

Run Instructions

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About this document

How to read this document

Chapter 1

Introduction to Infor ERP LX

1

Overview of Infor ERP LX

This topic contains information that pertains to all applications of the Infor ERP LX product. This information enables you to perform the following tasks:

- Navigate through menus and screens
- Specify information in the fields on the screens
- Use the screen actions
- Access the online help text
- Become familiar with terms used throughout Infor ERP LX

Navigation

The features described in the following paragraphs help you navigate within and between Infor ERP LX screens and programs quickly and easily.

Menus

Use Infor ERP LX menus to choose individual programs to process or view information. You can call individual applications directly from any menu.

Dates

Infor ERP LX includes full support for dates up to and beyond the year 2000. Although most date fields display six characters, Infor ERP LX stores the date as eight characters to include century information. Use Company Name and Date Format, SYS820, in the System Parameters Generation program, SYS800, to configure century dates and specify dates beyond 1999.

Attention key and quick access icon

The character-based user interface uses the attention key to directly access other programs, menus, and applications. On an Infor ERP LX screen, press the Esc key.

The Webtop user interface uses the Quick Access icon to directly access programs. On an Infor ERP LX screen, click the Quick Access icon.

You must have security authorization to use these features.

Look-up features

On the character-based user interface, a plus sign (+) indicates a prompt-capable field. Use F4 to display a look-up screen.

On the Webtop user interface, an arrow indicates a prompt-capable field. Click the arrow to display a look-up screen.

Most screens called from inquiry programs allow you to search for alphanumeric strings.

Remembered keys

Infor ERP LX remembers certain key values, such as item number, salesperson, or container, in your workstation memory as you process information in certain programs. You can assign one of the following values to each field:

- 0. Infor ERP LX automatically retrieves this value from remember key memory. Infor ERP LX updates this value on a continual basis.
- 1. Infor ERP LX automatically retrieves the value you specify in Display Remembered Keys, SYS080. It does not update the value from any other program.
- 2. Infor ERP LX does not retrieve or update remembered key fields.

Use the Display Remembered Keys program, SYS080, to set up remembered keys.

Standard online help features

Many Infor ERP LX programs display generic help text. Use F1 from within a field on the character-based user interface. Click the Show/Hide Help icon on the Webtop user interface. This generic help text includes help for standard line actions, standard screen actions, which are also called function keys or F keys, the run time parameter, and some screens types.

The information in the generic help text for line actions and screen actions in this document is not included in the help text for individual Infor ERP LX programs and screens. If a line action or screen action other than those defined in the generic help text occurs in a program, the help text for that program describes the specific action.

Additional generic help text is stored in the SSARUNHT document for users of the character-based UI. You can print this document and the individual application run instructions, SSARUN01, SSARUN02, and so on, from the DOC menu on the IBM(R) iSeries(TM) in the character-based user interface.

Generic help text for line actions

Line actions

The following line actions are valid in numerous screens. They have the functions described in the following sections.

1=Create

Specify Create on the prompt line and a value in at least one key field to add new information to the file. The system displays maintenance screens on which you can specify the new data. The system prints the new data on the audit report.

Note: You cannot specify Create next to existing data.

1=Select

On a prompt screen, specify 1 to return the selected data to the original screen.

2=Revise

Specify Revise to change the information for a line. Specify 2 and a value in at least one key field or specify 2 next to a line. The audit report lists the change. If you specify Revise next to a line with inactive information, the system reactivates the information.

3=Copy

Specify Copy to copy existing information. You can specify 3 and a value for at least one key field or you can specify 3 next to a line. The system displays a maintenance screen on which you can specify new data and change existing data.

4=Delete

Specify Delete to deactivate the information on a line. You can specify 4 and a value in the key fields or you can specify 4 next to the line to delete. Use Revise to reactivate deleted information.

5=Display

Specify Display to view information. You can specify 5 and a value in the key fields or you can specify 5 next to a line.

6=Print

Specify Print to print information on the audit trail. You can specify 6 and a value in the key fields or you can specify 6 next to a line.

8=Position To

Specify Position To to move a line to the top of the list. You can specify 8 and a value in the key fields or you can specify 8 next to a line. The system repositions the list to begin with the requested line or, if the line does not exist, to the line that is next in sequence.

After you use the Position To feature, you can page down or you can use the Position To action with a different value, but you cannot page up. You can return to the top of the list if you specify Position To but do not specify a value in the key fields on the prompt line. On a prompt screen, display details matching the information you specified.

10=Search

On the top line of a prompt screen, use 10 and known field data to locate specific information.

Additional line actions

If a program contains additional line actions, see the line actions help text in that specific program for descriptions of those line actions.

Generic help text for screen actions

Many screen actions, also called F keys, perform the same function for every program or screen in Infor ERP LX. Definitions for these screen actions follow.

Enter

Proceed to the next screen of a maintenance program. On the final screen, press Enter to update the file and return to the first screen of the program for additional maintenance activity.

Enter

Validate data in a screen. This function of Enter generally occurs in transaction programs that have an F6=Accept screen action, which saves the data on the screen.

Enter

Send the output from a report or listing program to an output queue for processing.

F1=Help

Display help text. This screen action applies to the character-based user interface only.

F3=Exit

Exit a program and do not record, update, or print the information you specified on the program screens.

F4=Prompt

Display a pop-up screen that lists existing values for the field. A plus (+) character denotes a prompt-capable field in the character-based user interface. In the Webtop user interface, the prompt -capable field has a small arrow that points to the right .

F5=Refresh

On a list screen, redisplay the screen to check the status of an executed function. On a maintenance screen, redisplay the original values on the screen.

F6=Accept

Accept your changes and exit the program.

F7=Backward

Display previous lines, that is, those alphanumerically closer to A or those with earlier dates.

F8=Forward

Display additional lines, that is, those alphanumerically closer to Z or 9, or those with later dates.

F11=Fold

Display a folded view of the screen that contains additional information. Use F11 again to return the screen to its previous format.

F12=Cancel

Return to the previous screen and do not save values you specified on this screen. If you use F12 to return to a selection screen in a maintenance program, you cancel changes you made to any screens in the program.

F23=More Actions

Display additional line actions. If a screen has many screen actions, you may need to press F24 to see that there is an F23 action, which indicates that additional line actions are available.

F24=More Keys

Display additional function keys.

Generic help text for standard screens

Several categories of screens have identical functionality, though the content differs. These types of screens are explained in the following sections.

Generic help text for list screens

Many Infor ERP LX programs contain screens with lists of information to specify for maintenance or inquiry. You have two options to specify the information to process on a list screen:

- Use the Act field and the key fields that appear at the top of the list.
- Specify a line action in the Act field of the line with the information you want to process.

After you make your entries, press Enter to perform the line action.

Generic help text for filter screens

Some Infor ERP LX programs feature a filter screen, which you can access with F13. The filter screen enables you to filter the data to display. For example, if you use F13 in Customer Master Maintenance, ACR100, you can display all records by customer number or only active records, either by customer number or by customer name. You can also specify a sort or sequence.

Generic help text for the run time parameter

Run Time Parameter (1,0):

Specify interactive to process the data in real time or batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Infor ERP LX menus

This section describes the menus in Infor ERP LX.

ERP LX main menu

The ERP LX Main Menu is the first of five master menus. You can access the four major Infor ERP LX application groups from this menu:

- Configurable Enterprise Financials, CEF
 - Multi-Mode Manufacturing, MMM
-

- Supply Chain Management, SCM
- Cross-Product Applications, XPA

Specify the abbreviated application group fast path code to access the master menu for the desired application group.

Configurable enterprise financials menu

Use the Configurable Enterprise Financials menu, CEF, to access Infor ERP LX financial applications. Specify the application fast path code to access the desired application menu.

Multi-mode manufacturing master menu

Use the Multi-Mode Manufacturing master menu, MMM, to access Infor ERP LX manufacturing applications. Specify the application fast path code to access the desired Infor ERP LX application menu.

Supply chain management master menu

Use the Supply Chain Management master menu, SCM, to access Infor ERP LX supply chain management applications. Specify the application fast path code to access the desired Infor ERP LX application menu.

Cross-product application menu

Use the Cross Product Application menu, XPA, to access, analyze, and transmit information within Infor ERP LX. Specify the application fast path code to access the desired Infor ERP LX application menu.

Commonly used terms in Infor ERP LX

(Y/blank)

If the screen displays (Y/blank) for a field, specify Y or Yes for a particular action to take place. Otherwise, leave the field blank. The screen displays (Y/N) if the field requires a Y or an N.

A/R, A/P

The documentation uses the abbreviations A/R and A/P to denote the terms accounts receivable and accounts payable, respectively. The abbreviations distinguish the terms from the corresponding program indicators of ACR, and ACP, which precede program numbers, for example, ACR500 and ACP100.

Alphanumeric

Alphanumeric refers to text that contains letters, letters and numbers together, and numbers arranged uniformly with special characters, such as dates in MM/DD/YY format. Infor ERP LX sorts reports and inquiries in ascending alphanumeric order, unless indicated otherwise. Ascending order arranges items from the lowest value to the highest value. Alphanumeric text is sorted in ascending order according to the following rules:

- Special characters, such as \$, %, - (hyphen), comma, and period, come before all others
- Lowercase letters come before uppercase letters
- Uppercase letters come before numbers
- Numbers, that is, 0 through 9, come last

Extreme values by default

Some fields display extreme values by default. The system uses an alphanumeric or numeric extreme in these fields if you do not override the value. Use these default values, which are usually specified as ranges, to include all information in the range. The default values or any other values specified to designate a range do not have to be valid values in a database file.

Ranges

Ranges refer to fields you can use to limit an inquiry or report or to display specific data. If there are multiple range fields in a program, you can tailor your inquiry or report to produce only the data you need.

Infor ERP LX sorts the information alphanumerically. Therefore, the value in the *From* field must be a lower alphanumeric value than the value in the *To* field.

Infor ERP LX usually inserts extreme values as defaults in the lower and upper fields. See the description for Extreme values by default. The entries you make in range fields do not have to be valid values in a database file.

Review the following suggestions to limit the information:

Specify the first value to include on the inquiry or report in the *From* field. Leave the *To* field blank to include all information to the end of the file. For example, you can print a report that starts with the customer number you specify in the *From* field and stops at the end of the Customer Master file.

Specify the last value to include on the inquiry or report in the *To* field. Leave the *From* field blank to start at the beginning of the file. For example, you can perform an inquiry that starts with the beginning of the Customer Master file and ends with the customer number you specify in the *To* field.

Specify the same value in both the *From* and *To* fields. For example, you can limit a display to one customer.

To include a group of items, specify a value in the *From* field and another value in the *To* field. For example, you can perform an inquiry that starts with the first of the month and ends with the last day of the month.

Reference only

Reference only indicates that the system uses the information for the given field only for reference and does not use it for processing.

System Overview

Use MDM for production control, engineering, and cost accounting to retrieve and use product structure, routing and work center information for a wide variety of planning and costing needs. MDM features immediate online posting and access to all basic manufacturing data. You can define the engineering controlled items and control these items with engineering change orders (ECO).

Below are the highlights of the MDM product.

- Online posting of additions, deletions, and changes to product structures
- Online copying and modification of bills and routings
- Effectivity and discontinue dates
- User-defined decimal precision in the quantity required
- Automatic update of low level codes
- Multi-level where-used and end item where-used inquiry
- Mass replace for components
- Allows multiple occurrences of child item on a single BOM
- Complete planning bill of material functions
- Mass replace for planning bill components
- Departments and work centers supported
- Tooling and efficiency information
- Alternate operations
- Engineering controlled items
- Revision Level tracking for parents and components
- Drawing master control and revision tracking
- Engineering change orders with automatic posting to the BOM
- Approval processing for engineering change orders
- Audit trails of all BOM maintenance

Introduction

This guide contains instructions on how to operate the MDM product. Refer to the Infor ERP LX Inventory Run Instructions to review additional information related to MDM before you proceed with this product.

Below is the implementation sequence. The SYS product is required for method codes and facility codes. The MRP product is required for facility planning data. The CAP product is required for work centers, machines, and departments. The SFC product is required for routings.

- Inventory Files. Item Class, Item Type, Warehouse, Location, Item Master, Lot Master, Transaction Effects (see Inventory Run Instructions).
- Bill of Material. The structures that show which items are components of other items, and how much is used of each.
- Departments or Groups of work centers. Each work center resides in a department.
- Work Centers. A specific machine or group of machines that can perform the same function. It can also be a certain job or group of employees.
- Routings. The sequence of operations required to make each manufactured item. Each operation is tied to a work center.

Suggested implementation

Below is a list of suggestion steps needed to implement and use MDM.

Read and understand the documentation, including the INV and MDM Run Instructions. Review your existing manufacturing material lists for:

- Completeness
- Accuracy
- Detail - Enough detail of quantities required?
- Allowance for scrap?
- End item batch sizes?
- Number of changes occurring
- Control - How are actual material decisions made in practice?

Review the requirements. Establish an accurate and complete Bill of Material, and keep it up to date. For example:

- How many items do you produce and from how many components?
- Average amount of levels involved?

Review staff and time available for implementation. Consider the activities in this list plus normal business operations.

Schedule the implementation activities into your calendar. This can provide a realistic go live date.

Install Bill of Material as an active product in your system.

Install INV and run live before you implement MDM.

Set up office and shop integration. Define the procedures to for the new system and explain the new reports to the people using them. Begin user education early.

Train employees on MDM operation. Operation of MDM is consistent with the operational procedure for the INV product. You must train operators who work with MDM on how to use the INV product.

Load master file data. This is a one time only task. An accurate bill of materials is essential to shop floor control and requirements planning. The BOM must reflect the way product manufacture is actually scheduled, and it must be changed when necessary to represent actual practice. The system makes it easy to copy whole structures, then make minor changes to them.

We recommend that for the first month you keep the old system running in parallel with the new one so that you can monitor all functions. If you cannot run the systems in parallel, consider a test month prior to running live, using a small but representative sample of customers. The test data is then erased and real processing begins.

Perform a system review. Choose appropriate intervals for review.

How-to Index

The following list provides a quick reference to the processes that you can perform in this application. The list also includes programs in related applications.

- Add bill of materials - BOM200
 - Add components - BOM200
 - Add departments - CAP120
 - Add planning bill of materials - BOM600
 - Add routing steps/operations - SFC100
 - Add work centers - CAP100
 - Change discontinue date - BOM200
 - Change effective date - BOM200
 - Change quantity required - BOM200
 - Change a component across the entire BOM - BOM510
 - Change planning bill of materials - BOM600
 - Copy bill of materials - BOM200
 - Copy planning bill of materials - BOM600
 - Copy a routing - SFC100
 - Delete bill of materials - BOM200
 - Delete components - BOM200
 - Delete departments - CAP120
 - Delete operations/routing steps - SFC100
 - Delete planning bill of materials - BOM600
 - Delete work centers - CAP100
-

- Display bill of materials - BOM300
- Display where-used - BOM300
- Display planning bill of material and where-used - BOM320
- Print bill of materials - BOM200
- Print where used - BOM220
- Print production process sheets - BOM240
- Print planning bill of materials - BOM260
- Print process sheets - SFC110
- Print work centers - CAP110
- Reorganize bill of materials master file - BOM900
- Replace a component across the entire BOM - BOM510

System functions

The MDM application provides the following functions:

Effectivity dates

The system allows for an effective and a discontinue date on each component. These dates are not mandatory. The default values are the current date and 99/99/99 for the effective and discontinue dates, respectively. These dates are referenced by all functions accessing bills of material.

Creating bills of material

All bill of material processing is online. The where-used chains and low level codes are updated dynamically. Entire structures can be copied and modified online. Entire structures can also be deleted with one command. The Required Quantity field is nine characters long and has five decimal place accuracy.

The system allows a mass replace (substitution) of component items.

Interfaces

The bill of material is accessed by:

- Inventory Management for multiple issues
- Shop Floor Control (for creating soft bills of material by individual order)
- Cost Accounting for standard and actual cost roll-ups
- MRP (for requirements explosions)
- Capacity Planning for bill of resource explosions

Inquiries and reports

The system supports multi-level and end item where-used inquiries and reports, as well as single level and multiple-level bills. A costed bill of material is available in the Cost Accounting product.

Batch bills of material:

If a parent item is defined with a standard batch size in its Item Master record, the bill of material required quantity for each component of that parent is the quantity of the child required per batch of the parent. This is also how the quantity required is displayed in the BOM product. Other modules automatically convert this to a per unit quantity, as required.

Planning bills of material

The system supports full planning bills of material for use by features and options in the Order Entry (ORD) and Master Production Scheduling (MRP/MPS) products. Information for planning bills of material includes forecast percentage, quantity required, feature group codes, effective and discontinue dates, invoicing options, and scrap.

Work centers and departments

Work Centers and departments can be created for routings, shop floor control, and capacity planning. Each work center has its own efficiency, cost rates, method of loading hours, capacity, and other parameters. Work centers can be grouped into departments.

Routings

Full operation and routing information is supported, including alternate generations and extra descriptions. Routing information includes run, setup, and machine hours, the number of operators, move and queue time, and other information. A production process sheet produced from the shop packet print includes routing and bill of material information.

For example, the Bill of Material file, together with the Item Master file, is the prime source of material data for production and production planning. To make a finished product, you must know which components are used and how much for each. Each component can be made from other components and be included more than once on the same or different levels of a bill of material or in the bills of material of different items.

Below is an example.

A finished product, Aspirin (10 bottles), has item number 4522 and contains the following items:

- B-4522, bulk aspirin (250 gm)
- RX100, bottle (10 bottles)
- RX516, label (10 labels)
- RX971, cap (10 caps)

This is the first level bill of material for item 4522. Item B-4522, 100gm, contains the following components:

- C100, salicylamine (90 gm)
 - C200, acetaminophen (10gm)
-

The required quantity of each component is the quantity for a batch of the finished item.

In the above example, you would need 2.5 batches of the bulk aspirin to yield the 250 gm for the finished product. Therefore, all of the quantities of the components would also require 2.5 times their base quantity. In this case, you would need 225 gm of C100 and 25 gm of C200. However, you would still only need 10 bottles, labels, and caps.

Use the Item Master to specify batch size. A parent item is built up from child items on subsequent levels. The top level is finished goods, the lowest level in any assembly is the raw material or purchased parts from which manufacturing starts. In the above example, level 2 is considered lower than level 1. If an item appears in more than one assembly, its low level is the lowest level of appearance. For example, if C200 displays elsewhere with level numbers 1 and 3, the low level is 3. The system maintains 99 levels.

C200 (Acetaminophen) is an ingredient in the concentrate HC499, which is used to manufacture the cough mixture HM66. Also, 1 gm of C200 is used to make 100ml of HC499, which is enough for 10 bottles of HM66. Before you order stock of C200, you want to know where it is used, and in what quantities.

For example, it could be used in bulk aspirin, item 4522, cough concentrate, and a cough mixture.

The level numbers are in reverse order from the bill of material. The child is still considered lower than the parent.

It is important that you keep the BOM is kept accurate and current, especially when you use the MRP and CAP products to schedule shop production. All bill of material processing is online, and updates are immediate, including the low level code in the Item Master.

You can also use optional Effective and Discontinue dates for each component.

You can copy and modify entire structures online. This is the best way to handle a new product that uses most of the same components as an old one. You can also delete entire structures with one command.

If any component becomes obsolete and is replaced by a new one, you can use a mass replace to automatically search the entire Bill of Material file (MBM) and update the item wherever it appears.

You can specify a scrap factor for any component. Use this value to adjust your order quantities to compensate for a statistical average amount of defective items in every order received from a given vendor. For example, if you know from experience that approximately one item per thousand child items received from a specific vendor does not meet your quality standards, you can order one extra item per thousand to meet your material requirements. In this case, your scrap factor should be 1.001.

Where-used inquiries and reports look upwards on the bill of material. The system provides multi-level and end item where-used inquiries and reports as well as single level and multi-level bills. A costed bill of material is available in the Cost Accounting product.

Engineering change order maintenance, BOM100

Use this program to maintain engineering change orders (ECOs). The ECO consists of a header for the parent item number and detail lines for each component part under change control, which is the single-level BOM format.

The component detail line tracks both the original BOM information and the revision to the component, which the system converts when you complete the ECO. The component detail line uses effective dates and stocking levels to phase out the original BOM component and phase in the ECO component. The creation of the new BOM component lines in the system occurs only when you specify the engineering change order as type 15. The Post and the Approval Process step is valid for posting the ECO.

Access: Menu MDM02

Add or select an ECO

Use the Engineering Change Order Maintenance selection screen to create a new ECO or to select an existing one to maintain.

Field descriptions - BOM100D1-01

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

12=Detail Lines

Use to display the Engineering Change Order Detail Lines List screen, BOM100D3-01, to inquire or maintain the component change instructions for the selected engineering change order.

14=Sim Post

Use to display the Engineering Change Order Posting screen, BOM610D-01, to simulate posting of the engineering change order.

15=Post

Use to display the Engineering Change Order Posting screen, BOM610D-01, if all required steps are completed and accepted in the approval process. In addition, the ECO must be at a step in the approval process that allows posting of the ECO.

16=Notes

Use to display the Notes Detail Maintenance screen, SYS181D3-01.

17=Close

Use to close the engineering change order and stop further processing of that ECO. If you use this action to close an ECO, the system keeps the ECO intact for history, but removes the ECO from further processing.

18=Approval Processing

Use to display the Approval Processing program, BOM550.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Order Type (2,A):

The system displays the order type for the existing change orders. You can use the top field with a line action. For example, to use the Create line action specify an order type here, complete the Number field, and press Enter. The typical order type for an engineering change order is EC. You maintain order types in Code Table Maintenance, SYS105D1.

Facility (3,A):

The system displays the facility for the existing engineering change orders. You can use the top field with a line action. The Facility field controls the facility in which the bill of material is maintained. The system copies the facility on the ECO header to each detail line or component instruction on the ECO.

Engineering Change Order Number (15,A):

The system displays the ECO number for the existing change orders. You can use the top field with a line action. For example, to use the Create line action specify an order type, specify a change order number here, and press Enter. The ECO number must be unique within the order type and facility. This field can include characters or numbers to accommodate existing ECO tracking systems.

ECO Description (30,A):

The system displays the description of the existing change orders. Depending on your filter selections, you can use the top field with a line action.

Effective Date (10,A):

The system displays the starting effective date for this engineering change order. This effective date is the starting effective date on the BOM component lines that this ECO updates.

Status (8,A):

The status indicates if this engineering change order is active or inactive.

Screen actions - BOM100D1-01**F13=Filters**

Use to access the filter screen to specify how to sequence the selection list.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify filter options

Use the ECO filter and sequence screen to specify how to sequence the list of ECOs on the selection screen.

Field descriptions - Filter**Sequence Option (1,0):**

Specify how to sequence the list on the selection screen.

Order Type (2,A):

To limit the list to a specific order type, specify that order type here. If you leave this value blank, the system displays ECOs for all order types.

Facility (3,A):

To limit the list to a specific facility, specify that facility here. If you leave this value blank, the system displays ECOs for all facilities.

Screen actions - Filter

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify ECO information

Use the ECO Header Maintenance screen, BOM100D2-01, to manage the ECO header information, which controls the approval process for the ECO as a whole. The system copies the starting effective date and discontinue date from the ECO header to each detail component line for convenience. All detail component line changes can affect the BOM at the same time. Use the parent ECO number to group multiple ECOs for tracking and processing. The current revision applies to the parent item number on the ECO header if one is present.

Field descriptions - BOM100D2-01

Order Type (2,A):

Specify the order type for this ECO.

Order Type Description (30,A):

The system displays the order type description for this ECO.

BOM Facility (3,A):

Specify the facility for this ECO. The Facility field controls the facility in which you maintain the bill of material. The system copies the facility on the ECO header to each detail line or component instruction on the ECO.

BOM Facility Description (30,A):

The system displays the facility description for this engineering change order. You maintain the Facility Description in Facility Master Maintenance, SYS190D1.

Engineering Change Order Number (15,A):

Specify the ECO number for this order to track ECOs. This number is user-defined and must be unique within order type and facility. This field can include characters or numbers to accommodate existing ECO tracking systems.

Order Date (8,0):

Specify the creation date for this ECO.

Description (30,A):

Specify the description for this ECO. You can use this description for searches.

Extra Description (30,A):

Specify the extra description for this ECO. For example, you can use this field to describe the purpose of the ECO. The system does not display this description on screens or reports.

Approval Process Type (2,A):

Specify the approval process type for this ECO. The typical approval process type for an ECO is NM (Named Approval Process). You maintain the approval process type in Code Table Maintenance, SYS105D1.

Approval Process (15,A):

Specify the approval process for this ECO. The approval process must exist before you can use it on an ECO. You create or maintain the approval process in Approval Process Maintenance, BOM170D1. After you specify an approval process on the ECO header, the system copies the approval process to a soft approval process attached to the ECO. You maintain the soft approval process through Approval Processing, BOM550D1, for this ECO. This field is required if the parent item on this ECO is set up in the Controlled Items Maintenance with a required approval process.

Approval Process Step (8,A):

The system displays the current approval process step for the selected ECO. You maintain the approval process step for the ECO in Approval Processing, BOM550D1.

Approval Process Step Description (17,A):

The system displays the approval process step description.

Priority Code (2,A):

Specify a code to use as a sort for user-developed reporting. You can group high-priority ECOs or categorize ECOs within an approval process step.

Engineer Responsible (8,A):

This field represents the employee number of the individual that originated or who is overall responsible for the ECO. You maintain employees in Employee Master Maintenance.

Comment (30,A):

Specify comments or general information about this ECO. For easier readability, you can use uppercase and lowercase characters.

ECO Starting Effectivity Date (8,0):

The system displays the component starting effective date that the system copies to each detail component line on the ECO for ease of data entry. This field is a discontinue date for a replaced or deleted BOM component or the starting effective date for an added or updated component on a BOM.

ECO Ending Effectivity (Discontinue) Date (8,0):

This field is the discontinue date on the component on the BOM when you post the ECO. The starting effective date and ending effective date must be one or more days apart.

Release Date (8,0):

This field is the date that you plan to release the ECO to manufacturing.

Due Date (8,0):

This field is the date that the ECO is due for completion from engineering or from the creating department for the ECO.

Date 1 (8,0):

Specify the first user-defined date for this ECO.

Date 2 (8,0):

Specify the second user-defined date for this ECO.

Parent Item Number (35,A):

This field is the single-level parent for a bill of material that is applied to this ECO. The parent item number is not required for ECOs that perform a mass add, mass change, or mass delete of a component. If you specify the parent item number, it must be a valid item in the Item Master.

