Infor Distribution FACTS 9.3.2 Incremental Update Release Notes

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Contents

Infor Distribution FACTS Incremental Update

9.3.2 Release Notes

Infor Global Solutions introduces Infor Distribution FACTS version 9.3.2. This document provides an overview of the new major feature and functionality changes in this release. This document is cumulative and contains all incremental update information for FACTS 9.3.

Incremental Update documentation consists of these documents:

- *Infor Distribution FACTS 9.3.2 Incremental Update Release Notes*
- *Infor Distribution FACTS Incremental Install Instructions for Windows*
- *Infor Distribution FACTS Incremental Install Instructions for Linux*
- *Infor Distribution FACTS Online Help Installation Instructions*

If additional configuration, administration or user guides are impacted by the incremental release, the updated documentation is also posted to inforxtreme.com. 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.

Upgrade path

If upgrading from a version prior to FACTS 6.06, you must first upgrade to version 6.06 then to the 9.3.0 FACTS release.

If upgrading from FACTS versions 6.06 through 7.9.3 to 9.3.2, use the FACTS 9.3.0 upgrade with the 9.3.2 incremental release.

If upgrading from FACTS version 9.3.1, install the 9.3.2 incremental.

Integrations

Infor OS Cloud Enabled

The Infor Distribution FACTS version 9.3.2 incremental release provides the base framework for connecting to the Infor OS Cloud Enabled (CE). For further details, refer to the System Management section of this document and *Infor Distribution FACTS Configuration Guide for Infor OS*.

Depending on integration method desired, one of these sequel database versions are required:

- MS SQL Server compatibility Version: 2019 version 15.0.2000.5
- PostgreSQL compatibility Version: 11.7

FACTS 9.3.2 Application Changes

System-wide changes

Metadata change - SO "Record in use by another user" message not displaying the user that has it locked (Defect 599213)

When a user tries to access an SO document that is in use by another user, the user code was not displayed in all situations. An additional parameter was added to message code, SOFT_LOCK, to accept and display a user code. This change expanded the user code display for a record that is soft locked when another user attempts to lock the same record.

These scenarios are possible with file locking:

1 When a user abnormally exits a program while a file is locked and that user is still logged into the system, the "Document in Use" box displays the user code.

2 When a user abnormally exits a program while a file is locked and that user is no longer logged into the system, the "Document in Use" box does not display the user code. The terminal ID at the time the record was locked is displayed. This may be used to cross reference in Terminal FM, but results are not guaranteed accurate.

3 When a user abnormally exits a program while a file is locked and another user tries access the file in an Entry program that uses soft locking, the user code is displayed with the message that the document or record is in use.

The content of the defect combined scenarios 2 and 3 where the Document in Use window displays the user name implemented at version 9.0.0, with the soft locking message, where that only displayed the key.

Custom column ordering and text-based list box column filtering

Custom column ordering and text-based list box column filtering are available for list boxes in Side Bars, three-level Entry programs, and Inquiry programs. When using list boxes you can right-click to display these options:

- My Column Order option to specify custom column ordering for the displayed data.
- My Side Bar Filter to specify a text filter for any column, or combination of columns in a Side Bar list box line.
- My Inquiry View Filter to specify a text filter for any column, or combination of columns in an Inquiry view list box line.

Custom column ordering

Use the My Column Order option to specify custom column ordering for the information displayed in the list box, which is stored in the SMGPRF file.

The default column options are displayed at the top of the screen. The default and current column orders are also displayed. In the New Column Order field, specify the codes to list the columns. Click Save.

You do not have to specify all codes. Partial entry is allowed. Any unspecified columns are appended to the grid in default column order.

Side Bar and Inquiry filters

For Inquiry and Side Bar list boxes, right click and select My Side Bar Filter or My Inquiry View Filter to display all the columns listed in default order in the list box, column code, and filter value, if set. Filtering values are not saved when you exit a program.

Check the Suspend Filtering check box to temporarily disable the filtering function.

Click Clear All to remove all filters values.

To specify a filter value, click a column line. On the edit screen, the current filter value is displayed. Specify a new value in the New Filter field and click Continue.

When you have specified the filter values click Continue to exit

Filter rules

In Side Bar areas, these filter rules apply:

- Filtering remains in effect across multiple documents.
- Filters are drop-box specific. For example adding a warehouse filter for drop box option “Warehouse Quantities” does not apply that warehouse filter to other drop box options.
- Filtering is not line specific. For example a warehouse text filter for a selected 3-level entry line is effective for all other lines in the grid.
- Filtering on values resets page count and page displays to page 1 when scrolling is turned on.

In Inquiry views, these filter rules apply:

- Filtering remains in effect across multiple Inquiry main screen selections.
- Filter is sort-order specific. For example adding a filter to a warehouse for a sort order of Document does not add that same filter to another sort order of Customer.
- Filtering does not override main level filters. For example, a Warehouse filter of 01 for Item Inquiry limits all Item Inquiry views to warehouse 01. Creating a filter for warehouse 02 when the main warehouse filter is already 01 will not return any records.
- Inquiry View list boxes with no line records have no right click functionality. If a filter results in no line records displayed the filter is locked until line records are shown. Then the filter can be edited again.

Job Streams in background processing

Job Streams are now available as a background process. A new background process, job streams (BKC611), was created to spawn unique and individual background processes for each job stream that is scheduled to run. History is now available for job stream background processes.

Individual job streams that do not complete, either reporting an error in the background process or without completing the job stream result file, are not allowed to run in the background again until the error in the SMBKPR background processing record or the JSRSLT job stream result record are managed.

A new alert is available to notify a subscribed user of job stream progress as it runs in the background.

These programs were modified.

Job Stream Entry (JSE110)

Job Stream Entry was enhanced to include Previous Record and Next Record buttons for record scrolling. A new Background Processing section was added and includes these fields:

Background - Indicate whether to run this job stream as a background process. Note the informational message indicating all lines should be set to 1) output to file and 2) perform no updates.

Months - Specify the 3-character abbreviation for each month to run the report.

Days - Specify the days this report will run. You can specify these options for the day of the month for the report. This table lists the options and when the report will run. When specified, the run report definition is displayed beside the Days field.

Option	Run report definition
Number, 1-30 or 31	Date of day of the month
B	First day of the month
B + M/T/W/H/F/S/U	First indicated day of the month
E	Last day of the month
E + M/T/W/H/F/S/U	Last indicated day of the month
M/T/W/H/F/S/U	Every indicated day in the month
1/2/3/4/5 + M/T/W/H/F/S/U	Indicated day of the month in the week specified
A + number	Number of days after the last run of the report.

Background Scheduler Dashboard (SME910)

The Background Scheduler Dashboard was updated to display the new job streams (BKC611) background process (JS).

Background Process Results (SME911)

The Background Process Results screen was updated to include all background job stream process results in order, job stream name, then within the name by date recent-to-oldest. A new Job Streams button in the header displays all background process job stream results.

JobStreams (SME911)

The new JobStreams window displays all background process job stream results in order, by job stream name, then within the name by date recent-to-oldest. You have these options:

Refresh - Redisplays with updated data in default/initial display order.

Delete - Deletes highlighted job stream result from the background processing file, SMBKPR, and refreshes the list box in default/initial display order.

JOBSTREAM (ALC150) - New alert

A new JOBSTREAM (ALC150) alert was created to notify the subscribed user of job stream progress as it runs in the background. Access the Alert Control Center (ALE100) to view and optionally dismiss this alert. The alert is raised when the JS background process, job streams (BKC611), runs. The subscriber can manually delete their raised job stream alerts at any time from the Alert Control Center.

This information is available for the alert.

- Job Stream
- Program
- Status - You can subscribe by these status values:
  - S: Starting - Job stream program has passed evaluation and the running of that program started.
  - F: Finishing - Job stream program has finished; the result file is set to ‘Complete’.
  - E: Erroring - Job stream program returned ‘with error’, the result file set to condition other than ‘Complete’.
  - Q: Queuing - Job stream program selected to run; the evaluation if it should run or not commencing.
  - C: Completing - Job stream has cycled all programs.
  - I: Initializing - Job stream is starting.
- Type - You can subscribe by these processing types:
  - B: Background (API) - The job stream was launched via the background process, code: JS.
  - M: Manual - The job stream was launched from the Job Stream Run (JSU100) program.
  - C: Cron - The job stream is evaluating environment variables SSI_JOBSTREAM and SSI_RUNPROG.

You can subscribe individually to any and all of these values.

Document Priority standardization

Document Priority functionality was standardized throughout the Sales Orders, Purchase Orders, Inventory Control and Manufacturing Control modules.

These document priority indicators are available for transfers, purchase orders, BOM and formulation production tickets and purchase orders: Normal, Rush and Service Hold.

For purchase orders, PO Debit Hold processing is available. PO Debit Holds can be set by creating a debit limit for vendors in Vendor FM. An override password and security code are available for this function in PO Static Control FM. During PO document entry, accumulated currently open PO document totals for the specified vendor are checked against the vendor's debit limit. When that vendor's open PO document total exceeds a specified limit, the PO debit limit action is triggered for the vendor.

Previously, rush text was hard-coded in programs and print controls. New document priority functionality now allows custom rush text for each document type.

Priority drop box functionality was added to entry, print, inquiry, and report programs and documents and files throughout PO, IC and MC. Refer to the change table for program details. New document review programs have been added in the PO, IC, and MC modules. New alerts for Service Hold and PO debit hold actions and changes have been included for PO, IC, and MC modules.

Hold processing details

Service Hold and PO Debit Hold prevents both printing a ticket or an order and entry for confirmation. Changes to priority after confirmation have no restrictive effect on further processing of that ticket.

Buyers Control Center changes

This section lists the major changes for Buyers Control Center.

The corresponding Buyers Control Center detail screens were updated to include a Rush column for purchase orders, transfers and production tickets. The BCC now provides for a Rush bump value to be added to the indicated color-coded sort priority. The Rush bump is set in PO Static Control FM on the BCC tab. The bump value increases the defaulted sort color and value on the BCC detail screen. This allows for lower ranked and lower priority items to shift higher in the BCC Detail hierarchy of presented rows. In the BCC, when calculating non-special orders to be pulled in based on backorders from existing SO docs, the resulting single BCC detail line is the accumulated total needed across all relevant SO docs. The rush value is not set on that single accumulated detail line. The accumulated multiple docs may have a variety of priority settings.

Special orders originating in SO then processed by the BCC, set the BCC Rush column to selected if the special order has a Rush priority and the special order is not already in the BCC.

Checking and unchecking the BCC Rush column checkbox does not change a tied special order SO document priority. When the BCC Rush column is checked and the PO, transfer, or production ticket is created from the BCC, the created document is set to Rush priority as the default.

To create a Rush priority purchase order or transfer from the BCC, all lines on the BCC detail screen that are set to Buy or Transfer must be set as Rush. A mixture of rush and non-rush lines results in the purchase order or transfer not having rush priority.

BOM or formulation production tickets created from the MC BOM and FML BCC Detail screens create unique documents corresponding to each BCC detail line. Rush and non-rush production tickets can be created at the same time since each line creates a unique document.

Special Order Entry programs and special-order creation changes

This section lists the major changes for document priority functionality in Special Order Entry programs and entry programs with special-order planning hot-key record creation.

When creating and adding lines to a purchase order or transfer from a menu-driven program option or special-order planning record option, the priority value set in the header during initial document creation is used. A mixture for rush and non-rush lines may be pulled in on the resulting purchase order or transfer. During import of a special order, Priority information was added to look-ups and entry screens when SO document priority is Rush or Service Hold.

Report changes

This section lists the major changes for reports and print processes.

