring an Estimate Job

To configure an estimate job, do the following:

- 1 From the Estimate Job Orders form, add or update a job for a configurable line item with a status of Planned. When you save the job, the **Configure** button is enabled.
- 2 Click **Configure**. The configuration user interface (UI) for the item displays.
- 3 Configure the estimate job. Refer to the configuration application documentation for additional information.

Note: When you are in a configuration session, the system prevents you from accessing any CloudSuite Business forms or online help.

4 After the system returns the configured estimate job, process it according to your standard procedures. After processing, the system updates the Estimate Job Orders form with the configuration information.

Note:

- For a configurable job/item with an incomplete configuration, or which has not been configured at all, the **Configure** button remains enabled.
When a configuration is complete, the **Configure** button changes to **Configure-Complete**.
- If **Auto Job Generation** is set to **Always** for this item on the Items form **Configuration** tab, a cross-reference job is automatically created.
If **Auto Job Generation** is set to **Prompt**, the system asks if you want to create a cross-reference job.
- Rules can be defined that place an Infor Configure Price Quote configuration on hold if, for example, an option in the configuration requires approval. When the original user completes the configuration, the **Configure** button for the line is set to **Configure-HOLD**, and the **Config Hold** field is selected. When a configuration is approved, you can either reconfigure the estimate job to remove the hold in Infor CPQ, or you can select the **Actions > Remove Config Hold** menu option in CloudSuite Business. The button label is updated to **Configure-Complete** and the **Config Hold** field is cleared. The configuration hold extends to any sub-jobs. Those sub-jobs cannot be released until the hold is removed.

Copying a Job with Configuration Information

To copy a job's configuration information to another job, select the appropriate row in the Job Orders or Estimate Job Orders form, and select **Actions > Copy**.

To copy a job's routing, BOM, and configuration information to another job, use the Copy Routing BOM form to copy the existing job to a new or existing job.

When Is Configuration Information Copied With a Job?

With the **Actions > Copy** method, any configuration data that exists for the job is also copied.

With the Copy Routing BOM form:

- If you copy a job that includes configuration information to a new job, the configuration information is automatically copied to the new job, along with the BOM and routing information.
- If you copy a job that includes configuration information to an existing job, the BOM and routing information are automatically copied. The configuration information is copied only if all the following conditions are true:
 - The From job and the To job cannot be current.
 - The From and To job types must be either **Job** or **Estimate**.
 - The To job must be Firm when its job type is **Job**.
 - The To job does not contain any subordinate jobs.
 - Every operation of the From job will be copied to the To job. (Use the **Starting** and **Ending Operation** fields to set this.)

- Both material and labor will be copied to the To job.
- All operations and BOMs of the To job will be deleted or replaced. (Use the **Option** field to set this.)

Any attached documents that were generated through Infor Configure Price Quote are not copied. However, if you reconfigure a copied line item, any generated documents are attached after the configuration is complete.

If you copy a configuration that is on hold, the copy is also placed on hold.

Costing Method for Configurable Items

Note: The following information applies only if Infor CPQ is installed.

We recommend that you use actual costing for configurable items. If you use standard costing, and if you are using intelligent part numbers, you must perform the Roll Current Cost to Standard Cost utility for the item on the job, before the job can be released.

Deleting Configurable Jobs, Items, and Operations

When you delete a configurable job, item, or operation, the associated configuration information is also deleted.

Reconfiguring a Line Item or Job

When a configuration is processed and line item records or jobs are created, the system stores key data for each line item or job in the `cfg_ref` table of the CloudSuite Business database.

You can choose to reconfigure part or all of a multi-level configuration. On reconfiguration, records in the `cfg_ref` table are read to find all line items and jobs created by the original configuration, so they can be deleted before creating new records.

The status of line items and jobs must be Firm in order to remove the entire job structure at reconfiguration. If the status of a line item or job record prevents it from being deleted, this warning appears before the configuration user interface opens:

"There are jobs from a prior configuration which cannot be deleted."

The status of order line items must be Planned in order to remove the items. If an order line item has a status other than Planned, this warning appears:

"There are line items from a prior configuration which cannot be deleted."

If you receive either of these messages, you can cancel, change the status of the line item or job, and reconfigure again.

If you ignore the warning message and open the configuration user interface, reconfigure, and then try to save or process the reconfiguration, the message displays again. You are given these choices:

- Click **Cancel** to cancel the reconfiguration.
- Click **OK** and continue without deleting any of these records, in which case an entire new structure is created and the old orders and jobs must be manually deleted.

Note: Reconfiguration does not delete other references (such as related purchase orders) because it cleans up only references created by the configuration UI.

Setting Up a Configuration Interface for an Item or Job

Note: The following information applies only if you have installed Infor CPQ Configurator.

- 1 To set up CloudSuite Business to work with Infor CPQ Configurator:
 - a On the Inventory Parameters form, specify the URL used to access the Infor CPQ Configurator application. Save your changes.
 - b Specify the name of the **Configurator Application ID**.
 - c If you are going to do header-level configurations, specify the **Header Name Space**.
 - d After you set up the fields on the **Product Configuration** tab, restart CloudSuite Business so that the **Configure** buttons are enabled throughout the system.

Note: If you change these values later, you must log out of CloudSuite Business and discard the IDO cache through Configuration Manager. Then restart CloudSuite Business. If you change the Configuration server, you must also restart the Infor Framework IDO Runtime Service before you restart CloudSuite Business.