Item Description (50,A):

The system displays the item description from the Item Master if you specify a parent item number on the ECO.

Drawing Number (30,A):

The Drawing Number and Drawing Page Number fields can link a drawing to an ECO. The drawing number and drawing page number must exist in the Drawing Master file, which you maintain through Drawing Master Maintenance,

BOM140D1. The Drawing Number field is large enough to accommodate most existing tracking systems.

Drawing Page Number (5,0):

Use this field for multiple-page drawings and the association of a specific page to this ECO.

Parent Order Type (2,A):

Specify the parent order type for this ECO. The typical parent order type for an ECO is EC. You maintain the order type in Code Table Maintenance, SYS105D1.

Parent Order Facility (3,A):

Specify the facility for the parent ECO.

Parent Engineering Change Order Number (15,A):

Specify the parent engineering change order number for this order.

BOM Mfg. Method Code (2,A):

Use this field to include alternate bills of material within a facility. You can use this code for experimental variations of a standard bill of material, operational variations of a standard BOM, and so on. Typical uses of the manufacturing method code include substitution of components on the standard BOM/Formula/Recipe or alternate routings (operational) that are attached to the components of the BOM.

On Order Quantity (11,3):

The system displays the value from the Parent Item Master, if the system displays a parent item on the engineering change order. Use this information to determine the exposure to existing customer orders or shop orders for change based on this ECO. If the on-order quantity is significant, a master scheduler or planner must be aware of the pending ECO.

Revision (To) Level (35,A):

Specify the new revision level for the parent item number on this engineering change order. The new revision level must exist in the Revision Master file before you can use it in this field. You can use screen action 14 to add the revision level to the Revision Master if it does not exist. Only use the revision level if the system displays a parent item number on this ECO.

Last Maint. User ID (10,A):

The system displays the user ID of the last person to update the ECO header. The system automatically maintains this field and you cannot change it.

Last Maintenance Date (8,0):

The system displays the date of the last add, update, or delete of this ECO header.

Last Maintenance Time (6,0):

The system displays the time of day of the last add, update, or delete of this ECO header.

Screen actions - BOM100D2-01**F13=ECO Header Notes**

Use to display ECO Header Notes program, SYS181D3.

F14=Revision Master Maintenance

Access the EC Revision Level Selection screen, BOM120D1-01.

F15=Engineering Controlled Items Maintenance

Use to display Engineering Controlled Items Maintenance, BOM110D1.

F16=More Info

Use to display the second screen for the ECO Header, BOM100D7-01.

F17=ECO Detail Lines Maintenance

Use to display ECO Detail Lines Maintenance, BOM100D3-01.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Maintain the engineering change detail lines

Use ECO Detail Lines screen, BOM100D3-01, to maintain multiple detail instructions to add, update, or delete components from one or more parents on a bill of material. This screen can provide more than one instruction for an ECO and maintains these instructions until you post the ECO. An ECO needs at least one detail line instruction in order to change a bill of material. The system copies the starting effective date, discontinue date, facility, and method code to each detail line from the ECO header for convenience in data entry.

Field descriptions - BOM100D3-01**Order Type (2,A):**

The system displays the order type for this ECO.

Facility (3,A):

The system displays the facility for this ECO.

Engineering Change Order (15,A):

The system displays the ECO number for this order.

Description (30,A):

The system displays the description for this ECO.

Start (8,0):

The system displays the component starting effective date that the system copies to each detail component line on the ECO for ease of data entry.

End (8,0):

The system displays the discontinue date on the component on the BOM.

Parent Item Number (35,A):

The system displays the single-level parent for a bill of material that is applied to this ECO.

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

12=Detail Notes

Access the Notes screen. Use this to display the notes at the Engineering Change Order Detail Line level.

18=Event Log

Use to display the results of the Detail Line instruction on posted or closed ECOs. The event log displays the before and after image of the Bill of Material file for a genealogy of changes.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Line (5,0):

The system displays the number of the detail instruction on this ECO. If you leave this field blank when you use the Create line action, the system assigns 1 to the line number. ECO Line Numbers are user-assigned so that you can

specify a number series, for example 10, 20, 30 and so on. You use a number series to allow for the insertion of an instruction between two other instructions.

ECO Detail Description (30,A):

The system displays the ECO detail description.

Original Component Item Number (35,A):

The system displays the component level item on which an update or delete is based. If the system locates the original component number on the single-level BOM, the new component number replaces this number or the system deletes this number, depending on the line action.

New Component Item Number (35,A):

The system displays the target item number for add, update, or delete instructions. The new component item number must exist on the Item Master before you use it in an ECO detail line instruction.

Screen actions - BOM100D3-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Maintain an ECO component line detail

Use ECO Component Line Detail screen, BOM100D4-01, to manage ECO component level detail. The ECO component details control the bill of material create and update process. Two key fields, Action Code and the Instruction Effectivity Code, work in combination for multiple methods of BOM creation or update and determine the conditions under which the system changes the BOM. You can post the date-based effectivity change to the bill of material at any time. The bill of material handles the effective change based on the current date. The stocking level-based effectivity codes can control processing by either the parent or component on-hand balance or a comparison of the on-hand balance and the minimum balance. You can process ECOs with the minimum balance to reserve repair parts for field upgrades while you implement a BOM creation or change.

Field descriptions - BOM100D4-01**Parent Item Number (35,A):**

The system displays the single-level parent for a bill of material that is applied to this ECO.

Item Description (50,A):

The system displays the item description from the Item Master if you specify a parent item number on the ECO.

ECO Order Date (8,0):

The system displays the creation date of the ECO.

Order Type (2,A):

The system displays the order type for this ECO.

Engineering Change Order Number (15,A):

The system displays the ECO number for this order.

Facility (3,A):

The system displays the facility for this ECO.

BOM Mfg. Method Code (2,A):

The system displays the manufacturing method code.

ECO Line Number (5,0):

The system displays the ECO line number of the detail instruction on this ECO.

Approval Process Step (8,A):

The system displays the approval process step for this ECO.

ECO Starting Effectivity Date (8,0):

The ECO starting effective date is the component starting effective date that the system copies to each detail component line on the ECO for ease of data entry. This field is a discontinue date for a replaced or deleted BOM component or the starting effective date for an added or updated component on a BOM.

ECO Ending Effectivity (Discontinue) Date (8,0):

The system displays the discontinue date on the component on the BOM when you post the ECO. The starting effective date and ending effective date must be one or more days.

Action (2,0):

Specify the number for the action that this detail line performs against the bill of material file and press Enter. Choose from the following actions:

1=Mass Adds

Use to add a new component to the bill of material based on whether the ECO Posting program, BOM610, finds a match on the original component after the BOM where-used parents are located. This action requires that you specify the original component item number, facility, and method code. You must complete the new component fields to add the component to the BOM. The facility and method code of the original component must equal the new component detail. The system validates the Current Revision field if specified against the Revision Level Master file for existence.

2=Mass Update

Use to add a new component to the bill of material based on whether the ECO Posting program, BOM610, finds a match on the original component after the BOM where-used parents are located. The original BOM component is discontinued the day before the starting effective date of the new BOM component. This action requires that you specify the original component item number, facility, and method code.

You must complete the new component fields to add the component to the BOM. The facility and method code of the original component must equal the new component detail. The system validates the Current Revision field if specified against the Revision Level Master file for existence.

3=Mass Delete

Use to discontinue an original component from the bill of material based on whether the ECO Posting program, BOM610, finds a match on the original component after the BOM where-used parents are located. The system discontinues the original BOM component as of the starting effective date of the posting date of the ECO. This action requires that you specify the original component item number, facility, and method code. The facility and method code of the original component must equal the new component detail. The system validates the Current Revision field if specified against the Revision Level Master file for existence.

4=Single Record Add

Use to add a new BOM component to the single-level bill of material based on the parent item number in the ECO header record. This action only requires that you complete the new component fields. The facility and method code of the original parent item must equal the new component detail. The system validates the Current Revision field if specified against the Revision Level Master file for existence.

5=Single Record Update

Use to add a new BOM component to the bill of material based on whether the ECO posting program, BOM610, finds a match on the original component on a

single level BOM. The original BOM component is discontinued the day before the starting effective date of the new BOM component. This action requires that you specify the original component item number, facility, method code, and the sequence number. The sequence number is required because of the potential of multiple occurrences of the same item number within the same level of the BOM.

For example, you can use this line action to change the required quantity. You must complete the new component fields to add the component to the BOM. The facility and method code of the original component must equal the new component detail. The system validates the Current Revision field if specified against the Revision Level Master file for existence.

6=Single Record Discontinue

Use to discontinue a BOM component from the bill of material based on whether the ECO Posting program, BOM610, finds a match on the original component on a single level BOM. The system discontinues the original BOM component as of the posting date of the ECO. This action requires that you specify the original component item number, facility, method code, and the sequence number. The sequence number is required because of the potential of multiple occurrences of the same item number within the same level of the BOM.

For example, you can use this line action to change the required quantity. The new component fields are not used on this instruction. The facility and method code of the original component must equal the new component detail. The Current Revision Level field is not used in this instruction.

7=Bill of Material Copy (Single Level)

Before you can use the Bill of Material Copy line action, the parent item number must be an engineering change controlled item and include a control by facility code. You must also set up the target, to facility, as an engineering controlled item prior to copying.

The copy from facility is the facility code on the ECO header record and the copy to facility is the facility on the new component detail record. The facility or method code must be different from the ECO header to the new component detail facility or method code. The new component item number does not need to equal the parent item number in the ECO header record. This line action copies only the single-level bill of material. The Instruction Effectivity code must be specified as 00, Effectivity date only. No other instruction effective types are processed.

8=Bill of Material Discontinued (Single Level)

An original component item number must equal the parent item number in the ECO header record. The facility code or method code on the original component must equal the parent facility or method code.

The system does not update the Current Revision Level field. This line action only discontinues each component on the single-level bill of material record for

the parent item number. You must specify the Instruction Effectivity code as 00, Effectivity date only. No other instruction effective types are processed.

9=Entire Bill of Material Copy (All Levels)

Before you can use the Bill of Material Copy line action, the parent item number must be an engineering change controlled item and include a control by facility code. You must also set up the target, to facility, as an engineering controlled item prior to copying.

The copy from facility is the facility code on the ECO header record and the copy to facility is the facility on the new component detail record. The new component item number can differ from the parent item number in the ECO header record. This copy function copies all levels of a multiple level BOM. The starting effective date and discontinue date of the ECO only applies to the top level of the BOM copied. You must specify the Instruction Effectivity code as 00, Effectivity date only. No other instruction effective types are processed.

10=Routings Copy - All BOM Levels

Before you can use the Routing Copy line action, the parent item number must be an engineering change controlled item and include a control by facility code. You must also set up the target item number and if applicable, the facility or method code, as an engineering controlled item prior to copy.

The copy from facility is the facility code on the ECO header record and the copy to facility is the facility on the new component detail record. The new component item number can differ from the parent item number in the ECO header record. This copy function copies all routings associated with a multiple level BOM. You must specify the Instruction Effectivity code as 00, Effectivity date only. No other instruction effective types are processed.

Action Code Description (25,A):

The action code description provides verification that the detail component instruction line action is correct.

Revision (To) Level (35,A):

Specify the new revision level for the parent item number on this ECO. The new revision level must exist in the Revision Master file before you use it. You can use the Revision Maint screen action to add the revision level to the Revision Master if it does not exist. Only use the revision level if a parent item number is on this ECO.

Instruction Effectivity Code (2,A):

Use this field to determine the conditions for which the detail instruction line action (add, change, delete) is applied to the bill of material. Based on the conditions below, the instruction effective code determines if the change is applied:

Below are the instruction effective codes.

- 00=Effectivity Date Only

This code immediately posts the ECO changes to the Bill of Material file and uses the starting effective date and the discontinue date on the component lines of the BOM to implement the changes. We recommend you use this code because the change is immediately visible throughout the system for purchasing, planning, and shop floor control activities.

The actual change to the bill of material is a function of the current date cutting off a component on its discontinue date and making the new component effective as of its starting date. For example, on September 10, 2004 discontinue (delete) component A and replace it with component B with new starting effective date.

- 01=Component On-hand Balance is 0

The system implements this code when you process ECO Stock-Based Effectivity Processing, BOM620. This job calculates the on-hand balances of all allocated warehouses within the ECO facility, checks if the resulting on-hand balance is zero, and performs the change to the BOM based on the line action.

The starting effective date of the component line is the date that the stocking conditions are met and it supersedes the starting effective on the ECO on this effective code. Use this effective code to replace phantoms in BOM structures that are implemented to change a BOM based on inventory stocking out. Visibility of this BOM change is hidden from the system for purchasing, planning and shop floor control activities until the stocking conditions are met and you run the ECO Stock-Based Effectivity Processing, BOM620.

The actual change to the bill of material is a function of the current date cutting off a component on its discontinue date and making the new component effective as of its starting date. For example, if the on-hand balance of component A is 0, discontinue (delete) component A and replace it with component B with new starting effective date.

- 02=Component On-hand Balance less than or equal to Minimum Balance

The system implements this code when you process ECO Stock-Based Effectivity Processing, BOM620. This job calculates the on-hand balances of all allocated warehouses within the ECO facility, checks if the resulting on-hand balance is less than or equal to minimum balance, and performs the change to the BOM based on the line action.

For component items that are not facility specific (global), the system uses the minimum balance from the Item Master. For component item numbers with a facility, the system uses the minimum balance from the Facility/Item Master, MRP140. The starting effective date of the component line is the date that the stocking conditions are met and that supersedes the starting effective on the ECO on this effective code. Use this effective code to replace phantoms in BOM structures that are implemented to change a

BOM based on inventory stocking out and where it is important to not deplete all stock (repair parts). Visibility of this BOM change is hidden from the system for purchasing, planning and shop floor control activities until the stocking conditions are met and you run the ECO Stock-Based Effectivity Processing, BOM620.

The actual change to the bill of material is a function of the current date cutting off a component on its discontinue date and making the new component effective as of its starting date. For example, if the on-hand balance of component A is 8 and the minimum balance is 10, discontinue (delete) component A and you replace it with component B with new starting effective date.

- 04=Component On-hand Balance is 0 or Effectivity Date

The system implements this code when you process ECO Stock-Based Effectivity Processing, BOM620. This job calculates the on-hand balances of all allocated warehouses within the ECO facility, checks if the resulting on-hand balance is less than or equal to 0 or if the current date is less than or equal to the effective date, and performs the change to the BOM based on the line action.

For component items that are not facility specific (global), the system uses the minimum balance from the Item Master. For component item numbers with a facility, the system uses the minimum balance from the Facility/Item Master, MRP140. The starting effective date of the component line is the date that the stocking conditions are met and that supersedes the starting effective on the ECO on this effective code. Use this effective code to replace phantoms in BOM structures that are implemented to change a BOM based on inventory stocking out and where it is important to not go past a specific date for cut over to the new item number. Visibility of this BOM change is hidden from the system for purchasing, planning and shop floor control activities until the stocking conditions are met and the ECO Stock-Based Effectivity Processing, BOM620, is run.

The actual change to the bill of material is a function of the current date cutting off a component on its discontinue date and making the new component effective as of its starting date. For example, if the on-hand balance of component A is 0 or the starting effective date is less than or equal to the current date, discontinue (delete) component A and replace it with component B with new starting effective date.

- 05=Component On-hand Balance less than or equal to Minimum Balance or Effectivity Date

The system implements this code when you process ECO Stock-Based Effectivity Processing, BOM620. This job calculates the on-hand balances of all allocated warehouses within the ECO facility, checks if the resulting on-hand balance is less than or equal to the minimum balance or if the current date is less than or equal to the effective date, and then performs the change to the BOM based on the line action.

For component items that are not facility specific (global), the system uses the minimum balance from the Item Master. For component item numbers with a facility, the system uses the minimum balance from the Facility/Item Master, MRP140. The starting effective date of the component line is the date that the stocking conditions are met and that supersedes the starting effective on the ECO on this effective code. This effective code is used to replace phantoms in BOM structures that are implemented to change a BOM based on inventory stocking out and where it is important to not go past a specific date for cut over to the new item number. Visibility of this BOM change is hidden from the system for purchasing, planning and shop floor control activities until the stocking conditions are met and you run the ECO Stock-Based Effectivity Processing, BOM620.

The actual change to the bill of material is a function of the current date cutting off a component on its discontinue date and making the new component effective as of its starting date. For example, if the on-hand balance of component A (4) is less than the minimum balance (5) or the starting effective date is less than or equal to the current date, discontinue (delete) component A and replace it with component B with new starting effective date.

- 13=Parent On-hand Balance is 0

The system implements this code when you process ECO Stock-Based Effectivity Processing, BOM620. This job calculates the on-hand balances of all allocated warehouses within the ECO facility, checks if the resulting on-hand balance is zero and then performs the change to the BOM based on the line action.

The starting effective date of the component line is the date that the stocking conditions are met and that supersedes the starting effective on the ECO on this effective code. Use this effective code to replace phantoms in BOM structures that are implemented to change a BOM based on inventory stocking out. Visibility of this BOM change is hidden from the system for purchasing, planning and shop floor control activities until the stocking conditions are met and the ECO Stock-Based Effectivity Processing, BOM620, is run.

The actual change to the bill of material is a function of the current date cutting off a component on its discontinue date and making the new component effective as of its starting date. For example, if the on-hand balance of parent A is 0 (zero), discontinue (delete) component B and replace it with component C with new starting effective date.

- 14=Parent On-hand Balance less than or equal to Minimum Balance

The system implements this code when you process Stock-Based Effectivity Processing, BOM620. This job calculates the on-hand balances of all allocated warehouses within the ECO facility, checks if the resulting on-hand balance is less than or equal to minimum balance and then performs the change to the BOM based on the line action.

For parent items that are not facility specific (global), the system uses the minimum balance from the Item Master. For parent item numbers with a facility, the system uses the minimum balance from the Facility/Item Master, MRP140. The starting effective date of the component line is the date that the stocking conditions are met and that supersedes the starting effective on the ECO on this effective code. Use this effective code to replace phantoms in BOM structures that are implemented to change a BOM based on inventory stocking out and where it is important to not deplete all stock (repair parts). Visibility of this BOM change is hidden from the system for purchasing, planning and shop floor control activities until the stocking conditions are met and the ECO Stock-Based Effectivity Processing, BOM620, is run.

The actual change to the bill of material is a function of the current date cutting off a component on its discontinue date and making the new component effective as of its starting date. For example, if the on-hand balance of parent item A is 8 and the minimum balance is 10, discontinue (delete) component B and replace it with component C with new starting effective date.

- 16=Parent On-hand Balance is 0 or Effective Date

The system implements this code when you process ECO Stock-Based Effectivity Processing, BOM620. This job calculates the on-hand balances of all allocated warehouses within the ECO facility, checks if the resulting on-hand balance is less than or equal to 0 or if the current date is less than or equal to the effective date and then performs the change to the BOM based on the line action.

For parent items that are not facility specific (global), the system uses the minimum balance from the Item Master. For parent item numbers with a facility, the system uses the minimum balance from the Facility/Item Master, MRP140. The starting effective date of the component line is the date that the stocking conditions are met and that supersedes the starting effective on the ECO on this effective code. Use this effective code to replace phantoms in BOM structures that are implemented to change a BOM based on inventory stocking out and where it is important to not go past a specific date for cut over to the new item number. Visibility of this BOM change is hidden from the system for purchasing, planning and shop floor control activities until the stocking conditions are met and the ECO Stock-Based Effectivity Processing, BOM620, is run.

The actual change to the bill of material is a function of the current date cutting off a component on its discontinue date and making the new component effective as of its starting date. For example, if the on-hand balance of parent A is 0 or the starting effective date is less than or equal to the current date, discontinue (delete) component B and replace it with component C with new starting effective date.

- 17=Parent On-hand Balance less than or equal to Minimum Balance or Effective Date

The system implements this code when you process ECO Stock-Based Effectivity Processing, BOM620. This job calculates the on-hand balances of all allocated warehouses within the ECO facility, checks if the resulting on-hand balance is less than or equal to 0 or if the current date is less than or equal to the effective date and then performs the change to the BOM based on the line action.

For parent items that are not facility specific (global), the system uses the minimum balance from the Item Master. For parent item numbers with a facility, the system uses the minimum balance from the Facility/Item Master, MRP140. The starting effective date of the component line is the date that the stocking conditions are met and that supersedes the starting effective on the ECO on this effective code. Use this effective code to replace phantoms in BOM structures that are implemented to change a BOM based on inventory stocking out and where it is important to not go past a specific date for cut over to the new item number. Visibility of this BOM change is hidden from the system for purchasing, planning and shop floor control activities until the stocking conditions are met and the ECO Stock-Based Effectivity Processing, BOM620, is run.

The actual change to the bill of material is a function of the current date cutting off a component on its discontinue date and making the new component effective as of its starting date. For example, if the on-hand balance of parent A (4) is less than the minimum balance (5) or the starting effective date is less than or equal to the current date, discontinue (delete) component B and replace it with component C with new starting effective date.

■ 19=Parent and Component On-hand Balance is 0 or Effective Date

The system implements this code when you process ECO Stock-Based Effectivity Processing, BOM620. This job calculates the on-hand balances of all allocated warehouses within the ECO facility, checks if the resulting on-hand balance is less than or equal to 0 or if the current date is less than or equal to the effective date and then performs the change to the BOM based on the line action.

For parent or component items that are not facility specific (global), the system uses the minimum balance from the Item Master. For parent or component item numbers with a facility, the system uses the minimum balance from the Facility/Item Master, MRP140. The starting effective date of the component line is the date that the stocking conditions are met and that supersedes the starting effective on the ECO on this effective code. Use this effective code to replace phantoms in BOM structures that are implemented to change a BOM based on inventory stocking out and where it is important to not go past a specific date for cut over to the new item number. Visibility of this BOM change is hidden from the system for purchasing, planning and shop floor control activities until the stocking conditions are met and the ECO Stock-Based Effectivity Processing, BOM620, is run.

The actual change to the bill of material is a function of the current date cutting off a component on its discontinue date and making the new component effective as of its starting date. For example, if the on-hand balance of parent A is 0 or the starting effective date is less than or equal to the current date, discontinue (delete) component B and replace it with component C with new starting effective date.

- 20=Parent and Component On-hand Balance less than or equal to Minimum Balance or Effective Date

The system implements this code when you process ECO Stock-Based Effectivity Processing, BOM620. This job calculates the on-hand balances of all allocated warehouses within the ECO facility, checks if the resulting on-hand balance is less than or equal to 0 or if the current date is less than or equal to the effective date and then performs the change to the BOM based on the line action.

For parent or component items that are not facility specific (global), the system uses the minimum balance from the Item Master. For parent or component item numbers with a facility, the system uses the minimum balance from the Facility/Item Master, MRP140. The starting effective date of the component line is the date that the stocking conditions are met and that supersedes the starting effective on the ECO on this effective code. Use this effective code to replace phantoms in BOM structures that are implemented to change a BOM based on inventory stocking out and where it is important to not go past a specific date for cut over to the new item number. Visibility of this BOM change is hidden from the system for purchasing, planning and shop floor control activities until the stocking conditions are met and the ECO Stock-Based Effectivity Processing, BOM620, is run.

The actual change to the bill of material is a function of the current date cutting off a component on its discontinue date and making the new component effective as of its starting date. For example, if the on-hand balance of parent A (4) is less than the minimum balance (5) or the starting effective date is less than or equal to the current date, discontinue (delete) component B and replace it with component C with new starting effective date.

Instruction Effectivity Code Description (25,A):

This field verifies that the detail component instruction effective code is correct.

Purchasing Date (10,0):

Specify the date of the purchase.

Purchasing Buyer Code (1,A):

The system uses the purchasing buyer code from the Item Master or Facility/Item Master file if a parent item is on the ECO header. You can manually override this field.

ECO Detail Line Description (30,A):

Specify the description for this detail line on the ECO. You can use this field to identify why this change is made to the bill of material. For easier readability, you can use uppercase and lowercase characters.

ECO Detail Line Comment (30,A):

Specify a comment for this detail line on the ECO. You can use this field to comment why the bill of material is changed or for general information. For easier readability, you can use uppercase and lowercase characters.

New Component Item Number (35,A):

This is the component that you want to add or update. The new component item number can be a parent item number or a child component item number based on the ECO line action. The new component item number is generally required for ECO detail lines that perform an add or change instruction. If you specify the new component item number, it must be a valid item in the Item Master.

New Component Bubble Number (3,0):

This field contains an extra user-defined reference number that you can use to re-sequence this display or bills of material listings. If you expect periodic changes in a bill of material, we recommend that you avoid consecutive integers for bubble numbers. Use a number series to allow for the insertion of new components into the bubble number sequence.

Original Child Item Number (35,A):

The system displays the original child (component) item number.

Original Component Bubble Number (3,0):

This field is the original reference number that you can display on this screen or print on the bill of material listings. If you expect periodic changes in a bill of material, we recommend that you avoid consecutive integers for bubble numbers. Use a number series to allow for the insertion of new components into the bubble number sequence.

Expiry Component (1,0):

Use this field to indicate whether to use the component in the expiry date calculation. Only lot controlled items are flagged for expiry date calculation (flag 1 or 2). Specify one of the following values:

0

Do not use the component for expiry date calculation.

1

The component is intermediate to parent (such as the active ingredient). For any parent BOM, there can only be one component designated as type 1 for any unique effective date. For components marked as a 1, the effective dates cannot overlap or contain date gaps.

2

The component is not an intermediate to parent but must be considered when the expiry date of the BOM parent is defined. There can be more than one component marked as a 2 on any particular BOM.

The effect of the codes is as follows:

If a parent has only an intermediate component flagged with 1, the retest and expiry dates of the parent are the manufacturing date of the parent plus the retest and shelf life days respectively. The manufacturing date of the parent is equal to the manufacturing date of the intermediate component.

If the parent has a component flagged 1 and also other components influencing the expiry date (components flagged 2), the expiry date is the earliest of the expiry date calculated from the manufacturing date of the intermediate component flagged 1 and the expiry dates of the other components flagged as 2.

If the expiry/retest date calculation method is equal to 2 or 3 for a parent item, the BOM must include at least one component that is flagged as Expiry Component 1 or 2.

The Expiry Component field does not process any edits to verify BOM compliance to the expiry component rules found in On-Line BOM Formula Recipe, BOM500, and BOM Formula Mass Update, BOM510.

New Component Description (50,A):

The system displays the item description of the new component item from the Item Master file. This field is display only.