Print programs were standardized to include options to print by document priority.

New fields on report program screens are not part of existing or saved user templates. Users must go to their saved templates and indicate the preferred values of any new fields to update their saved templates.

Sales Order Review (SOE230)

Existing Sales Order Review field layout was refactored so that all review programs have a similar layout. A Go To menu option allows quick navigation between all review programs.

New programs

This table lists the new document review programs for document priority standardization.

Module	Program	Function
Purchase Orders	Purchase Order Review (POE230)	Display, place or release documents from debit or service hold. Documents may be displayed by warehouse, hold status, order type, order status, origin, priority, request date and buyer
Inventory Control	Transfer Ticket Review (ICE325)	Display, place or release documents from service hold. Documents may be displayed by warehouse, hold status, order type, order status, origin, priority, request date, and to warehouse

Manufacturing Control	BOM Ticket Review (MCE135)	Display, place or release BOM production tickets from service hold. Documents may be displayed by warehouse, hold status, order status, origin, priority, and entry date
Manufacturing Control	FML Ticket Review (MCE245)	Display, place or release FML production tickets from service hold. Documents may be displayed by warehouse, hold status, order status, origin, priority, and entry date

New alerts

This section lists the new alerts for document priority standardization.

If you are subscribed to one of these alerts you can access the Alert Control Center (POE410) to view and optionally dismiss the alerts. The alerts are raised when S4 background program, BK610, checks the svc_alert_action field in the corresponding document header records, or the dbt_alert_action field for PO debit hold actions. When a debit hold or service hold alert action or release alert action is issued, the alert is raised and subscribed users are directed to corresponding Order Review program, based on the type of alert.

These alert types are available:

Hold Status = N - Document not on hold if alert is a release alert

Hold Status = H - Document on hold if alert is a hold alert

Note: New purchase orders, transfers or production tickets which are created with an initial Hold status, will not generate an alert.

This table lists the new alerts.

Alert	Action	Available Information
ServiceHoldPO (ALC154)	Notifies the user when a PO document is placed on service hold or released from a service hold. Any PO document placed on service hold or released from service hold generates the alert.	This information is available for the alert: Vendor Number Ship-From Number Action Creator (User) Hold Type H: Placed on Svc Hold R: Release from Svc Hold
ServiceHoldTR (ALC155)	Notifies the user when a transfer is placed on service	This information is available for the alert:

	hold or released from a service hold. Any transfer placed on service hold or released from service hold generates the alert.	From Warehouse To Warehouse Action Creator (User) Hold Type H: Placed on Svc Hold R: Release from Svc Hold
ServiceHoldMCB (ALC156)	Notifies the user when an BOM production ticket is placed on service hold or released from a service hold. Any BOM production ticket placed on service hold or released from service hold generates the alert.	This information is available for the alert: Finished Item Number Warehouse Action Creator (User) Hold Type H: Placed on Svc Hold R: Release from Svc Hold
ServiceHoldMCF (ALC157)	Notifies the user when a formulation production ticket is placed on service hold or released from a service hold. Any formulation ticket placed on service hold or released from service hold generates the alert.	This information is available for the alert: Formula Warehouse Action Creator (User) Hold Type H: Placed on Svc Hold R: Release from Svc Hold
DebitHoldPO (ALC158)	Notifies the user when a purchase order is placed on debit hold or released from a debit hold. Any PO document placed on debit hold or released from debit hold generates the alert.	This information is available for the alert: Vendor Number Ship-From Number Action Creator (User) Hold Type H: Placed on Dbt Hold R: Release from Dbt Hold

Program changes

This table lists changes to existing programs.

Module	Program	Change Summary
Accounts Payable	Vendor FM (APF910) - Miscellaneous tab	PO Debit limit amount and Debit limit check action
	Vendor AP Inquiry (API610) - General view	Debit limit and Debit Check
Inventory Control	IC Static Control FM (ICF980)	Rush Header text
	IC Print (ICP310) screens	Field additions and rearranged - Origin
	Planned Special Order Transfer Entry (ICE310)	Priority column
	Transfer Ticket entry (ICE320): Planned special order import function, Transfer Ticket Line F1 special order, F2 search on order	Priority column
Manufacturing Control	MC Static Control FM (MCF980)	Rush Header text
	MC Ticket Print (MCP110 and MCP210)	Screen additions - Origin, Priority
	MC Bill of Material Inquiry (MCI610), Production and Past Production views	Priority column
	MC Formulation Inquiry Production (MCI620), and Past Production views	Priority column
	Production Detail for the Selected Ticket (MCI624)	Priority column
	Production Detail for the Selected Ticket (MCI613)	Priority column

	MC BOM Ticket entry (MCE130)	Priority, Print now checkbox and window
	MC BOM Ticket Confirmation (MCE140)	Priority
	MC Production FML Ticket entry (MCE240)	Priority, Print now checkbox and window
	MC Production FML Confirmation (MCE250)	Priority
Purchase Orders	PO Static (POF980), General view Print Control view BCC view	PO Debit limit password and security code Rush Header text Rush Order Bump
	Vendor PO Inquiry (POI610), Codes view Purchase Orders view	Debit limit and Debit Check hold column, Priority column, API column
	Purchase Order Detail Window	Priority column
	PO Print (POP110)	Cutoff Date, Origin, Doc Type, Priority screen additions
	F2 search on PO number	* in status column if PO is on Debit Hold
	PO Entry Options FM (POF915)	Priority
	PO Status report (POR710)	Priority
	PO Entry (POE120), Header Detail button F1 Special order entry, F2 lookup	Priority, Special Order Import menu option, Hold/Rush label Priority column
	PO Receipt Entry (POE210), Header Detail button	Priority
	Non-PO Receipt Entry (POE220), Header Detail button	Priority
	Buyers Control Center Detail screens (POE405	Rush column and check box

	purchase orders and transfers, POE407 BOM tickets, POE408 formulation tickets)	
Sales Orders	SO Static Control FM (SOF980)	Rush Header text
	Sales Order Review (SOE230)	Screen rearranged, Go To menu expanded

Cost Discrepancy changes

Cost discrepancy processing (Defects: 700814, 660304, 66013, 616216, 597979, 510413, 501599, 500525, 496377, 474863, 468580, 461047, 430369, 420734)

Cost discrepancy processing was expanded and updated in the Inventory Control and Sales Orders modules.

These programs were modified in the Inventory Control module.

Cost Discrepancy Entry (ICE610)

These changes were implemented in Cost Discrepancy Entry.

Pre-register PO receipts and adjustments

For PO receipts that have been updated but not yet run through the PO Receipt Register, a message is displayed and cost discrepancy entry is not allowed.

Adjustment records are not displayed in the Cost Discrepancy Entry browser if they have not been processed through the Adjustment Register.

Verifying receipts

A new Verify Receipts button was added to check all cost discrepancy records currently on file for their matching receipt. If not found, the cost discrepancy record is removed. At least one cost discrepancy record is required to enable the button.

Cost factoring

When using cost factoring, the current and new unit costs are the same because the cost is factored across units. A new Factored Unit Cost column in the list box contains the factored cost that is applied during the register when no cost change is visible.

When a cost factoring value is specified, a new Update Cost button is available to calculate the unit factor value and display the value in the list box. If the entered cost factor value is not evenly distributable, you can choose to ignore the message or fix it. Specify Ignore to allow the uneven distribution to be saved and manually update individual lines to account for any unenven distribution. Specify Fix to allow entry of a new cost value. The Factored Unit Cost column is only populated when using cost factoring.

A new Cost Overridden column was included. An asterisk, *, is displayed in the Cost Overridden column when the receipt cost was changed by the user.

When using the look-up button for cost discrepancy records, factored cost records are included in the look-up results. Cost discrepancy records, which are auto-created by an over-shipment being filled by a receipt, are not included in the look-up results.

Cost Discrepancy Register (ICR610)

These changes were implemented in the Cost Discrepancy Register.

IC receipt and disbursement files

GL account numbers are written to IC receipt and disbursement files during registers. Cost discrepancy entry is only allowed on receipts that are post-register processing. Running the Cost Discrepancy Entry Register for receipts which have ‘open’ disbursement documents that are not yet run through their own register, does not show GL account information on the Cost Discrepancy Register output. Costs on ‘open’ disbursement documents can be updated by the Cost Discrepancy Register, and, when the ‘open’ documents have their own register run, the associated docs, having already had their costs updated through the Cost Discrepancy Entry Register, update GL on their own register.

Outputs with no cost difference

Records can be written to the cost discrepancy file when an over-shipment is filled by an incoming receipt. Additionally, factored cost discrepancy entry may be involved. These are two types of output that show no cost difference on the first page of the Cost Discrepancy Register. Running the register clears these records.

When an over-shipment (OS) receipt is resolved by an incoming receipt, the OS receipt record is removed, and a cost discrepancy entry record is written. Since the received cost did not exist at the time of the OS, the cost is the same as the receipt that resolved that OS. Any change to the cost of that receipt, making the cost different than the disbursement document, such as the sales order, will have that disbursement document's cost updated with the receipt cost during the Cost Discrepancy Entry Register.

For example: A new item is entered, and before any receipts occur that new item is sold, an OS record is written. Then, once a receipt for that new item comes in, the OS record is removed and the sold quantity is accounted for from that incoming receipt. To handle potential cost changes, a cost discrepancy entry record is written and “Created by Processing Overshipment” is displayed on the first page of the Cost Discrepancy Entry Register. The received cost has not changed. The sold item’s cost, if different from the receipt’s cost and not manually changed by the user at entry, would need to be updated with that incoming resolving receipt’s cost when the Cost Discrepancy Entry Register is run.

Update- and Report-only modes

The Cost Discrepancy Register runs in report-only mode by default. The Reports Only check box is checked by default. You must uncheck the Reports Only check box to run in update mode. If a locked distribution record is encountered during the report-only output, a message containing the document number and the cost discrepancy which will be skipped, is displayed. Make a note of any locked documents during report-only output allows for resolution before the Cost Discrepancy Register is run in update mode.

When output is report-only mode no files are updated in the system. The costs presented are the unchanged costs. When output is run updating costs, the values presented may be already updated values. The costs presented may be the changed cost instead of the pre-change cost. For example, if a receipt having disbursements associated has a cost change, then the disbursement summary page showing that receipt will show the original receipt cost in report-only mode, and show the changed, or updated, cost when run and updating costs.

When output is report-only mode, the register number displayed in the output header is 0000. If your system is using Unform Document Archiving, all Report-only mode output that is sent to Unform is stored under the 0000 register number.

Special Order Temporary items

Special Order Temporary items were included in cost discrepancy processing for the Cost Discrepancy Entry and Cost Discrepancy Register programs.

Cost Discrepancy Entry (ICE610) and Cost Discrepancy Register (ICR610)

If a temporary item is entered in Order Entry as a special order, then the temporary item is to be received on a tied special-order PO or transfer. During Order Confirmation, a tied disbursement record is created, against which any cost discrepancy entry can be successfully applied. Cost discrepancy entry and register for this type of special-order temporary item updates cost for both the receipt and the disbursement of that special-order temporary item.

Disbursement screen (ICI663)

Special Order Temporary item disbursement docs are now included and displayed.

This program was modified in the Sales Orders module.

SO Confirmation Entry (SOE514)

All special-order temporary items now create a disbursement.

Defects fixed

This table lists descriptions for the defects that were included.