- 2 To set up an item you want to be configurable:
 - a On the Items or Multi-Site Items form, select or enter the item number of the item that you want to be configurable.
 - b Select the **Configuration** tab.
 - c To allow users to configure order information for the item, select the **Order Configurable** check box.
 - d To allow users to configure job information, select the **Job Configurable** check box.
 - e If the item is both order-configurable and job-configurable, select an **Auto Job Generation** option:
 - To automatically create the job after order configuration is complete, select **Always**.
 - To ask the user whether to create the job after order configuration is complete, select **Prompt**.
 - To never automatically configure the job, select **Never**. Users must create the job manually, using the job cross-reference feature.
 - f Specify the **Name Space** to use for this item.
 - g Save the item.

For more information about setting up the Configurator UI for use with the CloudSuite Business portals, refer to the *CloudSuite Business Portals Administration Guide*.

Example: Setting Up a Configured Subassembly

Note: This topic applies only to using the Features and Options Product Configurator.

In this example, you will add a wheel to the current BOM of FO-10000, and allow customers to choose the color of the wheel reflectors.

- 1 Open the Copy Items activity and copy the following items. Be sure to select the check box to copy the Current BOM.
 - a SA-61500 to SA-61700
 - b RF-30000 to RF-30100
 - c RF30000 to RF-30200
- 2 Open the Items form and update the descriptions of the new items.
 - a SA-61700 - "CONFIGURED SUBASSEMBLY"
 - b RF-30100 - Add "WHITE" to the end of the description
 - c RF-30200 - Add "YELLOW" to the end of the description
- 3 Update SA-61700.
 - a Deselect the **Stocked** check box so that cross-referencing will create a configured sub-job for the wheel.
 - b Make SA-61700 a configured item by selecting its **Configuration Flag** check box.
- 4 Update feature templates.
 - a Update the FO-10000 feature template to include the wheel and reflectors by adding two segments to the end of the template. The final template should be "&&-&&&-&&&-&&-&&".
 - b Enter the same template on SA-61700.
- 5 Create feature groups.
 - a Wheel
 - ID: TWHEEL
 - Description: wheel
 - Mandatory: Yes
 - Mask: two characters at positions 9 and 10 (.....XX*).
 - b Reflectors
 - ID: TREFL
 - Description: reflectors
 - Mandatory: Yes
 - Mask: two characters at positions 11 and 12 (.....XX*).
- 6 Create feature group qualifiers.
 - a For the wheel option
 - Feature: TWHEEL
 - Include: Yes

- Code: ".....SA*
- b For the white reflector option
- ID: TREFL
 - Include: Yes
 - Code: ".....WH*
- c For the yellow reflector option
- ID: TREFL
 - Include: Yes
 - Code: ".....YL*
- 7 Update BOMs.
- a SA-61700
- Add a quantity of 2 RF-30100 and a quantity of 2 RF-30200 to operation 10.
 - Link both materials to the new feature group and fill in the appropriate Option Code.
- b FO-10000
- Add a quantity of 2 SA-61700 to operation 10.
 - Verify that Reference = Job. If you fail to do this, the system will not create sub-jobs and BOMs when you create the cross-references.
- 8 Generate feature group ranks.
- a For SA-61700.
- b For FO-10000, make sure you re-rank the seat before the rack.
- 9 Add a new customer order line for FO-10000 and verify the subassembly features and options are visible and updating the config string appropriately.
- 10 Save the line and click **Source** to generate the job orders and configured BOMs for FO-10000 and SA-61700. Verify that the correct jobs and BOMs were created.

Configuring Customer Orders or Estimates

Configuring a Customer Order

To configure a customer order header, do the following:

- 1 On the Customer Orders or Customer Orders Quick Entry form, add a new order, or edit an existing order. Ensure that the order status is Planned.

- 2 Save the order.
- 3 Select **Actions > Configure**. The system displays the configuration user interface (UI) for the order.
- 4 Configure the order. Refer to the configuration application's documentation for additional information.

Note: When you are in a configuration session, the system prevents you from accessing any CloudSuite Business forms or online help.

The information you select in the UI can be used to configure the order header and all items in the order.

- 5 After the system returns the configured order, process the order according to your standard procedures.

After configuration, the next time you select that order or line item, the UI displays the saved information.

Note: If you reconfigure a customer order, any existing customer order line items or job cross-references will be deleted.

Configuring an Item from a Customer Order Line (Regular or Blanket)

To configure a customer order line or blanket line, do the following:

- 1 Access the Customer Order Lines, Customer Order Blanket Lines, or Customer Orders Quick Entry form.
- 2 Add or update a configurable line item.
- 3 Save the line item and click **Configure**. The configuration user interface for the item displays.
- 4 Configure the line item. Refer to the configuration application's documentation for additional information.

Note: When you are in a configuration session, the system prevents you from accessing any CloudSuite Business forms or online help.

- 5 After the system returns the configured line item, process it in CloudSuite Business according to your standard procedures.

After processing, the system updates the form with the configuration information.

Note:

- For regular line items, if **Auto Job Generation** is set to **Always** for this item on the Items form **Configuration** tab, a cross-reference job is automatically created.
If **Auto Job Generation** is set to **Prompt**, the system asks if you want to create a cross-reference job.
- For blanket line items, the job is not created until a release is created. (The **Always** and **Prompt** options do not apply to blanket orders.)
- Rules can be defined that place an Infor Configure Price Quote configuration on hold if, for example, an option in the configuration requires approval. When the original user completes the configuration, the **Configure** button for the line is set to **Configure-HOLD**, and the **Config Hold** field is selected. When a configuration is approved, you can either reconfigure the order line to remove the hold in

Infor CPQ, or you can select the **Actions > Remove Config Hold** menu option in CloudSuite Business. The button label is updated to **Configure-Complete** and the **Config Hold** field is cleared.

