



Infor LN Warehousing User Guide for Inventory Blocking

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About this document

Objectives

The objectives of this book are to describe the purpose and the use of inventory blocking.

References

Use this guide as the primary reference for inventory blocking. Use the current editions of these documents for information that is not covered in this guide:

- *User Guide for Warehouses*
- *User Guide for the Inbound Goods Flow U9788 US*
- *User Guide for the Outbound and Shipments Goods Flows U9794 US*
- *User Guide for Warehousing Inspections U9875 US*
- *User Guide for Handling Units U8938 US*
- *User Guide for Project Pegging U9777 US*
- *User Guide for Cycle Counting and Adjustment Orders U9789 US*

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To block and unblock

You can block inbound movement, outbound movement, transfer (receipt, issue), or assembly of items at these inventory levels:

- Zone
- Location
- Lot
- Stock point
- Serialized item
- Handling unit
- peg

At each of these levels, you can implement blocking for one or more transactions. You can also block or unblock inventory at these levels for all transactions at once.

Consequences of manually blocking inventory

If you block inventory of an item for specific transactions, the item's inventory on hold is not increased. The inventory is just blocked for inbound, outbound, assembly, or transshipment.

Manually blocking inventory for all transactions increases the quantity of inventory on hold and decreases the quantity of inventory available.

If you block a:

- Stock point, the application also blocks the serial numbers of the stock point. Stock points are blocked in the Stock Point Blocking (whwmd6130m000) session.
- Lot, the application also blocks the stock points for the lot. Lots are blocked in the Lot Blocking (whwmd6120m000) session.
- Location, the application also blocks the stock points in that location. Zones and locations are blocked in the Zone/Location Blocking (whwmd6110m000) session.
- Zone, the application also blocks the locations in that zone.

- Handling unit, the application also blocks the stock points contained in the handling unit. If the handling units has child handling units, the application blocks the child handling units and the stock points contained in the child handling units. Handling units are blocked in the Handling Unit Blocking (whwmd6140m000) session.

Various manual blockings can affect the same stock points. In such cases, the highest blocked stock-point quantity prevails.

Example

A user manually blocked a location. Among various other items, this location holds 6 pieces of a particular lot. Now another user blocks the lot, which has a total quantity of 25. Of both blocked quantities for the lot, 6 and 25, 25 is the higher quantity. Therefore, the application sets the blocked stock point quantity for the lot to 25.

After blocking a zone or location, lot, handling unit, or stock point, the resulting blocked stock points are displayed in the Blocked Stock Points (whwmd6550m000) session.

You can zoom to the Blocked Stock Points (whwmd6550m000) session from these sessions:

- Zone/Location Blocking (whwmd6110m000)
- Lot Blocking (whwmd6120m000)
- Stock Point Blocking (whwmd6130m000)
- Handling Unit Blocking (whwmd6140m000)

After determining the blockings per stock point, the application generates blockings at the peg and ownership level if project pegged and customer owned or consigned inventory is present. Project peg and ownership information is displayed in the Blocked Stock Point Details (whwmd6152m000) session. In this session, you can manually adjust the peg and ownership blockings.

To block or unblock serialized items by transaction

Use the Serial Blocking by Transaction (whwmd6136m000) session to block or unblock transaction types for serialized items.

Using blockings in the application

Blockings can be specified by warehouse, zone, location, lot, handling unit, and stock point when you:

- Register the receipt of items
- Control the inbound movement of items
- Control the outbound movement of items
- Enter inventory transactions
- Create cycle-count orders
- Create inspection orders

Chapter 2

Blocking Zones and Locations

2

To block or unblock zones and locations

You can block or unblock all transactions on zones and locations using the Zone/Location Blocking (whwmd6110m000) session. In this session, you can partially block, block, or unblock the warehouse inventory. Only locations of types **Bulk** or **Pick** can be blocked using this session.

Use the Location Blocking by Transaction (whwmd6111m000) session to block or unblock specific transactions in an entire location or a part of a location. Use the Zone Blocking by Transaction (whwmd6112m000) to block or unblock transactions at zone level.

Use the Global Zone/Location Blocking (whwmd6210m000) session to block or unblock a range of zones or locations at once for a specific transaction type.

Tip

To block goods that are at a receiving location or quarantine location, neither of which supports stock points, in the Warehouse - Location (whwmd3100s000) session, on the **Transactions** tab, select the **Blocked** check box next to the appropriate transaction type.

Chapter 3

Blocking Lots

3

To block or unblock lots

Use the Lot Blocking (whwmd6120m000) session to block or unblock lots for all transactions.

You must use the Lot Blocking by Transaction (whwmd6121m000) session to block or unblock transaction types for lots.

You can block or unblock a range of lots by transaction using the Global Lot Blocking (whwmd6220m000) session.

Chapter 4

Blocking Stock Points

4

To block or unblock stock points

Use the Stock Point Blocking (whwmd6130m000) session to (partially) block or unblock stock points for all transactions.

