

Enspire 7.3.2.2 Release Notes

Incremental Update Release Notes March 26, 2009

Overview

Enspire Version 7.3.2.2 is a minor release which includes multiple enhancements and issue resolutions.

Enhancements in Enspire 7.3.2.2 include:

- Complete conversion of the Enspire middle tier to use RemObjects for remoting framework instead of using COM+
- New document lock with user's session id to prevent document editing by same user from multiple sessions
- New additional GL Set Control for KITS – “Kit credit account - Setup cost”
- New company-level replenishment option designed to maximize service levels and fill rates (Service Oriented Replenishment), as opposed to maximizing turns
- New company-level option to disable most item freezes while preserving reorder control calculations
- New option to process credit card payments in batch mode as a sale during order confirmation
- New installation of the Enspire Discover Service on the Web Server (in addition to the database server) to create a dedicated set of new Enspire middle tier services on the web server for eShop and eClient (remote users only)

These release notes go into more detail on the specific enhancements and issues, plus any special installation instructions. Users should also review the standard installation instructions.

Please let us know if you have any questions or suggestions on our documentation or implementation of Incremental Updates. We welcome any feedback or suggestions that you have.

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Enspire 7.3.2.2 Release Notes

Application Changes Enspire 7.3.2.2 Incremental Update

System-Wide Processing Enhancements

User Defined Fields (FM-00000-02706)

In user-defined fields throughout the system, the value did not remain visible when clicking into the program grid to edit records. This was corrected by using the LookupCombo control for the drop-down list instead of the combobox. This processing enhancement corrected all the User Defined fields in all areas of the system.

Option to Save User Session IDs within Enspire Documents (FM-00000-02267)

Document locking has been improved by including the user's session ID to prevent document editing by same user from different sessions. It has been implemented in the following documents:

- Order Entry(oe_doc_hdr)
- Return Merchandise Authorization(oe_doc_hdr)
- Purchase Order(po_doc_hdr)
- PO Receipts(po_doc_hdr)
- PO Line Buy Analysis(po_doc_hdr)
- PO VRA Entry(po_doc_hdr)
- Assembly orders(in_doc_hdr)
- Requisitions(in_doc_hdr)
- Transfers (in_doc_hdr)
- AR Check Batch (ar_check_batch_hdr)
- AR Check Application(ar_check_batch_hdr)
- AR Credit memo(ar_check_batch_hdr)

A new data field, logon_id, was added in the header tables in addition to the lock_user_id field to record the currently logged user session ID (logon_id). This field is updated while retrieving the document for edit operation, and it is validated on the concurrent request to edit the same document. Also this field value is removed when the user completes the edit operation.

In the event that the user's session terminates abnormally while editing a document, the system will allow the user to reacquire the document. A check is performed to verify that the session ID that has the document locked is still valid. If it is invalid, the user may edit the document. Enspire verifies user sessions at one minute intervals and marks the invalid user session for removal from the user session table.

Additionally, when auto-commits occur during day-closing processing or during the quick release process, the closing program updates the document lock_user_id and the new field logon_id to null. This releases locked documents when the locking user session is not valid. Enspire displays the following message when the locked document logon_id does not match the current logged on user logon_id.

Enspire 7.3.2.2 Release Notes



RemObjects (FM-00000-02885)

All of the Enspire middle tiers now use RemObjects for remoting framework instead of using COM+. The Enspire Enterprise Installation Console (EEIC) has been updated to cleanup the earlier versions of COM+ applications from current middle tier servers and to install the new Enspire middle tier services.

Transactions Processing Enhancements

Inventory (FM-00000-02708)

The eShop + eClient Categories tab of the **Item Master** screen now allows the user to delete entries

Purchase Orders (FM-00000-02855)

Enspire 7.3.2.2 includes a new company-level replenishment option designed to prioritize service levels and fill rates (Service Oriented Replenishment) over turns. A new option is available on the Inventory tab of CO Miscellaneous Control - **Use Service Oriented Replenishment**.

When **Use Service Oriented Replenishment** is enabled, the system will always select (set to True) the Stocked Item Replenishment program replenishment summary option, "**Use LP** (Line Point)", for the items below Line Point, and it will impact both which items will appear on the replenishment worksheet as well as the suggested order quantity.

For more information, refer to the System (FM-00000-02855) enhancement details in the File Maintenances Processing Enhancements section of this document.

Credit Card Processing in Order Confirmation (FM-00000-02677)

On the **Order Entry** tab of the **CO Miscellaneous Control File** program, a new option **Allow to enter credit card charges with predefined authorization code "NOAUTH" checkbox** has been added to allow the users to enter credit card charges with authorization code as NOAUTH and post the charges at the order confirmation as a direct sale operation. This option will be disabled by default, allowing only the current credit card processing procedures.