Defect Number	Description
700814	Using Cost Factor in Cost Discrepancy Entry creates an endless loop
660304	Cost Discrepancy for Temporary Items not updated to past SO document

Defect Number	Description
660137	Cost discrepancy update is not updating past invoice
616216	Cost Discrepancy Register not updating GL
597979	Cost Discrepancy Register has items with no cost discrepancy and prevents user from doing IC Month End
510413	CDR Currently only Post to current G/L Period
501599	Need ability for Cost Discrepancy Entry and Register, choose ALL warehouses
500525	Cost Discrepancy Report not removing orphaned records in ICCSDS
496377	Cost discrepancy register is ignoring the Cost Change Flag in SORSOL and SOPIND.
474863	Performing a Cost Discrepancy against a pre-register PO or Adjustment will not properly update cost
468580	Documentation for Cost Discrepancy records generated automatically by FACTS
461047	Cost Discrepancy Entry won't update thru Cost Discrepancy Register due to record locking failure
430369	Cost Discrepancy for Temp Items?
420734	Cost is not updating with cost discrepancy when in POUPDL - if in POUPDH don't allow cost discrepancy

Changes by Module

Accounts Receivable

Transfer/Change Customer Codes (ARU910) - change cust codes missing branch (Defect 735180)

The branch value was missing from the Transfer/Change Customer Codes program. A new field, Default Branch, was added.

Inventory Control

IC Side Bar feature

The Side Bar feature was expanded to these IC transfer and confirmation programs: Transfer Entry, Shipment Confirmation, and Receipt Confirmation. Use the IC Side Bar to display additional quantity and item detail information for quick item selection and viewing. This provides information about items in the line-item section to facilitate efficient transfer.

Click Show/Hide to toggle the Side Bar display off and on. Select a view from the drop box. For views with drag and drop functionality, click and drag one or multiple lines at a time to the line-item section. Click Reload to refresh the contents displayed in the Side Bar area list box.

You can use the Side Bar for research and review after you specify an item. Limiting, scrolling and double click actions, when available, are also enabled during line entry. Drag and Drop during line entry is not allowed.

Refer to this table for the available Side Bar views.

View	Description	Drag / Drop available	Functionality
F-From Warehouse Quantities	Displays the ‘from’ warehouse quantities for that selected line. All from warehouse’s quantities for a selected item on the ticket are displayed. This is item-specific, and contents change		There is no further action in this view.

	with items listed in Transfer Entry.		
T-To Warehouse Quantities	Displays the ‘to’ warehouse quantities for that selected line. All to-warehouse’s quantities for a selected item on the ticket are displayed. This is item-specific, and contents change with items listed in Transfer Entry.		There is no further action in this view.
A-Warehouse Quantities	Displays all warehouse quantities for that selected line. This is item-specific, and contents change with items listed in Transfer Entry.		There is no further action in this view.
R-Resources	Displays resources for the warehouse and item. This is warehouse-specific and item-specific. The contents related to the warehouse will not change, but content may change with item selection.		Select a line and double click to launch the Supplemental Resource Manager (SMC910).
t-Timeline	Displays the selected item’s current timeline for that single item and ‘from’ warehouse. Temporary items are omitted. This is item-specific, and contents change with items ordered.		Select a line and double click to launch the inquiry corresponding to the selected line type if the document is available.
N-Notes	Displays notes based on warehouse and item. This is warehouse-specific		Select a note and double-click to launch the Note Entry (SME710) for

	and item-specific. The contents related to the warehouse will not change, but content may change with item selection.		the line and type: Document header, Line or Item line.
I-Incoming	Displays where the item is coming into the “from” and “to” warehouses from Purchase Order, Transfer, or Manufacturing entry programs.		Select a line and double click to launch the inquiry corresponding to the selected document type.
O-Outgoing	Displays where the item is committed for the “from” and “to” warehouses from Sales Orders, Transfers, or Manufacturing entry programs.		Select a line and double click to launch the inquiry corresponding to the selected document type.
L-Long Term Surplus	Displays items with long-term surplus in the ticket’s ‘from’ and ‘to’ warehouses set in Warehouse/Item FM (ICF920). Alternate warehouses with long-term surplus are included if the Use Surplus check box is selected in IC Static Control FM and are valid for IC in Warehouse FM (ICF970).	X	Double click a line to display the Change Long Term Surplus Quantity window to change the order quantity. Click Refresh to reset all quantities and values to their initial amounts.
s-Substitute Items	Displays substitute items for the selected item in the ticket’s ‘from’ and ‘to’ warehouses set in Warehouse/Item FM (ICF920). The item description, quantity and	X	Double click a substitute item to launch the Change Substitute Item Quantity window for the selected substitute item.

	buying UM are also displayed.	

Process Warehouse Item Records (ICU960) - Message "Date must be after today" from ICU960 "Process Warehouse Item Records" T-Min OP expiration date even though the date entered is greater than the current date (Defect 707774)

When the Process Warehouse Item Records update program exported records from Warehouse Item FM (ICF920), an incorrect ‘Date must be after today message’ was displayed. The spreadsheet generated from the update contained validations that Warehouse Item FM did not. The validations were removed from the spreadsheet and a new version was released in the FACTS 9.3.2 incremental.

Print Count Sheets (ICR510) - Physical count needs to show committed with showing available/on hand (Defect 737416)

The Print Count Sheets output was expanded. When the Available or On Hand check box is checked, the output now includes the committed quantities in addition to the available or on-hand quantities.

Manufacturing Control

MC Side Bar feature

The Side Bar feature was added to Manufacturing Control entry and confirmation programs. Use the MC Side Bars to display additional information for bill of materials items, production ticket entry and confirmation, formula entry, production and confirmation. The Side Bar information varies by program. It is tailored for quick item selection and viewing. This provides details about manufacturing habits for the specified BOM or formula item and information about items in the line item section of MC entry programs to facilitate efficient manufacturing choices. The MC Finished Item Entry (MCE231.F) Side Bar is also available from the FML BCC Detail (POE408) screen in the Buyers Control Center.

Click Show/Hide to toggle the Side Bar display off and on. Select a view from the drop box. For views with drag and drop functionality, click and drag one or multiple lines at a time to the line item section. Click Reload to refresh the contents displayed in the Side Bar area list box. Use the arrows in the lower right corner to scroll through the pages and go to the first and last pages. Scrolling moves through the items loaded into a particular drop box a page at a time.

During line entry, Side Bar research functionality is enabled after the Item field is entered. Limiting, scrolling and double click actions, when available, are also enabled. Drag and Drop during line entry is not allowed.

These MC Side Bars were added.

Bill of Materials Entry (MCE110)

View	Description	Drag / Drop available	Functionality
W-Warehouse Quantities	Displays the warehouse quantities for that selected line. All warehouse's quantities for a selected item on the BOM are displayed. This is item-specific, and contents change with items on the BOM.		There is no further action in this view.
s-Substitute Items	Displays substitute items for the selected item. The item description, quantity and buying UM are also displayed.	X	Double click a substitute item to launch the Change Substitute Item Quantity window for the selected substitute item.
N-Notes	Displays notes based on BOM and item. This is BOM-specific and item-specific. The contents related to the BOM will not change, but content may change with item selection.		Select a note and double-click to launch the Note Entry (SME710) for the line and type: BOM or Document header, Line or Item line.
O-Open Tickets	Displays the selected item's current open production tickets for that single item. This is item-specific, and		Double click a line to launch the Production view of Bill of Materials Inquiry (MCI610)

View	Description	Drag / Drop available	Functionality
	contents change with item selection.		for the line selected.
P-Past Tickets	Displays the selected item’s current past production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Past Production view of Bill of Materials Inquiry (MCI610) for the line selected.

Production Planning (MCE120)

View	Description	Drag / Drop available	Functionality
W-Warehouse Quantities	Displays the warehouse quantities for that selected line. All warehouse’s quantities for a selected item on the BOM are displayed. This is item-specific, and contents change with items on the BOM.		There is no further action in this view.
s-Substitute Items	Displays substitute items for the selected item. The item description, quantity and buying UM are also displayed. Note: Only substitute items that are BOM defined items are displayed.	X When a drag and drop line is created, the warehouse for the currently selected line of the planned order.	Double click a substitute item to launch the Change Substitute Item Quantity window for the selected substitute item.
N-Notes	Displays notes based on BOM and		Select a note and double-click to

View	Description	Drag / Drop available	Functionality
	item. This is BOM-specific and item-specific. The contents related to the BOM will not change, but content may change with item selection.		launch the Note Entry (SME710) for the line and type: BOM or Document header; Line or Item line.
O-Open Tickets	Displays the selected item's current open production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Production view of Bill of Materials Inquiry (MCI610) for the line selected.
P-Past Tickets	Displays the selected item's current past production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Past Production view of Bill of Materials Inquiry (MCI620) for the line selected.
p-Past Planned Production	Displays the selected item's past planned production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Production view of Bill of Materials Inquiry (MCI620) for the line selected.

Production Entry (MCE130) and Production Confirmation (MCE140)

View	Description	Drag / Drop available	Functionality
W-Warehouse Quantities	Displays the warehouse quantities for that selected line. All warehouse's quantities for a selected item on the production ticket are displayed. This is item-specific, and contents change with items listed on the production ticket.		There is no further action in this view.
s-Substitute Items	Displays substitute items for the selected item. The item description, quantity and buying UM are also displayed.	X	Double click a substitute item to launch the Change Substitute Item Quantity window for the selected substitute item.
N-Notes	Displays notes based on BOM and item. This is BOM-specific and item-specific. The contents related to the BOM will not change, but content may change with item selection.		Select a note and double-click to launch the Note Entry (SME710) for the line and type: BOM or Document header, Line or Item line.
O-Open Tickets	Displays the selected item's current open production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Production view of Bill of Materials Inquiry (MCI610) for the line selected.

View	Description	Drag / Drop available	Functionality
P-Past Tickets	Displays the selected item's current past production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Past Production view of Bill of Materials Inquiry (MCI610) for the line selected.
B-BCC Activity	Displays the current records in the Buyers Control Center (POE400) for this selected buyer+warehouse+vendor combination.		There is no further action in this view.
S-Planned Production	Displays the selected item's current planned production tickets for that single item. This is item-specific, and contents change with item selection.		There is no further action in this view.
R-Finished Item Standard Requirements	Displays the standard components and required quantities for the finished item.	X	Double click a component item to launch the Change Item Quantity window for the selected item.

Formula Entry (MCE210)

View	Description	Drag / Drop available	Functionality
W-Warehouse Quantities	Displays the warehouse quantities for that selected line. All		There is no further action in this view.

View	Description	Drag / Drop available	Functionality
	warehouse's quantities for a selected item on the formula are displayed. This is item-specific, and contents change with items.		
s-Substitute Items	Displays substitute items for the selected item. The item description, quantity and buying UM are also displayed.	X	Double click a substitute item to launch the Change Substitute Item Quantity window for the selected substitute item.
N-Notes	Displays notes based on formula and item. This is formula-specific and item-specific. The contents related to the formula will not change, but content may change with item selection.		Select a note and double-click to launch the Note Entry (SME710) for the line and type: formula or Document header; Line or Item line.
O-Open Tickets	Displays the selected item's current open production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Production view of Formulation Inquiry (MCI620) for the line selected.
P-Past Tickets	Displays the selected item's current past production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Past Production view of Formulation Inquiry (MCI620) for the line selected.

View	Description	Drag / Drop available	Functionality
C-Formula Standard Ingredients	Displays the standard ingredients and required quantities for the formula item.		There is no further action in this view.

