



Infor Fourth Shift Migration Example

Release 9.01.x

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About this guide

This document provides an example of the migration sequence to follow when you migrate Infor Fourth Shift data to Infor SyteLine. Not all data that is required in SyteLine can be migrated from Fourth Shift, so there will be a mix of migrated tables and SyteLine input. Use the steps in this document to load the data into SyteLine in a logical manner so that data dependencies between the two products are honored.

See “Performing the Data Transfer” in the online help for full instructions on how to use the **Import Data Transfer** form.

See the SyteLine help for more information about the use of any form.

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://conciierge.infor.com/> and create a support incident.

The latest documentation is available from docs.infor.com or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

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Chapter 1: About the Fourth Shift migration

This sample migration process applies to Infor Fourth Shift version 9.00.00 and SyteLine version 9.00.30 and later. The migration is not intended to bring all data from Fourth Shift into SyteLine; it migrates only data that is necessary to continue business operations in SyteLine.

Chapter 2: Preparing for the migration

Preparing the SQL database

Ensure that the SQL Server database recovery model is set to Simple. This avoids the `Log Backup Full` error, which prevents users from logging into the system.

Preparing Fourth Shift data before the migration

In Fourth Shift, you must perform these steps to complete and post all transactions before the migration, to ensure that SyteLine has the most up-to-date information and that no transactions are missed:

- 1 For all import sequences where Rule 4 is applied, set up the `charfld1` columns and the Mask Character in the **Import Rule Definition** form.
 - a Column `charfld1` is used to define the chart fields, “Account”, “Unit Code 1”, “Unit Code 2”, “Unit Code 3”, and “Unit Code 4”.
 - b Mask Character is the partial value of the original mask which is defined in Fourth Shift. Use this field to set up the mapping between Fourth Shift’s account fields and SyteLine’s. Rule 4 uses this mapping to split the original value into SyteLine’s Account, Unit Code 1, Unit Code 2, Unit Code 3 and Unit Code 4.
- 2 `FS_TaxCode`: Ensure that tax codes are unique in the source database. If there are duplicates, users must decide whether to delete duplicates or update them to become unique records.
- 3 `FS_BankData`: Ensure that country values are already available in SyteLine, especially those that are referenced by bank address records.
- 4 `FS_InventoryLocation`: Ensure that bins are unique in the source database. If there are duplicates, delete them or update them to become unique records.
- 5 `FS_CoHeader`: Ensure that all UM conversions from the source database exist in SyteLine.

Setting the Order Entry Parameters

Set the order entry parameters in a single user mode. All other users must be logged out of the system.

- 1 On the SyteLine **Order Entry Parameters** form, specify these parameters:

- Invoice Length = 12
 - Estimate Prefix = E
 - DO/BOL Prefix = DO
- 2 After you specify the parameters, all users must log out from the application. Use the Configuration Manager utility, which is on the utility server, to publish form changes. This clears the form caches and applies the new prefixes and invoice length. These parameters take effect when users log back into the application.

Setting Import Parameters

Specify the appropriate connection parameters in the **Import Parameters** form. Ensure that the **Vendor required on Purchase Orders** check box is selected. The remaining check boxes must be cleared.

Modifying Import Steps

Default mappings between Fourth Shift tables and SyteLine tables are provided, with the appropriate sequences defined. These settings are shown in the **Import Steps** form in SyteLine. You can make these changes to the default mappings:

- To migrate only a subset of data from the Fourth Shift database table, specify a SQL WHERE clause in the **Source Filter** field.
- Change the order in which import sequences are processed, depending on the order of loading pre-requisites and other dependencies.
- If existing values from the source columns must be replaced with default values or other SyteLine valid values, you can set up rules in the **Import Table Column Rule Definition** form.

See *Defining Table Mappings*.

Chapter 3: List of tables and sequences

These are the tables that can be migrated with the sequences. All of the sequences, as well as any interim steps, are described in detail in the rest of this section.

