



# Infor LN User Guide for Item Setup

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# About this document

This document describes the process to set up the item data.

## Assumed knowledge

Although you need no detailed knowledge of the LN software to read this guide, general knowledge of the Infor LN functionality will help you understand this guide.

## Related documents

Use this guide as the primary reference for setting up the item data. Use the current editions of these related references for information that is not covered in this guide:

- *User Guide for Sales Master Data U9839 US*
- *User Guide for Purchase Master Data U9817 US*
- *User Guide for Serialized Items U9837 US*
- *User Guide for Site Activation*
- *User Guide for Enterprise Structures*

## How to read this document

This document is assembled from online Help topics.

Text in italics followed by a page number represents a hyperlink to another section in this document.

Underlined terms indicate a link to a glossary definition. If you view this document online, clicking the underlined term takes you to the glossary definition at the end of this document.

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## Item data

Companies can contain multiple business units in different locations and countries. For each location, the logistic and administrative handling of an item can be different. Here are some examples:

- The item is purchased from different suppliers at a different price
- The item is manufactured using different semi-finished products
- The item is produced using different machines
- The item is handled differently on purchase orders, sales orders, or service orders

If a company uses the [multisite](#) functionality, the locations are modeled using [sites](#) and [departments](#) (offices). The items used at these locations must also be set up by site and by office. Consequently, if you use multisite, you must specify the item data both at global (company) level and at local (site, office) level. If you do not use multisite, you specify the item data only at the global level.

## Global and local item data

*Global item data* includes the centrally controlled item data at the company level, such as item code and description, item type, item group, unit of measure, and settings about configuration, customization, unit effectiveness, order system, traceability, pegging, and engineering change control. If you use multisite, you specify which sites and offices can store, buy, make, and sell the item.

*Local item data* can be specified only if you use multisite. It includes the locally controlled item data at the site and office level, such as product group, supply source and all country-specific data. You specify how the item is stored, bought, made, and sold.

Both at global and local level, subentities of the item data can be specified. The item's subentities include the item data that is specific for the various LN packages, such as item sales data, item production data, and item purchase data by site.

### Note

All items that are used in a company are displayed in the [Items \(tcibd0501m000\)](#) overview session.

If you want to maintain the item data only at the global level instead of at the local level, in various item data by site and item data by office sessions, you can indicate that you want to use the global item data for the site or office. Consequently, changes to the item data at company level are synchronized automatically to the site or office level.

## Setting up the item data - multisite active

If your company uses multisite, you specify the item data at the global (company) level and at the local (site, office) level.

This table shows references to topics that outline the item setup for multisite:

Item process flow	See <i>New items in a multisite environment - process flow (p. 9)</i>
Item defaults	See: <ul style="list-style-type: none"><li>■ <i>Setting up item defaults for multisite (p. 9)</i></li><li>■ <i>Item defaults by site (p. 12)</i></li><li>■ <i>Item defaults by office (p. 13)</i></li></ul>
Item data	See: <ul style="list-style-type: none"><li>■ <i>Setting up item data for multisite (p. 14)</i></li><li>■ <i>Item data by site (p. 16)</i></li><li>■ <i>Item data by office (p. 17)</i></li></ul>

## Setting up the item data - multisite inactive

If your company does not use multisite, you specify the item data only at the global level. See *Setting up the item data (p. 19)*.

## Copying the item data

Instead of creating new items based on the item defaults, you can also create new items by copying existing items. See *Copying the item data (p. 21)*.

## Optional item data

Use of some item data is optional, depending on specific situations. See *Optional item data (p. 25)*.

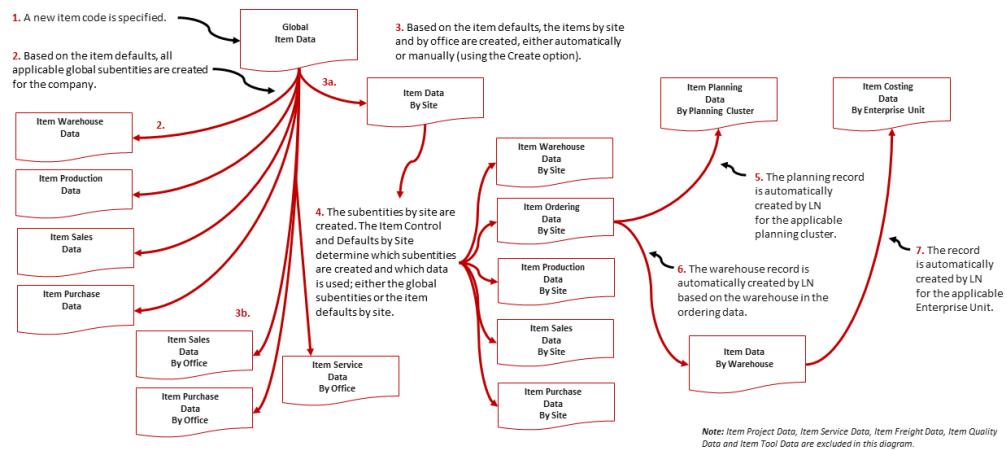
# Chapter 2

## Setting up items (multisite active)

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## New items in a multisite environment - process flow

This diagram shows the overall process flow for creating new item data in a multisite environment:



## Item defaults

### Setting up item defaults for multisite

If you use multisite, the item data includes the *global* item data at the company level and the *local* item data at the site and office level.