Finished Item Entry (MCE220)

View	Description	Drag / Drop available	Functionality
W-Warehouse Quantities	Displays the warehouse quantities for that selected line. All warehouse's quantities for a selected item on the ticket are displayed. This is item-specific, and contents change with items listed in Finished Item Entry.		There is no further action in this view.
s-Substitute Items	Displays substitute items for the selected item. The item description, quantity and buying UM are also displayed.	X	Double click a substitute item to launch the Change Substitute Item Quantity window for the selected substitute item.
N-Notes	Displays notes based on formula and finished item. This is formula-specific and item-specific. The contents related to the formula will not change, but content may change with item selection.		Select a note and double-click to launch the Note Entry (SME710) for the line and type formula or Document header; Line or Item line.

View	Description	Drag / Drop available	Functionality
O-Open Tickets	Displays the selected item's current open production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Production view of Formulation Inquiry (MCI620) for the line selected.
P-Past Tickets	Displays the selected item's current past production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Past Production view of Formulation Inquiry (MCI620) for the line selected.
c-Finished Item Standard Ingredients	Displays the standard ingredients and required quantities for the finished item.		There is no further action in this view.

Production Planning (MCE230)

View	Description	Drag / Drop available	Functionality
O-Open Tickets	Displays the selected item's current open production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Production view of Bill of Materials Inquiry (MCI620) for the line selected.
P-Past Tickets	Displays the selected item's current past production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Production view of Formulation Inquiry (MCI620) for the line selected.

View	Description	Drag / Drop available	Functionality
p-Past Planned Production	Displays the selected item's past planned production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Past Production view of Formulation Inquiry (MCI620) for the line selected.

Finished Item Entry (MCE231.F)

This Side Bar is a shared screen between Production Planning (MCE230) and FML BCC Detail (POE408). Side Bar settings and selections carry through.

View	Description	Drag / Drop available	Functionality
W-Warehouse Quantities	Displays the warehouse quantities for that selected line. All warehouse's quantities for a selected item on the ticket are displayed. This is item-specific, and contents change with items listed in Finished Item Entry.		There is no further action in this view.
s-Substitute Items	Displays substitute items for the selected item. The item description, quantity and buying UM are also displayed.	X	Double click a substitute item to launch the Change Substitute Item Quantity window for the selected formula finished item.
F-Formula Finished Items	Displays formula finished items for the selected formula. The item description, quantity and buying	X	Double click a formula item to launch the Change Item Quantity window for the

View	Description	Drag / Drop available	Functionality
	UM are also displayed.		selected formula finished item.
O-Open Tickets	Displays the selected item's current open production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Production view of Formulation Inquiry (MCI620) for the line selected.
P-Past Tickets	Displays the selected item's current past production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Past Production view of Formulation Inquiry (MCI620) for the line selected.
c-Finished Item Standard Ingredients	Displays the standard ingredients and required quantities for the finished item.		There is no further action in this view.

Production Entry (MCE240) and Production Confirmation (MCE250)

View	Description	Drag / Drop available	Functionality
W-Warehouse Quantities	Displays the warehouse quantities for that selected line. All warehouse's quantities for a selected item on the ticket are displayed. This is item-specific, and contents change with items listed in Finished Item Entry.		There is no further action in this view.

View	Description	Drag / Drop available	Functionality
s-Substitute Items	Displays substitute items for the selected item. The item description, quantity and buying UM are also displayed. Note: Only substitute items that are FML defined items are displayed.	X	Double click a substitute item to launch the Change Substitute Item Quantity window for the selected substitute item.
N-Notes	Displays notes based on formula and item. This is formula-specific and item-specific. The contents related to the formula will not change, but content may change with item selection.		Select a note and double-click to launch the Note Entry (SME710) for the line and type: vendor or Document header, Line or Item line.
O-Open Tickets	Displays the selected item’s current open production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Production view of Bill of Materials Inquiry (MCI620) for the line selected.
P-Past Tickets	Displays the selected item’s current past production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Production view of Bill of Materials Inquiry (MCI620) for the line selected.
B-BCC Activity	Displays the current records in the Buyers Control Center (POE400) for this selected		There is no further action in this view.

View	Description	Drag / Drop available	Functionality
	buyer+warehouse+vendor combination.		
S-Planned Production	Displays the selected item's current planned production tickets for that single item. This is item-specific, and contents change with item selection.		There is no further action in this view.
F-Formula Finished Items	Displays formula finished items for the selected formula. The item description, quantity and buying UM are also displayed.	X	Double click a formula item to launch the Change Item Quantity window for the selected formula finished item.

Production Entry - Ingredients (MCE241.I)

This Side Bar is a shared screen between Production Entry (MCE240) and Formula Entry (MCE210). Side Bar settings and selections carry through.

View	Description	Drag / Drop available	Functionality
W-Warehouse Quantities	Displays the warehouse quantities for that selected line. All warehouse's quantities for a selected item on the ticket are displayed. This is item-specific, and contents change with items listed in Finished Item Entry.		There is no further action in this view.

View	Description	Drag / Drop available	Functionality
s-Substitute Items	Displays substitute items for the selected item. The item description, quantity and buying UM are also displayed.	X	Double click a substitute item to launch the Change Substitute Item Quantity window for the selected substitute item.
N-Notes	Displays notes based on vendor and item. This is vendor-specific and item-specific. The contents related to the vendor will not change, but content may change with item selection.		Select a note and double-click to launch the Note Entry (SME710) for the line and type: vendor or Document header, Line or Item line.
O-Open Tickets	Displays the selected item's current open production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Production view of Bill of Materials Inquiry (MCI620) for the line selected.
P-Past Tickets	Displays the selected item's current past production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Production view of Bill of Materials Inquiry (MCI620) for the line selected.
C-Formula Standard Ingredients	Displays the standard ingredients and required quantities for the formula item.		There is no further action in this view.

Production Entry - Packaging (MCE241.P)

This Side Bar is a shared screen between Production Entry (MCE240) and Formula Entry (MCE210). Side Bar settings and selections carry through.

View	Description	Drag / Drop available	Functionality
W-Warehouse Quantities	Displays the warehouse quantities for that selected line. All warehouse's quantities for a selected item on the ticket are displayed. This is item-specific, and contents change with items listed in Finished Item Entry.		There is no further action in this view.
s-Substitute Items	Displays substitute items for the selected item. The item description, quantity and buying UM are also displayed.	X	Double click a substitute item to launch the Change Substitute Item Quantity window for the selected substitute item.
N-Notes	Displays notes based on vendor and item. This is vendor-specific and item-specific. The contents related to the vendor will not change, but content may change with item selection.		Select a note and double-click to launch the Note Entry (SME710) for the line and type: vendor or Document header; Line or Item line.
O-Open Tickets	Displays the selected item's current open production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Production view of Formulation Inquiry (MCI620) for the line selected.

View	Description	Drag / Drop available	Functionality
P-Past Tickets	Displays the selected item’s current past production tickets for that single item. This is item-specific, and contents change with item selection.		Double click a line to launch the Past Production view of Formulation Inquiry (MCI620) for the line selected.
c-Finished Item Standard Ingredients	Displays the standard ingredients and required quantities for the finished item.		There is no further action in this view.

View menu addition - Warehouse Quantities Display options

Warehouse quantity information is available in the MC Side Bar and in the Warehouse Quantities pop up window. Use the Warehouse Quantities Display option on the View menu to control the pop-up window. When checked, the Warehouse Quantity window is displayed during line entry or edit. When unchecked, the Warehouse Quantity window is not displayed during line entry or edit. Toggle the setting to select and unselect it.

Payroll

2019 Year End W2, 1099 and ACA Information

These details are provided to summarize the changes implemented in the FACTS Payroll module. No changes are necessary for 1099s for the 2019 reporting year. No changes are necessary for ACA (Affordable Care Act) from 2019 notes.

Changes are necessary for W2s for the 2019 reporting year. For more information see *2019 General Instructions for Forms W-2 and W-3*.

2020 FICA and Tax Table Changes - Per Publication 15 (Circular E), Employer's Tax Guide (2020) and Publication 15-T Federal Income Tax Withholding Methods (2020)

The IRS redesigned Form W-4 for 2020. In the past, the value of a withholding allowance was tied to the amount of the personal exemption. Due to changes in the law, taxpayers can no longer claim personal exemptions or dependency exemptions. The 2020 Form W-4 no longer asks an employee to report the number of withholding allowances that they are claiming. Withholding values for the revised Form W-4 are determined by Step 2: Multiple Jobs or Spouse Works. If the checkbox is not selected refer to the Standard Withholding rates. The checkbox is selected refer to the Form W4, Step 2, Checkbox, Withholding rates.

These changes are required in Tax Table FM (PRF940) and Deductions Code FM (PRF962) to comply with 2020 IRS changes.

Tax Table FM (PRF940)

In Tax Table FM, these tax table changes are required for 2020 for the prompts and values listed.

Tax Code: FIM Federal Married Filing Jointly

Standard Withholding Rate Schedules	Form W-4, Step 2, Checkbox, Withholding Rate Schedules
Use these if the Form W-4 is from 2019 or earlier, or if the Form W-4 is from 2020 or later and the box in Step 2 of Form W-4 is NOT checked.	Use these if the Form W-4 is from 2020 or later and the box in Step 2 of Form W-4 IS checked.
Bracket 1: .00%, base .00, limit 11900 Bracket 2: 10.00%, base.00, limit 31650 Bracket 3: 12.00%, base 1975.00, limit 92150 Bracket 4: 22.00%, base 9235.00, limit 182950 Bracket 5: 24.00%, base 29211.00, limit 338500 Bracket 6: 32.00%, base 66543.00, limit 426600 Bracket 7: 35.00%, base 94735.00, limit 633950 Bracket 8: 37.00%, base 167307.50, limit 9999999 Employer Adjust: 0% The withholding allowance, as previously used, has been removed for 2020. Exempt Amount 1, 2 and 3: 0.00	Bracket 1: .00%, base .00, limit 12400 Bracket 2: 10.00%, base.00, limit 22275 Bracket 3: 12.00%, base 987.50, limit 52525 Bracket 4: 22.00%, base 4617.50, limit 97925 Bracket 5: 24.00%, base 14605.50, limit 175700 Bracket 6: 32.00%, base 33271.50, limit 219750 Bracket 7: 35.00%, base 47367.50, limit 323425 Bracket 8: 37.00%, base 83653.75, limit 9999999 Employer Adjust: 0% The withholding allowance, as previously used, has been removed for 2020. Exempt Amount 1, 2 and 3: 0.00

Tax Code: FIS Federal Single or Married Filing Separately

Standard Withholding Rate Schedules	Form W-4, Step 2, Checkbox, Withholding Rate Schedules
Use these if the Form W-4 is from 2019 or earlier, or if the Form W-4 is from 2020 or later and the box in Step 2 of Form W-4 is NOT checked.	Use these if the Form W-4 is from 2020 or later and the box in Step 2 of Form W-4 IS checked.
Bracket 1: .00%, base .00, limit 3800 Bracket 2: 10.00%, base.00, limit 13675 Bracket 3: 12.00%, base 987.50, limit 43925 Bracket 4: 22.00%, base 4617.50, limit 89325 Bracket 5: 24.00%, base 14605.50, limit 167100 Bracket 6: 32.00%, base 33271.50, limit 211150 Bracket 7: 35.00%, base 47367.50, limit 522200 Bracket 8: 37.00%, base 156235.00, limit 9999999 Employer Adjust: 0% The withholding allowance, as previously used, has been removed for 2020. Exempt Amount 1, 2 and 3: 0.00	Bracket 1: .00%, base .00, limit 6200 Bracket 2: 10.00%, base.00, limit 11138 Bracket 3: 12.00%, base 987.50, limit 26263 Bracket 4: 22.00%, base 4617.50, limit 48963 Bracket 5: 24.00%, base 14605.50, limit 87850 Bracket 6: 32.00%, base 33271.50, limit 109875 Bracket 7: 35.00%, base 47367.50, limit 265400 Bracket 8: 37.00%, base 83653.75, limit 9999999 Employer Adjust: 0% The withholding allowance, as previously used, has been removed for 2020. Exempt Amount 1, 2 and 3: 0.00

Tax Code: FCA FICA

For Social Security and Medicare complete this information.