Sequence	Source Fourth Shift Table	Target SyteLine Table
10	FS_PasswordConfig	PasswordParameters
20	FS_SystemConfig	parms
30	FS_CurrencyCode	currency
40	FS_CurrencyExchangeRate	curate
50	FS_GLAccountGroup	chart
60	FS_GLMasterAccount	chart
70	FS_GLMasterAccount	unitcd1
80	FS_GLMasterAccount	unitcd2
90	FS_GLMasterAccount	unitcd3
100	FS_GLMasterAccount	unitcd4
110	FS_TaxCode	taxcode
120	FS_Bank	bank_hdr
130	FS_BankData	bank_hdr
140	FS_BankData	bank_addr
150	FS_InventoryLocation	whse
160	FS_InventoryLocation	location
170	FS_ProductLine	prodcode
180	FS_ProductLine	prodvar
190	FS_Item	item
200	FS_ItemPrice	itemprice
210	FS_LotTrace	lot
220	FS_NonInventoryItemSupply	non_inventory_item

Sequence	Source Fourth Shift Table	Target SyteLine Table
230	FS_CommissionCode	commtab
240	FS_Customer	customer
250	FS_Customer	custaddr
260	FS_Vendor	vendor
270	FS_Vendor	vendaddr
280	FS_ItemInventory	tmp_import_inventory
290	FS_COHeader	co
300	FS_COLine	coitem
310	FS_ARAgingConfig	arparms
320	FS_ARConfig	arparms
330	FS_ARInvoiceHeader	arinv
340	FS_ARInvoiceLine	arinvd
350	FS_ARInvoiceTax	arinvd
360	FS_CustomerItem	itemcust
370	FS_CustomerItemPrice	itemcustprice
380	FS_POHeader	po
390	FS_POLine	po_bln
400	FS_POLine	poitem
410	FS_APConfig	apparms
420	FS_APIInvoiceHeader	aptrx
430	FS_APIInvoiceLine	aptrxd
440	FS_APIInvoicePayment	appmt
450	FS_VendorItem	itemvend
460	FS_POContract	itemvend
470	FS_POContractItemPrice	itemvendprice
480	FS_BillOfMaterial	jobroute
490	FS_BillOfMaterial	jobmatl
500	FS_MOLine	job
510	FS_Forecast	forecast
520	FS_Demand	tmp_import_jobmalttran
530	FS_Demand	tmp_import_joblabortran

Sequence	Source Fourth Shift Table	Target SyteLine Table
540	FS_GLMasterAccount	journal

Chapter 4: Steps to perform the migration

Use these instructions to run the sequences and the interim steps to complete the migration.

Password configuration

To migrate the password configuration from the FS_PasswordConfig table, for use on the **Password Parameters** form, use the **Import Data Transfer** form. Specify 10 for the **Starting Sequence** and **Ending Sequence** values.

System configuration

To migrate the system configuration from the FS_SystemConfig table, for use on the **General Parameters** form, use the **Import Data Transfer** form. Specify 20 for the **Starting Sequence** and **Ending Sequence** values.

Currency codes

To migrate the currency codes from the FS_CurrencyCode table, for use on the **Currency Codes** form, use the **Import Data Transfer** form. Specify 30 for the **Starting Sequence** and **Ending Sequence** values.

Currency exchange rates

To migrate the currency exchange rates from the FS_CurrencyExchangeRate table, for use on the **Currency Rates** form, use the **Import Data Transfer** form. Specify 50 for the **Starting Sequence** and **Ending Sequence** values.

Chart of Accounts

To migrate the **Chart of Accounts** from the FS_GLMasterAccount table, for use on the **Chart of Accounts** form, use the **Import Data Transfer** form. Specify **60** for the **Starting Sequence** and **Ending Sequence** values.

Unit Code 1

To migrate unit code 1 from the FS_GLMasterAccount table, for use on the **General Ledger Transaction Report** form, use the **Import Data Transfer** form. Specify **70** for the **Starting Sequence** and **Ending Sequence** values.

Unit Code 2

To migrate unit code 2 from the FS_GLMasterAccount table, for use on the **General Ledger Transaction Report** form, use the **Import Data Transfer** form. Specify **80** for the **Starting Sequence** and **Ending Sequence** values.