Original Component Description (50,A):

The system displays the item description of the original component item from the Item Master file. This field is display only.

New Component Facility (3,A):

This field displays the new facility for this detail component on an engineering change order. The Facility field controls the facility in which you maintain the bill of material. The system copies the facility on the ECO header to each detail line or component instruction on the ECO.

The ECO header facility and the component facility must match.

New Component BOM Mfg. Method Code (2,A):

Use to include alternate bills of material within a facility. You can use this code for experimental variations of a standard bill of material, operational variations of a standard BOM, and so on.

New Component Operation Number (3,0):

Specify the number of the parent item's operation at which you want the system to backflush the material issues for this component item. Backflushing deletes manufacturing allocations and creates material issues for the specified component item. If specified, the operation must be a valid routing operation for a parent item.

Original Facility (3,A):

This field displays the original facility for this detail component on an engineering change order.

Original BOM Mfg. Method Code (2,A):

Use the manufacturing method code to include alternate bills of material within a facility.

Sequence Number (3,0):

Required for Single Parent-Component Update. Use the sequence number to specify which component record to update when the same item number is in the single level BOM more than once. You can maintain the sequence number from the BOM/Recipe/Formula Inquiry, BOM300.

Original Operation Number (3,0):

Specify the number of the parent item operation whose material issues of this component item the system must backflush.

Quantity Per/Relative Quantity:

Use this field to specify the quantity of a child item needed to create one parent. If the parent is a standard batch size, create one standard batch of the parent.

If the parent item is batched, specify the quantity to make one batch, not the quantity required to make one unit of the parent. If you do not specify a value in this field, the system uses a blank value.

When you choose 02=Mass Update, the quantity specified for the new component is a relative quantity per for the new component. The system uses this relative quantity per as a multiplier. For each instance of a component in a specified BOM, the new quantity per is the old quantity per times the multiplier.

For all other line actions requiring a new component quantity, the value in this field is an absolute quantity per for the new component.

Original Quantity Required (15,6):

Use this field to specify the quantity of a child item needed to create one parent. If the parent is a standard batch size, create one standard batch of the parent. If the parent item is batched, specify the quantity to create one batch, not the quantity required to create one unit of the parent. If you do not specify a value in this field, the system defaults to blank.

New Component Scrap Factor (5,4):

Use this field to specify a factor that the system multiplies by the Original Quantity Required field to calculate the true quantity used by all applications. A value of 1.0000 in this field indicates zero scrap. A value greater than one indicates positive scrap, a value less than one indicates negative scrap.

Original Scrap Factor (5,4):

Use this field to specify a factor that the system multiplies by the Original Quantity Required field to calculate the true quantity used by all applications. A value of 1.0000 in this field indicates zero scrap. A value greater than one indicates positive scrap, a value less than one indicates negative scrap.

New Component Date Effective (6,0):

Specify the date from which this child item is implemented in the production process. The current processing date is the default. This date must precede the discontinue date.

New Component Date Discontinued (6,0):

Specify the date after which a child item is no longer a part of the production process. The system uses a default value of 99/99/99 to indicate that a discontinue date is currently not assigned to this item.

The time span between the effective and discontinue dates determines the time period a component is used in production.

Original Component Date Effective (6,0):

Specify the date from which this child item is implemented in the production process.

Original Component Date Discontinued (6,0):

Specify the date after which a child item is no longer a part of the production process.

New Component Must Issue Override Y/N (1,A):

You can use this field to override the Must Single Issue parameter defined in the Item Master, INV100.

If you specify Y in the Must Single Issue field, you cannot delete the items from inventory through a multiple issue transaction. However, if this is a JIT item, the system does not backflush single issue items. Backflushing occurs only when an operation is associated with a bill of material through the Bill of Material Maintenance program, BOM500.

New Component Offset (4,0):

Specify a positive or negative adjustment to the parent lead time for the component. MRP and MPS use this value when they calculate the lead time offset for the due date of a component requirement.

New Component Usage Code (1,A):

Specify one of the following values:

0
Fixed Quantity
1
Active
2
Compensating
3
Filler
4
Packaging
9
Miscellaneous
B
By-Product
C
Co-Product
D
By-Product Fixed Quantity
E
Co-Product Fixed Quantity

Usage Codes define two functional characteristics of a component:

- If the quantity of a component item is adjusted to compensate for variations in the potency of active ingredients used on that batch.
 - If the quantity of a component is included in the batch size, for batch balancing calculations.
-

You can maintain usage codes in Component Usage Type Maintenance, API110. Only systems with API installed can specify and use usage codes, except for Usage Code 0.

Original Component Must Issue Override (1,A):

Use this field to override the Must Single Issue parameter defined in the Item Master, INV100.

Refer to the New Component Must Issue Override field for additional information.

Original Component Offset (4,0):

Specify a positive or negative adjustment to the parent lead time for the component. MRP and MPS use this value when they calculate the lead time offset for the due date of a component requirement.

Original Component Usage Code (1,A):

Specify a code. See the New Component Usage Code field for additional information.

CoProd Cst (New Comp. Co-Product Cost Pct) (5,4):

Specify the percentage of the parent item actual costs that the co-product absorbs during shop order costing.

New Component Bound (1,0):

Specify 1 to indicate a bounded relationship between this component and this parent. Specify no if there is no bounded relationship.

CoProd Cst (Orig. Comp. Co-Product Cost Pct) (5,4):

Specify the percentage of the parent item actual costs that the co-product absorbs during shop order costing.

Lots Allow (Number of Lots allowed) (1,0):

Specify the number of lots to allow for this component. If this is a global bill of material, the system uses a default value from the Item Master record. If it is facility specific, the system uses a default value from the Facility Planning file. In Revise mode, you can change the default value in the To Number of Lots Allowed field.

If the item is not lot controlled, the value in these fields must be zero. Otherwise, a value of 0 to 9 is valid, where 0 indicates no restriction in the number of lots.

Original Bounded Disposition Code (1,0):

Specify 1 to indicate a bounded relationship between this component and this parent. If the system default is zero, there is no bounded relationship.

New Component Start Lot (25,A):

You can specify an optional starting lot number for the component. This field is for reference only.

New Component End Lot (25,A):

You can specify an optional ending lot number for the component. This field is for reference only.

You must specify a value in this field in order to backflush the materials from the Work Center From location per CAP100.

Original Component Start Lot (25,A):

You can specify an optional starting lot number for the component. This field is for reference only.

Original Component End Lot (25,A):

You can specify an optional ending lot number for the component. This field is for reference only.

You must specify a value in this field in order to backflush the material from the Work Center From location per CAP100.

Estimated Cost 1 (17,5):

Specify the estimated cost for the new component item.

New Component Cost Set (2,0):

Specify a valid cost set to create or copy costs associated with the bill of material.

Screen actions - BOM100D4-01**F13=ECO Detail Line Notes**

Use to display ECO Detail Line Notes program, SYS181D3.

F14=Revision Master Maintenance

Use to display Revision Master Maintenance, BOM120D1.

F15=Reference Designators Maintenance

Use to display Reference Designators Maintenance, BOM505D1.

F16=Engineering Controlled Items Maintenance

Use to display Engineering Controlled Items Maintenance, BOM110D1.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Maintain additional ECO component line detail information

Use ECO Component Line Detail additional information screen, BOM100D4-02, to specify whether to exclude the component from BOM costing and planning.

Field descriptions - BOM100D4-02

Exclude from BOM Costing (1,0)

By default, the system uses the value from the Facility Planning file or Item Master file. To override the default value, specify one of the following values:

1

Exclude the component from BOM Costing.

0

Do not exclude the component.

Exclude from BOM Planning (1,0)

By default, the system uses the value from the Facility Planning file or Item Master file. To override the default value, specify one of the following values:

1

Exclude the component from BOM Planning.

0

Do not exclude the component.

Screen actions - BOM100D4-02

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Copy an ECO

Use the ECO Copy Function screen, BOM100D5-01, to copy an ECO. You can use this function to copy an ECO from one facility to another, from one method code to another, and from one ECO number to another.

Field descriptions - BOM100D5-01**Order Type (2,A):**

The system displays the From order type.

Facility (3,A):

The system displays the From facility.

Engineering Change Order Number (15,A):

The system displays the From order number.

Copy to Order Type (2,A):

Specify the order type for the new ECO.

Copy to Facility (3,A):

Specify the facility for the new ECO.

Copy to Engineering Change Order Number (15,A):

Specify the order number for the new ECO.

Copy to BOM Mfg. Method Code (2,A):

Use the manufacturing method code to include alternate bills of material within a facility. You can use this code for experimental variations of a standard bill of material, operational variations of a standard BOM, and so on. Typical uses of the manufacturing method code include substitution of components on the standard BOM/Formula/Recipe or alternate routings (operational) that are attached to the components of the BOM.

Copy to ECO Starting Effectivity Date (10,A):

This is the starting effective date for this ECO. This effective date is the starting effective date on the BOM component lines that this ECO updates.

Copy to ECO Discontinue Date (10,A):

This is the ending effective date for this ECO. This discontinue date is the discontinue date on the BOM component lines that this ECO updates.

Screen actions - BOM100D5-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Maintain the ECO reference designators

Use the ECO Reference Designators screen, BOM100D6-01, to create or revise reference designators for a component on the bill of material with this ECO. A reference designator is a comment attached to a bill of material component line. For example, the electronics industry uses a reference indicator to record the multiple locations for the same chip component used on an electronic board. The ability to track reference designators is an important feature in the electronics industry, or in manufacturing industries that produce electronic controls.

You can attach multiple reference designators to a component line. If the number of reference designators is not equal to the quantity per for the component line, you receive a warning message. You can override the message.

Field descriptions - BOM100D6-01

Order Type

Specify the order type for this ECO.

Facility

Specify the facility for this ECO. The Facility field controls the facility in which you maintain the bill of material. The system copies the facility on the ECO header to each detail line or component instruction on the ECO.

Engineering Change Order Number

Specify the engineering change order number for this order. The number must be unique within order type and facility. This field can include characters or numbers to accommodate existing ECO tracking systems.

Original BOM Mfg. Method Code

Use to include alternate bills of material within a facility. You can use this code for experimental variations of a standard bill of material, operational variations of a standard BOM, and so on. Typical uses of the manufacturing method code include substitution of components on the standard BOM/Formula/Recipe or alternate routings (operational) that are attached to the components of the BOM.

ECO Line Number

This value is the number of the detail instruction on this ECO. If the ECO Line Number is left blank on a Create line action, the system assigns a one to the line number. ECO Line Numbers are user-assigned so that you can specify a number series, for example 10, 20, 30 and so on. You can use a number series to insert an instruction between two other instructions.

Parent Item Number

This is the single-level parent for a bill of material that is applied to this ECO. The parent item number is not required for ECOs that perform a Mass Add, Mass Change, or Mass Delete of a component. If you specify the parent item number, it must be a valid item in the Item Master.

Item Description

The system displays the description from the Item Master if a parent item number is specified on the ECO.

Orig. Child

The field contains the original child (component) item number.

Orig. Child Description

The system displays the item description of the original child item from the Item Master file.

New Child

This field displays the new child (component) item number.

New Child Description

The system displays the item description of the new child item from the Item Master file.

New Child Quantity Required

Use this field to specify the quantity of a child to create one parent. If the parent is a standard batch size, create one standard batch of the parent.

You can override this quantity.

Reference Designator Number

This field shows the number of the reference designator.

New Reference Designator

A reference designator is a comment attached to a bill of material component line. You can attach multiple reference designators to a component line. If the number of reference designators is not equal to the quantity per for the component line, you receive a warning message. You can override the message.

New Comment

Use this field to specify comments or general information about this ECO. For easier readability, you can use uppercase and lowercase characters.

Original Reference Designator

A reference designator is a comment attached to a bill of material component line. You can attach multiple reference designators to a component line. If the number of reference designators is not equal to the quantity per for the component line, you receive a warning message. You can override the message.

Screen actions - BOM100D6-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Maintain additional ECO header information

Use the ECO Header Maintenance additional information screen, BOM100D7-01, to maintain engineering change order header information. The engineering change order header record controls the information about the ECO as a whole. Use this screen to specify the associated customer order, shop order, or purchase order that the ECO affects or was generated by. This screen records the personnel associated with this ECO and up to four costs that are user-defined.

Field descriptions - BOM100D7-01**Order Type (2,A):**

Specify the order type for this engineering change order. The typical order type for an engineering change order is EC. You maintain the order type in Code Table Maintenance, SYS105D1.

Order Type Description (30,A):

The system displays the order type description for this ECO. You maintain the order type description in Code Table Maintenance, SYS105D1.

Facility (3,A):

Specify the facility for this engineering change order.

Facility Description (30,A):

The system displays the facility description for this ECO.

Engineering Change Order Number (15,A):

Specify the engineering change order number for this order.

ECO Date (8,0):

Specify the creation date for this ECO. If left blank, this field defaults to current date.

ECO Description (30,A):

Specify the description for this ECO. You can use this description for searches. You can specify uppercase and lowercase characters in this field.

ECO Extra Description (30,A):

Specify the extra description for this ECO. For example, you can use this field to describe the purpose of the ECO. The system does not display this description on screens or reports.

Customer Order Number (8,0):

Specify the related customer order number for this ECO. This field is for reference only.

Customer Order Line Number (3,0):

Specify the related customer order line number for this ECO. This field is for reference only.

Shop Order Number (8,0):

Specify the related shop order number for this ECO. This field is for reference only.

Purchase Order Number (8,0):

Specify the related purchase order number for this ECO. This field is for reference only.

Purchase Order Line Number (3,0):

Specify the related purchase order line number for this ECO. This field is for reference only.

Manufacturing Effectivity Code (2,A):

Specify the manufacturing effective code. This field is for reference only.

Product Analyst (8,A):

The system displays the name of the individual who originates or is responsible for the product comprised in this ECO. This field is for reference only.

Employee Number 1 (8,A):

Specify the employee number of the individual person whose role with this ECO is user-defined. This field is for reference only.

Employee Number 2 (8,A):

See the Employee Number 1 field.

Estimated Cost 1 (17,5):

Optional. Specify the estimated costs related to this ECO. This field is for reference only.

Estimated Cost 2 (17,5):

See the Estimated Cost 1 field.

Estimated Cost 3 (17,5):

See the Estimated Cost 1 field.

Estimated Cost 4 (17,5):

See the Estimated Cost 1 field.

Last Maintenance User:

The system displays the user ID of the last person to maintain this record.

Last Maintenance Date:

The system displays the date this record was recently maintained.

Last Maintenance Time:

The system displays the time of day this record was recently maintained.

Screen actions - BOM100D7-01**F13=ECO Header Notes**

Use to display ECO Header Notes program, SYS181D3.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Engineering controlled item maintenance, BOM110

Use this program to manage which items are controlled for engineering changes. If a record for an item/facility/method is active here, you process the bill of material maintenance through the Engineering Change Order Maintenance, BOM100, not Bill of Material Maintenance, BOM500.

To implement engineering controls for multiple item/facility/methods, use one of the following field values:

- For the Facility field, specify *A for all facilities
- For the Item field, specify *ALL for all items
- For the Method field, specify *A for all methods

There are 11 possible combinations when you use *A and *ALL.

- If you specify a facility/item/method combination, that specific combination is EC-controlled.
- If you specify a facility and item, and you specify *A for a method, all BOMs in that facility/item combination are EC-controlled.
- If you specify an item and method, and you specify *A for a facility, all BOMs in all facilities for that item/method combination are EC-controlled.
- If you specify an item and you specify *A for a facility and method, all BOMs for that item are EC-controlled.
- If you specify a facility and method, and you specify *ALL for the item, all BOMs for that facility/method combination are EC-controlled.
- If you specify a facility and you specify *ALL for item and *A for method, all BOMS in that facility are EC-controlled.
- If you specify a method and you specify *ALL for item and *A for facility, all BOMS in all facilities for tjat method are EC-controlled.
- If you specify *A for facility and method and *ALL for item, all BOMs are EC-controlled.
- If you specify *ALL for item and you leave facility and method blank, the global/default BOM for all items is EC-controlled.
- If you specify a method and *ALL for item, and you leave facility blank, the global BOM for all items for that method is EC-controlled.
- If you specify a facility and *ALL for item, and you leave method blank, the default BOM for all items for that facility is EC-controlled.

Access: Menu MDM02

Add or select an ECO item

Use the Engineering Controlled Item Maintenance selection screen to create an EC control item or to select an existing one to maintain.

Field descriptions - BOM110D1-01

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

All line actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for line actions* in the overview information in this document.

Facility (3,A):

The system displays the facility associated with existing ECO items. To create an ECO item, use the Create line action in the top Act field, specify a facility here, complete the Item Number field, and press Enter.

Item Number (35,A):

The system displays the item number associated with existing ECO items. To create an ECO item, use the Create line action in the top Act field, specify a facility, specify an item number here, and press Enter.

BOM Mfg. Method Code (2,A):

The system displays the manufacturing code associated with existing ECO items. You can use the top field with a line action.

Item Description (50,A):

The system displays the description of the item associated with the ECO item.

Status (8,A):

This field indicates if this engineering controlled item is active or inactive.

Screen actions - BOM110D1-01

F13=Sequence

Use to display the sequence and selection screen where you can specify how to sequence the selection list.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify filter options

Use the Filter Options screen to specify how to sequence the list of EC items on the selection screen.

Field descriptions - Filter

Action Code (1,0):

Specify how to sequence the selection list.

Facility (3,A):

Specify a facility to limit the selection list to EC items that are associated with that facility.

Item Number (35,A):

Specify an item number to limit the selection list to EC items that are associated with that number.

BOM Mfg. Method Code (2,A):

Specify a manufacturing method code to limit the selection list to EC items that are associated with that code.

Screen actions - Filter

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify EC controlled item details

Use the Engineering Controlled Item Maintenance detail screen, BOM110D2-01, to maintain the items that are controlled for engineering changes within the system. A specified item master number marks the item for use as a change-controlled item. If the item number is change-controlled, you process the bill of material maintenance through Engineering Change Order Maintenance, BOM100, and not in Bill of Material Maintenance, BOM500.

Field descriptions - BOM110D2-01

Facility (3,A):

Specify the facility for this engineering change controlled item or *A for all facilities. The Facility field determines the facility in which you maintain the bill of material.

Item Number (35,A):

Specify the item number to be engineering controlled or *ALL for all items within a facility or method code. If you specify the item number, it must be a valid item in the Item Master.

BOM Mfg. Method Code (2,A):

Use the manufacturing method code to include alternate bills of material within a facility. Specify a valid method code or *A for all methods. You can use this code for experimental variations of a standard bill of material, operational variations of a standard BOM, and so on. Typical uses of the manufacturing method code include substitution of components on the standard BOM/Formula/Recipe or alternate routings (operational) that are attached to the components of the BOM.

Item Description (50,A):

If you specify an item number on the record, the system displays the item description from the Item Master.

Reference Designators (1,0):

This field indicates whether this level of ECO control defaults to a new ECO header. Specify one of the following values:

0

The ECO level does not default to a new ECO header.

1

The ECO level defaults to a new ECO header.

You can override the default value for each instance of an ECO.

Approval Process (1,0):

The Approval Process field indicates whether this ECO needs specific approval. Specify one of the following values:

0

No. The ECO does not need specific approval. Therefore, no entries are needed in the Default Approval Process Type, the Default Approval Process, and the Initial Approval Step.

1

Yes. The ECO does need specific approval. Therefore, you must specify the Default Approval Process Type and the Default Approval Process. The Initial Approval Step is optional.

Default Approval Process Type (2,A):

If the Approval Process field value is 1, specify the approval process type for starting an engineering change order. The typical approval process type for an

engineering change order is NM, Named Approval Process. You can maintain the approval process type in Code Table Maintenance, SYS105D1. If the Approval Process field value is 0, leave this field blank.

Default Approval Process (15,A):

If the Approval Process field value is 1, specify the approval process for starting an engineering change order. The approval process must exist before you can use it on an ECO and in this record. You can create or maintain the approval process in Approval Process Maintenance, BOM170D1. After you specify an approval process on the ECO header record, the approval process is copied to a soft approval process attached to the ECO. You can maintain the soft approval process through Approval Processing, BOM550D1, for this ECO. This field changes the parent item on an ECO to a required approval process. If the Approval Process field value is 0, leave this field blank.

Initial Approval Step (8,A):

If the Approval Process field value is 1, you can specify the approval process step for starting an engineering change order. This entry is optional. You can maintain the approval process step for the ECO through Approval Processing, BOM550D1. For convenience, the system copies this field to the ECO header at the beginning of the approval process. If the Approval Process field value is 0, leave this field blank.

Items Level Revision Control (1,0):

This field indicates whether this level of ECO control defaults to a new ECO header. Specify one of the following values:

0

The ECO level does not default to a new ECO Header.

1

The ECO level defaults to a new ECO Header.

You can override the default value for each instance of an ECO.

Item Last Revision Level (10,A):

Specify the new revision level for the parent or component item number. The revision level field in this file is information-only and is for future use.

Drawing Revision Control (1,0):

Specify one of the following values:

1

Print items with drawing revision control.

0

Print all items on the listing.

Drawing Last Revision Level (10,A):

This field indicates whether this level of ECO control defaults to a new ECO header. Specify one of the following values:

0

The ECO level does not default to a new ECO Header.

1

The ECO level defaults to a new ECO Header.

You can override the default value for each instance of an ECO.

Standard Batch Size (11,3):

Optional. Specify the standard batch size for batched items. If you use this field, the value is usually equal to the lot size. You use the batch size for bills of material representing a batch of the item that you can view as a BOM unit of measure. The number provides the terms for the items BOM. If the batch size is 100, the item BOM is in terms of the components needed to create 100 units of the item, not one unit. If you do not use this field, the default batch size is 1.

The standard batch size for kit parent items, Item Type 4, and assortment parent items, Item Type 3, is 1.00.

If you change the standard batch size, you must manually adjust the component quantities of children in the bill of material and planning bill of material. You must also manually adjust routings with basis code H. The system still divides setup costs for batched items by the lot size to determine per unit costs.

Standard Batch Weight (11,3):

Optional. Specify the standard batch weight for batched items.

Batch Balancing UOM (2,A):

Optional. Specify the batch balancing unit of measure.

Standard Yield Percentage (5,2):

The system supports yield percentages at the item level. This yield percentage affects the entire planning system for each item with a yield. On planning reports, inquiries, and in calculations, every scheduled receipt and planned receipt quantity is factored by the yield percentage. The open quantity multiplied by the yield percentage is what displays on the MRP planning reports and inquiries. This field supports yield data entry for facility, item number and method level calculations and is for future use.

Starting Effectivity Date (8,0):

This is the item starting effective date that is checked for change control in Bill of Material Maintenance, BOM500.

Ending Effectivity (Discontinue) Date (8,0):

This is the discontinue date for item to engineering change controlled.

Screen actions - BOM110D2-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

EC controlled item listing, BOM115

Use this program to print a list of all engineering change controlled items. You can print the list by facility range, item number range, method code range, and effective date range. You can limit the list to items that require reference designators, items that require an approval process, items with revision control, and items with drawing revision control.

Access: Menu MDM02

Print a change controlled item list

Use the EC Controlled Item Listing screen to specify which information to print. This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - BOM115D-01**From Facility (3,A):**

To limit the report to a range of facilities, specify the first value in the range.

To Facility (3,A):

To limit the report to a range of facilities, specify the last value in the range.

From Item Number (35,A):

To limit the report to a range of items, specify the first value in the range.

To Item Number (35,A):

To limit the report to a range of items, specify the last value in the range.

From Mfg Method Code (2,A):

To limit the report to a range of method codes, specify the first value in the range.

To Mfg Method Code (2,A):

To limit the report to a range of method codes, specify the last value in the range.

From Starting Effectivity Date (8,0):

To limit the report to a range of starting effective dates, specify the first value in the range.

To Starting Effectivity Date (8,0):

To limit the report to a range of starting effective dates, specify the last value in the range.

Items with Reference Designators only? (1,0):

Specify whether to include only those items with a reference designator.

Items with Approval Process Required only? (1,0):

Specify whether to include only those items with an approval process.

Items with Revision Control only? (1,0):

Specify whether to include only those items with revision control.

Items with Drawing Revision Control only? (1,0):

Specify whether to include only those items with drawing revision control.

Run Time Parameter (1,0):

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM115D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Revision level tracking, BOM120

Use this program to maintain the historical revision levels of change controlled items and drawings. There is a database record for each revision change for an item or drawing item. The system creates a single record to indicate the from and to revision levels. Use this historical database to track changes in manufacturing processes as follows:

- Item-to-item number changes
- Facility changes
- Manufacturing method changes
- Revision level changes and date of change

This program provides a view of all revision level changes for an item number. Parent item and component item revisions are both supported in this file.

Access: Menu MDM02. This menu option is available in maintenance and inquiry mode.

Add or select an EC revision level

Use the EC Revision Levels Selection screen to create an EC revision level or to select an existing one to maintain.

Field descriptions - BOM120D1-01

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

All line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Revision Type (1,A):

Specify one of the following revision types:

I

Item Revisions

D

Drawing Item Revisions

R

Routing Revisions (future)

Facility (3,A):

The system displays the facility associated with the existing revision levels. To create a revision level, use the Create line action in the top Act field, specify the

facility you want to associate with the level, complete the remaining fields, and press Enter.

Item Number (35,A):

The system displays the item number associated with the existing revision levels. To create a revision level, use the Create line action in the top Act field, specify the item number you want to associate with the level, complete the remaining fields, and press Enter.

Mfg Method Code (2,A):

The system displays the manufacturing method code associated with the existing revision levels.

To create a revision level, use the Create line action in the top Act field, specify the manufacturing method code you want to associate with the level, complete the remaining fields, and press Enter.

Revision From (35,A):

This is the original revision level prior to this record. In the list, the To field value resides just above the From field value.

Revision (To) (35,A):

The Revision (To) Level field is the new revision level from the original with this record. When creating a new record, you must input the Revision (To) Level value.

In the list, the To field value resides just above the From field value.

Status (8,A):

The status indicates if this revision level is active or inactive.

Screen actions - BOM120D1-01

F13=Sequence

Use to display the sequence and selection screen where you can specify how to sequence the selection list.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify filter options

Use Filter Options screen to specify how to sequence the list on the selection screen.

Field descriptions - BOM120D1-02**Sort Code (1,0):**

Specify how to sequence the list on the selection screen.