Bracket 1: 7.65%, base 0, limit 137700
Bracket 2: 1.45%, base 10534.05, limit 200000
Bracket 3: 2.35%, base 11437.40, limit 9999999
Employer Adjust: -.9% Bracket 3
Note that the employer adjust is a negative amount, and the bracket is the first bracket to apply the adjustment to.

Deductions Code FM (PRF962)

In Deductions Code FM for the FICA deduction code, the Max Contribution/Yr-Comp and Empl prompts should be set to 999999.99. These fields represent the maximum contribution per year for both the company employee matches.

Sales Orders

Sales Orders Past Order Status Change Inquiry (SOI660) - Past order status not filtering (Defect 735315)

The Sales Orders Past Order Status Change Inquiry was expanded to include filtering options for code type, user code, document number and invoice number. The document number, invoice number filters have no mask and when entered, lines matching the exact typed value are displayed.

System Management

Background Process Log File Viewer (SMI915) - Add sequence number 00001 filter

A new sequence number 00001 check box, Seq 0001, was added to the Background Process Log File Viewer. Check the Seq 0001 check box to indicate whether to display only records with a sequence number of 00001. This action displays only the first record of any possible record set, without showing all subsequent sequence number records for that first record.

You can double click a record in the list box to display all subsequent sequence number records and uncheck the check box by default.

The Entity Key field was also expanded as a text search for the entered value in the Entity key column. If the specified text exists anywhere in the entity key of a record, the record is displayed.

Active and Inactive setting for raising of alerts

New functionality allows the raising of alerts to be set to inactive at the alert, company and system levels. When inactive, no Raise Alerts XML is delivered to the API directory.

A hookpoint was added to SMF009 allowing partners to specify to skip alerts if they set the skip_alerts flag to 1 (true).

3016 skip_alerts=0; perform "prog/SM/SMF00J;pre_record_alerts",err=*next ! hookpoint for other validation - if sets skip_alerts=1 then no alert raised.

These programs were modified.

A new Raise Alerts check box was added to each of these programs:

- Alert Metadata Entry (SMF009) - check if the alert is active
- Company Control F/M (SMF920) - check if the alert is active for the specified company
- System Control F/M (SMF950) - check if the alert is active for the system

System Alerts Dashboard (ALE100)

A new column, Active, was added to the System Alerts Dashboard to indicate if the specified alert is active or inactive.

System Alerts Dashboard (ALE100), Alerts Control Center / Exception Control Center (POE400)

The Alert Details button display the System Alerts Dashboard and the Alerts Control Center / Exception Control Center now display the Raise Alert status to indicate if any alert, company-level, or system-level check box is inactive.

New alerts

These new alerts are included in version 9.3.2.

SOCITEM (ALC146)

The SOCITEM alert was added to notify the user that a SO companion item has an upcoming effective or expiration date where the number of days between today and the effective/expiration date equals the subscribed "Issue the alert" number of days.

If you are subscribed to the alert, access the Alert Control Center (ALE100) to view and optionally dismiss this alert. When background process A1 Data Miner (BKC100) runs, if the expiration and effective dates of the SO Companion item is greater than or equal to today's date, the alert is raised. Users are directed to SO Companion Item Entry (SOE150) with the parent item and the proper companion item displayed for viewing or editing of that companion item's effective and expiration date.

This information is available for the alert:

- Parent Item
- Companion Item
- Subscription Type
- Number of days prior to issue the alert
- Parent Item Status

You can subscribe to the parent and companion item number values, parent item status and subscription type.

POCITEM (ALC147)

The POCITEM alert was added to notify the user that a PO companion item has an upcoming effective or expiration date where the number of days between today and the effective or expiration date equals the subscribed "Issue the alert" number of days.

If you are subscribed to the alert, access the Alert Control Center (ALE100) to view and optionally dismiss this alert. When background process A1 Data Miner (BKC100) runs, if the expiration and effective dates of the PO Companion item is greater than or equal to today's date, the alert is raised. Users are directed to PO Companion Item Entry (POE150) with the parent item and the proper companion item displayed for viewing or editing of that companion item’s effective/expiration date.

This information is available for the alert:

- Parent Item
- Companion Item
- Subscription Type
- Number of days prior to issue the alert
- Parent Item Status

You can subscribe to the parent and companion item number values, parent item status and subscription type.

PGMLAUNCH (ALC148)

The PGMLAUNCH alert was added to notify the user when a specific program is launched from the FACTS Program Launcher.

If you are subscribed to the alert, access the Alert Control Center (ALE100) to view and optionally dismiss this alert. This alert provides detailed information about user program access. When viewing launched alerts you can export the list to Excel and perform these analysis tasks:

- Verify when users launch certain programs.
- Track all programs a user accesses to determine if more training or tighter security measures are needed to prevent unexpected or unusual program launches.
- Track all launches of a particular program to determine if the program is restricted to certain users and an unexpected user launches it.

Programs launched from within other programs via Go To or View menu options or direct code-based launching are not part of this alert.

You can subscribe to the program name, company and user code values.

FLDCHANGE (ALC149)

The FLDCHANGE alert is used to audit value changes in validated fields. The alert is triggered by a user change in program fields that have validation procedures.

You can access the Alert Control Center (ALE100) to view and optionally dismiss this alert.

These fields are available for subscription for the alert:

- Prompt Values - Specify the valid SMPRMT entry options. Use the provided F2 functionality and values are automatically separated and ended with: ^. These values must be filled in order. Entry is only expected when the preceding entry is not blank. Click Options to specify the program identifier, runtime condition and field to audit. This is a required field.
- Company - Optionally specify a company code.
- User - Optionally specify a user code.
- Value Comparison - Specify the value for raising the alert for the indicated field. Click Options to display the valid entry options. Choosing None or a drop box option without value blanks out the

field. The value entered should correspond to the expected and allowed values for the SMPRMT field being analyzed. This is a required field.

- Notice/Memo - Optionally specify information to display when the alert is raised.

Changes to character-based or GUI program fields without validation or from within code, using direct code-based change to relevant variables, are not part of this alert.

You can subscribe to the SMPRMT field details, company, user code values and or evaluated values.

ALERT-3LE (ALC151)

The ALERT-3LE alert is triggered when a specified header or line process occurs in a three-level entry program controlled by SME999 and SME997 driver programs. Processes and record changes to that are outside three-level entry driver control do not raise an alert. Alert subscribers can manually close or clear the alert at any time from the Alert Control Center (POE410).

This information is available for the alert.

3LE Selection - If this optional entry is made, it must be a valid 3LE program followed by ^ , followed by runtime condition. For example: SOE510^ORDER

The selected SMENTY values must have either a Header file entry, a Line file entry, or both to use the Data Filter field. Some three-level entry programs may have name changes during program runtime. To pick up program runtime changes, you can specify values with a description of “Not on file”. Refer to the SMGCTL Filter Scenario for details.

Process Type - This table shows the available Header and Line process options.

DB Value	Text Value
L	Launched/started, entering program
O	Opened/pulled, loading doc
C	Created/updated, header saved or updated
d	Deleted, deleted doc
S	Saved or closed, end of doc
F	Finished or exited, leaving program
A	Added line
R	Removed line
E	Edited line

Line options are specified including the text, Line.

All options are recorded post occurrence, after the indicated event is completed.

Company

User

Data Filter - This optional advanced filter requires a working knowledge of proper PxPlus syntax. It can be used only when a 3LE Selection value is specified.

These Process Type restrictions apply.

- The Header option, Launched/Started, should not engage a Data Filter when there has been no document loaded.
- The Delete option should not rely on a corresponding Header or Line Data Filter as the line or document has already been deleted.

Refer to these scenarios for In-Line filter and SMGCTL filter methods of use.

These filter scenarios detail the setup required for the optional advanced Data Filter for the ALERT-3LE (ALC151) alert. This optional advanced filter requires a working knowledge of proper PxPlus syntax. It can be used only when a 3LE Selection value is specified.

In-line filter scenario

These filter restrictions apply.

- May be up to 30 characters in length.
- Must use valid PxPlus syntax and evaluate to True for the alert to be recorded. For example: selecting for customer C100: cvs(h.cust_num$,3)="C100"
- Be specifically tied to the Process Type selected, being either a Header or a Line option.
- When a header option Process Type is selected:
    - the 3LE Header File variable alias is preceded with lower case h. and followed by the dollar sign: h.alias$
    - only 3LE Header file variable aliases may be used
- When a line option Process Type is selected:
    - the 3LE Line File variable alias is preceded with lower case l. and followed by the dollar sign: l.alias$
    - only 3LE Line file variable aliases may be used

SMGCTL filter scenario

These filter restrictions apply.

- Must begin with a lower-case letter: e
- Be equal to or less than 8 characters or digits
- Must correspond at some point to an entered SMGCTL record, which controls the filter process.
- When a new SMGCTL record is created, it must have these entries on the General tab of Search/Inq FM (SMF002). Quotes may be required around the value in some cases.

Field	Value
Primary File	no file
Kno	0

Title	Specify a descriptive title of what this filter SMGCTL record does for you.
Template	no template
Key Eval	no eval
Def Sort Ord	1

These additional new SMGCTL record details apply:

- You can use Data Filter 1 and 2 fields located at the bottom of tabs One-Five.
- To activate and use a disabled tab, specify no file in the Sort File field.
- All Data Filter field values must use valid PxPlus syntax, appropriate h. or l. syntax, and all inclusively must evaluate to True for the alert to be recorded.
- You can use either or both Header file and Line file variable aliases preceded with the appropriate h. or l. syntax and followed by the dollar sign.

Refer to these examples.

Header Process Type

When the Process Type of the tied alert is Header, and Line file variable aliases are used, all records of the Line file tied to that header record are evaluated for the indicated 'true' condition. If any record and other provided conditions are evaluated true, the alert is sent.

This table shows the SMGCTL values required on the One tab of Search/Inq FM (SMF002). If Line file variable aliases are not used in this SMGCTL record, these are not required.

Field	Value
Sort File	the Line file name (e.g. SORSOL)
Template	the Line file's template (eg. "prog/SO/SOSTRN;dim_sorsol")
Fixed Key	the Header file's variable aliases, with correct h. syntax, for the fixed key of the Line file (eg. h.company$+h.doc_num$)

Line Process Type

When the Process Type of the tied alert is Line, and Header file variable aliases are included/used, only the impacted line of the Line file is evaluated for the indicated 'true' condition,

This table shows the SMGCTL values required on the One tab of Search/Inq FM (SMF002). If Header file variable aliases are not used in this SMGCTL record, these are not required.

Field	Value
Sort File	the Header file name (e.g. SORSOLH)
Template	the Header file's template (eg. "prog/SO/SOSTRN;dim_sorsoh")

Fixed Key	the Line file's variable aliases, with correct l. syntax, for the fixed key of the Header file (eg. l.company$+l.doc_num$)

Notice/Memo - This optional text value is displayed in the Notice column of the Alert Control Center (POE410). You can specify specific notes or text of the corresponding alert. There is a 30-character max.

Except the for Notice/Memo, you can subscribe to all of these values.

This program was modified.

Alert Control Center (POE410)

The Alert Information column of the Alert Control Center was modified to include this information: The Process Type code and description are preceded by the date and time of the alert. If the process type is “removal” of a line, the FACTS line number of follows the ‘r’. The Data Filter does not display the user’s subscribed filter value; instead the file name and the file key of the corresponding Process Type of the impacted file are displayed.