Unit Code 3

To migrate unit code 3 from the FS_GLMasterAccount table, for use on the **General Ledger Transaction Report** form, use the **Import Data Transfer** form. Specify **90** for the **Starting Sequence** and **Ending Sequence** values.

Unit Code 4

To migrate unit code 4 from the FS_GLMasterAccount table, for use on the **General Ledger Transaction Report** form, use the **Import Data Transfer** form. Specify **100** for the **Starting Sequence** and **Ending Sequence** values.

Tax Codes

To migrate tax codes from the FS_TaxCode table, for use on the **Tax Codes** form, use the **Import Data Transfer** form. Specify 110 for the **Starting Sequence** and **Ending Sequence** values.

Bank headers

To migrate bank headers from the FS_Bank table, for use on the **Bank Reconciliations** form, use the **Import Data Transfer** form. Specify 120 for the **Starting Sequence** and **Ending Sequence** values.

Bank accounts

To migrate bank accounts from the FS_BankData table, for use on the **Bank Reconciliations** form, use the **Import Data Transfer** form. Specify 130 for the **Starting Sequence** and **Ending Sequence** values.

Bank addresses

To migrate bank addresses from the FS_BankData table, for use on the **Bank Addresses** form, use the **Import Data Transfer** form. Specify 140 for the **Starting Sequence** and **Ending Sequence** values.

Warehouses

To migrate warehouses from the FS_InventoryLocation table, for use on the **Warehouses** form, use the **Import Data Transfer** form. Specify 150 for the **Starting Sequence** and **Ending Sequence** values.

Locations

To migrate locations from the FS_InventoryLocation table, for use on the **Locations** form, use the **Import Data Transfer** form. Specify 160 for the **Starting Sequence** and **Ending Sequence** values.

Product codes (Product Code)

To migrate product codes from the FS_ProductLine table, for use on the **Product Code** form, use the **Import Data Transfer** form. Specify 170 for the **Starting Sequence** and **Ending Sequence** values.

Product codes (Product Codes)

To migrate product codes from the FS_ProductLine table, for use on the **Product Codes** form, use the **Import Data Transfer** form. Specify 180 for the **Starting Sequence** and **Ending Sequence** values.

Items

To migrate items from the FS_Item table, for use on the **Items** form, use the **Import Data Transfer** form. Specify 190 for the **Starting Sequence** and **Ending Sequence** values.

Note: Lot size quantity will be one for all records that had a lot size quantity of zero when migrated from SyteLine.

Item price

To migrate item price from the FS_ItemPrice table, for use on the **Item Pricing** form, use the **Import Data Transfer** form. Specify 200 for the **Starting Sequence** and **Ending Sequence** values.

Lots

To migrate lots from the FS_LotTrace table, for use on the **Lots** form, use the **Import Data Transfer** form. Specify 210 for the **Starting Sequence** and **Ending Sequence** values.

Non-inventory items

To migrate non-inventory items from the FS_NonInventoryItemSupply table, for use on the **Non-Inventory Items** form, use the **Import Data Transfer** form. Specify 220 for the **Starting Sequence** and **Ending Sequence** values.

Commission codes

To migrate commission codes from the FS_CommissionCode table, for use on the **Commission Table Maintenance** form, use the **Import Data Transfer** form. Specify 230 for the **Starting Sequence** and **Ending Sequence** values.

Note: Before running the preliminary data transfer, specify the correct product code.

Customers

To migrate customers from the FS_Customer table, for use on the **Customers** form, use the **Import Data Transfer** form. Specify 240 for the **Starting Sequence** and **Ending Sequence** values.

Customer addresses

To migrate customer addresses from the FS_Customer table, for use on the **Customers** form, use the **Import Data Transfer** form. Specify 250 for the **Starting Sequence** and **Ending Sequence** values.

Vendors

To migrate vendors from the FS_Vendor table, for use on the **Vendors** form, use the **Import Data Transfer** form. Specify 260 for the **Starting Sequence** and **Ending Sequence** values.

Vendor addresses

To migrate vendor addresses from the FS_Vendor table, for use on the **Vendors** form, use the **Import Data Transfer** form. Specify 270 for the **Starting Sequence** and **Ending Sequence** values.