Enspire 7.3.2.2 Release Notes

The purpose of this enhancement is to better serve Enspire customers who typically bill freight charges that are much larger than the sale amount, causing the standard “book and ship” process to be inadequate. This delays the initial capture until after freight charges are known.

It should be noted that employing this option will expose the Enspire user to the possibility that the goods will be shipped without guarantee that the credit card will be accepted. Users should choose this option at their own risk.

In the Order Confirmation process, after confirming/posting the confirmation batch, a new option is available to include shipping charges in the final credit card charges. This is done by entering and processing credit card payments without performing a pre- and final- authorization.

This new option is based on the following pre-requisite condition: The user has to enter the payment details in the Totals dialog of the Order Entry program with the pre-defined authorization code, “**NOAUTH**”, in order to avoid the credit card pre-authorization process and allow the user to post credit card charges at the time of order confirmation.

All credit card charges in the confirmation batch will be posted in batch mode as a SALE option.

To include shipping charges in credit charges:

1. Create an order in Order Entry.
2. Enter the credit card information on the Payment screen of the Totals dialog of the Order Entry program.
3. Enter “**NOAUTH**” in the Auth field so that the order will not go on hold.
4. The order is then picked, packed and entered into a confirmation batch.
5. The confirmation batch is saved, and shipping information (charges and tracking number) is brought into Enspire.
6. The confirmation batch is then posted. This step will generate the tax details for the new shipping charges and include them in the credit card charge amount. On the completion of confirmation, the Credit Card Processing dialog will display before the Invoice Screen with an option to modify the credit card amount: The amount shown in the Credit Card Processing dialog is the Invoice Total.
7. All credit cards in the batch are run in batch mode as a SALE.
8. Invoices are then generated with the final credit card charges.

File Maintenances Processing Enhancements

General Ledger (FM-00000-02536)

A new GL account type “KITS”, has been created to keep track of the setup cost associated with assembly orders. This new GL account type is included in the company GL set code control table. When upgrading to 7.3.2.2, the new KITS account type will be created with the same GL account information as in the KITO account type. The user will only need to change the GL account numbers for this new KITS GL account type if they wish to utilize the new capabilities where setup costs are separate from current kit related costs (i.e. labor/packaging/overhead).

Enspire 7.3.2.2 Release Notes

The new GL account type record will be displayed in the **Account Set Control** program. You must setup the correct account number detail for the new 'KITS' account type for each account set and the same should be repeated for all the GL set codes of item type 'N'-nonstock, and 'S'-standard in the **Account Set Maintenance**. This step is required to overcome the missing default information for the new account type 'KITS'.

Currently the assembly post processing program updates the GL for the "KITO" (Kit Credit Account – Overhead) GL account type with the overhead cost and the setup cost. The program was modified to update the overhead cost only and create a new GL entry for the setup cost with KITS as the GL account type.

Updating overhead cost and setup cost information for Stocked Kits

You can complete the following steps to update the overhead and setup cost information for stocked kits in Enspire:

1. Display a stocked kit in the **Item Master** and update the overhead cost and setup cost information.
2. In **Warehouse Item Maintenance** verify the GL set code that has account type with the newly entered account types.
3. Create a new assembly document from the **Transactions→Inventory→Assembly Order Documents** menu option.
4. After entering the item information and quantities, save the newly created document. Print the document so that the **Confirm** option on the Actions menu becomes available.
5. Click the **Confirm** menu option in the Actions menu and select **OK to Post**.
6. Run the **GL Docuscope** and verify the setup cost posted the newly selected account.

System (FM-00000-02855)

Processing enhancements to Enspire now provide a new company-level replenishment option designed to prioritize service levels and fill rates (Service Oriented Replenishment), over turns, and a new company-level option to disable most item freezes while preserving reorder control calculations.

To accomplish this, two options have been added to the **Inventory** tab of the **CO Miscellaneous Control File** program: **Service Oriented Replenishment** and **Disable Item Freezes in Reorder Control Calculation**.

Service Oriented Replenishment

On the **Inventory** tab of the **CO Miscellaneous Control File** program, a new **Use Service Oriented Replenishment** checkbox has been added to enable Service Oriented Replenishment at the company level. This option will be disabled by default.

In the Enspire Purchase Order Middle Tier, the new option for determining the Suggested Order Quantity, **Use Service Oriented Replenishment**:

- applies for the warehouse Items with reorder method as 'C' – Class or 'Q' – EOQ.
- will **not skip item classes above 4**, rather it will consider items from class 1 to class 12.
- **will always override the existing line point based calculations** for the items with reorder method as C or Q.