ALERT-FM (ALC152)

The ALERT-FM alert is triggered when a file maintenance process occurs via the SME999 driver program. Processes and record changes to files that are outside SME999 driver control do not raise an alert. Alert subscribers can manually close or clear the alert at any time from the Alert Control Center (POE410).

This information is available for the alert.

FM Selection - Optionally specify a valid file maintenance program. For example: SOF930.

Process Type - This table shows the process type options available.

DB Value	Text Value
L	Launched/started (entering program)
O	Opened/pulled (loading doc)
C	Created/updated (header saved/updated)
d	Deleted (deleted doc)
S	Saved/closed (end of doc)
F	finished/exited (leaving program)
A	Audit: added record
R	Audit: removed record
E	Audit: edited record/field

Audit options

The audit options, a, r, and e, are only applicable for file maintenance programs with the Audit settings turned on for the indicated file. Use the Audit>Change Audit Settings For This File FM menu option to activate file auditing. Audit-based alerts indicate that an audit record has been recorded for the indicated situation. If File Auditing is not turned on for the file impacted by the file maintenance, an alert is not raised for the audit Process Types.

All options are recorded post occurrence, after the indicated event is completed.

Company

User

Data Filter - This optional advanced filter requires a working knowledge of proper PxPlus syntax. It can be used only when a FM Selection value is specified.

These Process Type restrictions apply:

- The Launched/Started option should not engage a Data Filter when there has been no document loaded.
- The Delete option should not rely on a corresponding Filter as the record has already been deleted.
- Refer to these scenarios for using the In-Line filter and SMGCTL filter methods.

In-line filter scenario

These filter restrictions apply:

- May be up to 30 characters in length.
- Must use valid PxPlus syntax and evaluate to True for the alert to be recorded. For example: selecting for customer C100: cvs(f.cust_num$,3)=”C100”
- The file maintenance variable alias is preceded with lower case letter f. and followed by the dollar sign: f.alias$

SMGCTL filter scenario

These filter restrictions apply:

- Must begin with a lower-case letter: e
- Be equal to or less than 8 characters or digits
- Must correspond at some point to an entered SMGCTL record, which controls the filter process.
- When a new SMGCTL record is created, it must have these entries on the General tab of Search/Inq FM (SMF002). Quotes may be required around the value in some cases.

Field	Value
Primary File	no file
Kno	0
Title	Specify a descriptive title of what this filter SMGCTL record does for you.
Template	no template

Key Eval	no eval
Def Sort Ord	1

Additional new SMGCTL record details

You can use Data Filter 1 and 2 fields located at the bottom of tabs One-Five. To activate and use a disabled tab, specify no file in the Sort File field. All Data Filter field values must use valid PxPlus syntax, appropriate f. alias syntax, and all inclusively must evaluate to True for the alert to be recorded.

Notice/Memo - This optional text value is displayed in the Notice column of the Alert Control Center (POE410). You can specify specific notes or text of the corresponding alert. There is a 30-character max

Except the for Notice/Memo, you can subscribe to all of these values.

These programs were modified.

Alert Control Center (POE410)

The Alert Information column of the Alert Control Center was modified to include this information: The Process Type code and description are preceded by the date and time of the alert. The Data Filter does not display the user's subscribed filter value, instead the file name and the file key of the corresponding Process Type of the impacted file are displayed.

System Alerts Dashboard (ALE100)

A Description Filter field was added to the System Alerts Dashboard. If your specified filter text is not contained in the description, the line is not displayed.

Infor OS Cloud Enabled integration changes

These key changes were implemented for the Infor OS integration.

Inbox/outbox connection point methodology was modified to connect to the Infor OS interface.

New stored procedures were created to maintain the inbox/outbox tables of a database created on PostgreSQL servers.

Infor's ION Messaging Service (IMS) can also be used to integrate FACTS with ION through RESTAPI services. REST services can be used to transmit both inbound and outbound BODs for FACTS, but only outbound BODs are allowed at this release.

New and modified programs

These programs were created or modified to provide the base framework for connecting to the Infor OS Cloud Enabled (CE).

Infor OS Management FM (SMF951)

A new program, Infor OS Management FM, was created to manage all Infor OS-related settings and values. The SMOSFM file is used to store these values. The General tab contains global settings, such as the Tenant ID, Oagis release, and the connection type, Inbox/Outbox or REST/API. When modifying the connection method from Inbox/Outbox, a warning is displayed if there are any unprocessed records remaining in any database set up for use with Infor OS. Documents may be orphaned. The Inbox/Outbox and IMS tabs contain the necessary values for each integration connection type.

Note: To modify this program, you must check the Disable Background check box on the Settings tab of System Control FM (SMF950).

System Control FM (SMF950)

The ION tab was removed and the fields were relocated to Infor OS Management FM.

Database Definition (DOE400)

A new field, Type, was added to specify the database type: Microsoft SQL Server or PostgreSQL.

Stored Procedure Maintenance (DOF400)

A new Database Type drop box was added for selecting SQL Server or PostgreSQL.

Stored procedure records, specific to PostgreSQL functionality, were added:

1) pgs_facts_clean_inbox, 2) pgs_facts_create_outbox, 3) pgs_facts_get_inbox

Company Control FM (SMF920)

On the Modules Used tab, the ION checkbox was renamed to Infor OS.

New and modified alerts

These alerts were updated and created for the Infor OS integration.

Delivery of XML to Infor OS failure (ALC128)

The Delivery of XML to Infor OS failure, alert code: BK-I2 OUT, which is raised if an outbound BOD XML document was ready for delivery, but something prevented it from being delivered, was expanded to communicate with Infor OS.

Connection error to Infor OS (ALC131)

The Connection error to Infor OS, alert code: BK-I2 CERR, which is raised if the I2 background process attempted to connect but something prevented it from gaining a successful connection, was expanded to communicate with Infor OS.

IMS Connection error (ALC159)

New alert, IMS Connection error, alert code BK-IMS CERR, is raised if the current IMS settings cannot connect to Infor OS. You can access the Alert Control Center to view and optionally dismiss this alert. You must resolve the connection setting issue in Infor OS Management. The logical ID is displayed in the alert. You can subscribe to this value.

Meta Data file updates

Meta data files were updated for country code, SMCTRY, and state code, SMSTCD, tables.

Warehouse Management System

WMS Adjustment Interchange F/M (EWF960) - For a quick transfer via WMS, usage is recorded for the From warehouse (Defect 721564)

For warehouse transfers, users are not to specify QT in in the Whse Trans field on the Set 2 tab of WMS Adjustment Interchange (EWF960). The QT value was causing usage to be erroneously recorded. Existing QT entries will not be replaced during upgrade. Invalid existing QT entries are the responsibility of the EWMS manager/administrator to correct to another code suitable for their business case.

Fixed Defects

This table shows the defects fixed in Infor Distribution FACTS 9.3.2.

Defect Number	Short Description	Linked Incident Number
420734	Cost is not updating with cost discrepancy when in POUPDL - if in POUPDH don't allow cost discrepancy	
430369	Cost Discrepancy for Temp Items?	7136568
435287	(Originally reported in 7.8.3) - Error 2 line 20606 in SAE310	7250929, 7498627, 7916085, 8398112, 14932257
461047	Cost Discrepancy Entry won't update thru Cost Discrepancy Register due to record locking failure	7711585
468580	Documentation for Cost Discrepancy records generated automatically by FACTS	7751644
474863	(Originally reported in 7.8.5) - Performing a Cost Discrepancy against a pre-register PO or Adjustment will not properly update cost	
496377	(Originally reported in 7.8.6) - Cost discrepancy register is ignoring the Cost Change Flag in SORSOL and SOPIND.	8500487
500525	(Originally reported in 7.8.4) - Cost Discrepancy Report not removing orphaned records in ICCSDS	8589294, 13755616
500525	(Originally reported in 7.8.4) - Cost Discrepancy Report not removing orphaned records in ICCSDS	
599213	SO "Record in use by another user" message not displaying the user that has it locked	10700188, 10962963, 11050137, 14106464
616216	Cost Discrepancy Register not updating GL	10971344
660304	Cost Discrepancy for Temporary Items not updated to past SO document	12599382
679034	Job Stream Entry - Changes to Templates are not saved	13315346
700814	Using Cost Factor in Cost Discrepancy Entry creates an endless loop	13929215
704796	API Entry, Orderload, Relation field display issue	14037684
705039	Invalid record causes infinite loop in S1, System Clean Up	14037961

Defect Number	Short Description	Linked Incident Number
705841	Job Costing Shipment for multiple warehouse is not allowed when going back to the order	14059241
706690	Manufacturing variable issues	
706696	Side Bar "Scrolling" issues	
707770	T-Min OP = 0 set in ICF920 doesn't transmit correct data via "Process Warehouse Item Records"	14111190
707774	Message "Date must be after today" from ICU960 "Process Warehouse Item Records" T-Min OP expiration date even though the date entered is greater than the current date	14111190
708162	List Box Right-Click (3LE with Side bar shown) redisplay issues	
708347	System Cleanup - background process results file cleanup	14779192
711008	SF - OrderTotal triggers an Out of Stock notification	14239992
712477	Issue with printing job stream to archive	14255555
713672	Error 80 line 4120 program SMC600	14284614
713678	SO Customer Inquiry, Temp Service button active with Service and Repair turned off	14284821
713798	AP Vendor Listing (APR750) enforcing padding of Beginning/Ending Codes for GL Posting Table filter	
715902	Cannot save changes to Warehouse records.	14315109
719352	Stock Status Report - using Excel Standard layout overwrites rows	14392828
719632	GL Trial Balance Detail Ledger, doesn't print detail for next period entries	14398038
720241	Import Standard Order, un-inventoried item msg "Missing Warehouse Item Record"	14422255
720918	Job stream not running in background	
721564	When doing a quick transfer via WMS, usage is recorded for the FROM warehouse	14209455
721985	Unable to add temporary items via BCC Transfers as opposed to the enhancement notes of FACTS 7.9.0	14471689
725022	Lot item on sales order not disbursed correctly in ICRDST when manually allocating lot quantities	14539402

Defect Number	Short Description	Linked Incident Number
725126	PO Entry Header does not update buyer code when selected from the search window	14545189
727085	Change to BKC609 for Quote status is backwards	14586908
729568	Job Cost Estimate Entry does not use the Cost Type F/M tax settings	14607778
730108	Turbo Token masking the last four digits of the CC with #### in SORSOP	14621611
730713	Warehouse/Item record being validated for un-inventoried items in ICS flags	14649163
730715	Warehouse/Item record being validated for un-inventoried items. Can't delete a warehouse/item record for a stock item if it sees a tied un-inventoried doc	14649163
730862	Incorrectly gets prompted with over commitment when changing price to an existing order	14653639
732120	Automatic Credit Application Register applies credit base on document number instead of date to check oldest invoice	14678808
734028	Contract entry Screen re-sizing issue	14720697
735162	in SO side bar show all relevant quotes except those expired/deleted	14751614
735180	change cust codes - missing branch (ARU910)	
735315	Past order status not filtering	
735536	Error 46 line 640 in ALC119.	14751349
736327	Error 32 line 41075 program SOC504	14784670
737416	Physical Count needs to show committed with showing available/on-hand	
737700	Tab key must be pressed twice to advance to next field when field has a validation routine	14816273

9.3.1 Release Notes

Upgrade path

If upgrading from a version prior to FACTS 6.06, you must first upgrade to version 6.06 then to the 9.3.0 FACTS release.

If upgrading from FACTS versions 6.06 through 7.9.3 to 9.3.1, use the FACTS 9.3.0 upgrade with the 9.3.1 incremental release.