For customer order lines, the configuration hold extends to any jobs that are sourced from the order line. Those jobs cannot be released until the hold is removed.

You can create releases for a blanket order line with a configuration hold. The releases and any cross-referenced jobs are also on hold. To approve a sourced job for the held release, you can either reconfigure the job to remove the hold in Infor CPQ, or you can select the **Actions > Remove Config Hold** menu option for the job in CloudSuite Business.

- The system uses the configuration in effect at the time you perform a cross-reference.
- For regular orders, you configure the item and cross-reference it from the line item. If you reconfigure the item, the original job is deleted and a new one is created.

For blanket orders, you configure the item from the Customer Order Blanket Lines form and cross-reference it from the Customer Order Blanket Releases form. If you reconfigure the blanket line, it does not affect the jobs for any releases that are already cross-referenced. All releases that are not yet cross-referenced to jobs will use the new configuration on their jobs.

- If an item becomes obsolete, the system does not allow the obsolete part to be issued from stock. The obsolete item must be manually removed from the model.
- The value of each line item on an order is calculated to determine credit limit. When a configured line is generated and passed to Customer Orders, the completed line is checked against the customer's available credit.

Configuring an Estimate

To configure an estimate header, do the following:

- 1 Access the Estimates or Estimates Quick Entry form.
- 2 Add an estimate, or edit an existing estimate. Make sure the estimate has a status of Planned.
- 3 Save the estimate.
- 4 Select **Actions > Configure**.

The configuration user interface (UI) for the estimate displays. The information you select from the UI can be used to configure the estimate header and all line items.

- 5 Configure the estimate. Refer to the configuration application's documentation for additional information.

Note: When you are in a configuration session, the system prevents you from accessing any CloudSuite Business forms or online help.

- 6 After the system returns the configured estimate, process it according to your standard procedures.

The next time you select that estimate header or line item, the user interface displays the saved information.

Note: If you reconfigure an estimate, any existing line items or job cross-references will be deleted.

Configuring an Estimate Line

To configure an estimate line, do the following:

- 1 On the Estimate Lines or Estimated Quick Entry form, add or update a configurable line item that has a status of Planned.
- 2 To configure the line item, click **Configure**. The configuration user interface (UI) for the item displays.
- 3 Configure the estimate line. Refer to the configuration application's documentation for additional information.

Note: When you are in a configuration session, the system prevents you from accessing any CloudSuite Business forms or online help.

- 4 After the system returns the configured estimate line, process it according to your standard procedures.

After processing, the system updates the Estimate Lines form with the configuration information.

Note:

- If **Auto Job Generation** is set to **Always** for this item on the Items form, **Configuration** tab, a cross-reference job is automatically created.
If **Auto Job Generation** is set to **Prompt**, the system asks if you want to create a cross-reference job.
- Rules can be defined that place an Infor Configure Price Quote configuration on hold if, for example, an option in the configuration requires approval. When the original user completes the configuration, the **Configure** button for the line is set to **Configure-HOLD**, and the **Config Hold** field is selected. When a configuration is approved, you can either reconfigure the line to remove the hold in Infor CPQ, or you can select the **Actions > Remove Config Hold** menu option in CloudSuite Business. The button label is updated to **Configure-Complete** and the **Config Hold** field is cleared.
The configuration hold extends to any jobs that are sourced from the estimate line. Those jobs cannot be released until the hold is removed.

Copying a Customer Order or Estimate with Configuration Information

To copy an order or estimate's configuration information to another order or estimate, you have two options:

- Use the **Actions > Copy** menu option, if available, to copy an existing row on a form. Any configuration data that exists for the row is also copied.
- Use the Copy Orders and Estimates form to copy an existing order or estimate to a new or existing order or estimate.

When Is Configuration Information Copied With an Order/Estimate?

Configuration information for a line is always copied when the line is copied.

All the configuration information for an order or estimate (including configuration information for the header) is copied if one of these conditions is true:

- You use the **Actions > Copy** menu option on the appropriate header form (Customer Orders, Customer Orders Quick Entry, Estimates, or Estimates Quick Entry).
- You copy all lines of an order to a new order on the Copy Orders and Estimates form.
- You copy all lines of an order to an existing order on the Copy Orders and Estimates form, and you delete all lines in the existing order. (Use the **Option** field to do this.)

Any attached documents that were generated through Infor Configure Price Quote are not copied. However, if you reconfigure a copied line item, any generated documents are attached after the configuration is complete.

If you copy a configuration that is on hold, the copy is also placed on hold.

Single-Site and Multi-Site Environments

In a single-site environment, cross-references to the database are automatically set up for copied configurations.

For multi-site environments where Infor CPQ is used, all sites use the same output database. Sites can share model databases, and items can be configured at one site and reconfigured at another site. If each site has its own model database, they must be kept in sync. Refer to the Infor CPQ documentation for additional information.

About Post Configuration

Post Configuration is not supported for Infor CPQ 8.1C and above cloud versions.

Post processing allows for additional rules to be run once a user has successfully completed an interactive configuration. It can be executed either as a background task or as an Activity for a specific record, until the Post Configuration Status is completed.

List Configuration Values

When you select **Actions > List Configuration Values** from the Estimates, Estimate Lines, Estimate Job Orders, Estimates Quick Entry, Customer Orders, Customer Order Lines, Customer Orders Quick Entry, or Job Orders forms, the Configuration Values form displays the configuration date, status, and model name at the top of the form. The sort sequence for the components listed is as follows:

- The product selected from the model is displayed first.
- The operations selected are displayed in order.
- For each operation, all materials are displayed in sequence order (Sequence 0 is displayed last).
- All Control type components are listed last.