Revision Type (2,A):

Specify a revision type to limit the selection list to revision levels associated with that type. Specify one of the following values:

I

Item Revisions

D

Drawing Item Revisions

R

Routing Revisions (future)

Facility (3,A):

Specify a facility to limit the selection list to revision levels associated with that facility.

Item Number (35,A):

Specify an item number to limit the selection list to revision levels associated with that number.

BOM Mfg. Method Code (2,A):

Specify a manufacturing method code to limit the list on the selection screen to those revision levels associated with that code.

Screen actions - Filter**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify revision level details

Use the EC Revision Levels Maintenance screen, BOM120D2-01, to maintain the historical revision levels of a change-controlled items and drawings. The system creates a single record to indicate the from and to revision levels. Use this historical database to track changes in manufacturing processes.

Field descriptions - BOM120D2-01**Revision Type (2,A):**

The system displays the revision type associated with this revision level.

Facility (3,A):

The system displays the facility associated with this revision level.

Item Number (35,A):

The system displays the item number associated with this revision level.

Mfg Method Code (2,A):

The system displays the manufacturing method code associated with this revision level.

Revision (From) Level (35,A):

The system displays the manufacturing method code associated with this revision level.

Revision (To) Level (35,A):

The system displays the manufacturing method code associated with this revision level.

Starting Effectivity Date (8,0):

Specify the item starting effective date that is effective for this revision.

Ending Effectivity (Discontinue) Date (8,0):

Specify the item discontinue date for on this revision level record.

New Facility (3,A):

If applicable, specify the revision facility code for this item number. The facility is designed to include multiple bills of material within a corporation. Each facility can have a unique bill of material for an item. The facility code must exist in the Facility Master file before you can use it for engineering controlled items.

New Item Number (35,A):

Specify the revision item number for the previous item number. This provides important record keeping of item number revisions. The item number is the unique identification of a stocked product or inventory item in the system.

New Mfg Method Code (2,A):

Specify the new manufacturing method code that is created for this revision. Use the manufacturing method code to include alternate bills of material within a facility. You can use this code for experimental variations of a standard BOM, operational variations of a standard BOM, and so on. Typical uses of the manufacturing method code include substitution of components on the standard BOM or alternate routings (operations) that are attached to the components of the BOM.

Comment (30,A):

Use to specify comments or general information about this revision record. For easier readability, you can use uppercase and lowercase characters.

Screen actions - BOM120D2-01**F14=Revision Level Field**

Use to update the revision level in the Item Master file if you do not specify a facility for this record. If you specify a facility, this action updates the Revision Level field in the Item/Facility Master, CIC, file.

Do not use F14 if you use this record on an Engineering Change Order header. If you do, the revision record does not validate properly on the Engineering Change Order Header Maintenance screen, BOM100D2. Press Enter instead to not update the IIM or CIC. However, you can post the new revision to the IIM or CIC when you post the ECO.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

EC revision level listing, BOM125

Use this program to print a list of all revision level records. You can print the list by revision type, facility range, item number range, and method code range.

Access: Menu MDM02

Print a revision level list

Use the EC Revision Level Listing screen to specify which information to print. This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - BOM125D-01**Revision Type (1,A):**

Specify a revision type to limit the report to only those revision levels associated with that type. Specify one of the following values:

I

Item Revisions

D

Drawing Item Revisions

R

Routing Revisions (future)

If you leave this field blank, the system prints the report regardless of revision type.

From Facility (3,A):

To limit the report to a range of facilities, specify the first value in the range.

To Facility (3,A):

To limit the report to a range of facilities, specify the last value in the range.

From Item Number (35,A):

To limit the report to a range of items, specify the first value in the range.

To Item Number (35,A):

To limit the report to a range of items, specify the last value in the range.

From Mfg Method Code (2,A):

To limit the report to a range of method codes, specify the first value in the range.

To Mfg Method Code (2,A):

To limit the report to a range of method codes, specify the last value in the range.

Run Time Parameter (1,0):

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM125D-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Drawing master file maintenance, BOM140

Use this program to maintain drawing numbers. This file replaces a notebook or manual tracking system that you might use to assign new drawing numbers or to track a list of drawings maintained by an engineering department.

If you track drawings through this file, you can obtain multiple views of the file through reports. In addition, you can associate drawing numbers with engineering change orders and item masters. The Drawing Master provides the ability to segregate drawings by facility or plant and it supports multiple-page drawings.

Access: Menu MDM02

Add or select a drawing

Use the Drawing Master Maintenance selection screen to create a new drawing or to select an existing one to maintain.

Field descriptions - BOM140D1-01

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

All line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Facility (3,A):

The system displays the facility associated with existing drawings. To create a drawing, use the Create line action in the top Act field, specify a facility here, complete the other fields, and press Enter.

Drawing Number (30,A):

You can assign the drawing number to group similar drawings together. Use this field when you create a new drawing.

Mfg Method Code (2,A):

The system displays the manufacturing method code associated with existing drawings. To create a drawing, use the Create line action in the top Act field, specify a manufacturing method code here, complete the other fields, and press Enter.

Drawing Page Number (5,0):

Use the drawing page number for multiple page drawings and the association of a specific page to a drawing.

Drawing Description (30,A):

Specify the drawing or revision description. For easier readability, you can use uppercase and lowercase characters.

Screen actions - BOM140D1-01**F13=Sequence**

Use to display the sequence and selection screen where you can specify how to sequence the selection list.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify filter options

Use the Filter Options screen to specify how to sequence the list on the selection screen.

Field descriptions - Filter**Action Code (1,0):**

Specify how to sequence the list on the selection screen.

Facility (3,A):

To limit the selection list to a specific facility, specify the facility.

Drawing Number (30,A):

To limit the selection list to a specific drawing number, specify the number.

BOM Mfg. Method Code (2,A):

To limit the selection list to a specific manufacturing method code, specify the code.

Screen actions - Filter

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify drawing details

Use the Drawing Master Maintenance detail screen, BOM140D2-01, to specify information for the drawing. You can also specify the customer and salesperson associated with this product.

Field descriptions - BOM140D2-01

Facility (3,A):

The system displays the facility associated with this drawing.

Drawing Number (30,A):

The system displays the drawing number associated with this drawing.

Mfg Method Code (2,A):

The system displays the manufacturing method code associated with this drawing.

Drawing Page Number (5,0):

Use this field for multiple-page drawings and for the association of a specific page to a drawing.

Drawing Description (30,A):

Specify the drawing or revision description. For easier readability, you can use uppercase and lowercase characters.

Extra Drawing Description (30,A):

Specify an extra drawing or revision description. The system does not print this field on reports.

Drawing Starting Effectivity Date (8,0):

This value is the parent or component starting effective date for this drawing.

Drawing Ending Effectivity (Discontinue) Date (8,0):

This value is the discontinue date for this drawing.

Drawing Release Date (8,0):

Specify the date that you plan to release the drawing to manufacturing.

Drawing Due Date (8,0):

Specify the date that the drawing is due for completion from engineering or the creating department.

User Date 1 (8,0):

This is the first user-defined date for this drawing.

User Date 2 (8,0):

This is the second user-defined date for this drawing.

Drawing Item Number (35,A):

This is the single-level parent for a bill of material that this drawing is applied to or the component item for a detailed drawing. The item number is not required for a drawing master record. If you specify the drawing item number, it must be a valid item in the Item Master.

Item Description (50,A):

If you specify a drawing item number on the record, the system displays the item description from the Item Master.

Revision Level (10,A):

Specify the new revision level for the drawing. The new revision level must exist on the Revision Master file before you can use it with a revision type of D, Drawing. You can use the Revision Master Maintenance screen action to add the revision level to the Revision Master if it does not exist.

Multiple Items Drawing? (1,0):

This field tracks whether there are multiple item numbers on this drawing page. Specify one of the following values:

1

There are multiple items on the drawing page.

0

There is a single item (parent) on the drawing page.

Approval Process Type (2,A):

Specify the approval process type for this drawing. The typical approval process type for a drawing is DR, Drawing Approval Process. You can maintain the approval process type in Code Table Maintenance, SYS105D1.

Approval Process (15,A):

Specify the approval process for this drawing. The approval process must exist before you can use it on a drawing. You can create or maintain the approval process in Approval Process Maintenance, BOM170D1. After you specify an approval process on the drawing record, the system copies the approval process to a soft approval process attached to the drawing. You maintain the soft approval process through Approval Processing, BOM550D1, for this drawing.

Approval Process Step (8,A):

The system displays the current approval process step for this drawing. You can maintain the approval process step for the drawing through Approval Processing, BOM550D1.

Drawing Status (2,A):

You can use this user-defined field to mark a drawing with a drawing status code. For example, C, complete, H, on hold and so on. This field is for reference only.

Drawing Size (2,A):

You can use this user-defined field to track the size. For example, C for C size drawing and so on. This field is for reference only.

Parent Order Facility (3,A):

Specify the facility for the parent engineering change order. The Facility field determines the facility in which you maintain the bill of material. The system copies the facility on the ECO header to each detail line or component instruction on the ECO.

Parent Order Type (2,A):

Specify the parent order type for this engineering change order. The typical parent order type for an engineering change order is EC. You can maintain the Order Type in Code Table Maintenance, SYS105D1.

Parent Engineering Change Order Number (15,A):

Specify the parent engineering change order number for this order. The parent engineering change order number is user-defined and must be unique within order type and facility. You assign this value to track ECOs. You can use this field to group multiple ECOs or drawings together for tracking.

Employee Number - Designer (8,A):

The designer number is the employee number of the individual who originated the drawing or who is overall responsible for this drawing.

Requested by Employee (8,A):

Specify the employee number of the person who requested the drawing. The requested by employee number must be included on the drawing record.

Customer Number (8,0):

Specify the customer number that requested the drawing. If available, you must include the requested by customer number on the drawing record.

Salesperson Number (6,0):

This entry allows you to specify the salesperson number that requested the Drawing. You must include the requested by salesperson number on the drawing for certain reporting selections to work correctly, if available.

User Defined Code 1 (15,A):

Specify a user-defined code.

User Defined Code 2 (5,A):

Specify a user-defined code.

Comment (30,A):

Specify comments or general information about this ECO. For easier readability, you can use uppercase and lowercase characters.

Screen actions - BOM140D2-01**F14=Revision Master Maintenance**

Use to display Revision Master Maintenance, BOM120D1.

F16=Drawing Notes

Use to display Drawing Notes program, SYS181D3.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Drawing master listing, BOM145

Use this program to print a list of drawings from the Drawing Master file.

Access: Menu MDM02

Print a drawing master list

Use the Drawing Master File Listing screen to specify which information to print. This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - BOM145D-01

From Facility (3,A):

To limit the report to a range of facilities, specify the first value in the range.

To Facility (3,A):

To limit the report to a range of facilities, specify the last value in the range.

From Drawing Number (30,A):

To limit the report to a range of drawing numbers, specify the first value in the range.

To Drawing Number (30,A):

To limit the report to a range of drawing numbers, specify the last value in the range.

From Mfg Method Code (2,A):

To limit the report to a range of method codes, specify the first value in the range.

To Mfg Method Code (2,A):

To limit the report to a range of method codes, specify the last value in the range.

From Item Number (35,A):

To limit the report to a range of items, specify the first value in the range.

To Item Number (35,A):

To limit the report to a range of items, specify the last value in the range.

From Drawing Status (2,A):

To limit the report to a range of drawing statuses, specify the first value in the range.

To Drawing Status (2,A):

To limit the report to a range of drawing statuses, specify the last value in the range.

From Drawing Starting Effectivity Date (8,0):

To limit the report to a range of drawing starting effective dates, specify the first value in the range.

To Drawing Starting Effectivity Date (8,0):

To limit the report to a range of drawing starting effective dates, specify the last value in the range.

From Drawing Due Date (8,0):

To limit the report to a range of drawing due dates, specify the first value in the range.

To Drawing Due Date (8,0):

To limit the report to a range of drawing due dates, specify the last value in the range.

From Engineering Change Order Number (15,A):

To limit the report to a range of EC order numbers, specify the first value in the range.

To Engineering Change Order Number (15,A):

To limit the report to a range of EC order numbers, specify the last value in the range.

From Designer Number (8,A):

To limit the report to a range of designer numbers, specify the first value in the range.

To Designer Number (8,A):

To limit the report to a range of designer numbers, specify the last value in the range.

From Requested by Employee (8,A):

To limit the report to a range of requested by employee numbers, specify the first value in the range.

To Requested by Employee (8,A):

To limit the report to a range of requested by employee numbers, specify the last value in the range.

From Customer Number (8,0):

To limit the report to a range of requested by customer numbers, specify the first value in the range.

To Customer Number (8,0):

To limit the report to a range of requested by customer numbers, specify the last value in the range.

From Salesperson Number (6,0):

To limit the report to a range of requested by salesperson numbers, specify the first value in the range.

To Salesperson Number (6,0):

To limit the report to a range of requested by salesperson numbers, specify the last value in the range.

Print Drawing Notes? (1,0):

Specify whether to print drawing notes. If you print drawing notes, the size of the report increases.

Run Time Parameter (1,0):

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM145D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Posted ECO maintenance, BOM150

Use this program to maintain effective dates on posted ECOs and to unpost posted ECOs. This program is included in Security Group Maintenance, SYS603D1, and also controls system parameters.

Unposting, or logically deleting, an ECO discontinues the existing BOM-lines with this ECO number from corresponding BOMs and resets the discontinue dates of the original components on the ECO to the original components discontinue dates.

Access: Menu MDM02

Select a posted ECO

Use the Posted ECO Maintenance screen to select a posted ECO.

Field descriptions - BOM150D1-01

Act (2,A):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

16=Notes

Use to display the notes at the Engineering Change Order header level for maintenance.

19=Unpost

Use to display the Posted ECO Maintenance Detail screen, BOM150D2-01, in Unpost mode. You can unpost an already posted ECO for individual lines or all lines.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Line actions:

The system displays the list of available line actions.

Order Type (2,A):

The system displays the order type for the existing ECOs. You can use the top field with a line action.

Facility (3,A):

The system displays the facility for the existing ECOs. You can use the top field with a line action.

Engineering Change Order Number (15,A):

The system displays the ECO number for the existing ECOs. You can use the top field with a line action.

ECO Description (30,A):

The system displays the description for the existing engineering change orders.

Effective Date (8,0):

The system displays the effective date for this ECO. The effective date is the starting effective date for this engineering change order. This effective date is the starting effective date on the BOM component lines that this ECO updates. You can maintain this date on the detail screen.

Status (8,A):

The system displays the status of this ECO record. The status is active or inactive. Active ECOs are in the process of being maintained until they are closed or deleted. Inactive ECOs are closed or deleted. Posted ECOs are inactive.

The system does not change the ECO status in the Engineering Change Header file, MBV, if you revise or unpost the ECO..

Screen actions - BOM150D1-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Select posted ECO detail lines

Use the Posted ECO Maintenance screen, BOM150D2-01, to select a posted ECO line to maintain.

When you access the Posted ECO Maintenance Detail program, BOM150D2, you can only perform the action that is associated with the mode you are in. For example, if you are in Revise mode, you can only revise line dates of the ECO. If you are in Unpost mode, you can only unpost lines. The modes also determine which line actions and screen actions are available on this screen.

The system displays the order type, facility, and ECO number from the selection screen and the description and extra description from the Engineering Change Header file, MBV. Other fields are described in the help text for the individual fields.

Field descriptions - BOM150D2-01**Act (2,A):**

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

5=Display Line Detail

Use to display the ECO Component Line Detail, BOM100D4-01, in display only mode.

9=Unpost

Use to unpost a line. The system displays this action only if you accessed the screen in Unpost mode.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Line actions:

The system displays the list of available line actions.

Line (4,0):

This is the engineering change order line number. If you perform an action from the prompt line, you must specify the line number.

Effective Date from (header):

This is the effective date of the ECO header. You can maintain this value.

The starting effective date cannot be later than the ending effective date. Also, you cannot change this range to a range that includes open shop orders, purchase orders, or requisitions.

Effective Date from (line):

This is the effective date of the ECO line. You can maintain this value.

The starting effective date cannot be later than the ending effective date. Also, you cannot change this range to a range that includes open shop orders, purchase orders, or requisitions.

Effective Date to (header):

This is the discontinue date of the ECO header. You can maintain this value.

The ending effective date cannot be earlier than the starting effective date. Also, you cannot change this range to a range that includes open shop orders, purchase orders, or requisitions.

Effective Date to (line):

This is the discontinue date of the ECO line. You can maintain this value.

The ending effective date cannot be earlier than the starting effective date. Also, you cannot change this range to a range that includes open shop orders, purchase orders, or requisitions.

New Component Item Number (35,A):

The system displays this value from the EC Component Detail file, MBW. The new component item number is the target item number for add, update, or delete instructions. It must exist in the Item Master before you can use it in an ECO detail line instruction.

Instruction Effectivity Code (2,A):

The system displays the instruction effective code for this line. This code indicates the conditions under which the detail instruction line action is applied to the bill of material.

Original Component (35,A):

The system displays this value from the EC Component Detail file, MBW. The original component item number is the component-level item on which an update or delete is based. If the system locates the original component number on the single-level BOM, the new component number replaces this number or the system deletes this number, depending on the line action on the instruction.

Screen actions - BOM150D2-01**F6=Accept**

Use in Revise mode only. The system displays the Unpost/Revise Posted ECOs program, BOM621D, to process updates to bills of materials and the ECO tracking file for lines and line dates that changed.

F15=ECO Header

Use in Display mode. The system displays the Engineering Change Order Header Maintenance, BOM100D2, for the record you are maintaining.

F16=Copy Header Dates

Use in Revise mode to copy the header effective dates to all lines. Do not use this function if you are revising individual lines. Press Enter and then press Accept to perform the change.

Use in Unpost mode to unpost all lines. The system displays the Unpost/Revise Posted ECOs program, BOM621D, to perform the unpost.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Approval process maintenance, BOM170

Use this program to maintain the approval processes for engineering change orders and drawings. The multiple approval processes provide flexible sequential or parallel approval steps for engineering change orders and drawings. You can use general or named processes, ECO-specific approval processes or drawing-specific approval processes for the multiple types of approval processes.

Access: Menu MDM02

Add or select an approval process

Use the Approval Process Maintenance selection screen to create an approval process for an ECO or drawing or to select an existing one to maintain.

Field descriptions - BOM170D1-01

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

All line actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for line actions* in the overview information in this document.

Approval Process Type (2,A):

To create an approval process, use the Create line action on the top Act field, specify a type here, complete the other fields, and press Enter.

You maintain the approval process type in Code Table Maintenance, SYS105D1.

Facility (3,A):

To create an approval process, use the Create line action on the top Act field, specify a facility here, complete the other fields, and press Enter.

The facility code is designed to include multiple bills of material within a corporation. Each facility can have a unique bill of material for an item. The facility code must exist in the Facility Master file before you can use it for approval processing.

Approval Process (15,A):

To create an approval process, use the Create line action on the top Act field, specify an approval process name here, complete the other fields, and press Enter.

The approval process must exist before you can use it on a drawing or an ECO. After you specify an approval process on the drawing record or an ECO, the approval process is copied to a soft approval process attached to the drawing

or ECO. You can maintain the soft approval process through Approval Processing, BOM550D1, for the drawing or ECO.

Approval Process Description (30,A):

If you create an approval process, specify the description here. You can also leave this field blank and specify the description on the detail screen.

Reserved Type (1,0):

The system displays the reserve type.

1

Yes. You cannot delete a record that has this setting.

0

No

Status (8,A):

The system displays the status of the approval process.

Screen actions - BOM171D1-01

F13=Filters

Use to access the filter screen to specify how to sequence the selection list.

All other screen actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for screen actions* in the overview information in this document.

Specify filter options

Use the Filter Options screen to specify how to sequence the list of approval processes on the selection screen.

Field descriptions - Filter

Action Code (1,0):

Specify how to sequence the selection list.

Process Type (2,A):

To limit the selection list to a specific process type, specify that type.

Facility (3,A):

To limit the selection list to a specific facility, specify that facility.

Approval Process (8,A):

To limit the selection list to a specific approval process, specify that process.

Screen actions - Filter**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify approval process details

Use the Approval Process Maintenance detail screen, BOM170D2-01, to specify the approval processes details. The multiple types of approval processes allow general or named processes, ECO-specific approval processes, or drawing-specific approval processes.

Field descriptions - BOM170D2-01**Approval Type (2,A):**

Specify the approval process type. The typical approval process type for a drawing is DR, Drawing Approval Process, or EC, Engineering Change Order.

Drawing Approval Process (2,A):

Specify the approval process used on an ECO or drawing.

Facility (3,A):

The facility code is designed to include multiple bills of material within a corporation. Each facility can have a unique bill of material for an item. The facility code must exist in the Facility Master file before you can use it for approval processing.

Facility Description (30,A):

The system displays the facility description for this approval process. You can maintain the facility description in Facility Master Maintenance, SYS190D1.

Approval Process (15,A):

Specify the name for approval process. The approval process must exist before you can use it on a drawing or an ECO. After you specify an approval process on the drawing record or an ECO, the system copies the approval process to a soft approval process attached to the drawing or ECO. You can maintain the soft approval process through Approval Processing, BOM550D1, for the drawing or ECO.

Description (30,A):

Specify a description of the approval process used on an ECO or drawing. For easier readability, you can use uppercase and lowercase characters.

Reserved Type? (1,0):

Specify one of the following values:

1

Yes. You cannot delete a record that had this setting.

0

No

Comment (30,A):

Specify comments or general information about this ECO. For easier readability, you can use uppercase and lowercase characters.

Screen actions - BOM170D2-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Create or select a step/approval process combination

Use the Approval Process Step Maintenance selection screen, BOM170D3-01, to assign a step to an approval process or to select an existing combination to maintain.

Field descriptions - BOM170D3-01**Act (2,0):**

The system displays a list of line actions that are available on this screen.

Type (2,A):

The system displays the type of the approval process.

Facility (3,A):

The system displays the facility for the approval process.

Process (15,A):

The system displays the name of the approval process.

Description (30,A):

The system displays the description of the approval process.

Reserved Type? (1,0):

The system specifies the reserved type.

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

All line actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for line actions* in the overview information in this document.

Line Number (3,0):

Specify the approval process line number. The line number must be unique for each approval process step. We recommend that you increment the approval process line number in steps of 5 or 10. This allows you to insert steps during maintenance.

Step (8,A):

Specify the approval process step for this approval process. You can use a person or procedural step within an overall approval process. You can use the same process step more than once in an approval process, but the line number must be unique for each step. You can maintain the approval process step behavior through Approval Processing Step, BOM175D1.

Description (30,A):

Specify the description of the approval process step.

Required (8,A):

The system displays whether the this steps is required before you post an engineering change order or approve a drawing. 1 indicates required and 0 indicates optional.

Status (8,A):

The system displays the approval step status.

Screen actions - BOM170D3-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify approval process step details

Use the Approval Process Step Maintenance detail screen, BOM170D4-01, to specify the information that defines the connection between the approval process and this step. To define individual steps that do not have a relationship to an approval process, use Approval Step Maintenance, BOM175.

Field descriptions - BOM170D4-01

Approval Process Type (2,A):

The system displays the approval process type for the approval process.

Facility (3,A):

The system displays the facility for the approval process.

Facility Description (30,A):

The system displays the facility description.

Approval Process (15,A):

The system displays the approval process name.

Approval Process Description (30,A):

The system displays the description of the approval process.

Approval Process Line Number (3,0):

The system displays the approval process line number.

Approval Process Step (8,A):

The system displays the name of the approval process step from Approval Step Maintenance, BOM175.

Approval Process Step Description (30,A):

Specify a description for the step as it pertains to this approval process. In Approval Step Maintenance, BOM175, you assign the step a general description. For example, in Approval Step Maintenance, you can use Test as the step description. However, when you assign the step to an approval process, you might decide to use Final Processing Test Step as the description, as it provides more relevance in terms of its use in the approval process.

Required Step? (1,0):

Specify whether this is a required step. The system displays the value set up in Approval Step Maintenance, BOM175.

Tier Level (6,A):

Specify the tier level for this approval step. The tier level is the department or approval tier for this phase of the approval process. You can use a tier level as an intermediate level between the process name and the process step.

Number of Review Days (3,0):

Use this field to calculate the review date on the soft approval process from the date that the approval process is assigned to the ECO or drawing.

Priority Code (2,A):

Use this field to group high-priority approval steps or to categorize approval steps within an approval process. You can use this field to sort for user-developed reporting.

Reason Code 1 (2,A):

Use this field to describe categories of activities within an approval process step. You can use this field to sort for user-developed reporting. You can define the valid reason codes in Code Table Maintenance, SYS105D1.

Reason Code 2 (2,A):

See the Reason Code 1 field.

Reason Code 3 (2,A):

See the Reason Code 1 field.

Comment (30,A):

Use to specify comments or general information about this approval step. For easier readability, you can use uppercase and lowercase characters.

Screen actions - BOM170D4-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Approval process listing, BOM171

Use this program to print the approval processes within specified limits. The report lists the approval process name and the steps within that process. Each new approval process starts on a new page.

Access: Menu MDM02

Print an approval process list

Use the Approval Process Listing screen to specify which information to print. This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - BOM171D-01

From Facility (3,A):

To limit the report to a range of facilities, specify the first value in the range.

To Facility (3,A):

To limit the report to a range of facilities, specify the last value in the range.

From Approval Process Type (2,A):

To limit the report to a range of approval process types, specify the first value in the range.

To Approval Process Type (2,A):

To limit the report to a range of approval process types, specify the last value in the range.

From Approval Process (15,A):

To limit the report to a range of approval processes, specify the first value in the range.

To Approval Process (15,A):

To limit the report to a range of approval processes, specify the last value in the range.

From Approval Step (8,A):

To limit the report to a range of approval process steps, specify the first value in the range.

To Approval Step (8,A):

To limit the report to a range of approval process steps, specify the last value in the range.

From Tier Level (6,A):

To limit the report to a range of tier levels, specify the first value in the range.

To Tier Level (6,A):

To limit the report to a range of tier levels, specify the last value in the range.

Run Time Parameter (1,0):

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM171D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Approval step maintenance, BOM175

Use this program to maintain the approval process steps for engineering change orders and drawings. Each approval process step can represent a person or key activity in the process for approval. You can assign the sequence number in steps of 5 or 10, so that you can insert additional steps when you edit at a later time. The system copies the approval steps to the individual ECOs and drawings when you attach the approval process.

Access: Menu MDM02

Add or select approval steps

Use the Approval Step Maintenance selection screen to add or select the approval process steps for engineering change orders or drawings.