Enspire 7.3.2.2 Release Notes

The following definitions are used in the logic below:

Qty Available = Qty on Hand - Damage - Rework - Commit Today - Commit Later

Qty on Order = On Order PO + On Order Transfer

Net Available = Qty Available + Qty on Order - Qty Backlog

The new Service Oriented Replenishment logic to calculate the suggested order quantity is as follows:

When the value of the **Line Point Quantity** minus the **Net Available Quantity** is greater than the **Economic Order Quantity**, the system will calculate the **Suggested Order Quantity** as the **Line Point Quantity** minus the **Net Available Quantity**. Otherwise it will use the **Economic Order Quantity** as the **Suggested Order Quantity**.

In standard Enspire (without the new flag enabled), the System performs the following modifications to the Suggested Order Quantity. With the new flag enabled, these modifications are NOT performed.

1. The order quantity is increased by the current backlog for stock orders (S lines). Since X number of items are already committed, it makes sense to increase the purchase amount by this quantity so that your available stock can be roughly as intended after the immediate fills of open orders during receiving. This also ensures that the order quantity is always at least enough to fill the current backlog.
2. The order quantity is decreased by the quantity currently on order for stock purchases (S lines). Since X numbers of items are already on order, the system decreases the order quantity by that amount to ensure that double-ordering.

Furthermore, in standard Enspire (without the new flag enabled), the Suggested Order Quantity is further adjusted in the following ways. With the new flag enabled, these modifications are NOT performed.

1. The recommended order quantity will not exceed the Line Point + Order Quantity.
2. If the item does not have a defined shelf life, the order quantity never exceeds a 1 year supply. If there is a shelf life, the maximum order quantity is the expected amount that will be sold within the shelf life of the product.
3. The order quantity must be at least enough to last for one review cycle based on expected usage. (This condition applies only if the item has shelf life defined.) The calculation of review usage quantity is as follows: $\text{ReviewUsage} = \text{MonthlyUsage} * \text{ReviewCycle} * 0.25$
4. The order quantity must be at least a two weeks' supply based on expected usage. (This condition applies only if the item has shelf life defined.)

Enspire will continue to make the following adjustment:

1. The order quantity must be at least equivalent to one "standard pack" as defined in the Item/Vendor record. The standard pack quantity check is applied in the replenishment worksheet when using the auto buy option. It is not required while the LP, OP and EOQ calculation.

Enspire 7.3.2.2 Release Notes

The theories behind these changes are explained in the **Enspire 7.3.2 Replenishment and Item Freeze white paper available from Infor 365**.

Disable Item Freezes in Reorder Control Calculation

On the **Inventory** tab of the **CO Miscellaneous Control File** program, a new **Disable Item Freezes in Reorder Control Calculation** checkbox has been added to disable item freezes during the reorder control calculations in the month-end process or during the manual reorder control calculation process. This option will be disabled by default.

Typically, when Enspire finds sporadic usage of an item it sets the item to freeze code of 'P' – permanent freeze and the reorder method of the item will be modified to 'M' Min/Max from any other reorder types (Note: This processing will not modify the 'D' Do not re order types).

The system will not perform the above operation when the new option “**Disable Item Freezes in Reorder Control Calculation**” is selected (set to True).

When **Disable Item Freezes in Reorder Control Calculation** is selected, the following operations will be performed:

- The New Item Freeze condition check will set a New Item Freeze if there are less than 6 months of usage recorded. However, if the “Manual freeze flag” on the Item is set, this check will not be performed, allowing users to essentially extend the New Item Freeze to any number of months they choose by entering a manual freeze with the desired number of months.
- Enspire will perform the decrement month process for all manual and auto freeze codes except for the 'P' –Permanent freeze condition.
- Enspire will not calculate the LP, OP and EOQ when the following conditions are encountered:
 - Permanent Freeze
 - New Item Freeze
 - The Manual Flag is set to true on any Freeze condition
- Enspire will not create any new freeze codes except the New Item Freeze.
- Enspire will clear all existing 'L', 'S' and 'V' freeze codes that may exist except in the following situation:
 - Any Item freeze code with the Manual flag set to true will only be cleared once the decrement month process determines the freeze month equal to zero.

Enspire will perform the following actions on the reorder control calculation only when there is no manual freeze, Permanent freeze or new item Freeze:

- Update the optimized usage formula based if the option “Auto Set Usage Formula” is set to true and if the item is non seasonal.
- Monthly usage based on the usage forecast.
- Daily usage based on the above monthly usage and business days in the forecast period.
- Calculate Lead time, Line Point, Order Point and EOQ for item with reorder method in 'C', 'M', 'Q' and 'S' without any of Item class restrictions.

Enspire 7.3.2.2 Release Notes

IMPORTANT NOTICE: *These new options rely on specific manual processes which are assumed to be performed outside of standard Enspire. Implementing these options in Enspire without implementing the assumed manual processes will put you at risk of ordering the wrong items at the wrong quantities.*

The theories behind these changes are explained in the Enspire 7.3.2 Replenishment and Item Freeze white paper available on Infor 365. BEFORE IMPLEMENTING THESE NEW OPTIONS, READ THAT WHITE PAPER TO ENSURE YOU ARE USING THEM PROPERLY.