The check box **External Only** allows you to filter the Components/Attributes on the Configuration Values form.

Post Configuration Status Overview

Use the Post Configuration Status form to process those post configuration records with a status of not completed.

If you have post configuration records with a status of Not Found, that is most likely due to them being purged manually on the Queue Maintenance form on the Utility Server. If you repost them, that does not change their status or make them Complete. So, you need to reconfigure and then run this utility to change their status to Complete.

Other than Pending and Complete, these are the other possible statuses that can be displayed, and ones that can be changed to Complete with the use of this utility:

- Processing - The configuration item is processing.
- Error - The configuration is in an error state and has not completed successfully.
- On Hold - The configuration is on a manual hold process and it could be taken off at a later time.

These statuses are found by filtering in the **Post Configuration** tab on the following forms: Customer Order Lines, Customer Order Blanket Lines, Estimate Lines, Estimate Job Orders, and Job Orders.

Printing Configuration Information

You can include configuration values on any of the following reports by setting **Configuration Details** to **All** (all details, both external and internal) or **External** (external details only) on the following reports and forms:

- Estimate Response Form Report
- Estimate Job Routing Report
- Job Paper Work Report
- Order Invoicing/Credit Memo
- Print Price Adjustment Invoice
- Consolidated Invoicing

Setting Authorizations for Configuration Users

A default group authorization called ERPConfiguration allows you to access the Configuration Purge Utility form and the Configurator web browser. You can set up authorizations using this group so that only certain users can configure jobs, orders, and operations.

Attaching Configuration Documents to Records

Documents generated by Infor CPQ Configurator or Infor CPQ Document Automation can be attached to records on certain CloudSuite Business forms. Select the record and click the "Display Documents" toolbar icon to open the Documents form, where the Infor CPQ documents related to the record are listed.

Generating and Attaching Documents Using the Configure Button

The **Configure** button and **Actions > Configure** menu option are displayed only if the system is set up as described in "Setting Up a Configuration Interface for an Item or Job - Infor PCM" on page 11.

The **Configure** button and **Actions > Configure** menu option launch the Infor CPQ Configurator. If the Configurator generates content in the form of a document, information about that document can be passed back to CloudSuite Business in either a MFG Detail Rule or a SyteLineDocument Integration Rule.

If the Infor CPQ Configurator uses a MFG Detail rule to pass information about a generated document back to CloudSuite Business, the document is stored in the CloudSuite Business Attached Documents form and is attached to the appropriate form and record. The MFG Detail rule specifies the AttachTo type, which is used to attach the document to the appropriate form:

- If AttachTo is job, the document is accessible from the Job Orders or Estimate Job Orders forms.
- If AttachTo is material, the document is accessible from the Job Materials or Estimated Materials forms.
- If AttachTo is operation, the document is accessible from the Job Operations or Estimated Operations forms.

The MFG Detail rule must be defined in the Infor CPQ Design Studio. For information about setting up MFG Detail rules, see the *Integration Guide for Infor Product Configuration Management*.

If the Infor CPQ Configurator uses a SyteLineDocument integration rule to pass information about a generated document back to CloudSuite Business, the document is stored in the CloudSuite Business Attached Documents form and is attached to the form and record used to launch the Configurator.

Both the MFG Detail Rule and the SyteLineDocument Integration Rule have a **Document Name** field. This document name is displayed in the list of documents that are accessible through the "Display documents for the current object" toolbar button on these forms, when the appropriate record is selected:

- Customer Orders
- Customer Order Lines
- Customer Orders Quick Entry: If the focus is on the order header, documents attached to the order header are listed. If the focus is on an order line, documents attached to the line are listed.
- Estimate Job Orders
- Estimate Lines
- Estimates
- Estimates Quick Entry: If the focus is on the estimate header, documents attached to the order header are listed. If the focus is on an estimate line, documents attached to the line are listed.
- Job Orders

The SyteLineDocument integration rule must be defined in the Infor CPQ Design Studio. For information about setting up SyteLineDocument integration rules, see the *Integration Guide for Infor Configure Price Quote*.

Generating and Attaching Documents Using the Generate Document Button

The **Generate Document** button and **Actions > Generate Document** menu option are displayed only if the system is set up as described in "Setting Up the Document Automation Interface" on page 23.

The **Generate Document** button and **Actions > Generate Document** option launch the Infor CPQ Document Automation tool. If this tool generates content in the form of a document, it passes information about that document back to CloudSuite Business in a SyteLineDocument integration rule. The document is stored in the CloudSuite Business Attached Documents form, and is attached to the form and record used to launch Document Automation. These documents are accessible through the "Display documents for the current object" toolbar button on these forms, when the appropriate record is selected:

- Customer Orders
- Customer Orders Quick Entry
- Job Orders
- Estimate Job Orders
- Estimates
- Estimates Quick Entry

If a **Default Rule Set** was defined in the Inventory Parameters form, then when you select the menu option or click the button, you enter the Infor CPQ Document Automation tool. Otherwise, the Configuration Rule Sets form is displayed so you can select a rule set to generate the document.

Note: The Configuration Rule Sets form does not belong to a default authorization group, so the system administrator must assign individual users to the form or create a group.

For information about setting up rule sets in Infor CPQ Document Automation, see the *Infor CPQ Document Automation Installation and Setup Guide*.

Setting Up the Document Automation Interface

Infor CPQ Document Automation is a separately purchased product that is used to create configurable documents - for example, proposals that include MSDS (material safety data sheets), drawings, cover letter, and specifications. You can combine various pieces of documentation to build a single document. You can also build documents such as manufacturing instruction sheets, additional shipping information, or sales order addenda that further describe the options in a configured product.