Field descriptions - BOM175D1-01**Act (2,0):**

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

All line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Approval Process Step (8,A):

The system displays the name of existing approval process steps. To create a step, use the Create line action in the top Act field, specify a step name here, and press Enter.

Approval Process Step Description (30,A):

The system displays the description of existing approval process steps. You can specify a description if you use the Create line action.

Required Step? (1,0):

The system displays whether the existing step is required. 1 is required, 0 is optional.

Posting Step? (1,0):

The system displays whether the existing approval process steps allow posting of the ECO or drawing. 1 is yes, 0 is no.

Status (8,A):

The system displays the status of the existing approval process steps.

Screen actions - BOM175D1-01**F13=Sequence**

Use to access the filter screen to specify how to sequence the selection list.

All other screen actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for screen actions* in the overview information in this document.

Specify filter options

Use the Filter Options screen to specify how to sequence the list of approval steps on the selection screen.

Field descriptions - Filter**Action Code (1,0):**

Specify how to sequence the selection list.

Process Type (2,A):

To limit the selection list to those approval steps that are associated with a specific process type, specify that type.

Facility (3,A):

To limit the selection list to those approval steps that are associated with a specific facility, specify that facility.

Approval Process (8,A):

To limit the selection list to those approval steps that are associated with a specific approval process, specify that process.

Screen actions - Filter**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify approval step parameters

Use the Approval Step Maintenance parameters screen, BOM175D2-01, to specify the general parameters that define an approval process step. When you assign a step to an approval process, the system uses the parameters you define here as default information. You define the relationship details between an approval step and an approval process in Approval Process Maintenance, BOM170.

Each approval process step can represent a person or key activity in the process for approval.

This program displays several fields that are available in future versions/releases. These fields are documented as reference only.

Field descriptions - BOM175D2-01**Approval Process Step (8,A):**

The system displays the name of the approval process step.

Approval Process Step Description (30,A):

Specify the description of the approval process step. For easier readability, you can use uppercase and lowercase characters.

Reserved Type? (1,0):

Specify whether the step is reserved. You cannot delete a reserved step.

Required Step? (1,0):

Specify whether this approval process step is a required step for posting an ECO or drawing.

Return to Previous Step? (1,0):

Specify whether this approval process step can return to the previous step in the approval process of the ECO or drawing.

Block Further Order Maintenance? (1,0):

Specify whether to allow further ECO or drawing maintenance.

Valid Step for Posting? (1,0):

Specify whether this approval process step allows posting of the ECO or drawing.

User ID Sign-On Required? (1,0):

Specify whether this approval process step requires a unique user ID for the posting process.

Approval Step User ID (10,A):

Specify the user ID if the User ID Sign-On Required? field is yes. This field is relevant only if the step is valid for posting.

Approval Step Password Required? (1,0):

Reference only. We plan to use this field in future versions/releases. Specify if this approval process step requires a password for the accept or reject process.

Approval Step Password (10,A):

Reference only. We plan to use this field in future versions/releases. Specify the password if the Approval Step Password Required? field is yes.

Comment (30,A):

Use to specify comments or general information about this ECO. For easier readability, you can use uppercase and lowercase characters.

Send Message or Program 0/1 (1,0):

Reference only. We plan to use this field in future versions/releases. The Send Message or Program 0/1 field indicates whether the two fields below send a message or run a program upon activation of this approval step.

Message User ID/Program Name (10,A):

Reference only. We plan to use this field in future versions/releases. Based on the Send Message or Program field, specify the user ID for the message or the program ID to process from the Message/Program Execution field.

Message/Program Execution (256,A):

Reference only. We plan to use this field in future versions/releases. Specify a message to send or program parameters to run upon activation of this approval step. For easier readability, you can use uppercase and lowercase characters.

Screen actions - BOM175D2-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Approval steps listing, BOM176

Use this program to list the approval process steps that you can use to construct an approval process. Each approval process step can represent a person or key activity in the process for approval. The approval process step defines the behavior of the step when the approval process is copied to the individual Engineering Change Order or Drawing. The report lists only required steps or posting steps that use the options.

Access: Menu MDM02

Print an approval step list

Use the Approval Step Listing screen to specify which information to print.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - BOM176D-01**From Approval Process Step (8,A):**

To limit the report to a range of approval process steps, specify the first value in the range.

To Approval Process Step (8,A):

To limit the report to a range of approval process steps, specify the last value in the range.

Required Steps Only? (1,0):

Specify whether to print only approval process steps that are required for posting an ECO or drawing.

Posting Steps Only? (1,0):

Specify whether to print only approval process steps that are designated for posting.

Run Time Parameter (1,0):

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM176D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Manufacturing data notes, BOM190

Use this program to establish notes for materials and routings for non-planning bill item types, item type 5. You can:

- Print notes on the BOM listing
- Copy notes to shop order material sheets and print them
- View notes on the Shop Order Inquiry, SFC300

Routings for planning bill items must be facility specific. When you delete a routing, you must also delete any related notes to prevent these notes from attaching to a new routing.

Access: Menu MDM

Add or select manufacturing data notes

Use the Manufacturing Notes Selection screen to create a manufacturing data note or to select an existing one to maintain.

Field descriptions - BOM190D1-01**Act (2,A):**

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Item Number (35,A):

The system displays the item numbers associated with the existing notes. You can use the top field with one of the line actions.

Type (1,A):

The system displays the note type assigned to the existing notes. You can use the top field with one of the line actions. Valid type are:

M

Materials.

R

Routings.

Seq/Operation (2,0)/(3,0):

The system displays the sequence in the Bill of Material file, MBM, for material notes or the routing operation number for routing notes.

Facility (3,A):

The system displays the facilities associated with the existing notes. You can use the top field with one of the line actions. Routings must be facility specific.

Method (2,A):

The system displays the methods associated with the existing notes. You can use the top field with one of the line actions.

Screen actions - BOM190D1-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify manufacturing notes

Use the Manufacturing Notes Maintenance screen, BOM190D2-01, to add, view, or update the manufacturing notes.

Field descriptions - BOM190D2-01**Note Type:**

The system displays the note type you specified on the previous screen.

Item Number:

The system displays the item number to which this note applies.

Item Description:

The system displays a description of the item.

Facility:

The system displays the facility for this item.

Facility Description:

The system displays a description of the facility.

Method:

The system displays the routing or material method code.

Method Description:

The system displays a description of the method.

Operation/Sequence (3,0):

The system displays this field for R or routing type notes. The system displays the operation number to which this note applies.

This field is called Sequence for material notes. In this case, the system displays the sequence number for the component item in the BOM for the parent item.

Operation Description:

The system displays a description of the operation for routing notes.

Component Description:

The system displays a description of the component for material notes.

Seq (2,0):

The sequence number represents the sequence in the Bill of Material file, MBM.

Component (15,A):

The system displays the component operation for material type notes.

Note Text (50,A):

To add or update notes, use the arrow keys to move to a line. Type your note in the Note Text field. To remove notes, use the spacebar or field exit key to erase the individual note lines.

When you delete a routing, you must also delete any related notes to prevent these notes from attaching to a new routing.

Bom (1,A):

Specify Y here if you want the system to print routing notes or component notes from the Print Released Planned Orders program, SFC550. The system prints all lines with Y on the BOM and Routing listings. Specify N to not print the line of text.

Cpy To Ord (1,A):

Specify Y next to a line of text to print it on shop orders. If you want the system to print routing notes or component notes from the Print Released Planned Orders program, SFC550, specify Y to copy the note text to the shop order material sheets. Specify N to not print the line of text.

Screen actions - BOM190D2-01**F6=Update**

Use to update the notes file with your changes. Only F6 can update the changes to the database. Do not use Enter to update.

F14=Insert

Use to insert lines between existing note lines.

F15=Move

Use to move existing note lines to different lines.

F16=Copy

Use to copy existing note lines to different lines.

F17=Delete

Use to delete one or more note lines.

F18=Change

Use to prevent users from changing the print flags in the BOM and CpyToOrd fields. Use F18 again so that users can change the flags.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add or update manufacturing notes

To access this screen, use the Insert screen action on the note detail screen, BOM190D2-01. Use the Insert Function screen, BOM190D2-14, to insert new text in an existing note.

Field descriptions - BOM190D2-14

Note Text (50,A):

Type the note you want to insert.

Bom (1,A):

Specify whether to print the line of text on a BOM.

Cpy To Ord (1,A):

Specify whether to print the line of text on shop orders.

Before Line Number (4,0):

Specify the line number of the existing note where you want to insert this note. The system inserts the note on the line immediately before the line you specify..

Screen actions - BOM190D2-14

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Move manufacturing notes lines

Use the Move Function screen, BOM190D2-15, to move text to a different line. You must move the text line by line.

Field descriptions - BOM190D2-15

Before Line Number (4,0):

Specify the line number before which you want to move the text.

From Line Number (4,0):

Specify a first line number of the block of lines to move.

Through Line Number (4,0):

Specify the last line number of the block of lines to move.

Screen actions - BOM190D2-15**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Copy manufacturing notes lines

Use the Copy Function screen, BOM190D2-16, to copy and paste existing lines of text.

Field descriptions - BOM190D2-16**Before Line Number (4,0):**

Specify the line before which you want to copy the text.

From Line Number (4,0):

Specify the first line number of the block of lines to copy.

Through Line Number (4,0):

Specify the last line number of the block of lines to copy.

Screen actions - BOM190D2-16**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Delete manufacturing notes lines

Use the Delete Function screen, BOM190D2-17, to delete selected lines of text from a note.

Field descriptions - BOM190D2-17**From Line Number (4,0):**

Specify the first line number of the block of lines to delete.

Through Line Number (4,0):

Specify the last line number of the block of lines to delete.

Screen actions - BOM190D2-17**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Bill of material/formula/recipe listing, BOM200

Use this program to generate a report of all bills of materials that currently exist on disk. This report lists all components of an item or all items within a class of items. The report can include single-level or multi-level components of the item or class.

The program name and the description header that the system displays at the top of the screen varies. Use the Parameter Generation program, SYS800, to change the name of this program and the screen header. Specify an alphanumeric description in the User Defined Description of Bill of Materials field in the Parameter Generation program, SYS800. For example, you may want the screen header to read BOM Materials Listing or Formula-Recipe Listing.

The report lists:

- Level
- Unit of measure
- Usage code
- Item
- Effective date
- Co/by product
- Quantity required
- Discontinue date
- Start lot
- Cumulative quantity
- Batch size
- End lot
- Alternate items and relative quantity of them required to substitute for a unit of the original item

Access: Menu MDM

Print a bill of material/formula/recipe list

Use the BOM-Formula-Recipe Listing screen to print a list of all bills of material that currently exist on disk.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - BOM200D-01

By Item or Class (1,0):

Specify one of the following values:

1

Sort the listing by item number.

2

Sort by item class. This is the system default value.

From Parent Item Class (2,A):

To print the report based on a range of parent item classes, specify the first value in the range.

To Parent Item Class (2,A):

To print the report based on a range of parent item classes, specify the last value in the range.

From Item Number (35,A):

To print the report based on a range of item numbers, specify the first value in the range.

To Item Number (35,A):

To print the report based on a range of item numbers, specify the last value in the range.

From Material Method (2,A):

To print the report based on a range of material methods, specify the first value in the range.

To Material Method (2,A):

To print the report based on a range of material methods, specify the last value in the range.

Facility (3,A):

Specify the facility for this report. This facility specifies the first product structure as it performs the explosion. If a facility-specific structure is not present or is blank, the system uses the global structure.

From Engineering Change Order Number (15,A):

To print the report based on a range of ECO numbers, specify the first value in the range.

To Engineering Change Order Number (15,A):

To print the report based on a range of ECO numbers, specify the last value in the range.

Single- or Multi-Level (1,A):

Specify one of the following values:

1

Include only the first-level components in the report.

2

Include all levels of detail in the report.

Effective Components Only? (1,0):

Specify one of the following values:

0

Include all components in the report.

1

Include only components with active effective dates in the report.

Print Reference designators (1,0):

Specify whether the system prints the reference designators for each component line on the report. Specify one of the following values:

1

Print the reference designators.

0

Do not print the reference designators.

Print Notes? (1,0):

Specify whether the system prints the notes for the BOM on the report. If you specify to print the notes, the size of the report increases because the system prints the notes for each component line on the BOM.

Use Scrap Factor?

Type 1 to include the scrap factor in the report. The scrap factor is the calculation you use to compensate for a statistical average amount of defective items in every order received from a given vendor.

Include Substitute Items (1,0):

Specify 1 to include alternate items, if they exist, for the BOM items on the report.

Run Time Parameter (1,0):

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM200D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Engineering change order report, BOM210

Use this program to print a list of ECOs. The report prints the ECO header and detail lines with or without ECO notes.

Access: Menu MDM

Print an engineering change order report

Use the ECO Report screen to specify which information to print.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - BOM210D-01**From Facility (3,A):**

To limit the report to those ECOs that are associated with a range of facilities, specify the first value in the range.

To Facility (3,A):

To limit the report to those ECOs that are associated with a range of facilities, specify the last value in the range.

From Order Type (2,A):

To limit the report to those ECOs that are associated with a range of order types, specify the first value in the range.

To Order Type (2,A):

To limit the report to those ECOs that are associated with a range of order types, specify the last value in the range.

From Engineering Change Order Number (15,A):

To limit the report to those ECOs that are associated with a range of ECO numbers, specify the first value in the range.

To Engineering Change Order Number (15,A):

To limit the report to those ECOs that are associated with a range of ECO numbers, specify the last value in the range.

Order Status (1,0):

To limit the report to a specific order status, specify an order status.

From Parent Item Number (35,A):

To limit the report to those ECOs that are associated with a range of parent item numbers, specify the first value in the range.

To Parent Item Number (35,A):

To limit the report to those ECOs that are associated with a range of parent item numbers, specify the last value in the range.

From Component Item Number (35,A):

To limit the report to those ECOs that are associated with a range of component item numbers, specify the first value in the range.

To Component Item Number (35,A):

To limit the report to those ECOs that are associated with a range of component item numbers, specify the last value in the range.

From Mfg Method Code (2,A):

To limit the report to those ECOs that are associated with a range of method codes, specify the first value in the range.

To Mfg Method Code (2,A):

To limit the report to those ECOs that are associated with a range of method codes, specify the last value in the range.

From Revision (10,A):

To limit the report to those ECOs that are associated with a range of revision levels, specify the first value in the range.

To Revision (10,A):

To limit the report to those ECOs that are associated with a range of revision levels, specify the last value in the range.

From Approval Type (2,A):

To limit the report to those ECOs that are associated with a range of approval types, specify the first value in the range.

To Approval Type (2,A):

To limit the report to those ECOs that are associated with a range of approval types, specify the last value in the range.

From Approval Process (15,A):

To limit the report to those ECOs that are associated with a range of approval processes, specify the first value in the range.

To Approval Process (15,A):

To limit the report to those ECOs that are associated with a range of approval processes, specify the last value in the range.

From Approval Process Step (8,A):

To limit the report to those ECOs that are associated with a range of approval process steps, specify the first value in the range.

To Approval Process Step (8,A):

To limit the report to those ECOs that are associated with a range of approval process steps, specify the last value in the range.

From Starting Effectivity Date (8,0):

To limit the report to those ECOs that are associated with a range of starting effective dates, specify the first value in the range.

To Starting Effectivity Date (8,0):

To limit the report to those ECOs that are associated with a range of starting effective dates, specify the last value in the range.

From Discontinue Date (8,0):

To limit the report to those ECOs that are associated with a range of discontinue dates, specify the first value in the range.

To Discontinue Date (8,0):

To limit the report to those ECOs that are associated with a range of discontinue dates, specify the last value in the range.

Sort Order (1,0):

Specify the sort order for the report. Specify one of the following values:

0

Order type/facility/engineering change order number sequence.

1

Parent item number sequence.

2

Component item number sequence.

Print ECO Notes? (1,0):

Specify whether to print the ECO notes.

Run Time Parameter (1,0):

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM210D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Where-used listing, BOM220

Use this program to print the information displayed from the Where-Used Inquiry program, BOM300. This program generates a report that lists where all of the items or groups of items (class) are used.

Access: Menu MDM

Print a where-used list

Use the Where Used Listing screen to specify which information to print.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - BOM220D-01

By Item or Class (1,0):

Specify how to sequence the report.

1

By item number

2

By item class

From Class (2,A):

To print the report for a range of item classes, specify the first value in the range.

To Class (2,A):

To print the report for a range of item classes, specify the last value in the range.

From Item (35,A):

To print the report for a range of items, specify the first value in the range.

To Item (35,A):

To print the report for a range of items, specify the last value in the range.

From Material Method Code (2,A):

To print the report for a range of material method codes, specify the first value in the range.

To Material Method Code (2,A):

To print the report for a range of material method codes, specify the last value in the range.

Facility (3,A):

To limit the report to a facility, specify the facility.

Type (1,0):

Specify one of the following values:

1

Single-level reports to include first level components only.

2

Multi-level reports to include all levels of detail.

3

End-level reports to include the last level of where the component is used.

Effective Parents Only? (1,0):

Specify one of the following values:

1

Include only components of parents with active effective dates.

0

Include all components.

Run Time Parameter (1,0):

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM220D-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

BOM comparison listing, BOM230

This program and BOM Comparison Inquiry, BOM330D, use the BOM Comparison Process described below to print or display a summary BOM, which compares the BOMs of two individual items.

These programs use a multi-level bill of material explosion to create a summary BOM for the bills of material of the two items so that you can compare them.

This summary BOM logic uses the extended quantities on indented bills of material and adds the quantities of the same components to provide a summary quantity for each component for each of the two items, which are the source item and target item.

The system then uses this summary information to compare and contrast various cost set and cost bucket combinations. The system also uses the information to identify common components and components unique to the two items you are comparing.

Access: Menu MDM

Print a BOM comparison list

Use the BOM Comparison Listing screen to specify which information to print. This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - BOM230D-01

Source Item Number (35,A):

Specify the item number to use for comparison of its summary BOM and the target items summary.

Source Method Code (2,A):

Specify the manufacturing material method code that you want to use with the source item number to obtain the summary BOM for the source item.

Source Facility (3,A):

Specify the facility used for the source item to obtain the source items summary BOM. If you leave the facility blank, the system uses the global BOM structure.

Target Item Number (35,A):

Specify the number of the item to use for the comparison of its summary BOM and the source item summary.

Target Method Code (2,A):

Specify the manufacturing material method code to use with the target item number to obtain the summary BOM for the target item.

Target Facility (3,A):

Specify the facility used for the target item to obtain the target items summary BOM. If you leave the facility blank, the system uses the global BOM structure.

Quantity to Summarize (11,3)

Specify the quantity for the source and target item used to calculate the values of the summary BOMs.

Level (1,A):

Specify the level used to calculate the summary BOMs for the source and target items. Specify one of the following values:

- 1
Single level
- 2
Multi level

Effective Components Only? (1,A):

Specify one of the following values:

- 0
Include all components in the calculation of the summary BOM
- 1
Include only components with active effective dates in the calculation of the summary BOM

Use Scrap Factor? (1,A):

Specify one of the following values:

- 0
Do not use the scrap factor in the extended quantity calculations.
- 1
Use the scrap factor in the extended quantity calculations.
The scrap factor is the calculation you use to compensate for a statistical average amount of defective items in every order received from a given vendor.

Comparison Method (1,A):

Use to display the results of the summary BOM comparison. Specify one of the following values:

- 1
Unique items only
- 2
Common items only
- 3
Summary individual
- 4
Summary combined

Cost Set for Comparison (2,A):

Specify the cost set to use when you compare the costs associated with the summary quantities of the components for the source and target item.

Cost Bucket for Comparison (3,A):

Specify the cost bucket associated with the cost set. The system uses this value to compare the costs associated with the summary quantities of the components for the source and target item.

Print Run Parameter (1,A):

Specify interactive to process the data in real time or batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM230D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Production process sheets, BOM240

Use this program to print information about component routing, lead time, quantity required, and batch numbers. You can specify components by item or class, or you can generate reports for all operations or for primary operations only.

Access: Menu MDM

Print a production process sheet

Use the Production Process Sheet screen to specify which information to print. This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - BOM240D-01**By Item or Class (1,0):**

Specify how to sort the report.

1

By item number

2

By item class

From Item Class (2,A):

To print the report for a range of item classes, specify the first value in the range. To include all item classes, leave the default value.

To Item Class (2,A):

To print the report for a range of item classes, specify the last value in the range. To include all item classes, leave the default value.

From Item Number (35,A):

To print the report for a range of item, specify the first value in the range. To include all item numbers, leave the default value.

To Item Number (35,A):

To print the report for a range of item, specify the last value in the range. To include all item numbers, leave the default value.

Facility (3,A):

Specify the facility for the range of items to print. If the field is left blank, the system prints the process sheets that apply to the global routings and product structures. Though production is never accomplished in the global facility, you can use it to maintain a global production process sheet for planning and control.

All Operations or Primary Only (1,0):

Specify one of the following values:

1

Include all operations (primary and alternates).

2

Include only primary operations. The system does not print alternate operations.

Effective Components Only? (1,0):

Specify one of the following values:

1

Include production operations for components with active effective dates.

0

Include production operations for all components.

Alternate Material Method (2,A):

Specify a method code for item notes to limit the report to that code.

Alternate Routing Method (2,A):

Specify a routing code for item notes to limit the report to that code.

Run Time Parameter (1,0):

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM240D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Planning bill listing, BOM260

Use this program to list all planned bills of material that currently exist on file, item type 5. This report lists all of the components of an item or class as defined by the features, options, and standards of the planning BOM.

Access: Menu MDM

Print a planning bill of material list

Use the Planning Bill Listing screen to specify which information to print.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - BOM260D-01**By Item or Class (1,0):**

Specify how to sort the report.

1

By item number

2

By item class. This is the default value.

From Item Class (2,A):

To print the report for a range of item classes, specify the first value in the range. To include all item classes, leave the default value.

To Item Class (2,A):

To print the report for a range of item classes, specify the last value in the range.
To include all item classes, leave the default value.

From Item Number (35,A):

To print the report for a range of item numbers, specify the first value in the range. To include all item classes, leave the default value.

To Item Number (35,A):

To print the report for a range of item numbers, specify the last value in the range.
To include all item classes, leave the default value.

Single Level or Multi-Level (1,0):

Specify one of the following values:

1

For single-level reports to include first level components only.

0

For multi-level reports to include all levels of detail.

Effective Components Only? (1,0):

Specify one of the following values:

1

Include only components with active effective dates.

0

Include all components.

Screen actions - BOM260D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions.
See *Generic help text for screen actions* in the overview information in this document.

BOM change audit report, BOM265

Use this program to print the ECO history.

Access: Menu MDM

Print a BOM change audit report

Use the BOM Change Audit Report screen to specify which information to print. This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - BOM265D-01

User ID (10,A):

Specify the user ID of the person who originated the order.

Earliest Transaction Date (8,0):

Specify a transaction date to limit the report to those orders that were entered on or after that date. You can use this date with the Latest Transaction Date to limit the report to a range of transaction dates. You must specify a four-digit year, for example MMDDYYYY.

Latest Transaction Date (8,0):

Specify a transaction date to limit the report to those orders that were entered on or before that date. You can use this date with the Earliest Transaction Date to limit the report to a range of transaction dates. You must specify a four-digit year, for example MMDDYYYY.

Order Type From (2,A):

To print the report for a range of orders types, specify the first value in the range.

Order Type To (2,A):

To print the report for a range of orders types, specify the last value in the range.

Facility From (3,A):

To print the report for a range of facilities, specify the first value in the range.

Facility To (3,A):

To print the report for a range of facilities, specify the last value in the range.

Order Number From (8,A):

To print the report for a range of order numbers, specify the first value in the range.

Order Number To (8,A):

To print the report for a range of order numbers, specify the last value in the range.

Report Type (1,0):

Use this field to indicate the type of report to print. Specify one of the following values:

0

Use for ECO posting.

1

Use for BOM processing.

2

Use for BOM Mass Update.

3

Use for all.

Run Time Parameter (1,0):

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM265D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Manufacturing data management inquiry, BOM300

Use this program to display the complete product structure relationships for any item in Infor ERP LX. When you access this program, the system displays the heading BOM-Formula-Recipe.

The program produces a separate display for each item you specify. You can only view the displays in Inquiry mode. You cannot change any data in this program.

The system displays parent items and respective relative BOM levels for each component, as well as additional information such as amount of the component on-hand, the amount on order, required allocation, and the scrap factor.

You can specify the type of inquiry you want by using the appropriate screen action. The program then explodes the item with the bill of material at single or multiple levels.

The inquiry results in three basic formats:

BOM Explosion

This mode looks down the BOM. The system starts with the input of a parent item. The system then displays the children of the parent. If item A is made from B, and B from C, then the BOM for A shows B on the first level and if selected, C on the second Level. The system supports 99 levels.

Where Used

Use this mode to look up the BOM. The lookup starts at the bottom level component and goes up to the parents. In the above case, if you enter C as the child, B will be the where-used parent at level one, and A will be the parent at level two, since C goes into B, which goes into A.

The levels are reversed from the order they appear on the BOM.

Multi-Facility

Use the global (facility is blank) bill of material in these inquiries when a facility-specific bill of material does not exist.

Access: Menu MDM

View a manufacturing data management

Use the BOM-Formula-Recipe selection screen to display the complete product structure relationships for any item.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - BOM300D1-01

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

10=Where-Used Multi-Level

Use to display the Where-Used Multi-Level screen, BOM300D3-01. The system reviews the BOM from the child through all levels.

11=Where-Used Single-Level

Use to display the Where-Used Single-Level screen, BOM300D3-01. The system reviews the BOM from the child one level.

12=Indented BOM

use to display the Indented Bill of Material screen, BOM300D2-01. The system reviews the BOM of a parent item. The system then displays the children of the parent.

16=Material Status Inquiry

Use to display the Material Status Inquiry program, INV300, so you can inquire into the inventory status of the specified item.

17=Routing Inquiry

Use to display the Routing Inquiry screen, SFC100D2-01. The routing links the item to defined work centers, providing the basis for costing time.

18=Single-Level BOM

Use to display the Single-Level Bill of Material Inquiry screen, BOM300D2-01. The system reviews the BOM from a parent down one level only.

19=Display the Where-Used End Item panel

Use to display the Where-Used End Item screen, BOM300D3-01. The system reviews the BOM from the child only to the highest level.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Item Number (35,A):

The system displays the item number for the existing records. You can use the top field with a line action.

Facility (3,A):

The system displays the facility for the existing records. You can use the top field with a line action.