Item inventory

To migrate item inventory from the FS_ItemInventory table, for use on the **Import Inventory Balances** form, use the **Import Data Transfer** form. Specify 280 for the **Starting Sequence** and **Ending Sequence** values.

Note: Before running the preliminary data transfer, ensure that all records have a valid “Bin” and a Lot Number equal to or greater than one. Upon preliminary success, provide a serial number for all items that are serial-tracked.

Customer orders

To migrate customer orders from the FS_COHeader table, for use on the **Customer Orders** form, use the **Import Data Transfer** form. Specify 290 for the **Starting Sequence** and **Ending Sequence** values.

Customer order lines

To migrate customer order lines from the FS_COLine table, for use on the **Customer Order Lines** form, use the **Import Data Transfer** form. Specify 300 for the **Starting Sequence** and **Ending Sequence** values.

Accounts receivable aging configuration

To migrate the accounts receivable aging configuration from the FS_ARAgingConfig table, for use on the **Accounts Receivable Parameters** form, use the **Import Data Transfer** form. Specify 310 for the **Starting Sequence** and **Ending Sequence** values.

Accounts receivable configuration

To migrate the accounts receivable configuration from the FS_ARConfig table, for use on the **Accounts Receivable Parameters** form, use the **Import Data Transfer** form. Specify 320 for the **Starting Sequence** and **Ending Sequence** values.

Accounts receivable invoices

To migrate the A/R invoices from the FS_ARInvoiceHeader table, for use on the **Invoices, Debit and Credit Memos** form, use the **Import Data Transfer** form. Specify 330 for the **Starting Sequence** and **Ending Sequence** values.

Perform these steps before you run the preliminary data transfer:

- 1 Set the **Invoice Length** to 12 on the **Order Entry Parameters** form. Ensure that all users have logged out of SyteLine first.
- 2 Ensure that all customers have an **End User Type**.
- 3 Ensure that the records have a valid inventory number.

Accounts receivable invoice lines

To migrate the A/R invoice lines from the FS_ARInvoiceLine table, for use on the **Invoices, Debit and Credit Memos G/L Distribution** form, use the **Import Data Transfer** form. Specify 340 for the **Starting Sequence** and **Ending Sequence** values.

Accounts receivable invoice taxes

To migrate A/R invoice taxes from the FS_ARInvoiceTax table, for use on the **Invoices, Debit and Credit Memos G/L Distribution** form, use the **Import Data Transfer** form. Specify 350 for the **Starting Sequence** and **Ending Sequence** values.

Customer contracts

To migrate customer contracts from the FS_CustomerItem table, for use on the **Customer Contracts** form, use the **Import Data Transfer** form. Specify 360 for the **Starting Sequence** and **Ending Sequence** values.

Customer contract prices

To migrate customer contract prices from the FS_CustomerItemPrice table, for use on the **Customer Contract Prices** form, use the **Import Data Transfer** form. Specify 370 for the **Starting Sequence** and **Ending Sequence** values.

Purchase orders

To migrate purchase orders from the FS_POHeader table, for use on the **Purchase Orders** form, use the **Import Data Transfer** form. Specify 380 for the **Starting Sequence** and **Ending Sequence** values.

Note: Upon preliminary success, set a value for the **Terms Code**.

Purchase order blanket lines

To migrate purchase order blanket lines from the FS_POLine table, for use on the **Purchase Order Blanket Lines** form, use the **Import Data Transfer** form. Specify 390 for the **Starting Sequence** and **Ending Sequence** values.

Purchase order lines (regular)

To migrate regular purchase order lines from the FS_POLine table, for use on the **Purchase Order Lines** form, use the **Import Data Transfer** form. Specify 400 for the **Starting Sequence** and **Ending Sequence** values.

Accounts payable configuration

To migrate the accounts payable configuration from the FS_APConfig table, for use on the **Accounts Payable Parameters** form, use the **Import Data Transfer** form. Specify **410** for the **Starting Sequence** and **Ending Sequence** values.

Note: Upon final success, manually specify values for the required fields with no mapping on the **Accounts Payable Parameters** form.