If upgrading from FACTS version 9.3.0, install the 9.3.1 incremental.

FACTS 9.3.1 Application Changes

System-wide changes

Credit Card Control (SME957), Deposit/Payment Entry (SOC718) - SO Doc payment ignoring Transmit to CenPOS settings at company and warehouse level (Defect 689193)

In Credit Card Control (SME957), the Transmit to CenPOS checkboxes, at both the company- (SMCCCF) and the warehouse-level (SMCCCW) were ignored. Transmissions to CenPOS were allowed regardless of the checkbox settings. This occurred in Order Entry, Order Confirmation, Direct Invoice Entry, Credit Memo Entry and Counter Sale Entry.

In Deposit/Payment Entry (SOC718), a new TRANSMIT_CHECK routine was added to check Credit Card Control (SME957) settings to see if transmission to CenPOS is allowed. The TRANSMIT_CHECK routine is a 3-level check to determine these conditions:

- FACTS is setup to use CenPOS
- the Transmit to CenPOS checkbox in Credit Card Control (SME957) is checked at the company level
- the Transmit to CenPOS checkbox in Credit Card Control (SME957) is checked at the warehouse level

If there is no warehouse record in SMCCCW, then the logic forces a fallback to the company level Transmit to CenPOS checkbox value.

MC Planned special orders

In FACTS 9.3.1, you can tie a production or formulation ticket to a sales order line that is backordered and preferred as a build item. Notes functionality was expanded to include bill of materials and formulation tickets and lines. History and past ticket information and notes are now saved to MC BOM/FML files.

Previously Sales Order Entry suite only allowed special orders to be as purchase orders or transfers. A planned special order can be "built in house" MC BOM or formulation tickets instead of acquired via PO or transfer, using Order Entry suite functionality.

The special order can be built in a different warehouse from the sales order line's shipping warehouse. Using the API system, the MC BOM and FML Production Registers (MCR110/MCR210) create transfer tickets for the just built quantity from the indicated 'build warehouse' to the sales order line's shipping warehouse. After normal transfer ticket processing, update the sales order.

In Production Planning Entry and Production Entry programs, planned special order record creation is based on the prompt in the Sugg PO/TR by Type section of the Line Options tab of SO Entry Options F/M (SOF915). When the Sales Order entry programs are evaluating a line item with a back-ordered quantity to determine whether to prompt you to create a planned special-order transaction, the system looks at the item type and uses the SO Entry Option prompt associated with that type.

The planned special-order tie cannot be 'cleared', is not available for editing nor the plan status changed.

The plan record can be processed in these ways:

- Deleted from within the Planning Entry screen
- Deleted from the tied sales order if no ticket is yet created
- Processed through FACTS to completion

Feature demonstration

To see MC planned special orders in action, click this link:

Using planned special orders for production ties

Limitations/Exclusions

These limitations and exclusions apply:

- Credit memos and quotes do not have special order backorder entry capability.
- Only BOM or formulation finished items are available for planned special order ties. BOM or formulation 'built on the fly' items are not special order eligible.

Program Changes

These changes were implemented.

System Management

Note Entry (SME710)

Note Entry functionality was updated to include BOM and formulation header and line notes for production tickets; including note history. The Export/Print note to PO/TR was updated to include MC. When BOM/FML ticket is created, then SO Line note is pulled from OE into the MC ticket and placed at the document level for BOM and at the finished item list box ‘line’ level for FML

System Clean Up F/M (SMF993)

A new Manufacturing tab was added to System Clean Up F/M to specify how long to keep any manufacturing history.

Inventory Control

Warehouse F/M (ICF970)

A new check box, Allow Planned Special Order Builds, was been added to the Multiple Warehouses tab. Allow When selected, Planned Special Order Builds indicates this warehouse allows other warehouses to create a special order coming from or within this warehouse.

Item Inquiry (ICI610)

These views were modified:

Production view

A new column to display the associated SO Doc & line number was added. The column only has value if the inquiry item is a BOM/FML finished item tied to a special order.

Ledgercards and Timeline views

The Line Detail button displays MC ticket inquiry for BOM and formulation tickets if still on file.

IC Code List (ICR790)

A new column was added to the end of the report output to indicate the ‘Valid for MC’ setting.

Sales Orders

SO Entry Options FM (SOF915), Line Options tab

In the Sugg PO/TR by Type section, the drop box options text was expanded to Procurement.

Order Entry suite (Order Entry, Order Confirmation, Invoice Entry, and Counter Sale Entry)

When the Planned Special Order window is displayed from the Order Entry suite programs, new Create options for building the item via Manufacturing Control are available.

Create: Displays the new “M” option to manufacture when applicable.

The new Formula prompt is displayed when Create is “M” and enabled when the item is a formulation item.

The new Build Warehouse prompt is the warehouse in which the Build of the item should take place. This can be the order line's shipping warehouse unless the restocking path is set to a different warehouse. If different from the order line's shipping warehouse, the MC module BOM or Formulation Register build creates an appropriate IC transfer ticket. If the ticket fails to be created, a special-order transfer record is created in ICSTRN. Once the transfer is managed, the order line's quantities are committed.

Line Detail (SOE510) window

The status of the build ticket is displayed.

Manufacturing Control

MC Static Control FM (MCF980)

Two new check boxes were added:

Store Past BOM allows, at the BOM register processing, the storing of all completed BOM document detail within new BOM history files.

Store Past FML allows, at the FML register processing, the storing of all completed FML document detail within new FML history files.

MC NonStatic Control FM (MCF990)

Two new fields were added to display the terminal running the BOM/FML register(s)

Bill of Materials Entry (MCE110) / Finished Item Entry (MCE220)

A new Build Preferred Check Box was added to indicate to build the item when possible by default, when a special order is being entered for a BOM or formula item.

Production Planning Entry (MCE120)/ Production Planning (MCE230)

Two new columns added for Special Order Sales Order Document and Line number.

Note that the special order "Finished Item" is the tie to the special order and is viewed by editing the tied special-order formula line.

Quantities on an order are expressed in Selling UOMs; quantities in MC are expressed in Stocking UOMs. Expect to see quantities reflected in those UOMs, and 1 box in Order Entry programs may equal 10 each in MC programs.

BOM Production Entry(MCE130) / Production Confirmation(MCE140)

Document and line notes are now available. Document and line notes may be toggled to be imported from existing BOMS notes. Notes are included when storing past BOM information.

FML Production Entry (MCE240) / Production Confirmation(MCE250)

Document and line notes are now available. Document and line notes may be toggled to be imported from existing FORM notes. Notes are included when storing past BOM information. Line notes may be toggled to be imported from existing ITEM notes. Line level Ingredient and Packaging notes are also available and can be imported from existing ITEM notes.

Production Entry (MCE240) / (MCE130), Production Confirmation (MCE250)/ (MCE140)

In BOM and Formulation Production Entry and Confirmation programs, special orders display the tied sales order document and line number.

Bill of Materials Inquiry (MCI610) / Formulation Inquiry (MCI620)

The Planned views contains new columns for special order document and line number.

Production Register (MCR110) / (MCR210)

For planned special orders tied to the production tickets, the associated SO document and line number are displayed in the register detail. An IC transfer ticket is created if the special-order ticket's build warehouse is not the same as the sales order line's shipping warehouse. If the transfer ticket fails to be created the fallback is to create an IC special order transfer record in file ICSTRN.

Production Ticket Print (MCP110) / Production Ticket Print (MCP210)

For planned special orders tied to the production tickets, the associated SO document and line number are displayed in the upper right corner.

Bill of Materials Inquiry (MCI610)

Two new views were added to display past planning information.

The Past Planned view displays past planned production in the BOM system for the finished item. Past planned production is displayed in date order and includes the warehouse, units and UM, and status. Click Requirements to display the Production Planning Requirements (MCE121) program.

The Past Production view displays past production tickets for the finished item in summary. Summary information includes ticket number, status (the S column: E-entered, P-printed and C-confirmed), entry date, planned production date, production date (if not confirmed, date is blank), units planned to be produced and actual units produced. Click Line Detail to access Production Detail for the Selected Ticket (MCI613).

The Planned view was updated for planned special orders tied to the production tickets, the associated SO document & line number and whether this item is a build or transfer are displayed.

The Production view was updated to include a special-order indicator.

The General view was updated to indicate whether the item is procurable or preferred to build.

Formulation Inquiry (MCI620)

The Finished Items view was updated to indicate whether the item is procurable or preferred to build.

Bill of Materials Listing (MCR710) / Formula Listing (MCR750)

The report summaries were updated to include whether the item is procurable or preferred to build.

BOM Past Production Report (MCR725)

This new report is available to print a report of all past BOM production tickets.

FML Past Production Report (MCR765)

This new report is available to print a report of all past formulation production tickets.

BOM Requirements Report (MCR730) / Formulation Requirements Report (MCR770)

These reports were updated to use only planned production records with a status for N-Normal/Active.

Production Planning (MCE120) BOM(MCE120)/FML(MCE230) Planning Entry

These programs were updated to include the Special Order function to add a sales order line that is backordered and preferred as a build item.

In the lower portion of the screen you can filter planning records by: date, item number, warehouse, status, and sales order document number.

Special Order Entry (MCE120.S)

This new window is used to tie a BOM production ticket to a sales order line that is backordered and preferred as a build item. This screen is displayed when you click Special Order on the Production Planning Entry (MCE120) screen.

Special Order Entry (MCE230.S)

This new window is used to tie a Formulation production ticket to a sales order line that is backordered and preferred as a build item. This screen is displayed when you click Special Order on the FML Production Planning Entry (MCE230) screen.

Purchase Orders

Buyers Control Center BOM (POE407) / Buyers Control Center FML (POE408)

A new column was added to display special order and line number. A lookup is available to view that document.

Side Bar features

In FACTS 9.3.1 the Side Bar list box options were enhanced to now allow scrolling. Scrolling moves through the items loaded into a particular drop box a page at a time. The ability to scroll back and forth through the pages and go to the first and last page was added. The 9.3.1 incremental release is delivered with some Side Bar drop-box options turned off for scrolling. Those turned on for scrolling are set to limit the Side Bar rows displayed to eight rows per page.

During line entry, Side Bar research functionality is now enabled after the Item field is entered. Limiting, scrolling and double click actions, when available, are also enabled. Drag and Drop during line entry is not allowed.

These changes were also implemented.

- Side Bar scrolling memory allows each item selected in the list box to remember its last Side Bar ‘scrolled page’ displayed. Returning to an item and drop box option which was already viewed returns the Side Bar to the ‘page’ last viewed.
- Side Bar pages are dynamic and represent real time data when using scrolling. Extremely active systems may present dynamically changing pages.
- The Reload button resets all Side Bar pages for all drop box options of the item selected back to page 1.
- The Add line function allows scrolling through header-level Side Bar drop box options.

Feature demonstration

To see Side Bar scrolling and filtering information, click these links:

Side Bar scrolling and filtering user training

Side Bar scrolling and filtering technical training

Warehouse/Item F/M (ICF920) / Purchase Order History (POC414) / Planned Special Order PO Entry (POE110) Lead Time displaying in BCC does not match numbers in drill down (Defect 676013)

The Lead Time displays for receipts indicated different information. The BCC Purchase Order History (POC414) screen display was restricting the receipt lines displayed to be only those lines for the specific vendor. The Lead Time used and displayed in the Buyers Control Center Detail (POE405) screen is the average lead time across all vendors as stored in file ICWHSE.