You can manually specify the item data, or generate the item data from defaults. If you set up defaults, you can restrict the amount of item data that you must specify each time you add an item. The item

default setup also includes settings for pushing your data from the global level to the local level. At the local level, you can modify the item data that is retrieved from the global level.

## Setup

### Step 1: Segmented item codes

To use segmented item codes, the item code segments must first be set up in the Segmented Domains (ttgfd4122m000) session in Tools. Next, specify the item code segments in the Item Code Segmentation (tcibd0500m000) session.

### Step 2: Item groups

Specify the item groups in the Item Groups (tcmcs0123m000) session. Every item must belong to an item group.

### Step 3: Unit sets

Specify the unit sets for the items in the Unit Sets (tcmcs0106m000) session and link units to the unit sets in the Units by Unit Set (tcmcs0112m000) session.

### Step 4: Default global item data

Set up global item defaults for a combination of item group and item type in the Item Defaults (tcibd0102m000) and Item Defaults (tcibd0502m000) sessions.

Click the buttons in the **Subentities** group box to specify your default global item data also by subentity.

The buttons refer to these subentities and related sessions:

- **Sales**  
Item - Sales Defaults (tdisa0102s000)
- **Project**  
Item - Project Defaults (tppdm0106s000)
- **Ordering**  
Item - Ordering Defaults (tcibd2101m000)
- **Production**  
Item - Production Defaults (tiipd0102m000)
- **Purchase**  
Items - Purchase Defaults (tdipu0102m000)
- **Warehousing**  
Item - Warehousing Defaults (whwmd4101s000)
- **Freight**  
Items - Freight Defaults (fmfmd1101m000)
- **Service**  
Items - Service Defaults (tsmdm2105m000)
- **Quality**  
Items - Quality Defaults (qmptc0117m000)

- **Tool**

Tool - Defaults (titrp0109m000)

**Note:** The availability of default global item data by subentity, which is indicated by a green check mark next to the subentity, does not automatically imply that the global item data by subentity is also created. The global item data by subentity is created only if the **Create** check box is also selected for the subentity in the **Subentities** group box of the Item Defaults (tcibd0502m000) session.

## Step 5: Default local item data

The item defaults can also include local data, such as default sites, sales offices, and service offices. Consequently, in the Item Defaults (tcibd0502m000) session, you can specify the default sites, enterprise units, planning clusters, purchase offices, sales offices, and service offices to link to the previously specified combination of item type and item group.

The Item Defaults (tcibd0502m000) session includes these tabs:

- **Item Control and Defaults by Site**

On this tab, you can specify and view the default sites that are linked to the item type and item group. Click the Go to details button for a line to specify how item data is controlled and defaulted for the site in the Item Control and Defaults by Site (tcibd1552m000) session.

- **Enterprise Units**

Refers to the Item - Costing Defaults (ticpr0108m000) session. On this tab, you can view the default costing data that is generated based on the enterprise unit that is linked to the warehouse in the Item - Ordering Defaults (tcibd2101m000) session. You must manually specify the default **Standard Cost Component Scheme**, the **Surcharges** and the **Landed Costs Set**. You can also specify new default costing data on this tab.

- **Clusters**

Refers to the Items - Planning Defaults (cprpd1110m000) session. On this tab, you can view the default planning data that is generated based on the planning cluster that is linked to the warehouse in the Item - Ordering Defaults (tcibd2101m000) session. You must manually specify the default **Order Horizon** and the **Plan Level**. You can also specify new default planning data on this tab.

- **Purchase Offices**

Refers to the Purchase Offices - Item Defaults (tcibd1165s000) session. On this tab, you can specify and view the default purchase offices that are linked to the item type and item group.

- **Sales Offices**

Refers to the Sales Offices - Item Defaults (tcibd1175s000) session. On this tab, you can specify and view the default sales offices that are linked to the item type and item group.

- **Service Offices**

Refers to the Service Departments - Item Defaults (tcibd1185s000) session. On this tab, you can specify and view the default service offices that are linked to the item type and item group.

To automatically generate the local item data for the linked sites and offices when you specify a new item in the Item (tcibd0501m100) session, select these check boxes in the Item Defaults (tcibd0502m000) session:

- **Create Item by Site Automatically**

- **Create Item by Purchase Office Automatically**
- **Create Item by Sales Office Automatically**
- **Create Item by Service Office Automatically**

## **Step 6: Default item data by site**

Set up default item data by site. See *Item defaults by site* (p. 12).