Effective Date (6,N):

The system displays the effective date for the existing records. You can use the top field with a line action.

Material Method (2,A):

The system displays the material method code for the existing records. You can use the top field with a line action.

Screen actions - BOM300D1-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Display the BOM Inquiry in indented or single-level mode

Use the BOM-Formula-Recipe Inquiry screen, BOM300D2-01, to display the Bill of Material Inquiry screen. You can access this screen through line action 12, Indented, or line action 18, single level, from the selection screen.

The single-level bill of material inquiry displays only the first-level components. These components, or sub-assemblies, are the immediate children of this item. The display includes the required quantity and scrap factor from the bill of materials.

The indented bill of material inquiry displays all the components of the BOM. The display includes the quantity required to make the selected parent item and not the quantity for the intermediate item.

One item can have several BOMs depending on whether you use facility-specific or alternate-method BOMs.

If you leave the facility blank, the system does not display all facilities and method codes. A blank facility displays the global, non-facility-specific, method. A blank method displays the default method.

BOM300 cannot display all of the BOMs for a specified item at one time.

For indented BOMs, BOM300 displays only one BOM. BOM300 searches for the exact BOM for the item-facility-method combination specified on the BOM300D1-01 screen. If it cannot locate a match, BOM300 searches through lower levels of the BOM hierarchy and displays the first BOM it locates. The following list illustrates the BOM hierarchy starting from the highest level to the lowest level:

- Hierarchy level 1-Facility and method are specified.
- Hierarchy level 2-Method only
- Hierarchy level 3-Facility only
- Hierarchy level 4-Neither facility nor method is specified (global BOM)

For example, if you specify an item number, facility, and method on the selection screen, the system displays the BOM that matches. If the system does not locate a match, it searches for a BOM for that item for the specified method (hierarchy level 2). If the system still does not locate a match, it searches for a BOM for the specified facility (hierarchy level 3). Finally, if the system still does not locate a match, it searches for the global BOM (hierarchy level 4).

If you specify only an item number and method on the BOM300D1-01 screen (hierarchy level 2), the system displays the BOM that matches. If the system does not locate a match, it searches for the global BOM (hierarchy level 4). It

skips the BOM in which only a facility is specified (hierarchy level 3), even if it exists.

If you specify only an item number and facility on the selection screen (hierarchy level 3), the system displays the BOM that matches. If the system does not find a match, it searches for the global BOM (hierarchy level 4).

If you specify only an item number on the selection screen (hierarchy level 4), the system only searches for the global BOM.

For all subsequent BOM levels, the system repeats the search, beginning at the requested BOM hierarchy level and working through the lower levels.

The system displays some general display-only fields for the record you select on the previous screen.

Field descriptions - BOM300D2-01

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

1=Select

The system displays this line action if you access this screen from ECO Maintenance. Use to retrieve the sequence number. The system returns the bill of material information and the sequence number of that component to the engineering change order. Use to update or revise the correct bill of material component line when the potential exists for the *same* item number to occur multiple times in a single-level BOM. For example, if you change vendors, you can replace a single group of memory chips with another part number.

11=First Occurrence

Use to position the first occurrence of the item number specified on the selection line. You can use this for a bill of material in which a component item number occurs more than once and you subsequently use the line action 14=Next to move to the next occurrence of the specified item number.

12=Last Occurrence

Use for a bill of material in which a component item number occurs more than once or the single level BOM contains a large number of components. This line action moves to the last occurrence of the specified item number in the BOM. Subsequently, use the 13=Previous line action to step backwards through the BOM for each occurrence of the item number.

13=Previous

Use to search up the BOM to locate the previous occurrence of the specified item number.

14=Next

Use to search down the BOM to locate the next occurrence of the specified item number.

16=Notes Inquiry

Use to display the Manufacturing Data notes program, BOM190D2, for the component or parent item number on the same line.

18=Routing Inquiry

Display the Routing Inquiry. The routing links the item to defined work centers, providing the basis for costing time. You can maintain the Routing Inquiry in Routing Maintenance, SFC100.

19=ECO Inquiry

Use to pass the facility and ECO number from the BOM fold line.

20=Reference Designators Inquiry

Use to display the Maintain the ECO reference designators screen, BOM100D6, if reference designators are attached to this component line.

21=Line Detail

Display additional fields for the line.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Component (15,0):

Specify the component item number on which to perform the action.

Sequence (3,0):

Specify the sequence number of the component item.

Lead Time:

The system displays the cumulative lead time for the component item.

Expiry Component (1,0):

The system displays whether to use the component in the expiry date calculation. Only lot-controlled items are flagged for expiry date calculation (flag 1 or 2). Specify one of the following values:

0

Do not use the component for expiry date calculation.

1

The component is intermediate to parent, for example, the active ingredient. For any parent BOM, there is only one component designated as type 1 for any unique effective date. You cannot overlap the effective dates or date gaps for components marked as 1.

2

The component is not an intermediate to parent but must be considered when the expiry date of the BOM parent is defined. You can mark more than one component as a 2 on any particular BOM.

Below is a description of the effects of each code.

If a parent has only an intermediate component flagged with 1, the retest and expiry dates of the parent are the manufacturing date of the parent plus the retest and shelf life days respectively. The manufacturing date of the parent is equal to the manufacturing date of the intermediate component.

If the parent has a component flagged 1 and also other components influencing the expiry date (components flagged 2), the expiry date is the earliest of the expiry date calculated from the manufacturing date of the intermediate component flagged 1 and the expiry dates of the other components flagged as 2.

If the expiry/retest date calculation method is equal to 2 or 3 for a parent item, the BOM must include at least one component that is flagged as Expiry Component 1 or 2.

Screen actions - BOM300D2-01**F11=Fold**

Use to display the description of the component. Previously, the F11 key also displayed information that you can now view with action 21=Line Detail:

- OFF(Lead time offset)
 - Eff (Effective) Date
 - Dis (Discontinue) Date
 - On Hand
 - Op (Operation Number)
 - Co/By Prod Cost %
 - Iss (Must Issue Ovr)
 - Usage Code
 - Bound (Disposition)
-

- RD (Reference Designators Indicator)
- L/T (Lead Time Days)
- Notes (BOM)
- ECN Number
- Rev/Dwg (Revision/Drawing Number)
- Exclude from BOM Costing/Planning

F13=All/Effective

Use to toggle between all past, present, and future components, and only the components that are effective as of today.

F14=Single/Indented

Use to toggle between single-level and indented bill of material. The Indented mode displays all components and their sub-assemblies.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Display the BOM Formula Recipe Where Used

Use the BOM-Formula-Recipe Where-Used screen, BOM300D3-01, to display one of the where-used inquiries, depending on your selection on the previous screen. The inquiries are single-level, multi-level, and end item. The system displays the where-used information for all parents of the selected item.

When parent bills of material represent batch quantities, the displayed quantities represent the required quantity of the component that is used to manufacture the highest-level parent. Each level of scrap factor is taken into account. Lead time offset is accumulated for each level.

For each immediate parent, the system displays only one BOM.

If you leave the facility blank, the system does not display all facilities and method codes. A blank facility displays the global, non-facility-specific, method. A blank method displays the default method.

For where-used inquiries, the BOMs displayed are based on the values you specified on the selection screen, BOM300D1-01. The system first establishes all the immediate parents for the specified item. For each immediate parent, the system first searches to locate the parent BOM that matches the facility-method combination you specified on the selection screen. If a match is not located, the system searches through lower levels of the BOM hierarchy and displays the first BOM it locates. The following list illustrates the BOM hierarchy starting at the highest level to the lowest:

- Hierarchy level 1-Facility and method are specified.
 - Hierarchy level 2-Method only
 - Hierarchy level 3-Facility only
 - Hierarchy level 4-Neither facility nor method is specified (global method).
-

For example, if you specify a component item number, facility, and method on the BOM300D1-01 screen (hierarchy level 1), for each immediate parent the system displays the parent BOM that matches the specified facility and method. If the system does not locate a match, it searches for a parent BOM for the specified method (hierarchy level 2). If the system still does not locate a match, it searches for a parent BOM for the specified facility (hierarchy level 3). And if the system still does not locate a match, it looks for a parent BOM in which no facility and no method are specified (hierarchy level 4).

If you specify only a component item number and method on the selection screen (hierarchy level 2), for each immediate parent the system displays the parent BOM that matches the alternate method with no specific facility. If the system does not locate a match, it searches for a parent using the global BOM (hierarchy level 4). It skips parents whose BOMs specify only a facility (hierarchy level 3), even if they exist.

If you specify only a component item number and facility on BOM300D1-01 (hierarchy level 3), for each immediate parent the system displays the parent BOM for that facility and no alternate method. If the system does not locate a match, it looks for a parent using the global BOM (hierarchy level 4).

If you specify only a component item number on the BOM300D1-01 screen, BOM300 searches only for the parent using the global BOM.

Field descriptions - BOM300D3-01

Component

The component item number is the item number that the system displays on the BOM/Recipe/Formula master. If you specify the component item number, it must be a valid item in the Item Master.

Class

The system displays the item class of the component.

On Hand

The system displays the on-hand balance of the component item number.

On Order

The system displays the on order quantity from the Parent Item Master.

Allocated

The system displays the amount of allocations for this component.

Screen actions - BOM300D2-01**F11=Fold**

Use to display the additional field information below.

- OFF(Lead time offset)
- Start (Effective) Date
- End (Discontinue) Date
- On Hand Amount
- Op (Operation Number)
- Co/By Prod Cost %
- Mth Cd (Method Code)
- Must Issue Ovr
- Usage Code
- Bound (Disposition)

F13=Toggle All

Use to toggle between all past, present, and future components, and only the components that are effective as of today.

F20=Manufacturing Data Notes

Use to display Manufacturing Data Notes, BOM190.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Engineering change order inquiry, BOM305

Use this program to display engineering change orders. The inquiry displays open and closed (history) ECOs. You can use Engineering Change Order Maintenance, BOM100D1, to review ECO Header information, ECO Detail Component lines, and notes for open and closed ECOs.

Access: Menu MDM02

Specify selection criteria

Use the ECO Inquiry Filter screen to specify information that the system uses to determine which ECOs to display.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - BOM305D1-01**From Order Type (2,A):**

To display ECOs based on a range of associated order types, specify the first order type in the range.

To Order Type (2,A):

To display ECOs based on a range of associated order types, specify the last order type in the range.

From Facility (3,A):

To display ECOs based on a range of associated facilities, specify the first facility in the range.

To Facility (3,A):

To display ECOs based on a range of associated facilities, specify the last facility in the range.

From Engineering Change Order Number (15,A):

To display ECOs based on a range of associated ECO numbers, specify the first number in the range.

To Engineering Change Order Number (15,A):

To display ECOs based on a range of associated ECO numbers, specify the last number in the range.

From Parent Item Number (35,A):

To display ECOs based on a range of associated parent item numbers, specify the first number in the range.

To Parent Item Number (35,A):

To display ECOs based on a range of associated parent item numbers, specify the last number in the range.

From Component Item Number (35,A):

To display ECOs based on a range of associated component item numbers, specify the first number in the range.

To Component Item Number (35,A):

To display ECOs based on a range of associated component item numbers, specify the last number in the range.

From Approval Process Step (8,A):

To display ECOs based on a range of associated approval process steps, specify the first step in the range.

To Approval Process Step (8,A):

To display ECOs based on a range of associated approval process steps, specify the last step in the range.

From Starting Effectivity Date (8,0):

To display ECOs based on a range of associated starting effective dates, specify the first date in the range.

To Starting Effectivity Date (8,0):

To display ECOs based on a range of associated starting effective dates, specify the last date in the range.

From Discontinue Date (8,0):

To display ECOs based on a range of associated discontinue dates, specify the first date in the range.

To Discontinue Date (8,0):

To display ECOs based on a range of associated discontinue dates, specify the last date in the range.

Type of Inquiry 0=Open, 1=Close (1,0):

Specify which engineering change orders to include in the inquiry. The closed engineering change orders retains the history of BOM changes from ECOs. Specify one of the following values:

0

All open or unposted engineering change orders.

1

All closed or posted engineering change orders.

Screen actions - BOM305D1-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Display an ECO event log (BOM genealogy) inquiry

To access this screen, use the Event Log line action on the Engineering Change Order Detail Lines selection screen, BOM100D3-01. The Event Log line action is available only for closed or partially-closed ECOs that generated a history of the BOM changes.

Use the BOM Event Log Inquiry screen, BOM305D2-01, to select the ECO for which you want to display the before and after historical BOM record changes from the posting of the ECO.

Field descriptions - BOM305D2-01

Act (2,0):

Type 5 next to an ECO and press Enter to display the ECO event log.

Order Type (2,A):

The system displays the order type for the orders in the list.

ECO Detail Description (30,A):

The system displays the ECO detail description for the orders in the list.

Facility (3,A):

The system displays the facility for the orders in the list.

ECO Detail Line Comment (30,A):

The system displays the comment associated with this ECO.

Revision Level (35,A):

The system displays the new revision level for the parent item number on this engineering change order.

Engineering Change Order Number (15,A):

The system displays the engineering change order number for this ECO.

Order Type Description (30,A):

The system displays the order type description from the Order Type System table.

ECO Line Number (5,0):

The ECO line number is the number of the detail instruction on this ECO.

ECO Description (30,A):

The system displays the description for this engineering change order.

Original Facility (3,A):

The system displays the original facility for this detail component on an engineering change order.

Parent Item Number (35,A):

The parent item number is the single level parent for a bill of material that is applied to this ECO.

Original Child Item Number (35,A):

The system displays the original child (component) item number.

Original BOM Mfg. Method Code (2,A):

The system displays the manufacturing method code of the original BOM.

Sequence Number (3,0):

The system displays the sequence number for this ECO.

History file record type (1,0):

The system displays the history file record type.

Quantity Required (15,6):

The system displays the quantity of a child to create one parent.

Starting Effectivity Date (8,0):

The system displays the starting effective date.

Ending Effectivity (Discontinue) Date (8,0):

The system displays the ending effective date.

Screen actions - BOM305D2-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Display event log details

Use the EC Order Component Line Detail screen, BOM305D3-01, to display the engineering change order component level detail. This inquiry displays the engineering change order header and component detail instruction that generated the before and after BOM records that the system displays in the detail portion of the screen.

Field descriptions - BOM305D3-01

Parent Item Number (35,A):

The system displays the parent item number.

Item Description (50,A):

The system displays the parent item description.

Order Type (2,A):

The system displays the order type.

Engineering Change Order Number (15,A):

The system displays the ECO number.

Facility (3,A):

The system displays the facility.

BOM Mfg. Method Code (2,A):

The system displays the manufacturing method code.

ECO Line Number (5,0):

The system displays the ECO line number.

Approval Process Step (8,A):

The system displays the approval process step for this engineering change order.

ECO Starting Effectivity Date (8,0):

The system displays the starting effective date.

ECO Ending Effectivity (Discontinue) Date (8,0):

The system displays the ending effective date.

Action (2,0):

The system displays the actions associated with this ECO. The action code determines what this detail line instruction performs against the Bill of Material file.

Action Code Description (25,A):

The system displays the action description.

Revision Level (35,A):

The system displays the new revision level for the parent item number on this engineering change order. The new revision level must exist in the Revision Master file before you can use it.

Instruction Effectivity Code (2,A):

The system displays the conditions for which the system applies the detail instruction line action (add, change, delete) to the bill of material.

Instruction Effectivity Code Description (25,A):

The system displays the instruction effective code description.

Purchasing Buyer Code (1,A):

The system displays the purchasing buyer code.

ECO Detail Line Description (30,A):

The system displays the ECO detail line description.

ECO Detail Line Comment (30,A):

The system displays the ECO detail line comment.

New Component Item Number (35,A):

The system displays the new component item number.

New Component Bubble Number (3,0):

The system displays the new component bubble number.

Original Child Item Number (35,A):

The system displays the original child (component) item number.

Original Component Bubble Number (3,0):

The system displays the original component bubble number.

New Component Description (50,A):

The system displays the new component description.

Original Component Description (50,A):

The system displays the original component description.

New Component Facility (3,A):

The system displays the new component facility.

New Component BOM Mfg. Method Code (2,A):

The system displays the new component manufacturing method code.

New Sequence Number (3,0):

The system displays the new sequence number.

New Component Operation Number (3,0):

The system displays the new component operation number.

Original Facility (3,A):

The system displays the original facility.

Original BOM Mfg. Method Code (2,A):

The system displays the original manufacturing method code.

Sequence Number (3,0):

The system displays the original sequence number.

Original Operation Number (3,0):

The system displays the original operation number.

New Component Quantity Required (15,6):

The system displays the new quantity of a child to create one parent.

Original Quantity Required (15,6):

The system displays the original quantity of a child to create one parent.

New Component Scrap Factor (5,4):

The system displays the factor that is multiplied by the Original Quantity Required field to calculate the true quantity used by all applications.

Original Scrap Factor (5,4):

The system displays the factor that is multiplied by the Original Quantity Required field to calculate the true quantity used by all applications.

New Component Date Effective (6,0):

This system displays the date from which this child item is implemented in the production process. The current processing date is the default value. This date must precede the discontinue date.

New Component Date Discontinued (6,0):

This field indicates the date after which a child item is not part of the production process.

Original Component Date Effective (6,0):

This system displays the date from which this child item is implemented in the production process.

Original Component Date Discontinued (6,0):

This field indicates the date after which a child item is not part of the production process.

New Component Must Issue Override Y/N (1,A):

The system displays the value set for this field for this ECO.

New Component Offset (4,0):

The system displays the value set for this field for this ECO.

New Component Usage Code (1,A):

The system displays the new component usage code.

Original Component Must Issue Override Y/N (1,A):

The system displays the value set for this field for this ECO.

Original Component Offset (4,0):

The system displays the original component offset.

Original Component Usage Code (1,A):

The system displays the new component usage code.

New Component Co-Product Cost Percent (5,4):

The system displays the percentage of the parent item actual costs that the co-product absorbs during shop order costing.

New Component Bound (1,0):

The system displays whether a bounded relationship exists between this component and this parent. 1 for yes, 0 for no.

Original Co-Product Cost Percent (6,3):

The system displays the percentage of the parent item actual costs that the co-product absorbs during shop order costing.

Original Bounded Disposition Code (1,0):

The system displays whether a bounded relationship exists between this component and this parent. 1 for yes, 0 for no.

New Component Start Lot (25,A):

The system displays an optional starting lot number for the component.

New Component End Lot (25,A):

The system displays an optional ending lot number for the component.

Original Component Start Lot (25,A):

The system displays an optional starting lot number for the component.

Original Component End Lot (25,A):

The system displays an optional ending lot number for the component. This field is for reference only.

Estimated Cost 1 (17,5):

The system displays the estimated cost for the new component item.

New Component Cost Set (2,0):

The system displays a valid Infor ERP LX cost set for creating or copying costs associated with the bill of material.

Screen actions - BOM305D3-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Planning bill of material inquiry, BOM320

Use this program to display a selected planning bill of material with the standard components as well as features and options available on an item. You can only view the displays in Inquiry mode.

Planning bills of material are common during product development or in tracking product ideas for future consideration. Many planned components and parent items are ideas rather than actual materials. Therefore, you cannot use them in actual bills of materials.

Because this program is similar to BOM-Recipe-Formula, BOM300, we recommend that you refer to that program for detailed information.

Access: Menu MDM

Select an inquiry mode

Use the Planning BOM Inquiry selection screen to select a planning bill of material and the inquiry mode.

Field descriptions - BOM320D1-01**Act (2,0):**

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

10=Where-Used Multi-Level

Use to display the Planning BOM Where-Used Multi-Level screen, BOM320D3-01.

11=Where-Used Single-Level

Use to display the Planning BOM Where-Used Single-Level screen, BOM320D3-01.

12=Indented BOM

Use to display the Planning BOM Indented Bill of Material screen, BOM320D2-01.

16=Material Status Inquiry

Use to display the Material Status Inquiry program, INV300, so you can inquire into the inventory status of the specified item.

17=Routing Inquiry

Use to display the Routing Inquiry screen, SFC100D2-01

18=Single-Level BOM

Use to display the Planning BOM Single-Level Bill of Material Inquiry screen, BOM320D2-01.

19=Display the Where-Used End Item panel

Use to display the Planning BOM Where-Used End Items screen, BOM320D3-01. The system reviews the BOM from the child only to the highest level.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Item Number (35,A):

The system displays the item number for the existing bills of material. You can use the top field with a line action.

Item Description (50,A):

The system displays the item description for the existing bills of material.

Item Type (2,A):

The system displays the item type.

Screen actions - BOM320D1-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Display a planning BOM inquiry

Use the Planning BOM Inquiry indented or single-level screen, BOM320D2-01, to display the Bill of Material Inquiry screen. You can access this screen through line action 12, Indented, or line action 18, single level, from the selection screen.

The single-level bill of material inquiry displays only the first-level components. These components, or sub-assemblies, are the immediate children of this item.

The display includes the required quantity and scrap factor from the bill of materials.

The indented bill of material inquiry displays all the components of the BOM. The display includes the quantity required to make the selected parent item and not the quantity for the intermediate item.

You can attach notes only to valid routing records.

Screen actions - BOM320D2-01

F11=Fold

Use to display additional information about each component.

F13=Display

Use to display additional information about components that are no longer in use or are planned for future use. You can use F13 from any detail screen. To reverse this action, use F13 again.

F14=Change

Use to change the display from single-level to multi-level indented BOM, and back again.

F20=Manufacturing Data Notes

Use to display Manufacturing Data Notes, BOM190.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Display where-used information

Use the Planning BOM Where-Used indented or single-level screen, BOM320D3-01, to display one of the where-used inquiries, depending on your selection on the previous screen. The inquiries are single-level, multi-level, and end item. The system displays the where-used information for all parents of the selected item.

When parent planning bills of material represent batch quantities, the displayed quantities represent the required quantity of the component that is used to manufacture the highest-level parent. Each level of scrap factor is taken into account. Lead time offset is accumulated for each level.

You can attach notes only to valid routing records.

Screen actions - BOM320D3-01

F11=Fold

Use to display additional information about each component.

F13=Display

Use to display additional information about components that are no longer in use or are planned for future use. You can use F13 from any detail screen. To reverse this action, use F13 again.

F20=Manufacturing Data Notes

Use to display Manufacturing Data Notes, BOM190.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

BOM comparison inquiry, BOM330

This program and BOM Comparison Listing, BOM230D, use the BOM Comparison Process described below to print or display a summary BOM, which compares the BOMs of two individual items.

These programs use a multi-level bill of material explosion to create a summary BOM for the bills of material of the two items so that you can compare them.

This summary BOM logic uses the extended quantities on indented bills of material and adds the quantities of the same components to provide a summary quantity for each component for each of the two items, which are the source item and target item.

The system then uses this summary information to compare and contrast various cost set and cost bucket combinations. The system also uses the information to identify common components and components unique to the two items you are comparing.

Access: Menu MDM

View a BOM comparison

Use the BOM Comparison Inquiry screen to display a comparison summary of two individual BOM items.

Field descriptions - BOM330D1-01**Source Item Number (35,A):**

Specify the item number to use for comparison of its summary BOM and the target items summary.

Source Method Code (2,A):

Specify the manufacturing material method code to use with the Source Item Number to obtain that source items summary BOM.

Source Facility (3,A):

Specify the facility to use with the source item number to obtain that source items summary BOM. If you leave facility blank, the system uses the global BOM structure.

Target Item Number (35,A):

Specify the item number that the system uses to compare its summary BOM with the source items summary BOM.

Target Method Code (2,A):

Specify the manufacturing material method code that the system uses with the target item number to obtain the summary BOM for the target item.

Target Facility (3,A):

Specify the facility used for the target item to obtain the target items summary BOM. If you leave facility blank, the system uses the global BOM structure.

Quantity to Summarize (11,3)

Specify the quantity for the source and target item the system uses to calculate the summary BOM values.

Level (1,A):

Specify the level the system uses to calculate the summary BOMs for the source and target items. Specify one of the following values:

1

Single level

2

Multi level

Effective Components Only? (1,A):

Specify one of the following values:

0

Include all components in the calculation of the summary BOM.

1

Include only components with active effective dates in the calculation of the summary BOM

Use Scrap Factor? (1,A):

Specify one of the following values:

0

Do not use the scrap factor in the extended quantity calculations.

1

Use the scrap factor in the extended quantity calculations.

The scrap factor is the calculation you use to compensate for a statistical average amount of defective items in every order received from a given vendor.

Comparison Method (1,A):

Use this field to display the results of the summary BOM comparison. Specify one of the following values:

1

Unique items only

2

Common items only

3

Summary individual

4

Summary combined

Cost Set for Comparison (2,A):

Specify the cost set to use when comparing the costs associated with the summary quantities of the components for the source and target item.

Cost Bucket for Comparison (3,A):

Specify the cost bucket associated with the cost set. The system uses this value to compare the costs associated with the summary quantities of the components for the source and target item.

Screen actions - BOM330D1-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Display a BOM comparison inquiry unique items

If you specify the Unique Items Only comparison method on the selection criteria screen or use the Unique Items function in any of the other results screens, the system displays the results on this screen. The totals that the system displays vary with the mode you are in.

Field descriptions - BOM330D2-01

Source Item

The system displays the source item that you specify on the selection criteria screen.

Source Item Description

The system displays the description of the source item.

Target Item

The system displays the target item that you specify on the selection criteria screen.

Target Item Description

The system displays the description of the target item.

Level

The system uses this level to calculate the summary BOMs for the source and target items that you specify. The system displays one of the following values that you specify on the prompt screen:

1

Single level

2

Multi level

Effective Components Only?

The system displays one of the following flags that you specify on the prompt screen:

0

Displays all components in the calculation of the summary BOM.

1

Displays only components with active effective dates in the calculation of the summary BOM.

Use Scrap Factor?

The system displays one of the following flags that you specify on the prompt screen:

0

The system does not use the scrap factor in the extended quantity calculations.

1

The system uses the scrap factor in the extended quantity calculations.

Cost Set

The system displays the cost set that you specify on the selection criteria screen. The system uses this value to compare the costs associated with the summary quantities of the components for the source and target item.

Cost Bucket

The system displays the cost bucket that you specify on the selection criteria screen. The system uses this value to compare the costs associated with the summary quantities of the components for the source and target item.

Item Number of Components

The system displays the item numbers of the components that you specify on the selection criteria screen.

Description of the Included Item Numbers

The system displays the descriptions of the item numbers of the components that you specify on the selection criteria screen.