Snap-On's Processing Enhancements

eClient (FM-00000-02885)

eClient now uses the new active server object "EnspireWeb.Dll" located on the eClient install folder "C:\inetpub\wwwroot\eClient" to communicate to the Enspire Discover Service and Enspire Middle Tier Service running on the web server. This new active server object will be registered and set for read, write and execute permission for "everyone" group.

The setup programs for eClient have been modified to create the required registry entries to keep the Enspire Middle Tier Services listening to the Enspire Discover Service running on the web server. The active server object "EnspireWeb.Dll" will communicate to the Enspire Discover Service running on the web server to gain access to Enspire Middle Tier Services. The active server object "EnspireWeb.Dll" will skip the proxy service running locally on the web server to improve performance.

To prevent internal users from using the Middle Tier Service on the web server, and thereby slowing the response time for remote users, you must install the Enspire Discover Service on the web server to keep an isolated set of Enspire middle tier services on the web server that can service only the web requests from eShop and eClient.

The Enspire Discover Service on the web server will be the second instance of Enspire Discover service running on the network, the first instance of Enspire Discover should already be running on the database server to provide service for the Enspire clients (internal users).

The following information has been added to the Enspire Installation Guide, Chapter 4 (in the eClient Installation after the Installing the Enspire Middle Tier section):

Installing the Enspire Discover Service

You perform this procedure on the eClient server. This is a one-time requirement unless there is a hardware change.

1. Copy the *Enspire Discover Service Installation.exe* to a network location that can be accessed by the eClient server.
2. While logged on the eClient server, double click the *Enspire Discover Service Installation.exe*. This will cause a popup dialog to appear which requires a user-id and password in which the service will be installed under. Each service must be installed utilizing a network administrator user-id and password. Infor strongly suggests that the same user-id and password be used to install each service on every computer. It is very important that this information not change frequently because the services will not function if the user-id is deleted or the password modified. The user name must include the domain name (e.g. INFOR\ADMINUSER). Where INFOR is the domain name and

Enspire 7.3.2.2 Release Notes

ADMINUSER is a network administrator user-id. NOTE: passwords are case sensitive in a Windows 2000 network environment and therefore must be adhered to when entering the password for the user-id.

3. Click the **Next** button.
4. A warning message may be displayed detailing a potential conflict – ignore this warning and click **OK** to continue the installation of the service.
5. Click the **Install** button.
6. When the installation has completed, click the **Finish** button.

eShop (FM-00000-02885)

eShop now uses the new active server object “EnspireWeb.Dll” located on the eShop install folder “C:\inetpub\wwwroot\eshop” to communicate to the Enspire discover service and Enspire Middle Tier Services running on the web server. This new active server object will be registered and provided with read, write and execute permission for the “everyone” group.

The setup programs for eShop have been modified to create the required registry entries to keep the Enspire Middle Tier Services listening to the Enspire Discover Service running on the web server. The active server object “EnspireWeb.Dll” will communicate to the Enspire Discover Service running on the web server to gain access to Enspire Middle Tier Services. The active server object “EnspireWeb.Dll” will skip the proxy service running locally on the web server to improve the performance.

To prevent internal users from using the Middle Tier Service on the web Server, and thereby slowing the response time for remote users, you must install the Enspire Discover Service on the web server to keep an isolated set of Enspire middle tier services on the web server that can service only the web requests from eShop and eClient.

The Enspire Discover Service on the web server will be the second instance of Enspire Discover Service running on the network. The first instance of the Enspire Discover Service should already be running on the database server to provide service for the Enspire clients (internal users).

The following information has been added to the Enspire Installation Guide, Chapter 4 (in the eShop Installation after the Installing the Enspire Middle Tier section):

Installing the Enspire Discover Service

You perform this procedure on the eShop server. This is a one-time requirement unless there is a hardware change.

1. Copy the *Enspire Discover Service Installation.exe* to a network location that can be accessed by the eShop server.
2. While logged on the eShop server, double click the *Enspire Discover Service Installation.exe*. This will cause a popup dialog to appear which requires a user-id and password in which the service will be installed under. Each service must be installed utilizing a network administrator user-id and password. Infor strongly suggests that the same user-id and password be used to install each service on every computer. It is very important that this information not change frequently because the services will not function if the user-id is deleted or the password modified. The user name must include the domain name (e.g. INFOR\ADMINUSER). Where INFOR is the domain name and ADMINUSER is a network administrator user-id. NOTE: passwords are case sensitive in a

Enspire 7.3.2.2 Release Notes

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