To block or unblock specific serialized items in case of a partial blocked stock point, use the Serial Blocking (whwmd6135m000) session.

You can use the Stock Point Blocking by Transaction (whwmd6131m000) session to block or unblock transaction types for stock points.

You can block or unblock a range of stock points by transaction by using the Global Stock Point Blocking (whwmd6230m000) session. Only locations of types **Bulk** or **Pick** can be blocked using these sessions.

Generate NCMR for blocked stock points

LN allows you to generate a non-conformance material report (NCMR) report for blocked stock points in the Stock Point Blocking (whwmd6130m000) session.

The **Report** option in this session is enabled only if the **Non-Conformance Implemented** check box is selected in the Quality Management Parameters (qmptc0100m000) session. This option starts the Non-Conformance Reports (qmncm1100m000) session that:

- Allows you to create a new NCMR report for a stock point.
- Displays the existing NCMR report for a stock point.

If a non-conformance material report (NCMR) exists for a stock point, the **Non-Conforming Material Report** field is checked by LN.

You can modify the quantity or the unit in the Non-Conformance Reports (qmncm1100m000) session if the NCMR **Status** is **Open**. This also applies to the blocking data associated with the NCMR. When

the NCMR **Status** is **Open**, and the serials are added or removed in the Serial Blocking (whwmd6135m000) session, LN modifies the corresponding NCMR report.

LN allows the user to generate a NCMR report blocked by other users. You can also block stock points by specific business partner.

When a stock point is blocked and the item is serialized in inventory, and not all the serials can be blocked, then the stock point can only be blocked partially for the quantity that allows you to block.

When multiple stock points are blocked for the same warehouse, location and the item, but for different lots, LN groups the stock points or lots into a single NCMR report.

Chapter 5

Blocking Handling Units

5

Blocking or unblocking handling units

Use the Handling Unit Blocking (whwmd6140m000) session to partially block, block, or unblock handling units for all transactions.

To view the blocked stock points of a parent handling unit, in the Handling Unit Blocking (whwmd6140m000) session, select the line containing the blocked parent handling unit and from the appropriate menu, select **Blocked Stock Points** to start the Blocked Stock Points (whwmd6550m000) session.

The Blocked Stock Points (whwmd6550m000) session displays the stock points contained in the blocked handling unit. If the blocked handling unit is linked to child handling units, the child handling units are displayed together with the blocked stock points contained in them.

If project peg or ownership details exist for the blocked inventory contained in the handling units, you can view and maintain the project peg or ownership details in the Blocked Stock Point Details (whwmd6152m000) session. You can start this session from the Blocked Stock Points (whwmd6550m000) session.

Chapter 6

Blocking Project Pegs

6

Manual blocking and project pegged inventory

You can manually block a:

- Zone
- Location
- Lot
- Stock point
- Serialized item
- Handling unit

If the inventory contained in these elements includes project pegged inventory, the application uses this sequence to determine the pegs that must be blocked:

1. Block unpegged inventory.
2. Block pegged inventory with excess and partly or entirely block the excess quantity alphabetically.
3. Block pegged inventory with available-to-transfer and partly or entirely block the available-to-transfer quantity alphabetically.
4. Block the pegged inventory without excess and without available to transfer by the latest next requirement date.

The blocked project peg and ownership information is displayed in the Blocked Stock Point Details (whwmd6152m000) session. This session allows you to manually adjust the project peg blockings generated by the application.

When you close the Blocked Stock Point Details (whwmd6152m000) session after adjusting the blocked project peg details, the application checks if the total blocked quantity of the pegs is equal to the blocked quantity of the previously imposed manual peg of type zone/location, lot, handling unit or stock point.

For example, if you specify a manual block of type lot in the Lot Blocking (whwmd6120m000) session and adjust the project pegged quantities in the Blocked Stock Point Details (whwmd6152m000) session, the blocked quantities in the Blocked Stock Point Details (whwmd6152m000) session are not allowed

to exceed the blocked quantities resulting from the blocked lot in the Lot Blocking (whwmd6120m000) session.

The application also allows you to block the project inventory that is located in a project warehouse. You must manually assign the blocked stock to pegs. Consequentially, you can enter blocked quantities only from the peg distribution. The blocked quantity cannot be specified at the header level. Based on the reason type, the blocked quantity is also adjusted in the Project Pegged Inventory (whwmd2560m000) session.

The application allows you to block quantities for multiple reasons and by multiple users. The maximum number of the manually blocked and process blocked quantities is displayed in the Project Pegged Inventory (whwmd2560m000) session. For example, a user blocks a peg for quantity 3 and another user blocks the same peg for quantity 4. The quantity 4 is displayed as the quantity blocked for the peg.

Chapter 7

Including or Excluding Enterprise Planning

7

Inventory blocking including or excluding Enterprise Planning

Enterprise Planning may require information of blocked inventory.