Exists on

The value in this field indicates on which summary the component item exists. Specify one of the following values:

0

Only on the source items summary BOM.

1

Only on the target items summary BOM.

2

On both the source and target items summary BOM.

Summarized Quantity

This field is the result of the explosion of the source or target item's BOM. The program adds together the individual quantities of all occurrences of the same component in the BOM to calculate a summarized quantity of the component.

Summarized Cost

The system displays the value from the calculation of the summarized quantity of the component multiplied by the component cost.

Screen actions - BOM330D2-01**F14=Common Items**

Use to view results in the Common Items mode.

F15=Summary Individual

Use to view results in the Summary Individual mode.

F16=Summary Combined

Use to view results in the Summary Combined mode.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Display a BOM comparison inquiry common items

If you specify the Common Items Only comparison method on the selection criteria screen or use the Common Items function in any of the other results screens, the system displays the results on this screen. The totals that the system displays vary with the mode you are in.

Field descriptions - BOM330D2-02**Source Item**

The system displays the source item that you specify on the selection criteria screen.

Source Item Description

The system displays the description of the source item.

Target Item

The system displays the target item that you specify on the selection criteria screen.

Target Item Description

The system displays the description of the target item.

Level

The system uses this level to calculate the summary BOM for the source and target items you specify. The system displays one of the following values that you specify on the selection criteria screen:

1

Single level

2

Multi level

Effective Components Only?

The system displays one of the following flags that you specify on the selection criteria screen:

0

Displays all components in the calculation of the summary BOM.

1

Displays only components with active effective dates in the calculation of the summary BOM.

Use Scrap Factor?

The system displays one of the following flags that you specify on the selection criteria screen:

0

The system does not use the scrap factor in the extended quantity calculations.

1

The system uses the scrap factor in the extended quantity calculations.

Cost Set

The system displays the cost set that you specify on the selection criteria screen. The system uses this value to compare the costs associated with the summary quantities of the components for the source and target item.

Cost Bucket

The system displays the cost bucket that you specify on the selection criteria screen. The system uses this value to compare the costs associated with the summary quantities of the components for the source and target item.

Item Number of Components

The system displays the item numbers of the components that you specify on the selection criteria screen. This varies on the screens depending on the comparison mode.

Description of the Included Item Numbers

The system displays the descriptions of the item numbers of the components that you specify on the selection criteria screen.

Source Summarized Quantity

This field is the result of the explosion of the source items BOM. This value is an indented BOM explosion that adds together the individual same components quantities to calculate a summarized quantity per component.

Target Summarized Quantity

This field is the result of the explosion of the target items BOM. This value is an indented BOM explosion that adds together the individual same components quantities to calculate the summarized quantity per component.

Quantity Difference

This value is the difference between the Source and Target Summarized Quantity fields. The calculation subtracts the target value from the source value. If the result is negative, the value is followed by a minus sign.

Source Summarized Cost

The system displays the value from the calculation of the summarized quantity of the component multiplied by the components cost. The component cost is the cost value from the Cost Master file, CMF, cost set and cost bucket as specified on the BOM Comparison Inquiry selection criteria screen, BOM330D1-01.

Target Summarized Cost

The system displays the summarized quantity of the component multiplied by the components cost.

Cost Difference

This value is the difference between the Source and Target Summarized Costs. The calculation subtracts the target value from the source value. If the result is negative, the value is followed by a minus sign.

Screen actions - BOM330D2-02**F10=Unique Items**

Use to view results in the Unique Items mode.

F15=Summary Individual

Use to view results in the Summary Individual mode.

F16=Summary Combined

Use to view results in the Summary Combined mode.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Display a BOM comparison inquiry summary individual

If you specify the Summary Individual Method on the selection criteria screen or use the Summary Individual function in any of the other results screens, the system displays the results on this screen. The totals that the system displays vary with the mode you are in.

Field descriptions - BOM330D2-03**Source Item**

The system displays the source item that you specify on the selection criteria screen.

Source Item Description

The system displays the description of the source item.

Target Item

The system displays the target item that you specify on the selection criteria screen.

Target Item Description

The system displays the description of the target item.

Level

The system uses this level to calculate the summary BOM for the source and target items you specify. The system displays one of the following values that you specify on the selection criteria screen:

1

Single level

2

Multi level

Effective Components Only?

The system displays one of the following flags that you specify on the selection criteria screen:

0

Displays all components in the calculation of the summary BOM.

1

Displays only components with active effective dates in the calculation of the summary BOM.

Use Scrap Factor?

The system displays one of the following flags that you specify on the selection criteria screen:

0

The system does not use the scrap factor in the extended quantity calculations.

1

The system uses the scrap factor in the extended quantity calculations.

Cost Set

The system displays the cost set that you specify on the selection criteria screen. The system uses this value to compare the costs associated with the summary quantities of the components for the source and target item.

Cost Bucket

The system displays the cost bucket that you specify on the selection criteria screen. The system uses this value to compare the costs associated with the summary quantities of the components for the source and target item.

Item Number of Components

The system displays the item numbers of the components that you specify on the selection criteria screen. This varies on the screens depending on the comparison mode.

Description of the Included Item Numbers

The system displays the descriptions of the item numbers of the components that you specify on the selection criteria screen.

Exists on

The value in this field indicates on which summary the component item exists. Specify one of the following values:

0

Only on the source items summary BOM.

1

Only on the target items summary BOM.

2

On both the source and target items summary BOMs.

Summarized Quantity

This field is the result of the explosion of the source or target items BOM. This value is an indented BOM explosion that adds together the individual same components quantities to calculate a summarized quantity per component.

Summarized Cost

The system displays the value from the calculation of the summarized quantity of the component multiplied by the components cost. The component cost is the cost value from the Cost Master file, CMF, cost set and cost bucket as specified on the BOM Comparison Inquiry selection criteria screen, BOM330D1-01.

Screen actions - BOM330D2-03**F10=Unique Items**

Use to view results in the Unique Items mode.

F14=Common Items

Use to view results in the Common Items mode.

F16=Summary Combined

Use to view results in the Summary Combined mode.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Display a BOM comparison inquiry summary combined

If you specify the Summary combined method on the selection criteria screen or use the Summary combined function in any of the other results screens, the system displays the results on this screen. The totals that the system displays vary with the mode you are in.

Field descriptions - BOM330D2-04

Source Item

The system displays the source item that you specify on the selection criteria screen.

Source Item Description

The system displays the description of the source item.

Target Item

The system displays the target item that you specify on the selection criteria screen.

Target Item Description

The system displays the description of the target item.

Level

The system uses this level to calculate the summary BOM for the source and target items you specify. The system displays one of the following values that you specify on the selection criteria screen:

1

Single level

2

Multi level

Effective Components Only?

The system displays one of the following flags that you specify on the selection criteria screen:

0

Displays all components in the calculation of the summary BOM.

1

Displays only components with active effective dates in the calculation of the summary BOM.

Use Scrap Factor?

The system displays one of the following flags that you specify on the selection criteria screen:

0

The system does not use the scrap factor in the extended quantity calculations.

1

The system uses the scrap factor in the extended quantity calculations.

Cost Set

The system displays the cost set that you specify on the selection criteria screen. The system uses this value to compare the costs associated with the summary quantities of the components for the source and target item.

Cost Bucket

The system displays the cost bucket that you specify on the selection criteria screen. The system uses this value to compare the costs associated with the summary quantities of the components for the source and target item.

Item Number of Components

The system displays the item numbers of the components that you specify on the selection criteria screen. This varies on the screens depending on the comparison mode.

Description of the Included Item Numbers

The system displays the descriptions of the item numbers of the components that you specify on the selection criteria screen.

Exists on

The value in this field indicates on which summary the component item exists. Specify one of the following values:

0

Only on the source items summary BOM.

1

Only on the target items summary BOM.

2

On both the source and target items summary BOM.

Summarized Quantity

This field is the result of the explosion of the source or target items BOM. This value is an indented BOM explosion that adds together the individual same components quantities to calculate a summarized quantity per component.

Summarized Cost

The system displays the value from the calculation of the summarized quantity of the component multiplied by the components cost. The component cost is the cost value from the Cost Master file, CMF, cost set and cost bucket as specified on the BOM Comparison Inquiry prompt screen, BOM330D1-01.

Screen actions - BOM330D2-04**F10=Unique Items**

Use to view results in the Unique Items mode.

F14=Common Items

Use to view results in the Common Items mode.

F15=Summary Individual

Use to view results in the Summary Individual mode.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Engineering change order inquiry by item number, BOM340

Use this program to view active ECOs by item number. Use the Engineering Change Inquiry program, BOM305, to view posted ECOs.

Access: MDM02

View active ECOs by item number

Use the ECO by Item Number selection screen to display active engineering change orders sorted by item number.

Field descriptions - BOM340D1-01**Act (2,0):**

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

12=Bill of Material Detail

Use to display the BOM Formula-Recipe Inquiry Indented screen, BOM300D2-01.

13=Material Status Inquiry

Use to display the Material Status Inquiry, INV300D1, for this item number.

15=Drawing Master List

Use to display the Drawing Inquiry by Item Number screen, BOM345D-01.

16=ECO Header Notes

Use to display the ECO Header Notes screen. The notes display at the Engineering Change Order Header level.

17=ECO Detail Lines

Use to display the Engineering Change Order Detail Lines screen, BOM100D3-01.

18=ECO Header

Use to display the Engineering Change Order Header record screen, BOM100D2-01.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Facility (3,A):

The system displays the facility for the existing ECOs. You can use the top field with a line action.

Parent Item Number (35,A):

The system displays the parent item number for the existing ECOs. You can use the top field with a line action.

BOM Mfg. Method Code (2,A):

The system displays the manufacturing method code for the existing ECOs. You can use the top field with a line action.

ECO Description (30,A):

The system displays the description for the existing ECOs.

Order Type (2,A):

The system displays the order type for the existing ECOs. You can use the top field with a line action.

Engineering Change Order Number (15,A):

The system displays the ECO number for the existing ECOs. You can use the top field with a line action.

Screen actions - BOM340D1-01**F13=Sequence**

Use to display the sequence and selection screen where you can specify how to sequence the selection list.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify filter options

Use the Filter Options screen to specify how to sequence the list on the selection screen. All sequence selection records include both active and inactive records.

Field descriptions - Filter**Sequence Option (1,0):**

Specify how to sequence the selection list.

Screen actions - Filter**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Drawing inquiry by item number, BOM345

Use this program to display drawings by item number. After you specify the selection criteria, the system displays Drawing Master Maintenance, BOM140, in Inquiry mode as well as Drawing Master Notes, SYS181D3. This inquiry displays an item number view of the Drawing Master file. However, a Drawing does not require a parent item number, especially in the case of assembly or multiple item drawings.

Access: MDM02

View a drawing master by item number

Use the Drawing Inquiry by Item Number selection screen to display the selections in the Drawing Master file sorted by item number.

Field descriptions - BOM345D1-01**Act (2,0):**

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

13=Material Status Inquiry

Use to display the Material Status Inquiry, INV300D1, for this item number.

16=Drawing Notes

Use to display the Drawing Notes screen, SYS181D3, in Inquiry mode.

17=Drawing Master Detail

Use to display the Drawing Master Maintenance detail screen, BOM140D2, in inquiry mode.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Facility (3,A):

The system displays the facility for the existing drawings. You can use the top field with a line action.

Parent Item Number (35,A):

The system displays the parent item number for the existing drawings, if the drawing has an item. You can use the top field with a line action.

BOM Mfg. Method Code (2,A):

The system displays the manufacturing method code for the existing drawings. You can use the top field with a line action.

Drawing Number (30,A):

The system displays the number for the existing drawings. You can use the top field with a line action.

Drawing Page Number (5,0):

The system displays the drawing page number for the existing drawings. You can use the top field with a line action.

Screen actions - BOM345D1-01**F13=Sequence**

Use to display the sequence and selection screen where you can specify how to sequence the selection list.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify filter options

Use the Filter Options screen to specify how to sequence the list of drawings on the selection screen.

Field descriptions - Filter**Sequence Option (1,0):**

Specify how to sequence the selection list.

Screen actions - Filter**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

On-line BOM/formula/recipe, BOM500

Use this program to create and maintain a bill of material. You perform all maintenance on one level of a BOM at a time. Only direct build-up relationships are changed. If A is made from B and B is made from C, the BOM for A (for maintenance purpose) is B only.

You process bills of material entries online. The system prints an audit report when the session is complete. You can view the resulting bills of material in the BOM Where-Used Inquiry program, BOM300.

Access: Menu MDM

Add or specify a bill of material

Use the On-Line BOM-Formula-Recipe selection screen to create a new bill of material or to select an existing one to maintain.

Field descriptions - BOM500D1-01

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

12=Material Status Inquiry

Use to display the Material Status Inquiry, INV300D1, for this parent item number.

13=Routing Maintenance

Use to display the Routing Maintenance program, SFC100, for this parent item number.

14=Delete Structure

Use to display the Structure Delete Confirmation screen. You can then delete the single level BOM/Recipe/Formula for this parent item number, facility, or method code combination.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Parent Item Number (35,A):

The system displays the item number for the existing BOMs. You can use the top field with a line action.

Facility (3,A):

The system displays the facility for the existing BOMs. You can use the top field with a line action.

If you run planning globally, you must use global bills of material if you intend to use bounded dispositions. If you run planning by facility, you must use facility-specific bills of material if you intend to use bounded dispositions.

BOM Mfg. Method Code (2,A):

The system displays the manufacturing method code for the existing BOMs. You can use the top field with a line action.

Screen actions - BOM500D1-01

F13=Sequence

Use to display the sequence and selection screen where you can specify how to sequence the selection list.

F17=Item/Facility Quality

Use to display the Item/Facility Quality Selection program, SFC121D1. You need group authority to use this screen action.

F18=Item/Fac Quality History

Use to display the Item/Facility Quality History program, SFC561D1. You need group authority to use this screen action.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify filter options

Use the Filter Options screen to specify how to sequence the selection list.

Field descriptions - Filter**Sequence Option (1,0):**

Specify how to sequence the list of BOMs on the selection screen.

Facility (3,A):

Specify the facility to filter the BOM/Recipe/Formula records on the list screen. If you leave this field blank, the system displays all BOMs for all facilities.

BOM Mfg. Method Code (2,A):

Specify the BOM manufacturing method code to filter the BOM/Recipe/Formula records on the list screen. If you leave this field blank, the system displays all BOMs for all method codes.

Screen actions - Filter**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Use the delete structure screen

Use the Delete Structure Confirmation screen, BOM500D3-02, to confirm that the system deletes the entire single level BOM/Recipe/Formula for this parent item. To complete the deletion, you must change the delete field value from the default of 0 to 1 and use F6=Accept. These steps prevent you from inadvertently deleting an entire structure.

Field descriptions - BOM500D3-02

Confirm Delete (1,0):

Specify 1 and use F6=Accept to complete the deletion of the single level BOM. Otherwise, you can use F12=Cancel to return to the selection screen.

Screen actions - BOM500D3-02

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Maintain a single-level online BOM/formula/recipe

Use the BOM-Formula-Recipe Maintenance single-level screen, BOM500D2-01, to create and maintain component (children) items on a bill of material/recipe/formula. You can maintain components for a single level of the BOM at a time, use the same item number as a component on the single level BOM more than once, and attach reference designators to a component level item. Use reference designators to record comments or locations for each unit in the quantity required amount on the component.

Field descriptions - BOM500D2-01

Lead Time:

The system displays the lead time required to make this item. By default, the system uses the value from the Item Master program, INV100, or the Facility Planning Maintenance program, MRP140D2-02.

Lot Size:

The system displays the standard lot size for this item. By default, the system uses the value from the Item Master program, INV100, or the Facility Planning Maintenance program, MRP140D2-02.

Standard Batch Size:

The system displays the standard size of one batch of this item. By default, the system uses the value from the Item Master program, INV100, or the Facility Planning Maintenance program, MRP140D2-02.

Action Code (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

12=Material Status Inquiry

Use to display the Material Status Inquiry, INV300D1, for this parent item number.

13=ECO Inquiry

Use to display, in Inquiry mode, the Engineering Change Order Maintenance program, BOM100, for this parent item number or the closest match.

14=Reference Designators

Use to display the Reference Designators Maintenance screen, BOM505D1, for the specified component item.

16=Notes

Use to display the Manufacturing Data Notes Maintenance screen, BOM190, for the specified component item.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Bubble Number (3,0):

This field contains an extra user-defined reference number that you can use to re-sequence this display or bills of material listings. The system displays the bubble number for the existing child items.

If you expect periodic changes in a bill of material, it may be wise not to use consecutive integers for bubble numbers to allow you to insert new components into the bubble number sequence.

Child Item (35,A):

The field contains the child (component) item number. In Create mode, you use this field to define the new component. This field is not maintainable in revise mode. You cannot use the revise mode to switch components. To exchange components, see the Bill of Material Mass Replace, BOM510, instructions for this product or use an Engineering Change Order.

Sequence Number (3,0):

The sequence number is the number displayed in the first column of this screen and the number you use to specify a child item in Revise or Delete modes. In Add mode, the new component is assigned the next integer value following the

last-used sequence number. The sequence number of deleted components is not re-assigned.

Description (50,A):

The system displays the item description of the child item as recorded in the Item Master file through INV100.

Expiry Component (1,0):

The system displays whether the component is used in expiry date calculation. Flags are described below. You can flag only lot-controlled items for expiry date calculation (flag 1 or 2).

0

Component is not used for expiry date calculation.

1

Component is intermediate to parent such as the active ingredient. There can only be one component designated as type 1 for any unique effective date, for any parent BOM. There can be no overlapping of effective dates or date gaps for components marked with 1.

2

Component is not an intermediate to parent but must be considered when the expiry date of the BOM parent is defined. There can be more than one component marked as a 2 on any particular BOM.

The effect of the codes is as follows:

If a parent has only an intermediate component flagged with 1, the retest and expiry dates of the parent are the manufacturing date of the parent plus the retest and shelf life days respectively. The manufacturing date of the parent is equal to the manufacturing date of the intermediate component.

If the parent has a component flagged 1 and also other components influencing the expiry date, components flagged 2, the expiry date is the earliest of the expiry date calculated from the manufacturing date of the intermediate component flagged 1 and the expiry dates of the other components flagged as 2.

If the expiry/retest date calculation method is equal to 2 or 3 for a parent item, the BOM must include at least one component that is flagged as Expiry Component 1 or 2.

Screen actions - BOM500D2-01

F13=Sequence

Use to display the sequence and selection screen where you can specify how to sequence the selection list.

F14=Copy BOM

Use to copy the single level Bill of Material/Recipe/Formula for the parent item number, facility and method code combination specified or copy all levels of the BOM/Recipe/Formula based on a prompt screen. You can review the components on the single level BOM prior to the copy.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify BOM/recipe/formula component detail

Use the BOM-Formula-Recipe Component Detail screen, BOM500D3-01, to manage the BOM/Recipe/Formula component details for MDM. When in Revise mode, the system displays the previous component information on the right side and you can specify new field values on the left. The Create mode uses the left column fields only. The system displays only the fields on the right for the Delete or Display modes. In Add mode, the system creates the component record and clears the screen fields so that you can add the next component.

If you use F16, F17, or F18 to display this screen, you are in Mass Create, Mass Revise, or Mass Delete mode, respectively. In this case, the new component values you specify update all of the BOMs shown on the BOM Mass Update - Where Used screen. There is no Mass Undo function.

When you execute a Mass Revise or Mass Replace where the new component specified is different from the original component, the system discontinues the original component the day before the new component is effective. The system does not physically delete the original component.

In Mass Revise mode you must choose whether the Use Existing BOM Values field specifies the values from the original component when replacing it with the new component or to leave the fields blank for the new component.

If you specify yes in the Use Existing BOM Values field and leave any of the fields blank, , the process uses the existing values from the original component and supplies these on the new component. These values are for the fields that are left blank prior to processing and not for any fields which you specified a value.

If you specify no in the Use Existing BOM Values field, and leave any fields blank, these fields are also blank on the new component. If either value is in the Use Existing BOM Values field, specifying any value in any of the fields supplies that value on the new component for all of the parents BOMs. The Use Existing BOM Values field only affects the values supplied on the new component for fields that are blank.

In Mass Revise mode, the system updates all of the following BOM fields with the specified new component data:

- Item Number
 - Bubble Number
 - Routing Operation
-

- Scrap Factor
- From/To Effectivity Dates
- Must Issue Override flag
- BOM Offset
- Usage Code
- Co-Product Cost
- Bounded Disposition
- From/To Lot Number

Do not use the Mass Update function if there are any BOMs you do not want to update.

If you specify a line action against an individual BOM to access this screen, the system uses the new component values you specify to update only the selected BOM. This is not a Mass Update, but you can use it to update BOMs that contain a particular component.

Field descriptions - BOM500D3-01

Standard Batch Size:

The system displays the standard size of a batch for this item. By default, the system uses the value from the Facility Planning Maintenance program, MRP140D2-02, or the Item Master program, INV100.

Standard Batch Weight:

The system displays the weight of a batch for this item. By default, the system uses the value from the Facility Planning Maintenance program, MRP140D2-02, or the Item Master program, INV100.

Unit of Measure Batch Balancing:

The system displays this field only if it is a batch controlled item. The system displays the common unit of measure to be used for batch formulations. This value defaults from the Facility Planning Maintenance screen, MRP140D2-02.

This U/M is the common unit of measure for all components of this item for batch balancing purposes. If the components are not stocked in the same unit of measure, you must define a conversion factor in the U/M Conversion Table, maintained in Unit of Measure Selection, API120. The system does not perform a validation.

Child Item (35,A):

This field contains the child component item number. To exchange components, you can also use F17=Mass Revise. For more information, see the Bill of Material Mass Replace, BOM510, section in the run instructions for this product.

Bubble Number (3,0):

This field contains an extra user-defined reference number that you can use to re-sequence this display or Bills of Material listings. If you expect periodic changes in a bill of material, you may not want to use consecutive integers for bubble numbers to allow for the insertion of new components into the bubble number sequence.

Expiry Component (1,0):

Use this field to indicate whether the component is used in expiry date calculation.. You can flag only lot-controlled items for expiry date calculation, flag 1 or 2.

0

Component is not used for expiry date calculation.

1

Component is intermediate to parent, such as the active ingredient. There can only be one component designated as type 1 for any unique effective date, for any parent BOM. There can be no overlapping of effective dates or date gaps for components marked with 1.

2

Component is not an intermediate to parent but must be considered when the expiry date of the BOM parent is defined. There can be more than one component marked as a 2 on any particular BOM.

Effect of the codes is as follows:

If a parent has only an intermediate component flagged with 1, the retest and expiry dates of the parent are the manufacturing date of the parent plus the retest and shelf life days respectively. The manufacturing date of the parent is equal to the manufacturing date of the intermediate component.

If the parent has a component flagged 1 and also other components influencing the expiry date (components flagged 2), the expiry date is the earliest of the expiry date calculated from the manufacturing date of the intermediate component flagged 1 and the expiry dates of the other components flagged as 2.

If the expiry/retest date calculation method is equal to 2 or 3 for a parent item, the BOM must include at least one component that is flagged as Expiry Component 1 or 2.

Facility (3,A):

Specify the facility for this component item on the BOM.

BOM Mfg. Method Code (2,A):

Use the manufacturing method code to include alternate bills of material within a facility. You can use this code for experimental variations of a standard bill of material, operational variations of a standard BOM, and so on. Typical uses of the manufacturing method code include substitution of components on the

standard BOM/Formula/Recipe or alternate routings (operational) that are attached to the components of the BOM.

Operation Number (3,0):

This field contains the number of the parent item's operation at which you want the system to backflush the material issues of this component item. Backflushing removes manufacturing allocations and creates material issues for the specified component item.

To back flush materials from the Work Center From location per CAP100, a value must be specified in this field.

Quantity Per/Relative Quantity (15,6):

Use this field to specify the quantity of a child to create one parent. If the parent is a standard batch size, create one standard batch of the parent.

If the parent item is batched, specify the quantity to create one batch, not the quantity required to create one unit of the parent. If you do not specify a value in this field, the system uses a blank value.

MPS and/or MRP explodes negative quantity-per values for planning purposes only. When you release shop orders, the system generates zero allocations for components whose quantity-per is negative.

In Mass Revise mode, this field represents the relative quantity or multiplier factor to be used. See the BOM510D1 help text for further information.

Scrap Factor (5,4):

A factor that is multiplied by the quantity required to get the true quantity used by all applications. A value of 1.0000 in this field indicates zero scrap. A value greater than one indicates positive scrap, a value less than one indicates negative scrap.

Date Effective (6,0):

This field displays the date from which this child item is implemented in the production process. The current processing date is the default.

For region clock time zone conversion, the default is the facility region current date, or for a blank facility, the user region current date.

This date must precede the discontinue date.

Date Discontinued (6,0):

This field indicates the date after which a child item is not part of the production process. The system uses a default value of 99/99/99 to indicate that a discontinue date is currently not assigned to this item.

The time span between the Effective and Discontinue dates determines the time period a component is used in production.

Must Issue Override Y/N (1,A):

You can use this field to override the Must Single Issue parameter defined in Item Master, INV100.

If you specify yes in the Must Single Issue field, you cannot delete the items from inventory through a multiple issue transaction. However, if this is a JIT item, the system does not backflush single issue items. Backflushing occurs only when an operation is associated with a bill of material through the Bill of Material Maintenance program, BOM500.

Offset (4,0):

An adjustment to the parent lead time for the component (positive or negative). This is used by MRP and MPS to calculate the lead time offset for the due date of a component requirement.

Usage Code (1,A):

Below are the usage codes.

0
Fixed Quantity
1
Active
2
Compensating
3
Filler
4
Packaging
9
Miscellaneous
B
By-Product
C
Co-Product
D
By-Product fixed quantity
E
Co-Product fixed quantity

Usage Codes define two functional characteristics of component:

First, usage codes determine if the quantity of a component item will be adjusted to compensate for variations in the potency of active ingredients used on that

batch. Second, usage codes determine if the quantity of a component is included in the batch size (for batch balancing calculations).

You can maintain usage codes in Component Usage Type Maintenance, API110. Only systems that have API installed can specify and use usage codes with the one exception of the fixed usage code (0).

CoProd Cst (Co-Product Cost Percent) (5,2):

Specify the percentage of the parent item actual costs that the co-product absorbs during shop order costing.

Bound (Bounded Disposition) (1,0):

Specify 1 to indicate a bounded relationship between this component and this parent. The default of zero indicates no bounded relationship.