## **Step 7: Default item data by office**

Set up default item data by office. See *Item defaults by office* (p. 13).

# Item defaults by site and office

## Item defaults by site

To specify the item defaults for the sites that you previously specified in the Item Defaults (tcibd0502m000) session:

### **Step 1:**

Click the Go to details button for a line on the Sites tab of the Item Defaults (tcibd0502m000) session. The Item Control and Defaults by Site (tcibd1552m000) session is started.

### **Step 2:**

In the Item Control and Defaults by Site (tcibd1552m000) session, click the **Item** button to specify the item defaults for a site in the Item Defaults by Site (tcibd1551m000) session. If you do not specify default data for a site in this session, the global item data is used to retrieve default values.

### **Step 3:**

Use the buttons in the **Create Sub Entities and Defaults** group box of the Item Control and Defaults by Site (tcibd1552m000) session to specify your default item data by subentity for a site.

The buttons refer to these subentities and related sessions:

- **Sales**  
Item - Sales Defaults by Site (tdisa0182m100)
- **Ordering**  
Item - Ordering Defaults by Site (tcibd2151m000)
- **Production**  
Item - Production Defaults by Site (tiipd0152m000)
- **Purchase**  
Items - Purchase Defaults by Site (tdipu0182m000)

- **Warehousing**  
Item - Warehousing Defaults by Site (whwmd4109m000)
- **Service**  
Items - Service Defaults by Site (tsmdm2125m100)

### Note

Consider these remarks for item defaults by site:

- When you create a new item, item data by subentity for a site is created only if the **Create** check box is selected for the subentity in the Item Control and Defaults by Site (tcibd1552m000) session. Consequently, the availability of default item data by subentity for a site, which is indicated by a green check mark next to the subentity, does not automatically imply that the item data by subentity is also created for the site.
- If the **Create** check box is selected for a specific subentity in the Item Control and Defaults by Site (tcibd1552m000) session, but the default item data by subentity is not specified for the site (no green check mark), the *global* item data by subentity is used for the site.
- If you select the **Centrally Managed** check box in the Item Control and Defaults by Site (tcibd1552m000) session, it is centrally managed which item data by subentity is created for the site. The **Create** check boxes become disabled for the subentities.
- If a subentity button is disabled in the Item Control and Defaults by Site (tcibd1552m000) session, default item data is not available for the subentity at *global* level. Consequently, you cannot specify the default item data by subentity at *site* level.

### Item defaults by office

To specify the item defaults for the purchase offices, sales offices, and service offices that you previously specified in the Item Defaults (tcibd0502m000) session:

#### Step 1:

Select a record on the **Purchase Offices**, **Sales Offices**, or **Service Offices** tab in the Item Defaults (tcibd0502m000) session.

#### Step 2:

Depending on the office type, click **Item - Purchase Defaults**, **Item - Sales Defaults**, or **Item - Service Defaults** on the appropriate menu of the tab.

These sessions are started:

- **Purchase offices**  
Items - Purchase Defaults by Office (tdipu0182m100)
- **Sales offices**  
Items - Sales Defaults by Sales Office (tdisa0182m000)
- **Service offices**  
Items - Service Defaults by Service Office (tsmdm2125m000)

### Step 3:

Specify item defaults by office in the Items - Purchase Defaults by Office (tdipu0182m100), Items - Sales Defaults by Sales Office (tdisa0182m000), and Items - Service by Site (tsmdm2120m100) sessions.

After defaults are specified for the office in the appropriate item defaults by office session, a green check mark is displayed for the office on the **Purchase Offices**, **Sales Offices**, or **Service Offices** tab in the Item Defaults (tcibd0502m000) session.

#### Note

If item defaults for an office are not specified in the item defaults by office session, the (default) global item data by subentity (purchase, sales, or service) is used to retrieve default values.

## Item data

### Setting up item data for multisite

If you use multisite, the item data includes the *global* item data at the company level and the *local* item data at the site and office level.

You can manually specify the item data, or generate the item data based on defaults. Item defaults also include settings to generate item data at local level based on the data specified at global level. At local level, you can modify the retrieved item data.

#### Setup

### Step 1: Global item data

Specify a new item in the Items (tcibd0501m000) session. Consequently, the Item (tcibd0501m100) session is started in which you can specify your global item data.

You can also set up global item data by subentity. Click the buttons in the **Subentities** group box to specify this data.