BCC Purchase Order History (POC414) is a limited view of receipts, focused only on Purchase Order history, while the FACTS programs displaying receipts are showing all modules and types of receipts. To clarify the displayed receipt information, these programs were updated to include a Vendor column for receipts: Warehouse/Item FM – Receipts view, Planned Special Order PO Entry – Inquiry function, and BCC Purchase Order History view.

Service and Repair enhancements

Functionality was enhanced in the Sales Orders and Service and Repair modules.

These enhancements were implemented in Sales Orders:

- In SO Customer Inquiry (SOI610), Past Sales view, temporary service parts are now available by clicking the Temp Service button.
- The SO Past Invoice Report (SOR870) was enhanced to include a Service Information check box was added to allow printing service detail.

These enhancements were implemented in Service and Repair:

- The Preventative Maintenance Entry (SRE516) program was enhanced to allow entry of a specific dates for service, and the same service codes can be used multiple times for each schedule date. Preventative Maintenance Entry can be accessed through Contract Entry (SRE510), Proposal Entry (SRE510), and Contract Template FM (SRF964).
- The Technician Time Report (SRR785) was enhanced to allow filtering by individual service code and an option to print details about work performed. The report was also converted to use the Report Formatter feature.

Changes by Module

Accounts Receivable

AR Static Control FM (ARF988) and UP93INC - Credit check password is prompted in sales order when no password set in AR Static Control F/M (Defect 686214)

In AR Static Control FM (ARF988), the Password field was modified to be a required field. It cannot be left blank. This change ensures that there is an actual password for use during a credit check in Sales Order Entry when the Credit Check field on the Accounting tab of Customer FM (ARF910) is set to "Require Password".

The upgrade process, UP93INC, was also modified to insert a default password of "12345" if the Password field in AR Static Control FM (ARF988) is found to be blank during the upgrade.

General Ledger

Trial Balance Detail Ledger (GLR770) - GL Trial Balance Detail Ledger does not calculate ending balances properly (Defect 694500)

There was an issue where ending balances of current and next periods were not calculated correctly based on the beginning balance and the account activity.

This information clarifies ending-balance calculations:

- The amount entered in Account FM (GLF910) is used as the past-period ending balance. The account activity is based on the ending balance of the period minus the ending balance of the previous period. The Trial Balance Detail Ledger processing reads through the journal entries to calculate the journal activity.
- If the calculated balance, based on journal activity (the beginning balance plus journal activity) does not match the account activity, the ending balance now has an asterisk to denote this.
- For current period activity, the ending balance on the Trial Balance Detail Ledger is the calculated amount from the journal entries plus the last closed period-ending balance, since the current period does not have an official ending balance. If the ending balance in Account F/M does not match the calculated ending balance, an asterisk is shown beside the ending balance.

- For next period activity, the ending balance is calculated by taking the last closed ending balance and adding the current-period journal entries plus the next-period journal entries.

Inventory Control

Item Inquiry (ICI610) / Item Ledgercards Listing (ICR745) - Item Inquiry - Ledgercards - Filter rows (Defect 695128)

New units filtering options were added for item ledger cards in Inventory Control.

In Item Ledgercards Listing (ICR745), a new Units filter option was added to include: equal to, not equal to, greater than or less than zero; register values only; filters ignored; or the default, which is standard filter settings for the item.

In Item Inquiry (ICI610), Ledgercards view, new Units and Type filters were added below the grid. For the Type filter, click Options to select documents to filter by transaction type: Adjustments, Sales, Purchases, Formulation tickets, Item Balancing Register lines, Production tickets, or Warehouse Transfers. For the Units filter, specify the quantity or setting for filtering ledgercards. Options are: equal to, not equal to, greater than or less than zero; register values only; filters ignored; or the default, which is standard filter settings for the item.

Feature demonstration

To see the power of these new filtering options, click this link:

Ledgercards filtering in IC

Review Cycle Setup (ICE560) - BCC not able to show temporary items under the buyer to be notified (Defect 646018)

In FACTS 9.3.1 you can now create review cycle records for temporary items. This allows the Buyers Control Center to process temporary items assigned to a buyer. In Review Cycle Setup, a new Show Zero Item ARPs checkbox is available to display items without a warehouse/item cross reference record for the vendor and/or warehouse ARPs selected. Double click the line in the browser to display the Setup Review Cycle screen where you can assign buyers for temporary items.

In Sales Order Entry, the temporary item is assigned the vendor as set up with a buyer in Review Cycle Setup for the line's warehouse + ARP. The temporary item quantity is backordered. Creating a planned special order is not necessary for the BCC to pull in this backordered temporary item. Temporary items backordered in Sales Order Entry are considered "special orders" in the BCC whether a 'planned special order' is created or not.

System Management

System Control FM (SMF950) - Non-secure Unform communications currently hardcoded in SMC040. Need to make user selectable (Defect 687251)

With the support of Unform v10, in FACTS v9.3, some Unform communications require secure, HTTPS communications. The supporting program, SMC040, that handles this is hard-coded for the non-secure method of communications and is not user-selectable. Changes to the Archiving tab of System Control FM now make the use of secure or non-secure communication methods user-selectable. A new Use Secure URL (HTTPS) checkbox was added. Setting this checkbox ensures that all subsequent Unform communications utilize the HTTPS communication method. Clearing this checkbox, ensure that all subsequent Unform communications utilize the normal, non-secure, HTTP communication method.

Additionally a new command line argument of “-nostatus” was added to the command line that is constructed to check if an archive exists. This new command line argument suppresses the pop-up communications message that is displayed.

The UP93INC upprog contains a new SMS section, defaulting the value to “N”.

User Code F/M (SMF950) - Planned Special Order Override

Special order overrides allow authorized users to manage special order quantities outside of normal FACTS processing that was added to version 9.3.0. Override quantity changes are at the users own risk. Restrictions already in place in FACTS 9.3.0 for editing of sales order or purchase order or transfer documents are not removed.

The override ability applies to quantity and unit changes only. Override ability does not affect system behavior for non-special-order quantities and units from stock. Special-order stock still cannot be used on non-special-orders. Non-special-orders still cannot use special-order stock.

Override privileges provide the ability to create situations where special-order receipt records are over- or under-received. This creates OS type receipt records, even when the special-order receipt remains under- or not utilized. Use the Item Balancing Register to clean up OS type records for over and under situations.

Infor recommends that the override messages are left on for all users with override ability. This allows users to be forewarned that their changes should be carefully considered.

Messages can be displayed to users with override ability to special order quantity changes. This provides knowledge of potential issues. Messages can be turned off, per user with override ability.

Users without override ability will also see the relevant messages when changing quantity if that quantity changes falls outside allowed ranges.

Two new check boxes were added to User Code F/M (SMF950):

- Special Order Override, which is used to indicate whether this user has the ability to modify special order quantities outside of standard processing restrictions.
- Special Order Override Msgs, which is used to indicate whether this user sees alert messages when the quantity entered is a potential conflict with special order management. This check box setting defaults to the Special Order Override check box value.

Feature demonstration

For a deeper understanding of planned special order overrides, click this link:

Planned special order overrides

Integration updates

External warehouse management

The external warehouse management system, Acellos One Warehouse, has been rebranded to Acellos HighJump WMS. User documentation, online help and licenses were updated for this change.

Fixed Defects

This table shows the defects fixed in Infor Distribution FACTS 9.3.1.

Defect Number	Short Description	Linked Incident Number
574257	MCBLOT being created not showing 2 fields	10232231
646018	BCC not able to show temporary items under the buyer to be notified	11553909
661666	Error 13 line 1430 in EMF100	12689489
671415	Order Confirmation not allowing a negative quantity ordered	13115211
671434	Error 47 line 20920 program SOC503	13116805
671445	Credit Memo Reference # gets replaced by the reference # of its past invoice.	13117202
673527	ICWICX - IC_WHSE_ITEM_CROSS_REF - DO Definition for Item_num is incorrect	13172791
674079	Unable to create Returns from BCC if Item is assigned to a Purchasing Line	13186983
675711	Overrides in BCC renders missing vendors when "mass change buyer code" is processed via Review Cycle Setup	13230643
676013	Lead Time displaying in BCC does not match numbers in drill down	13230999
677404	Blair - Error 40 line 14620 POC999 when in 'add' mode - click on the LINES box	13279170
679380	Error 11 line 1160 of program SMR996 in running ICR740 via JobStream	13332910
679613	EFT - Consumer payments when processed with commercial payments have and incorrect total.	13338449
682061	Error 47 line 21120 program GLR771	13379395
683624	Can't apply two separate payments in footer of sales order	13419300
684103	Error 47 line 14230 Program SMC905 - Because Sidebar>Prior Purchase cannot be filtered by warehouse	13465671

Defect Number	Short Description	Linked Incident Number
685036	Over Committed Qty when flags are set to Not allow Over Committed Qty's	13493843
686214	Credit check password is prompted in sales order when no password set in AR Static Control F/M	13507323
686547	Data inconsistency at 9.2.2 - ICMAST Purchasing Line is alpha, but ICPULN is numeric.	13536597
686654	Error 11 line 58200 program BKC605	13536836
686784	Error 47 line 6040 program SOC270 entering a quote	13541135
687251	non-secure Unform communications currently hardcoded in SMC040. Need to make user selectable	
687543	Error 65 line 6060 program CSCPOS.pvc	13566814
688037	Error 42 Line 7040 CSCPOSTKN	
688218	EMV search window pops up each time they use CenPOS interface even if EMV flag is unchecked/not used	13587138
688869	DO Definition issue - Field "Year" in SAFCUS is set to Alpha instead of Numeric	13606317
689069	CenPOS - Error 13 occurred at line 40195 in program SOC508	13610843
689193	SO Doc payment ignoring Transmit to CenPOS settings at company and warehouse level	
691433	Sidebar columns don't sort properly	13649398
691573	Making change to sales order takes document off service hold	13653454
691702	Item Inquiry, Preferences hiding serial/lots drops you to basic 2> prompt	13657124
691986	Inquiry "date order", "Go to" field issue field focus missing and search criteria not working properly	

Defect Number	Short Description	Linked Incident Number
692454	Hard error occurs when CenPOS transmits a scrambled/bad Token Record during a Get Token web request	
692660	Error 14 in SOC755 due to line 5210 having LFO	13684328
694145	Error 15 at 11315 in SMC001 running 'Create .SSI Metadata Files' **Linux ONLY**	13678579
694500	GL Trail Balance Detail Ledger does not calculate ending balances properly	13745187
694868	CRS > Error 14, line 43730, SMC999	13754816
695128	9.3.1 - Item Inquiry - Ledgercards - Filter rows	
695154	Check History Missing when a space is added from the check number field of ARE210	13759173
696135	Error 11 line 24355 program ICF910	13791570
696637	Frozen Usage Method is not being released from Freeze although the expiration date has passed	13792873
697969	GL Detail Ledger goes into Trial Balance library using Unform Archiving	13779261
697992	Error 40 occurred on line 12485 of program SME997	13847076
698182	Wrong case in program for Linux in POC551	13852159
698757	Order Entry Credit Check - Error 11 on line 540 in ARC110	13869255
699031	Background S3 errs for un-opened SMSOFT	
699054	"Template format invalid. Resetting format_layout to standard" message when using custom layout in POR870	13877804
699192	Can't import item onto sales order if temporary item selected for a planned special order	13881913 13951496
699331	Sales order deposit refund memo with "B" in memo does not print the "B" on invoice	13873567

Defect Number	Short Description	Linked Incident Number
700886	IC-PASTPD PO past promise date alert shows up for 999 days past promise when it should be smaller number	13933207
701535	SO Returns Report, sort order by Item, can't enter item longer than 15 characters	13949880
702242	Error 47 line 3560 program ICR211	13968906