You can access the Document Automation interface through the **Generate Document** button and **Actions > Generate Document** menu option on some CloudSuite Business forms. The button and menu option are displayed only after you have set up fields on the Inventory Parameters form.

To set up CloudSuite Business to work with Infor CPQ Document Automation:

- 1 On the Inventory Parameters form, specify the **Configurator URL**, which is used to access the Infor CPQ Document Automation application. Save your changes.
- 2 Specify the name of the **Document Automation Application ID**, as provided in your Infor CPQ documentation. CloudSuite Business uses this name to locate the name space and rule sets.
- 3 Specify the appropriate **Document Automation Name Space**, as provided in your Infor CPQ documentation.
- 4 Optionally, specify a **Default Rule Set** to be used when the interface is opened. The list of rule sets is based on the specified **Document Automation Application ID** and **Document Automation Name Space**. If no default rule set is specified here, you must select a rule set before continuing with document generation in Infor CPQ.
- 5 After setting up the fields, restart CloudSuite Business so that the **Document Automation** buttons are enabled throughout the application.

For more information about what to specify in these fields, see the *Infor CloudSuite Business Integration Guide for Infor Configure Price Quote* .

Posting and Validating Data Collection Transactions

Your data collection solution uploads transaction data into the CloudSuite Business data collection tables. Depending on options you set in the Data Collection Parameters form, the data is either automatically posted to the CloudSuite Business database, or it remains in the error processing table until you manually validate and post the transactions through the appropriate Error Processing forms.

You can include jobs with co-product mixes in the data collection tables. By-products are not supported for data collection solutions.

To post and validate data collection transactions, use these steps:

- 1 Set up the data collection options on the **General** tab of the Data Collection Parameters form, including these settings:
 - For each type of data collection transaction, specify whether the transactions should be automatically posted. If you want to review the transactions before they are posted, do not select this option.
 - How to track overtime, double-time and the grace period for jobs.
- 2 On the **Background** tab of the Data Collection Parameters form, for each selected **Auto-Post** option, click **Background Queue**. Set the frequency and starting/ending times for the background task to match your shift codes.

For example, set the frequency to **Daily**, with an interval of 5 minutes. Set the starting time one half hour before the start of your first shift, and the ending time one hour after the end of your last shift. For a 24 hour shop, set the starting time to 12:00:00 a.m. and ending time to 11:59:59 p.m. If your company has 2 shifts -- the first shift works 7:00 a.m. to 3:00 p.m. and second shift works 3:00 p.m. to 11:00 p.m. -- then set the starting time to 6:00 a.m. (or 6:30 a.m., depending on how early the employees start entering DC transactions) and the ending time to 11:59 p.m.
- 3 Use a data collection solution to create data collection transactions and place them in the CloudSuite Business data collection tables.
- 4 Review and post the data collection transactions in the appropriate Error Processing form:

Note: For transaction types that are set to **Auto-Post** and have background tasks defined through the Data Collection Parameters form, validated transactions are automatically posted to the appropriate CloudSuite Business file, and the **Post** button is disabled on the Error Processing form. For these types of transactions, you can only view transactions that contain errors in the Error

Processing forms. You can also check the Background Task History form for problems that might have occurred during auto-posting.

- Customer Order Shipping Error Processing
- Cycle Counting Error Processing
- Job Error Processing
- Job Material Transactions Error Processing
- Job Receipt Error Processing
- JIT Production Error Processing
- Miscellaneous Issue/Receipt and Quantity Adjustment Error Processing
- Production Schedule Complete Error Processing
- Production Schedule Scrap Error Processing
- Purchase Order Receiving Error Processing
- Quantity Move Error Processing
- Time and Attendance Error Processing
- Transfer Receive Error Processing
- Transfer Ship Error Processing
- Work Center (WC) Labor Error Processing
- Work Center (WC) Material Error Processing
- Work Center (WC) Machine Time Error Processing

When you post the transactions from the Error Processing form, the system defaults to the current date. Specify the date through which to post transactions or accept the displayed date.

Note: Transactions for items flagged obsolete or slow-moving may not post.

- 5** In the Error Processing form, review any data collection transactions that did not post. An error message is displayed with each unposted transaction to indicate why the transaction did not post. If a transaction has an Unposted status after posting is performed, but there is no error associated with it, the end time is within the Job Grace Period specified on the Data Collection Parameters form, and the transaction can still be adjusted.
- 6** Correct the errors. When you update the error transaction, the status changes to Pending.
- 7** After all or most of the transactions that were in error have been corrected, run the Validate Data Collection Transactions utility, selecting the type of transactions that were corrected. The utility forces the same interactive validation as if the data were being entered for the first time. You can run the utility manually for specific types of transactions, or you can schedule it to run at certain times. The transaction will post during the next posting process.
- 8** Fix any data collection transaction errors and repost the transactions.
- 9** To delete any or all records in the Error Processing forms, use the corresponding Purge utility.

To stop auto-posting (temporarily or permanently): select the appropriate DCPPost... task in the Active Background Tasks form and delete it. Then, in the Data Collection Parameters form, clear the check box next to the appropriate Auto-Posting option.

About Auto-Posting and Data Collection Background Tasks

On the Background Task Definitions form, you can see all of the available DCPPost... tasks. Notice that they all have **Concurrency** set to **1**, which means that only one instance of this task can run at a time. Do not change that setting, because it prevents different instances of the same background posting tasks from running simultaneously if you accidentally set the task run times to overlap.