The buttons refer to these subentities and related sessions:

- **Sales**  
Item - Sales (tdisa0601m000)
- **Project**  
Item - Project (tppdm0105s000)
- **Ordering**  
Item - Ordering (tcibd2600m000)
- **Production**  
Item - Production (tiipd0601m000)
- **Purchase**  
Item - Purchase (tdipu0601m000)

- **Warehousing**  
Item - Warehousing (whwmd4600m000)
- **Freight**  
Items - Freight Management (fmfmd1100m000)
- **Service**  
Items - Service (tsmdm2100m000)
- **Quality**  
Items - Quality Data (qmptc0118m000)
- **Tool**  
Tools (titrp0101m000)

If you specified default global item data in the Item Defaults (tcibd0502m000) session for the selected item group and item type, the default global item data is automatically populated. You can use the default values or change the values as required.

## Step 2: Local item data

The item data can also include local data, such as sites, sales offices, and service offices. Consequently, in the Item (tcibd0501m100) session, you can specify the sites, enterprise units, planning clusters, purchase offices, sales offices, and service offices to link to the item.

The Item (tcibd0501m100) session includes these tabs:

- **Sites**  
On this tab, you can specify and view the sites that are linked to the item. Click the Go to details button for a line to specify and maintain the item data by site in the Items by Site (tcibd1550m000) session.
- **Enterprise Units**  
Refers to the Item - Costing (ticpr0107m000) session. On this tab, you can view the costing data that is generated based on the enterprise unit that is linked to the warehouse in the Item - Ordering (tcibd2600m000) session. You must manually specify the **Standard Cost Component Scheme**, the **Surcharge** check boxes and the **Landed Costs Set**. You can also specify new costing data on this tab.
- **Clusters**  
Refers to the Items - Planning (cprpd1100m000) session. On this tab, you can view the planning data that is generated based on the planning cluster that is linked to the warehouse in the Item - Ordering (tcibd2600m000) session. You must manually specify the **Order Horizon** and the **Plan Level**. You can also specify new planning data on this tab.
- **Purchase Offices**  
On this tab, you can specify and view the purchase offices that are linked to the item. Click the Go to details button for a line to specify and maintain the item data by purchase office in the Items - Purchase by Office (tdipu0181m100) session.
- **Sales Offices**  
On this tab, you can specify and view the sales offices that are linked to the item. Click the Go to details button for a line to specify and maintain the item data by sales office in the Items - Sales by Office (tdisa0181m000) session.

- **Service Offices**

On this tab, you can specify and view the service offices that are linked to the item. Click the Go to details button for a line to specify and maintain the item data by service office in the Items - Service by Service Office (tsmdm2120m000) session.

If you specified default global item data in the Item Defaults (tcibd0502m000) session for the selected item group and item type, along with the creation of the global item data, local item data can be generated for the sites and offices specified in the Item Defaults (tcibd0502m000) session.

**Note**

- Item by site data is generated based on the defaults that are specified for the site in the Item Control and Defaults by Site (tcibd1552m000) session. See: *Item defaults by site* (p. 12).
- Item by office data is generated based on the defaults that are specified for the offices, for example, in the Items - Purchase Defaults by Office (tdipu0182m100) and Items - Sales Defaults by Sales Office (tdisa0182m000) sessions. See: *Item defaults by office* (p. 13).

### **Step 3: Item data by site**

Set up item data by site. See *Item data by site* (p. 16).

### **Step 4: Item data by office**

Set up item data by office. See *Item data by office* (p. 17).

## Item data by site and office

### Item data by site

To specify the item data for the sites that you previously specified in the Item (tcibd0501m100) session, click the Go to details button for a line on the Sites tab in the Item (tcibd0501m100) session. The Items by Site (tcibd1550m000) session is started.

You can click the buttons in the **Subentities** group box to specify your item data also by subentity for a site.

The buttons refer to these subentities and related sessions:

- **Sales**  
Items - Sales by Site (tdisa0181m100)
- **Ordering**  
Item - Ordering by Site (tcibd2150m000)
- **Production**  
Item - Production by Site (tiipd0151m000)
- **Purchase**  
Items - Purchase by Site (tdipu0181m000)
- **Warehousing**  
Item - Warehousing by Site (whwmd4104m000)

- **Service**  
Items - Service by Site (tsmdm2120m100)
- **Planning**  
Items - Planning (cprpd1100m000)

For the sites that are linked to the selected item group and item type in the Item Defaults (tcibd0502m000) session, item by site data can also be generated when you specify a new item. Generation of the item data is based on the local item defaults specified for the sites in the Item Control and Defaults by Site (tcibd1552m000) and Item Defaults by Site (tcibd1551m000) sessions.

The **Create Item by Site Automatically** check box in the Item Defaults (tcibd0502m000) session determines the generation method:

- If the check box is selected, local item data is generated automatically for all linked sites.
- If the check box is cleared, you must manually create local item data for a site. Use the **Create Items by Site** command on the appropriate menu of the Sites tab in the Item (tcibd0501m100) session.