For example, if a lot is blocked for a quick inspection on the packing materials and you expect to lift the blocking shortly, Enterprise Planning does not require this information. On the other hand, if you expect the lot to be withdrawn from inventory, Enterprise Planning must be informed that this lot is no longer part of the available inventory.

In the first case, you must select a reason code of reason type **Inventory Blocking excluding EP**. Consequently, Enterprise Planning ignores this type of blocking and regards the blocked inventory as available inventory. In the latter case, you must select a reason code of reason type **Inventory Blocking including EP**.

Note

You can use reason codes of either reason type for items:

- Without **Order System Planned**
- Used as supplying items or bill of material (BOM) parts for items planned by Enterprise Planning.

Chapter 8

Blocking after Storage Inspection and Cycle Counting

8

Blocking after storage inspection and cycle counting

You can block inventory that result from:

- **Storage inspection orders**
You can block inventory if the items are yet to pass inspection.
- **Cycle-count orders**
You can block inventory if the items are included in a cycle count order. When you process a counting list, the inventory blocked for cycle counting is unblocked by the application.

Note

When the application prints cycle-counting lists, the inventory lines printed on the counting list are automatically blocked, to prevent changes to quantities during cycle counting. When counting lists are processed, the inventory lines are unblocked by the application.

Appendix A

Glossary

A

appropriate menu

Commands are distributed across the **Views**, **References**, and **Actions** menus, or displayed as buttons. In previous LN and Web UI releases, these commands are located in the *Specific* menu.

bill of material (BOM)

A list of all parts, raw materials, and subassemblies that go into a manufactured item and show the quantity of each of the parts required to make the item. The BOM shows the single-level product structure of a manufactured item.

blocking

A function used to block inventory transactions. You can define blockings by zone, location, lot, stock point, or serialized item.

See: reason for blocking

cycle count order

An order generated by LN to count the inventory by stock point at a particular frequency and to subsequently register the counted quantities. A cycle count order consists of an order number and a sequence number indicating the number of counts performed on this order. As a result of the count action, you can adjust the inventory.

handling unit

A uniquely identifiable physical unit that consists of packaging and contents. A handling unit can contain items. A handling unit has a structure of packaging materials used to pack items, or is a part of such a structure.

A handling unit includes the following attributes:

- Identification code
- Packaging item (optional)
- Quantity of packaging items (optional)

If you link an item to a handling unit, the item is packed by means of the handling unit. The packaging item refers to the type of container or other packing material of which the handling unit consists. For example, by defining a packaging item such as Wooden Crate for a handling unit, you specify that the handling unit is a wooden crate.

See: handling unit structure

inspection order

An order used to structure the inspection of products that are purchased, produced, or sold.

inventory on hold

A quantity of goods that is blocked. On-hold inventory can arise when the location, the lot, the zone, or the stock point is blocked. You can block inventory for various reasons, for example, for inspection or cycle-counting.

If a location has been blocked for all transactions, the blocked quantity is equal to the inventory on hand. You cannot partially block the inventory at a location.

Synonym: on-hold inventory

location

A distinct place in a warehouse where goods are stored.

A warehouse can be divided into locations to manage the available space, and to locate the stored goods. Storage conditions and blocks can be applied to individual locations.

lot

A number of items produced and stored together that are identified by a (lot) code. Lots identify goods.

non-conformance report (NCR)

The report that identifies non-conformance of material during QM/warehousing inspection or during the movement of the materials and/or when the material is in stock.

on-hold inventory

See: *inventory on hold* (p. 24)

peg

A combination of project/budget, element and/or activity, which is used to identify costs, demand, and supply for a project.

project warehouse

A warehouse that only stores goods that are used for projects. In contradiction to a normal warehouse goods are administrated for a project and its details. The goods in the default project warehouse represent inventory value. The inventory value of a project warehouse is not part of the project costs. When the goods are transferred to the project, they add to the project costs. A project warehouse can be used by one or more projects.

quarantine location

A type of warehouse location in which goods initially rejected during warehousing inspection or production are stored for further examination to determine their disposition.

receiving location

The location in which the received goods are placed while they await the generation of an inbound advice.

See: inbound advice

serialized item

A physical occurrence of a standard item that is given a unique lifetime serial number. This enables tracking of the individual item throughout its lifetime, for example, through the design, production, testing, installation, and maintenance phases. A serialized item can consist of other serialized components.

Examples of serialized items are cars (Vehicle Identification Number), airplanes (tail numbers), PCs, and other electronic equipment (serial numbers).

stock point

The smallest inventory level that can be registered in LN.

The stock point is defined by the following data:

- Warehouse
- Location: only if you have locations
- Item
- Inventory date: important if you work with LIFO or FIFO
- Lot: only if the item is low volume lot controlled

zone

A part of the warehouse that can be assigned to specific employees or vehicles. Each location can be assigned to a zone.

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