To determine if a recurring data collection background task is set up to run, go to the Active Background Tasks form and look for these background tasks that are associated with the Auto-Post options:

Post Option	Background Task
Auto-Post Receiving	DCPostPurchaseOrderReceiving
Auto-Post Shipping	DCPostCustomerOrderShipping
Auto-Post Cycle Count	DCPostCycleCounting
Auto-Post Misc Issue/Receipt Qty Adjust	DCPostMiscIssue/ReceiptandQuantityAdjust
Auto-Post Quantity Move	DCPostQuantityMove
Auto-Post Job Material	DCPostJobMaterial
Auto-Post Job Receipt	DCPostJobReceipt
Auto-Post Transfer Ship	DCPostTransferShip
Auto-Post Transfer Receipt	DCPostTransferReceipt
Auto-Post Mfg Labor	DCPostMfgLabor
Auto-Post Time/Attendance	DCPostTime/Attendance
Auto-Post Production Schedule	DCPostProductionSchedule
Auto-Post JIT	DCPostJIT
Auto-Post Work Center Material	DCPostWorkCenterMaterial

Note: The **Auto-Post Job Transactions** option does not have its own background task, since it is used to turn on more processing for the Auto-Post Manufacturing Labor task.

To find out the times and dates when the task is scheduled to run, look at the SQL job in the database.

About the Error Processing Forms

Data collection transactions are stored in the data collection tables until they are posted. Your data collection solution loads transactions into CloudSuite Business database tables. You can use the error processing forms for the various types of transactions to:

- Validate transactions
- Update existing transactions
- Delete existing transactions
- Browse existing transactions
- Manually post transactions to the CloudSuite Business database

Validating Data Before Posting

Whenever a transaction is updated via an error processing form, the data is interactively validated as if the data were being entered for the first time. The data must be free from errors to allow the data to be updated and stored.

All transactions must be validated prior to being posted to the CloudSuite Business database. As part of the posting process, the data is validated again to ensure accuracy. However, one complicating factor does arise. Since all Data Collection transactions can be posted manually or through a batch process, the validations that are performed during the posting process cannot be done interactively. Instead, if errors are detected as the validations are performed, an error number is assigned to the transaction and the posting for that transaction is stopped, but processing continues. The transaction must be corrected before posting into CloudSuite Business. When the transaction is updated, the status will change from Error to Pending.

After all or most of the transactions that were in error have been corrected, run the Validate Data Collection Transactions utility, selecting the type of transactions that were corrected. The utility forces the same interactive validation as if the data were being entered for the first time. You can run the utility manually for specific types of transactions, or you can schedule it to run at certain times.

After the transactions are validated, they can be posted.

About Data Collection Transaction Validation

Data collection transactions are not posted if they have an error status. After problems that caused errors are corrected, use the Validate Data Collection Transactions utility to revalidate the transactions and mark them as ready for posting. This utility forces the same interactive validation as if the data were being entered for the first time.

We recommend that you run this utility at the end of each work shift that includes data collection processing. Do not run the utility more than two or three times per day.

You can manually run the utility or use the **Actions > Background Queue** menu option to schedule it to run at a convenient time. If the adjustments or corrections will be performed throughout the day as time permits, schedule this utility to run several times a day in the background.

You can use the check boxes on the utility, along with the background queue, to create multiple schedules to revalidate transactions from different error processing forms at different times. The check boxes also allow different users to run the utility concurrently for different types of transactions.

Examples of Error Corrections that Require Revalidation

- Miscellaneous Issue transactions may require an increase in inventory. Users might not issue all material for a work center item between the time multiple dcwc transactions are entered and the time the transactions are posted.
- Miscellaneous Receipt transactions may require creation of locations.
- Transfer orders, purchase orders and customer orders must have a status of Open in order for related transactions to post. Often these orders are closed before all the transactions are posted.
- Product code and inventory locations may require corrections to the account setup.
- An error might occur where the database was too heavily loaded and a transaction failed to post due to a deadlock. You can manually run this utility with the appropriate check box selected, as a quick way to clear the deadlock error so that another attempt can be made to post the transaction.

Notes

If On Hand Negative errors occur, all records from the dcwc table are placed in Pending status until posting is run. Depending upon how far the posting process gets before an error occurs, a significant rollback can occur. Resubmitting these records frequently can cause heavy loads on the database server and transaction processing. We recommend that you perform all inventory adjustments and corrections prior to running this utility. If adjustments and corrections are performed throughout the day as time permits, then you can schedule this utility to run only several times a day.

About Machine Transactions (Data Collection)

The system allows you to track machine time for data collection solutions in two different ways:

- Prorated with labor
- Independent of labor

Machine Transactions Prorated with Labor

Machine transactions prorated with labor are affected by all labor parameters, including:

- Time and attendance
- Shift changes
- Breaks
- Holidays
- Overtime
- Double rates
- Any other time and labor factors

For example, in multi-job transactions, labor time and machine time are prorated to 50% labor and 50% machine in a job for machine transactions from the Job Transactions form. If a worker is operating two machines, the system prorates to 33% for labor and 33% for each machine.

Machine Transactions Independent of Labor

Machine transactions independent of labor provide tracking of specific machine transactions for more accurate costing figures.

Machine transactions tracked independently from labor contain the following attributes:

- Machine transactions are not affected by grace periods or time and attendance parameters. Machine transactions are based on standard clock time and are not affected by clock in or clock out, breaks, lunch breaks, and so forth.
- Machine overhead is calculated in terms of standard rates regardless of the shift and hour. Therefore, there are no overtime and double-rates or indirect time for machine transactions. There are no special machine rates for weekends or holidays, either.
- Machine transactions are not affected by shifts and machine time is accrued regardless of shifts. At the end of shifts, machine transactions are not automatically stopped.
- Start and end transitions are required but can be entered by different employees on different shifts or days.