Accounts payable invoices

To migrate accounts payable invoices from the FS_APInvoiceHeader table, for use on the **A/P Vouchers and Adjustments** form, use the **Import Data Transfer** form. Specify **420** for the **Starting Sequence** and **Ending Sequence** values.

Note: Upon preliminary success, populate the **PO** field with a valid value, and delete or update records that have a negative purchase amount.

Accounts payable invoice lines

To migrate the A/P invoice lines from the FS_APInvoiceLine table, for use on the **Voucher Adjustment Distribution** form, use the **Import Data Transfer** form. Specify **430** for the **Starting Sequence** and **Ending Sequence** values.

Accounts payable invoice payments

To migrate the A/P invoice payments from the FS_APInvoicePayment table, for use on the **A/P Payments** form, use the **Import Data Transfer** form. Specify **440** for the **Starting Sequence** and **Ending Sequence** values.

Vendor contracts

To migrate vendor contracts from the FS_VendorItem table, for use on the **Vendor Contracts** form, use the **Import Data Transfer** form. Specify **450** for the **Starting Sequence** and **Ending Sequence** values.

Note: Upon preliminary success, there are duplicate item and vend_num combinations. The combinations have different vend_items. Decide which records to keep.

Vendor contracts (Vendor Contracts)

To migrate vendor contracts from the FS_POContract table, for use on the **Vendor Contracts** form, use the **Import Data Transfer** form. Specify **460** for the **Starting Sequence** and **Ending Sequence** values.

Note: Upon preliminary success, there are duplicate item and vend_num combinations. The combinations have different vend_items. Decide which records to keep.

Vendor contract prices

To migrate vendor contract prices from the FS_POContractItemPrice table, for use on the **Vendor Contract Prices** form, use the **Import Data Transfer** form. Specify **470** for the **Starting Sequence** and **Ending Sequence** values.

Bill of Materials (Current Operations)

To migrate bill of materials from the FS_BillofMaterial table, for use on the **Current Operations** form, use the **Import Data Transfer** form. Specify **480** for the **Starting Sequence** and **Ending Sequence** values.

Upon preliminary success:

- 1 Verify FSDept and all other departments found in the TargetDL are automatically created in the **Departments** form.
- 2 Verify FSWC and all other work centers found in the TargetDL are automatically created in the **Work Centers** form.
- 3 Verify that the **Department** field on the **Work Centers** form has a value for all records (from the **Departments** form).

Bill of Materials (Current Materials)

To migrate bill of materials from the FS_BillofMaterial table, for use on the **Current Materials** form, use the **Import Data Transfer** form. Specify 490 for the **Starting Sequence** and **Ending Sequence** values.

Note: Ensure that all UM conversions are in the **Unit of Measure Conversions** form.

Jobs

To migrate jobs from the FS_MOLine table, for use on the **Job Orders** form, use the **Import Data Transfer** form. Specify 500 for the **Starting Sequence** and **Ending Sequence** values.

Before running the preliminary data transfer:

- 1 Verify that all departments found in the TargetDL are automatically created in the **Departments** form after the preliminary success.
- 2 Verify that all work centers found in the TargetDL are automatically created in the **Work Centers** forms.
- 3 3 Verify that there is at least one record each for Department and Work Center.

Forecasts

To migrate forecasts from the FS_Forecast table, for use on the **Forecast** form, use the **Import Data Transfer** form. Specify 510 for the **Starting Sequence** and **Ending Sequence** values.

Demand (Import Job Material Transactions)

To migrate demand from the FS_Demand table, for use on the **Import Job Material Transactions** form, use the **Import Data Transfer** form. Specify 520 for the **Starting Sequence** and **Ending Sequence** values.

Demand (Job Transactions)

To migrate demand from the FS_Demand table, for use on the **Job Transactions** form, use the **Import Data Transfer** form. Specify 530 for the **Starting Sequence** and **Ending Sequence** values.

Journal entries

To migrate journal entries from the FS_GLMasterAccount table, for use on the **Journal Entries** form, use the **Import Data Transfer** form. Specify **540** for the **Starting Sequence** and **Ending Sequence** values.