### Note

Consider these remarks for item data by site:

- If item defaults for a site are not specified in the Item Defaults by Site (tcibd1551m000) session, the global item data is used to retrieve default values.
- If the **Use Global Item** check box is selected in the Items by Site (tcibd1550m000) session, the global item data is used for the site.
- When you create a new item, item data by subentity for a site is generated only if the **Create** check box is selected for the subentity in the Item Control and Defaults by Site (tcibd1552m000) session.
- If the **Create** check box is selected for a specific subentity in the Item Control and Defaults by Site (tcibd1552m000) session, but the default item data by subentity is not specified for the site (no green check mark), the *global* item data by subentity is used for the site.
- If you select the **Centrally Managed** check box in the Item Control and Defaults by Site (tcibd1552m000) session, it is centrally managed which item data by subentity is created for the site. The **Create** check boxes become disabled for the subentities.
- If a subentity button is disabled in the Item Control and Defaults by Site (tcibd1552m000) session, item data is not available for the subentity at *global* level. Consequently, you cannot specify the item data by subentity at *site* level.

### Item data by office

To specify the item data for the purchase offices, sales offices, and service offices previously specified in the Item (tcibd0501m100) session, click the Go to details button for a line on the **Purchase Offices**, **Sales Offices**, or **Service Offices** tab in the Item Defaults (tcibd0502m000) session.

Depending on the office type, these sessions are started:

- **Purchase offices**  
Items - Purchase by Office (tdipu0181m100)

- **Sales offices**

Items - Sales by Office (tdisa0181m000)

- **Service offices**

Items - Service by Service Office (tsmdm2120m000)

For the offices that are linked to the selected item group and item type in the Item Defaults (tcibd0502m000) session, item data can also be generated when you specify a new item. Generation of the item data is based on the local item defaults specified for the offices in the Items - Purchase Defaults by Office (tdipu0182m100), Items - Sales Defaults by Sales Office (tdisa0182m000), and Items - Service Defaults by Service Office (tsmdm2125m000) sessions.

The **Create Item by Purchase Office Automatically**, **Create Item by Sales Office Automatically**, and **Create Item by Service Office Automatically** check boxes in the Item Defaults (tcibd0502m000) session determine the generation method:

- If the check boxes are selected, local item data is generated automatically for all linked offices.
- If the check boxes are cleared, you must manually create local item data for an office. Use the **Create Items by Purchase Office**, **Create Items by Sales Office** and **Create Items by Service Office** commands on the appropriate menu of the relevant tabs in the Item (tcibd0501m100) session.

#### Note

Consider these remarks for item data by office:

- If item defaults for an office are not specified in the item defaults by office sessions, the (default) global item data by subentity (purchase, sales, or service) is used to retrieve default values.
- If the **Use Global Item Sales** check box is selected in the Items - Sales by Office (tdisa0181m000) session, the global item sales data is used for the sales office.
- If the **Use Global Item Service** check box is selected in the Items - Service by Service Office (tsmdm2120m000) session, the global item service data is used for the service office.
- The usage of the global item purchase data cannot be set for the purchase office. You can select the **Use Global Item Purchase** check box only for the item purchase data by site in the Items - Purchase by Site (tdipu0181m000) session.

# Chapter 3

## Setting up items (multisite inactive)

3

### Setting up the item data

This topic outlines the item setup for companies that do not use [multisite](#).

To specify the item data:

#### **Step 1: Segmented item codes**

To use [segmented](#) item codes, the item code segments must first be set up in the Segmented Domains (ttgfd4122m000) session in Tools. Next, specify the item code segments in the Item Code Segmentation (tcibd0500m000) session.

#### **Step 2: Item groups**

Specify the [item groups](#) in the Item Groups (tcmcs0123m000) session. Every item must belong to an item group.

#### **Step 3: Unit sets**

Specify the [unit sets](#) for the items in the Unit Sets (tcmcs0106m000) session and link units to the unit sets in the Units by Unit Set (tcmcs0112m000) session.

#### **Step 4: Default item data**

Specify default item data for items of a specific item type within each item group in the Item Defaults (tcibd0102m000) session. If you set up defaults, you can restrict the amount of item data that you must specify when you add items.

You can also specify default item data by subentity in separate sessions. For example, default sales item data in the Item - Sales Defaults (tdisa0102s000) session and default item ordering data in the Item - Ordering Defaults (tcibd2101m000) session. You can indicate whether you want to create the item data by subentity, based on the subentity defaults, when you add an item.

## Step 5: Item data

Specify the item data for each item in the Items (tcibd0501m000) session. If you specified default item data for the selected item group and item type, the default data is automatically populated. You can use the default values or change the values as required.