The system keeps track of a specific machine time when a machine set up or machine run process is interrupted for the same job.

Note: After machine transactions are posted to the system, you cannot trace the transactions back to a specific machine or to a specific machine setup or run transaction.

If multiple machines are required by a job and you need to track time for each machine, you may want to create multiple operations and work centers to allow for the tracking of machine time after posting.

Example 1

You have a job operation that requires the setup of a machine. You start the machine setup, but have to end it abruptly. Enter the transactions as follows:

Machine Trans	Hour	Reason
Start Set Up (F)	8:00 a.m.	Job setup
End Set Up (G)	8:15 a.m.	Job setup interrupted
Start Set Up (H)	8:30 a.m.	Job setup resumed
End Set Up (I)	9:00 a.m.	Ready to run the job

If machine setup and run transactions cross midnight, the system automatically generates the end transaction for that day and start transaction for the next day for the same transaction type and machine.

Example 2

Machine setup started at 7:00 p.m. on 3/18 and ended at 3:00 a.m. on 3/19. The machine run started at 3:10 a.m. on 3/19 and ended at 2:00 p.m. on 3/21. The system automatically enters the other transactions (denoted below with an asterisk).

Machine Trans	Start Time	End Time	Date
Start Set Up	19:00:00		03/18
End Set Up *		23:59:59	03/18
Start Set Up *	00:00:00		03/19

Machine Trans	Start Time	End Time	Date
End Set Up		03:00:00	03/19
Start Mach Run	03:10:00		03/19
End Mach Run *		23:59:59	03/19
Start Mach Run *	00:00:00		03/20
End Mach Run *		23:59:59	03/20
Start Mach Run *	00:00:00		03/21
End Mach Run		14:00:00	03/21

Examples of Machine Transaction Entered in Data Collection

Machine transactions entered in Data Collection can either be machine transactions prorated with labor or independent of labor. This topic contains examples of the two types of machine transactions.

Example 1: Machine Transactions Independent of Labor

Your operation requires the use of resource Mach1. The operation might require 20 machine hours, and in that time you complete 100 pieces. Enter a transaction as follows:

Transaction Type	Total Hours	Complete
Complete	20	100

Your company should establish procedures to prevent doubling the completed pieces.

After machine transactions are posted to the system, you cannot trace the transactions back to a specific machine or to a specific machine setup or run transaction.

Example 2: Machine Transactions Prorated With Labor

If you want a particular operation to report both machine and labor hours, make sure you report only the completed quantities for that operation one time. Otherwise, the system treats those two transactions separately and doubles the quantity of completed pieces.

You may have a job operation requiring the use of resource Mach2. The operation might require 20 machine hrs, and in that time you complete 100 pieces. The operation simultaneously requires 10 labor hours. Enter two transactions as follows:

Transaction Type	Total Hours	Complete
Complete	20	100
R	10	0

About Multi-Job Transactions

Data collection solutions can run several jobs concurrently. CloudSuite Business prorates each job's run time based on the number of jobs running at the same time for that employee. The prorations are not weighted to favor more time to one job versus another.

The system calculates the proration at the time you post the transaction from the DC Error Processing (dcsfc) table to the Unposted Job Transactions (jobtran) table. The proration affects all transactions in the dcsfc table, unposted job transactions, and posted job transactions.

When running multiple jobs in the data collection solution, the employee must specify start and end transactions.

The TERMID in the system DC Error Processing table must be set to MJOB.

EXAMPLE: "Multi-Job Transactions" on page 32

EXAMPLE: "Multi-Job Proration" on page 33

Example: Multi-Job Transactions

An employee enters two start transactions. The first is at 8:00 a.m. for job 100. The second is at 9:00 a.m. for job 200.

Scenario 1: The Multi-Job option is cleared on both transactions.

Job 100 starts at 8:00 a.m. When the start transaction for job 200 is entered, the system automatically ends job 100 with a total run time of 1 hour. Job 200 starts at 9:00 a.m. and continues until one of the following is true:

- An end transaction is entered for Job 200.
- A start transaction is entered for another single job.
- The employee clocks out.

	8	9	10
Job 100	*****		
Job 200		*****	*****

Scenario 2: The Multi-Job option is selected on both transactions.

Job 100 starts at 8:00 a.m. and Job 200 starts at 9:00 a.m. Both jobs will continue until one of the following is true:

- An end transaction is entered for each job.
- The employee clocks out.

	8	9	10
Job 100	*****	*****	*****

	8	9	10
Job 200		*****	*****

Scenario 3: The Multi-Job check box is cleared for job 100 and selected for job 200.

Job 100 starts at 8:00 a.m. The employee wants to start job 200 at 9:00 a.m. and job 100 is still running. When the employee enters the start transaction for job 200 at 9:00 a.m., the system automatically ends job 100 with a total run time of 1 hour, because it is not a multi-job. Job 200 starts at 9:00 a.m. and continues until one of the following is true:

- An end transaction is entered for job 200.
- The employee clocks out.

	8	9	10
Job 100	*****		
Job 200		*****	*****

Example: Multi-Job Proration

	8	9	10	11	12	1	2	3	4
Job 100	*****	*****	*****		*****	*****	*****		
Job 200	*****	*****							
Job 300		*****	*****		*****	*****			
Job 400					*****	*****	*****	*****	*****

Total Run Times:

Job	Hours
Job 100	6.0
Job 200	2.0
Job 300	4.0
Job 400	5.0
TOTAL	17.0 hours

Times	Job 100	Job 200	Job 300	Job 400	TOTAL
8-9	0.50	0.50			
9-10	0.33	0.33	0.33		
10-11	0.50		0.50		

Times	Job 100	Job 200	Job 300	Job 400	TOTAL
12-2	0.66		0.66	0.66	
2-3	0.50			0.50	
3-5				2.00	
TOTAL	2.50	0.83	1.50	3.16	8.00hrs

Using Barcode Font Code128 in Barcode Reports

Use the following steps to replace the default barcode font in reports with barcode font Code128. Code128 prints smaller barcodes than the default font (barcode font Code39QuarterInch).