## Step 6: Item data by subentity

Depending on the item type, item data by subentity is or can be specified in these sessions:

- **Warehousing**  
Item - Warehousing (whwmd4600m000)
- **Planning**  
Items - Planning (cprpd1100m000)
- **Costing**  
Item - Costing (ticpr0107m000)
- **Quality**  
Items - Quality Data (qmptc0118m000)
- **Ordering**  
Item - Ordering (tcibd2100m000)
- **Sales**  
Item - Sales (tdisa0601m000)
- **Production**  
Item - Production (tiipd0101m000)
- **Purchase**  
Item - Purchase (tdipu0601m000)
- **Project**  
Item - Project (tppdm0105s000)
- **Service**  
Items - Service (tsmdm2100m000)
- **Freight**  
Items - Freight Management (fmfmd1100m000)
- **Tool**  
Tools (titrp0101m000)

## Copying the item data

Instead of creating new items based on the item defaults, you can also create new items by copying existing items.

These copying scenarios are available:

- Copy an item
- Copy an item within a site
- Copy an item within an office
- Copy an item from one site to another
- Copy an item from one office to another
- Copy all items from one site to another

### Copy an item

You can use the Copy Item Data (tcibd0205m000) session to copy a source item to a new (target) item. All global item data of the source item is copied, including the global item data by subentity, such as the item-sales or item-production data.

If you select the **Items by Site and Items by Office** check box in the Copy Item Data (tcibd0205m000) session, all local item data (by site and office) of the source item is also copied, including the local item data by subentity.

### Copy an item within a site

Within a specific site, you can use the Copy Item Data by Site (tcibd1250m000) session to copy the item by site data of a source item to a target item. The target item for which the item by site data is created, must be available in the Items (tcibd0501m000) session.

All item by site data of the source item is copied, including the item data by subentity for the site.

You can start the Copy Item Data by Site (tcibd1250m000) session standalone, or from the Items by Site (tcibd1550m000) session by selecting a record and then clicking the **Duplicate** button.

To copy only the item-purchase, item-sales, or item-service data within a site:

1. Sort the view by Item in the Items - Purchase by Site (tdipu0181m000), Items - Sales by Site (tdisa0181m100), or Items - Service by Site (tsmdm2120m100) sessions.
2. Select the sites to which you want to copy the item data.
3. Click the **Copy records from one group to another** button.  
One of these sessions is started:
  - Copy Items by Site (tdgen0281m000), for item-purchase and item-sales data.
  - Copy Items - Service by Site (tsmdm2280m000), for item-service data.
4. In one of these copy sessions, select a target item to which to copy the item by site data of the source item.

## Copy an item within an office

Within a specific office, you can copy the item by office data of a source [item](#) to a target item. The target item for which the item by office data is created, must be available in the Items (tcibd0501m000) session.

To copy item data within an office:

1. Sort the view by Office in the Items - Purchase by Office (tdipu0181m100), Items - Sales by Office (tdisa0181m000), or Items - Service by Service Office (tsmdm2120m000) sessions.
2. Select the item record whose data you want to copy.
3. Click the **Duplicate** button.
4. Select a target item from the Items (tcibd0501m000) session to which the item by office data of the source item is copied.

Alternatively, to copy an item within an office:

1. Sort the view by Item in the Items - Purchase by Office (tdipu0181m100), Items - Sales by Office (tdisa0181m000), or Items - Service by Service Office (tsmdm2120m000) sessions.
2. Select the offices to which to copy the item data.
3. Click the **Copy records from one group to another** button.  
One of these sessions is started:
  - Copy Items by Office (tdgen0281m000), for purchase offices and sales offices.
  - Copy Items - Service by Service Office (tsmdm2280m000), for service offices.
4. In one of these copy sessions, select a target item to which to copy the item by office data of the source item.

## Copy an item from one site to another

You can copy an item from a source site to a target site. The source item whose item data is copied, must be available in the Items by Site (tcibd1550m000) session. The target site for which the item by site data is created, must be available in the Sites (tceomm0150m000) session. All item by site data of the source item is copied, including the item data by subentity for the site.

To copy an item from one site to another:

1. Select an item record in the Items by Site (tcibd1550m000) session.
2. Click **Copy Item to Site** on the appropriate menu of the Items by Site (tcibd1550m000) session.
3. Specify your target site data in the Copy Item to Site (tcibd1251m000) session and click **Copy**.

#### Note

You can also start the Copy Item to Site (tcibd1251m000) session standalone to copy an item from one site to another. In this case, you must manually specify your source and target data. The data is not populated.

To copy only the item-purchase, item-sales, or item-service data from one site to another:

1. Sort the view by Site in the Items - Purchase by Site (tdipu0181m000), Items - Sales by Site (tdisa0181m100), or Items - Service by Site (tsmdm2120m100) sessions.
2. Select the item records whose data you want to copy.
3. Click the **Copy records from one group to another** button.  
One of these sessions is started:
  - Copy Items by Site (tdgen0281m000), for item-purchase and item-sales data by site.
  - Copy Items - Service by Site (tsmdm2280m000), for item-service data by site.
4. In one of these copy sessions, select the target site to which to copy the item data.

## Copy an item from one office to another

You can copy item by office data from a source office to a target office. The target office for which the item by office data is created, must be available in the Purchase Offices (tdpur0112m000), Sales Offices (tdslo0512m000) or Service Offices (tsmdm1100m000) sessions.

To copy an item from one office to another:

1. Sort the view by Office in the Items - Purchase by Office (tdipu0181m100), Items - Sales by Office (tdisa0181m000), or Items - Service by Service Office (tsmdm2120m000) sessions.
2. Select the item records whose data you want to copy.
3. Click the **Copy records from one group to another** button.  
One of these sessions is started:
  - Copy Items by Office (tdgen0281m000), for purchase offices and sales offices.
  - Copy Items - Service by Service Office (tsmdm2280m000), for service offices.
4. In one of these copy sessions, select the target office to which to copy the item data.

## Copy all items from one site to another

You can copy all items from a source site to a target site. The source items whose item data is copied, must be available in the Items by Site (tcibd1550m000) session. The target site for which the item by

site data is created, must be available in the Sites (tcemm0150m000) session. All item by site data of the source items is copied, including the item data by subentity for the site.

To copy all items from one site to another:

1. Start the Items by Site (tcibd1550m000) session.
2. Click **Copy Item to Site** on the appropriate menu of the Items by Site (tcibd1550m000) session. Do not select any record.
3. Specify the target site data in the Copy Item to Site (tcibd1251m000) session and click **Copy**.

**Note**

You can also start the Copy Item to Site (tcibd1251m000) session standalone to copy all items from one site to another. In this case, you must manually specify your source and target data. The data is not populated.

This chapter provides a summary of optional item-data processes. Detailed information can be found in the Online Help for the referenced sessions and topics.

## Optional item data

Use of some item data is optional, depending on specific situations.

### Alternative items

Some types of items can easily be replaced by similar items with a different item code, for example, when an item is not immediately available or was replaced. You can use the Alternative Items (tcibd0505m000) session to specify which items can replace other items.

For more information, refer to Defining alternative and replacement items.

### Date-effective supply source

You can specify an item's default supply source in the Items (tcibd0501m000) and Item Defaults (tcibd0102m000) sessions.

You can temporarily change the supply source of **Purchased**, **Manufactured**, or **Product** items in the Date-Effective Supply Source (tcibd0510m000) and Date-Effective Supply Source by Site (tcibd1155m000) sessions.

For more information, refer to Date-effective supply source.

### Equipment items

To use equipment items, you must specify the items in the Equipment (tppdm0512m000) or Project Equipment (tppdm6512m000) sessions. After specification, they are displayed in the Items (tcibd0501m000) session.

## Item code systems

In addition to your company's item codes, you can identify items by other item codes, for example, the item codes that your business partners use. Use these sessions to specify the other item codes and link them to your items:

- [Item Code Systems \(tcibd0106m000\)](#)
- [Item Code System - Items \(tcibd0104m000\)](#)

## Item grouping data

You can group items in many ways and for various purposes. For more information, refer to [Item grouping data](#).

## Item signals

You can link [signals](#) to items in the Item Signals (tcmcs0118m000) session. For more information, refer to [Using signals](#).

## List items

You can set up [list items](#) to speed up the order processing and order entry of repetitive sales orders. You can use product lists to define the composition of a product in terms of other products and/or lists.

For more information, refer to [List items](#).

## Manufacturer's items

You can set up the item data to buy items that can be manufactured by alternative manufacturers.

For more information, refer to [Purchasing manufacturer's items](#).

## Mass change of item assignments

You can use the Mass Change Item Assignments (tcibd0204m000) session to specify or change assignments for multiple items at once. For example, you can reassign a range of items from buyer A to buyer B, or you can assign all the unassigned items to buyer B.

For ranges of item groups and items you can specify or change these assignments:

- [Buyer](#)
- [Planner](#)
- [Shop floor planner](#)
- [Routing group](#)

## Seasonal pattern for safety stock and demand

You can link seasonal patterns for safety stock and forecast (demand) to items. The seasonal pattern indicates the expected fluctuations in sales. For more information, refer to Seasonal pattern for safety stock and demand.

## Serialized items

If the item is a serialized item, you can use the Serialized Items (tcibd4501m000) session to view serial numbers that were automatically generated or manually specified. You can use the Mask by Item/Item Group (tcibd4505m000) session to define the masks that LN uses to generate serial numbers.

For more information, refer to Overview of serialized items.

Optional data

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# 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.

### buyer

The employee of your company who is the contact to the concerned buy-from business partner. The buyer is also known as the purchasing agent.

### default supply source

The source that supplies an item by default. You can use purchase orders or schedules, production orders or schedules, assembly orders, or warehousing orders to supply an item.