Note that Infor's support of barcode font Code128 prints only the characters currently available in the default barcode font.

Note: With Code128, Code128Narrow, and Code128VeryNarrow, a font size of 48 or greater is recommended. With Code128Wide and Code128VeryWide, a font size of 36 or greater is recommended.

When using this font, you must use English as the Windows regional setting.

These are the differences between Code 128A and Code 128B:

- Code 128A does not support lower case characters but Code 128B does support lower case characters.
- Code 128A can encode punctuation, the digits 0 through 9, uppercase characters (no lowercase), the standard ASCII control codes, and the special characters shown in the table below. Code 128B can encode punctuation, digits 0 through 9, upper and lower case characters, and the special characters in the table below.

We recommend that you use Code 128B; it is generally the best choice for most circumstances.

This table shows the Code 128 special characters:

ASCII Code	Code 128A	Code 128B
32	FNC3	FNC3
33	FNC2	FNC2
34	Shift	Shift
35	Code C	Code C
36	Code B	FNC4
37	FNC4	Code A
38	FNC1	FNC1

(FNC = Function Key)

To replace the default barcode font in reports with barcode font Code128:

- 1 In Visual Studio 2008, open the .rdl file in which you want to substitute barcode font Code128 for the existing barcode font. .Rdl files are generally stored on the utility server in the TaskMan\Report folder.
- 2 Include one of these functions in the rdl file:

For Code128 A:

```
Public Function GetBarCodeOutput t(ByVal inputValue As String) As String
Dim CheckDigit As Integer = 0
Dim i As Integer = 0
Dim BarCodeOutput As String = ""
Dim BarCodeInput As String
Dim BarCodeTemp As String = ""
Dim SingleByte As Integer = 0
BarCodeInput = inputValue.ToUpper()
For i = 1 To Len(BarCodeInput)
    SingleByte = Asc(Mid(BarCodeInput, i,1))
    BarCodeTemp = BarCodeTemp + Chr(SingleByte - 32)
Next
CheckDigit = 1
For i = 1 To Len(BarCodeTemp)
    SingleByte = Asc(Mid(BarCodeTemp, i,1))
    CheckDigit = (CheckDigit + (SingleByte * i)) Mod 103
Next
BarCodeTemp = BarCodeTemp + Chr(CheckDigit)
For i = 1 To Len(BarCodeTemp)
    SingleByte = Asc(Mid(BarCodeTemp, i, 1))
    If SingleByte =0 Then
        BarCodeOutput = Chr(0)
    ElseIf SingleByte > 0 And SingleByte < 94 Then
        BarCodeOutput = BarCodeOutput + Chr(SingleByte + 32)
    Else
        BarCodeOutput = BarCodeOutput + Chr(SingleByte + 103)
    End If
Next
Return "µ"+ BarCodeOutput + Chr(196)
End Function
```

For Code128 B:

```
Public Function GetBarCodeOutput(ByVal inputValue As String) As String
Dim CheckDigit As Integer = 0
Dim i As Integer = 0
Dim BarCodeOutput As String = ""
Dim BarCodeInput As String
Dim BarCodeTemp As String = ""
Dim SingleByte As Integer = 0
BarCodeInput = inputValue.ToUpper()
```

```
For i = 1 To Len(BarCodeInput)
    SingleByte = Asc(Mid(BarCodeInput, i,1))
    BarCodeTemp = BarCodeTemp + Chr(SingleByte - 32)
Next
CheckDigit = 1
For i = 1 To Len(BarCodeTemp)
    SingleByte = Asc(Mid(BarCodeTemp, i,1))
    CheckDigit = (CheckDigit + (SingleByte * i)) Mod 103
Next
BarCodeTemp = BarCodeTemp + Chr(CheckDigit)
For i = 1 To Len(BarCodeTemp)
    SingleByte = Asc(Mid(BarCodeTemp, i, 1))
    If SingleByte =0 Then
        BarCodeOutput = Chr(0)
    ElseIf SingleByte > 0 And SingleByte < 94 Then
        BarCodeOutput = BarCodeOutput + Chr(SingleByte + 32)
    Else
        BarCodeOutput = BarCodeOutput + Chr(SingleByte + 103)
    End If
Next
Return "¶"+ BarCodeOutput + Chr(196)
End Function
```

- 3 Right-click a barcode object and select **Edit Formula**. In the Formula Editor, you will see a formula similar to this:

```
= "*" & Replace(UCase(Trim(Fields!item.Value)), ",", "_") & "*"
```

In this example, Trim(Fields!item.Value) is a database field that is replaced with a barcode. Reports can also include formulas for stored procedures

- 4 Replace the one-line formula with a call to the function you added in step 2:

```
=Code.GetBarCodeOutput(FieldValue)
```

where *FieldValue* is the database field or stored procedure field that is replaced with a barcode, for example:

```
=Code.GetBarCodeOutput(Trim(Fields!item.Value))
```

- 5 To close the Formula Editor, click the **Close** button.
- 6 Right-click the barcode object and select **Format Field**.
- 7 On the **Font** tab, select the appropriate font and font size. For example, select Font Code128 and Size 48.

- 8 Click **OK**.
- 9 Save the .rdl file and test the report.