The default supply source determines what type of order is used to supply the item, but in general, you can override the default and specify an alternate source.

### department

A company's organizational unit that carries out a specific set of tasks, for example, a sales office or a purchase office. Departments are assigned number groups for the orders they issue. The department's enterprise unit determines the financial company to which the financial transactions that the department generates are posted.

### enterprise unit

A financially independent part of your organization that includes entities such as departments, work centers, warehouses, and projects. The enterprise unit's entities must all belong to the same logistic company, but a logistic company can contain multiple enterprise units. An enterprise unit is linked to a single financial company.

When you carry out logistic transactions between enterprise units, the resulting financial transactions are posted to the financial companies to which each enterprise unit is linked.

## equipment item

Reusable items used to produce or to ship goods for a project. Equipment is not consumed while the project is carried out. Equipment can be internally owned or externally rented. Equipment items can range from tools such as electric drills and wheelbarrows, to machines, large cranes, trucks, tug boats, and so on.

## item

The raw materials, subassemblies, finished products, and tools that can be purchased, stored, manufactured, and sold.

An item can also represent a set of items handled as one kit, or which exist in multiple product variants.

You can also define nonphysical items, which are not retained in inventory but can be used to post costs or to invoice services to customers. The examples of nonphysical items:

- Cost items (for example, electricity)
- Service items
- Subcontracting services
- List items (menus/options)

## item group

A group of items with similar characteristics. Each item belongs to a particular item group. The item group is used in combination with the item type to set up item defaults.

## item type

A classification of items used to identify if the item is, for example, a generic item, a service item, or an equipment item. Depending on the item's type, certain functions will only apply to that item.

## list item

A type of item that consists of multiple components. The components can also be managed and ordered separately. The type of list item (kit, menu, options, or accessories) indicates how the components are related.

List items are used to speed up the order-entry process. The order lines for a list item can contain main items or components.

## mask

A template that specifies the structure of an identification code. A mask is used to generate the identifier for a shift when it is generated through either the Update Calendar Working Hours (tcccp0226m000) session.

See: mask segment

**multisite**

Refers to the management of multiple sites within a single (logistic) company.

In a multicompny structure, which includes several companies, multisite applies to each of the logistic companies.

**planner**

The employee or department responsible for planning the production, purchase and distribution of items. The planner takes into account the inventory levels, availability of materials, and capacities of resources, and reacts on signals such as rescheduling messages that LN generates.

**planning cluster**

An object used to group warehouses for which the inbound and outbound flow of goods and materials is planned collectively. For this purpose, the demand and supply of the warehouses of the planning cluster is aggregated. Within a planning cluster one supply source is used, such as production, purchasing or distribution.

If multisite is implemented, a planning cluster must include one or more sites. The site or sites include the warehouses for which the planning processes are performed.

**purchase office**

A department in your organization that is responsible for buying the materials and services required by your organization. You assign number groups to the purchase office.

**routing group**

A group of items with similar routing attributes, for example, the same work center, routing operation, BOM, and so on. A routing group is defined by the user as a selection criterion for production orders.

**sales office**

A department that is identified in the company business model to manage the business partner's sales relations. The sales office is used to identify the locations that are responsible for the organization's sales activities.

**seasonal pattern**

Seasonal patterns define the fluctuation of certain values, such as the expected usage or demand of an item in the course of a year. These values serve as parameters in forecast and advice.

## segmentation

A subdivision of the item code in different logical parts, called segments.

These segments are visible in the sessions as separate fields. Examples of segments are:

- Project segment
- Cluster segment
- Item identification

## 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).

## service office

A department clearly identified within the company business model to manage the services provided to a customer. The service office is used to identify the locations that are responsible for the service activities within the organization.

## shop floor planner

The person responsible for printing, (re)scheduling and releasing production orders and managing workloads.

## signal

A warning message displayed if you enter or select an item to which a signal is linked. Item signals can also be used to block the issue and/or requisition of items.

### **Business-partner signal**

A warning message displayed if you select a business partner to whom a signal is linked.

## site

A business location of an enterprise that can maintain its own logistical data. It includes a collection of warehouses, departments and assembly lines at the same location. Sites are used to model the supply chain in a multisite environment.

These restrictions apply to sites:

- A site cannot cross countries. The warehouses and departments of the site must be in the same country as the site.
- A site is part of a planning cluster. Consequently, all warehouses and work centers of a site must belong to the same planning cluster.
- A site is linked to one logistic company.

You can link a site to an enterprise unit or an enterprise unit to a site.

If an enterprise unit is linked to a site, the entities of the site belong to the enterprise unit. Conversely, if a site is linked to an enterprise unit, the entities of the enterprise unit belong to the site.

## unit set

A group of unit codes that can be linked to standard or customized items, or to item defaults. In a unit set, you can indicate the physical quantities that can be used for the item, in which modules, and for what purposes.



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