Lots Allow (No. Lots allowed From and To) (1,0):

Specify the number of lots to allow for this component. The value defaults in from the Item Master record if this is a global bill of materials, or from the Facility Planning file if it is facility specific. In Revise mode, you can change the default value in the To Number of Lots Allowed field.

If the item is not lot-controlled, the value in these fields must be zero. Otherwise, a value of 0 to 9 is valid, where 0 indicates no restriction in the number of lots.

Start Lot (25,0):

You can specify an optional starting lot number for the component. This field is for reference only.

End Lot (25,0):

You can specify an optional ending lot number for the component. This field is provided for reference only.

Copy Notes Flag (1,0):

This field whether the system should copy the notes for the original BOM to the notes for the target BOM. This notes flag controls the copy of only M material notes.

1

Yes, copy the notes.

0

No, do not copy the notes. The default is no.

Use Existing BOM Values (1,A):

Specify yes to use existing BOM values in new components. Specify no not to carry these over.

The value that you specify in this field affects only fields on this screen with a blank value. If you specify No in the Use Existing BOM Values field, the system uses a blank value for the BOM for the parent. If you specify Yes, the system uses the value from the BOM for the parent as the default value.

Exclude from BOM Costing (1,0)

Specify whether to exclude this component from BOM costing.

1

Exclude. The system does not include the component in the cost of the parent during cost rollup or actual cost update.

0

Do not exclude.

Exclude from BOM Planning (1,0)

Specify whether to exclude this component from BOM planning.

1

Exclude. The system does not pass the planned orders for the parent, KFP file, to the component as requirements, KMR file, during MPS/MRP generation. The system does not create Material allocations, FMA records, during Shop Order creation.

0

Do not exclude.

Screen actions - BOM500D3-01**F14=Material Status Inquiry**

Use to display Material Status Inquiry, INV300D1.

F15=Reference Designators Maintenance

Use to display Reference Designators Maintenance, BOM505D1. In create or add mode, this screen can automatically display based on the Engineering Controlled Items flag - Reference Designators is yes for this component item number.

F16=Manufacturing Data Notes Maintenance

Use to display Manufacturing Data Notes Maintenance, BOM190D1.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Copy a BOM/recipe/formula structure

Use the Copy BOM-Formula-Recipe screen, BOM500D4-01, to maintain the BOM/Recipe/Formula copy structure process. You can copy a BOM from one facility to another or from one method code to another. The system copies the starting and ending effective dates to each component line on the single-level BOM.

Field descriptions - BOM500D4-01

Parent Item Number (35,A):

The parent item number is the single-level parent for a bill of material that is the target for this copy function. If you specify the parent item number, it must be a valid item in the Item Master.

Facility (3,A):

Specify the target facility for this copy function.

BOM Mfg. Method Code (2,A):

Use the manufacturing method code to include alternate bills of material within a facility. You can use this code for experimental variations of a standard bill of material, operational variations of a standard BOM, and so on. Typical uses of the manufacturing method code include substitution of components on the standard BOM/Formula/Recipe or alternate routings (operational) that are attached to the components of the BOM.

Copy notes flag (1,0):

Specify whether the system should copy the notes for the original BOM to the notes for the target BOM. This notes flag controls the copy of only M material notes.

Copy Reference designators (1,0):

Specify whether the system should copy the reference designators attached to each component line from the original BOM to the target component line on the new BOM.

Date Effective (6,0):

This field displays the date from which this child item is implemented in the production process. This new date effective only applies to the single-level BOM copy or the first level of an all levels BOM copy. This date must precede the discontinue date.

Date Discontinued (6,0):

This field indicates the date after which a child item is not part of the production process. The system uses a default value of 99/99/99 to indicate that a discontinue date is currently not assigned to this item. There must be at least one day between the date effective and the date discontinued.

The time span between the effective and discontinue dates determines the time period a component is used in production.

Copy type flag (1,0):

This field controls how many levels of the BOM the system copies.

0

Single level, copies only the single level bill of material for that parent item number.

1

All levels, copies the entire BOM for all levels below the original parent item number. Lower level global BOMs for Infor PLM Optiva-controlled items are not created in this process.

If you specify 1, the facility or method code of the target BOM should be different than the original BOM.

Screen actions - BOM500D4-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Reference designator maintenance, BOM505

Use this program to create and maintain the reference designators that you attach to component items on a bill of material/recipe/formula. You can use reference designators to record comments or locations for each unit in the quantity required amount on the component. For example, if the required quantity for component A is 4, you can record 4 comments or reference designators for component A.

Typically, you use a reference designator to record board locations for memory chips on an electronic circuit board.

The number of reference designators must match the quantity required on the component line in the bill of material. If reference designators do not exist on the bill of material component being maintained, the system adds reference designators you create on this screen to the component on the bill of material. If reference designators exist on the BOM you select to maintain, the system

displays those reference designators on the right side of the screen and you can specify the new reference designators on the left.

Access: BOM500D2-01

Add or select a reference designator

Use the Reference Designator selection screen to add or maintain a specified reference designator.

Field descriptions - BOM505D1-01

Parent Item Number (35,A):

The system displays the parent item number for this designator.

Facility (3,A):

The system displays the facility for component for which you create or maintain the designator.

BOM Mfg. Method Code (2,A):

The system displays the manufacturing method code for the component.

Date Effective (6,0):

The system displays the date from which this child item is implemented in the production process. This new date effective only applies to the single-level BOM copy or the first level of an all levels BOM copy. This date must precede the discontinue date.

Item Description (50,A):

The system displays the item description from the Item Master.

Child Item (35,A):

The field contains the component item number.

Child Item Description (50,A):

The system displays the item description from the Item Master.

Quantity Required (15,6):

Specify the quantity of a child to create one parent. If the parent is a standard batch size, create one standard batch of the parent. The number of reference designators must match this quantity.

Reference Designator Number (4,0):

This is the count of reference designators. The number of reference designators must match the value in the quantity required field. The system automatically generates this value.

Reference Designator (6,A):

This is a user-defined field that can record an electronics board location, for example, or any type of comment for each quantity per required for a component. Specify the text here.

Comment (25,A):

Specify comments, general information, or notes for each reference designator. For easier readability, you can use uppercase and lowercase characters.

Original Reference Designator (6,A):

This is the original reference designator prior to maintenance provided for ease of data entry. The system copies the original reference designators to the new column to make revisions easier.

Screen actions - BOM505D1-01**F21=Delete**

Use to delete all of the reference designators for this component line if they no longer apply or for convenience in data entry of revisions.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

BOM/formula/recipe mass update, BOM510

Use this program to update specific components on multiple bills of material. For example, this can occur when production materials or your product design and specifications change.

In Mass Create mode, you specify an absolute quantity-per for the new component. In Mass Revise mode, you specify a relative quantity-per for the new component. The system uses this relative quantity-per as a multiplier. For each instance of a component in a specified BOM, the new quantity-per is the old quantity-per times the multiplier.

For example, if you replace every occurrence of a thick washer with two thin washers, the relative quantity-per is two. The update logic works as follows:

When you execute a mass revise, or mass replace where the new component specified is different from the original component, the system discontinues the

original component the day before the new component is effective. The system does not delete the original component.

When you execute a Mass Update or Mass Replace, verify that the system does not change bills with cost-only method codes.

When you execute a Mass Update, verify that the system eliminates bounded relationships found for replaced components when you add the new component.

Access: Menu MDM

Update a bill of material component

Use the BOM-Formula-Recipe Mass Update selection screen to maintain a specified bill of material component.

Field descriptions - BOM510D1-01

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

12=Material Status Inquiry

Use to display the Material Status Inquiry, INV300D1, for this parent item number.

13=Where Used

Use to display the parent item numbers for the component where-used. You can use this line action to determine the impact of the change or update by displaying all of the parent items where the component occurs.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Component (Child) Item Number (35,A):

The component item number is the item number that the system displays on the BOM/Recipe/Formula master record. If you specify the component item number, it must be a valid item in the item master.

Facility (3,A):

Specify the facility for the component item to be updated. If you leave the field blank, the system uses the global product structure in the calculation of global costs.

If you run planning globally, you must use global bills of material if you use bounded dispositions. If you run planning by facility, you must use facility specific bills of material if you use bounded dispositions.

BOM Mfg. Method Code (2,A):

Use the manufacturing method code to include alternate bills of material within a facility. You can leave the BOM Mfg. Method Code field blank. You can use this code for experimental variations of a standard bill of material, operational variations of a standard BOM, and so on. Typical uses of the manufacturing method code include substitution of components on the standard BOM/Formula/Recipe or alternate routings (operational) that are attached to the components of the BOM.

Screen actions - BOM510D1-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Mass update a BOM/recipe/formula where-used list

Use the BOM-Formula-Recipe Mass Update-Where Used selection screen, BOM510D2-01, to view a list of the parent items in which the component item that you selected on the previous screen is used.

You can use a line action to update a parent item here or you can use a screen action to mass update all of the parents in the list.

If an error occurs when you update one parent in the list, the program stops on the parent BOM in error and does not proceed.

Field descriptions - BOM510D2-01**Action (2,0):**

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

When you use line actions 1, 2, or 4, the action applies only to the item you select. If you use F16, F17, or F18, the action applies to all parent items in the list.

Choose from the following actions:

12=Material Status Inquiry

Use to display the Material Status Inquiry, INV300D1, for this parent item number.

16=Notes

Use to display the Manufacturing Data Notes, BOM190, for the parent item number.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Parent Item Number (35,A):

The system displays the item number for the existing parent items in the list. You can use the top field with a line action.

Sequence Number (3,0):

The system displays the sequence number for the existing parent items. You can use the top field with a line action.

Expiry Component (1,0):

The system displays expiry component value from the BOM-Formula-Recipe program.

Screen actions - BOM510D2-01

F11=Fold

Use to display additional fields.

F16=Mass Create

Use to display the Mass Create screen, BOM510D3-01.

F17=Mass Revise

Use to display the Mass Update screen, BOM510D3-01.

F18=Mass Delete

Use to confirm deletion of the components.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Delete BOM confirmation window

Use the Delete Confirmation screen to confirm the mass deletion of the specified component from all of the parent items in the selection list. The component the system deletes is the one for which you view the parent item where-used information. The system displays this component on the top of the Where-Used screen, BOM510D2-01.

Field descriptions - BOM510D2-02**Confirm Delete (1,0):**

Specify 1 and press Enter to delete the component from all of the parent items in the list. Otherwise, type 0.

Screen actions - BOM510D2-02**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Approval processing order level maintenance, BOM550

Use this program to maintain the soft approval process attached to Engineering Change Orders by using an approval process type and a process name on the ECO header.

When the approval process is attached to the ECO header, the system copies the approval process developed in Approval Process Maintenance, BOM170D1, to a soft approval process that is part of the ECO.

You can add, revise, and delete additional steps to an ECO-specific approval processing without affecting the original approval process.

Access: MDM02

Select an approval process order level

Use the Approval Processing selection screen to select an approval process whose additional attached approval process steps you want to maintain.

Field descriptions - BOM550D1-01**Act (2,0):**

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

15=Post

Use to display the Engineering Change Order Posting screen for posting of the engineering change order processing against the BOM files. This line action processes the ECO and updates the Bill of Material file only if all required approval steps are in an accepted status and the ECO current approval step is a valid

step for posting. Refer to BOM170D1. This line action also produces the Impact of Change report that indicates the result of the ECO posting. This audit report is an important feature, especially if the ECO is a Mass Add, Mass Update, or Mass Delete.

17=Order Header

Use to display the Engineering Change Order Header screen. You can inquire or maintain the ECO header including the parent item number, starting and ending effective dates, and notes for the selected engineering change order.

18=Order Detail

Use to display the Engineering Change Order Detail Lines List screen. You can inquire or maintain the component change instructions for the selected engineering change order.

19=Approval Processing

Use to display the Approval Process Maintenance program, BOM170. You can inquire or maintain the approval process in general for the maintenance of new steps or the elimination of steps.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Order Type (2,A):

The system displays the order type associated with the existing approval processes. You can use the top field with a line action.

Facility (3,A):

The system displays the facility associated with the existing approval processes. You can use the top field with a line action.

Engineering Change Order Number (15,A):

The system displays the ECO number associated with the existing approval processes. You can use the top field with a line action.

Approval Process (15,A):

The system displays the approval process name of the existing approval processes. You can use the top field with a line action.

Approval Process Line Number (3,0):

The system displays the line number associated with the existing approval processes. You can use the top field with a line action.

Approval Process Step (8,A):

The system displays the approval process step associated with the existing approval processes. You can use the top field with a line action.

Screen actions - BOM550D1-01**F13=Sequence**

Use to access the filter screen to specify how to sequence the selection list.

All other screen actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for screen actions* in the overview information in this document.

Specify filter options

Use the Filter Options screen to specify how to sequence the list of approval processes on the selection screen.

Field descriptions - Filter**Sequence Option (1,0):**

Specify how to sequence the selection list.

Order Type (2,A):

Specify an order type to limit the list on the selection screen to those approval processes that are associated with this order type.

Facility (3,A):

Specify a facility to limit the list on the selection screen to those approval processes that are associated with this facility.

Approval Process (15,A):

Specify an approval process to limit the list on the selection screen to this approval process.

Approval Process Step (8,A):

Specify an approval process step to limit the list on the selection screen to those approval processes that contain this step.

Screen actions - Filter

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Maintain an approval processing step level

Use the Approval Processing Detail Maintenance screen, BOM550D2-01, to maintain the approval process steps within the soft approval process attached to the ECOs. On this screen, you can add, revise, or delete additional steps for an ECO for a specific approval process. If you frequently add steps, use Approval Process Maintenance, BOM170D1, to permanently add the step for future soft approvals.

Field descriptions - BOM550D2-01

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

13=Accept

Use to mark the approval step as approved. After you approve a step, the system marks the Order Header with this step as the previous step and the next open (unprocessed) step as current step. All required steps must be accepted for posting as well as the current Order Header step must be valid for posting.

14=Reject

Use to mark the approval step as rejected. If the approval step is a required step then a rejected flag blocks the order from posting. After you update the step, the system marks the order with this step as the previous step and the next open (unprocessed) step is the current step. All required steps must be accepted for posting as well as the current Order Header step must be valid for posting.

16=Notes

Use to display the Notes Maintenance program, SYS181D3. You can write notes about why the step is accepted or rejected, and general comments about this approval step or notes.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Approval Process Line Number (3,0):

This is the approval process line number. The line number must be unique for each approval process step. You should increment the approval process line number in steps of 5 or 10 to allow you to insert steps during maintenance.

Approval Process Step (8,A):

This is the approval process step for this approval process. An approval process step can be a person or procedural step within an overall approval process. The same process step can be used more than once in an approval process, but the line number must be unique for each step. You can maintain the approval process step behavior through BOM175D1, Approval Processing Step.

Approval Process Step Description (30,A):

Specify a description of the approval process step to use on an ECO or drawing. You can use uppercase and lowercase characters for easier readability.

Review Date (8,0):

This field is calculated from the approval process when the soft approval process was created for the order. If the complete date is after the review date this line is highlighted on the screen.

Completion Date (8,0):

This is the completion date for this step in the approval process for the order.

Screen actions - BOM550D2-01**F13=Sequence**

Use to display the sequence and selection screen. You can specify a sequence or filter so that the system displays a list matching the information specified in that sequence or filter.

F15=Post

Use to display the Engineering Change Order Posting screen for posting of the ECO processing against the BOM files. This action processes the ECO and updates the Bill of Material file only if all required approval steps are in an Accepted status and the ECO current approval step is a valid step for posting, refer to Approval Step Maintenance, BOM175D1. This action produces the Impact of Change report that indicates the effect of the ECO posting. This audit report is an important feature, especially if the ECO is a Mass Add, Mass Update or Mass Delete.

F17=Order Header

Use to display the ECO header screen. Use this mode to inquire or maintain the ECO header including the parent item number, starting and ending effective dates and notes for the selected engineering change order.

F18=Order Detail

Use to display the Engineering Change Order Detail Lines List screen. Use this mode to inquire or maintain the component change instructions for the selected engineering change order.

F19=Approval Processing

Use to display the Approval Process Maintenance program, BOM170. Use this mode to inquire or maintain the approval process for maintaining new steps or eliminating steps.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Maintain an approval processing step detail

Use the Approval Processing Detail Maintenance information screen, BOM550D3-01, to maintain the approval process step detail within the soft approval process attached to Engineering Change Orders. On this screen, you can revise the soft approval process step detail for date information, reason codes, and notes.

Field descriptions - BOM550D3-01**Approval Process Line Number (3,0):**

Specify the approval process line number. The line number must be unique for each approval process step. You should increment the approval process line number in steps of 5 or 10 to allow for the insertion of steps during maintenance.

Approval Process Step Description (30,A):

This is a text field used to describe the approval process step used on an ECO or drawing. You can uppercase and lowercase characters for easier readability.

Approval Process Step (8,A):

Specify the approval process step for this approval process. An approval process step can be a person or procedural step within an overall approval process. You can use the same process step more than once in an approval process, but the line number must be unique for each step. You can maintain the approval process step behavior through BOM175D1, Approval Processing Step.

Accept/Reject Status (1,0):

Specify Accept to indicate if this approval process step is approved. Specify Reject to indicate if this approval process step is rejected or not approved. The Reject value is an indication that this step has not been processed yet. After a step is approved, the Order Header is marked with this step as the previous step and the next open (unprocessed) step as current step. All required steps must be accepted for posting as well as the current Order Header step must be valid for posting. If the approval step is a required step then a rejected value blocks the order from posting. After the step is updated, the order is marked with this step as the previous step and the next open (unprocessed) step becomes the current step.

Accepted/Rejected By (10,A):

The system displays the User ID of the user to last maintain this record.

Step Originated Date (8,0):

This field displays the date that the approval step record was created from the approval process added to the order header. Specify the review date for the list screen to filter the approval process steps for this approval process.

Step Acknowledged Date (8,0):

Specify the date that the approval step record was acknowledged by the approver of the step. Specify the review date for the list screen to filter the approval process steps for this approval process.

Step Review Date (8,0):

This field is calculated from the standard approval process based on the number of review dates in that steps record. The number of review days are added to the step originated date. Specify the review date for the list screen to filter the approval process steps for this approval process.

Step Review Completed Date (8,0):

Specify the date that the approval step is approved, rejected or otherwise considered complete. Specify the review date for the list screen to filter the approval process steps for this approval process.

Required Step? (1,0):

Specify 1 if this approval process step is required prior to posting an ECO or approving a drawing. Specify 0 to make this step optional prior to posting. By default, the system uses the value from the standard approval process step.

Priority Code (2,A):

This is a user-defined value that you can use for reporting as a sort, to group high-priority approval steps, or to categorize approval steps within an approval process. By default, the system, uses the value from the standard approval process step.

Reason Code 1 (2,A):

You can use this field for user-developed reporting as a sort. You can also use the reason code to describe categories of activities within an approval process step. You can define the valid reason codes in Code Table Maintenance, SYS105D1. By default, the system, uses the value from the standard approval process step.

Reason Code 2 (2,A):

See Reason Code 1.

Reason Code 3 (2,A):

See Reason Code 1.

Comment (30,A):

Specify comments or general information about this approval step. For easier readability, you can use uppercase and lowercase characters.

Tier Level (6,A):

Specify the tier level for this approval step. The tier level is the department or approval tier for this phase of the approval process. The tier level allows an intermediate level between the process name and the process step.

Screen actions - BOM550D3-01**F16=Notes**

Use to display the Notes Maintenance program, SYS181D3. You can write general comments or notes regarding this approval step. For example, you can explain why the step is accepted or rejected.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Approval processing report, BOM555

Use this program to list the ECOs by approval process type, process name and process steps. This report lists all open orders for an approval step to facilitate approval processing of orders. This report is generated by the actual approval process attached to an order and provides the history of the approval process of an ECO.

Access: MDM02

Print an approval processing report

Use the Approval Processing Report screen to specify which information to print. This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - BOM555D-01

From Order Type (2,A):

To print the report based on a range of order types, specify the first value in the range.

To Order Type (2,A):

To print the report based on a range of order types, specify the last value in the range.

From Facility (3,A):

To print the report based on a range of facilities, specify the first value in the range.

To Facility (3,A):

To print the report based on a range of facilities, specify the last value in the range.

From Engineering Change Order Number (15,A):

To print the report based on a range of ECO numbers, specify the first value in the range.

To Engineering Change Order Number (15,A):

To print the report based on a range of ECO numbers, specify the last value in the range.

From Parent Item Number (35,A):

To print the report based on a range of parent item numbers, specify the first value in the range.

To Parent Item Number (35,A):

To print the report based on a range of parent item numbers, specify the last value in the range.

From Approval Type (2,A):

To print the report based on a range of approval types, specify the first value in the range.

To Approval Type (2,A):

To print the report based on a range of approval types, specify the last value in the range.

From Approval Process (15,A):

To print the report based on a range of approval processes, specify the first value in the range.

To Approval Process (15,A):

To print the report based on a range of approval processes, specify the last value in the range.

From Approval Process Step (8,A):

To print the report based on a range of approval process steps, specify the first value in the range.

To Approval Process Step (8,A):

To print the report based on a range of approval process steps, specify the last value in the range.

From Starting Effectivity Date (8,0):

To print the report based on a range of starting effective dates, specify the first value in the range.

To Starting Effectivity Date (8,0):

To print the report based on a range of starting effective dates, specify the last value in the range.

From Discontinue Date (8,0):

To print the report based on a range of discontinue dates, specify the first value in the range.

To Discontinue Date (8,0):

To print the report based on a range of discontinue dates, specify the last value in the range.

Run Time Parameter (1,0):

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM555D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Planning bill of materials maintenance, BOM600

Use this program to add, revise, or delete the planning bills of material, item types 3, 4, and 5. The planning bill describes standards, features, and options for the parent item types. The planning bill also defines components of kits, item type 4, and assortments, item type 3. All maintenance is completed on a single level of a bill, so only direct build-up relationships are changed. For example, if A is made from B and B is made from C, only B is the planning bill of A.

Phantom items, item type 0, in planning bills are a place holder for the order entry planning BOM selection process. They represent a set of components of the phantom item which appear in full on the customer order. Releasing a shop order through Final Assembly Shop Order Release, FAS500, creates FMA, shop order material allocation, records for the selected phantom children. No netting of phantom inventory occurs.

Planning Bills are used by companies that need multi-level planning bills of material for make-to-stock or assemble-to-order items. Companies that use make-to-stock, but package in multiple presentations, can use planning bills to plan manufacturing by item groups or families. You can then forecast by item family and allow MPS to explode the percentages to your various presentation levels.

Companies that use assemble-to-order can use the planning bill of material to carry the features and options items of the finished good. Again, multi-level

planning bills of material plan the features and options based on the available-to-promise of the parent item.

Planning bills are not specific to any one facility.

The system processes planning bills of material entries online. The system prints an audit report when the session is complete. You can view the resulting planning bills of material with the Planning BOM Inquiry, BOM320.

Access: Menu MDM

Add or select a planning bill of material for update

Use the Planning Bill of Material Maintenance selection screen to select a planning BOM for which you want to create component information or maintain its existing components.

You can also copy another planning bill to a blank planning bill of material or an existing planning bill. You can copy a BOM and change the components. For example, if product G is identical to product A except that G uses an additional part Z, you could copy the BOM from A to G and add Z separately to create the new BOM.

Copying to an existing planning bill requires adjustments to forecasting percentages and bubble numbers. To re-sequence a planning bill in bubble number sequence, run Bill of Material Reorganization, BOM900.

Field descriptions - BOM600D1-01

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

14=Delete Structure

Use to display the Delete Confirmation screen. You can then delete the single level Planning BOM for this parent item number.

17=Routing

Use to display the Routing Maintenance, SFC100, for this parent item number.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Parent Item Number (35,A):

The system displays the parent item number for the existing planning BOMs. You can use the top field with a line action.

Screen actions - BOM600D1-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Maintain online planning BOM single level

Use the Planning Bill of Material Maintenance component selection screen, BOM600D2-01, to create the new component or to select an existing one to maintain.

You can maintain components for a single level of the BOM at a time.

Field descriptions - BOM600D2-01**Act (2,0):**

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

16=Notes

Use to display the Manufacturing Data Notes Maintenance, BOM190, screen.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Bubble Number (3,0):

The system displays the bubble number for the existing components. You can use the top field with a line action.

Child Item (35,A):

The system displays the name existing components. You can use the top field with a line action.

Sequence Number (3,0):

The system displays the sequence number for the existing components. You can use the top field with a line action. If you do not specify a number in the Create mode, the system assigns the next available number.

Screen actions - BOM600D2-01

F11=Fold

Use to display additional fields.

F14=Copy BOM

Use to copy the single level planning Bill of Material for the specified parent item number. You can review the components on the single-level BOM prior to the copy.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify filter options

Use the Filter Options screen to specify how to sequence the list of components on the selection screen.

Screen actions - Filter

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Maintain planning BOM component detail

Use the Planning Bill Component Line Detail screen, BOM600D3-01, to specify the planning BOM component details. When in Revise mode, the system displays the previous component information on the right and you can specify new field values on the left. The Create mode uses the left column fields only. The system displays only the fields on the right for the Delete and Display modes. In Add mode, the system creates the component record and clears the screen fields so you can add the next component.

If you press F16, F17, or F18 to display this screen, you are in Mass Create, Mass Revise, or Mass Delete mode, respectively. In this case, the new component values you specify update all of the BOMs shown on the Planning BOM Mass Update - Where Used screen, BOM650D2. There is no mass undo feature.

In Mass Revise mode, all of the following BOM fields are updated with the specified new component data:

- Item Number
 - Bubble Number
 - Routing Operation
 - Scrap Factor
-

- From/To Effectivity Dates
- Must Issue Override flag
- BOM Offset
- Usage Code
- Co-Product Cost
- Bounded Disposition
- From/To Lot Number

Do not use the Mass Update function if there are any BOMs you do not want to change.

If you specify a line action against an individual planning BOM to access this screen, the system uses the new component values you specify to update only the selected planning BOM. This is not a Mass Update, but you can use it to update BOMs that contain a particular component.

Field descriptions - BOM600D3-01

Child Item (35,A):

The field contains the child (component) item number. In Create mode, you use this field to define the new component. You can maintain this field in Update mode to replace the original component with the specified new component.

Bubble Number (3,0):

This field contains an extra user-defined reference number that you can use to re-sequence this display or Bills of Material listings. If you expect periodic changes in a bill of material, do not to use consecutive integers for bubble numbers so that you can insert new components into the bubble number sequence.

Operation Number (3,0):

This field contains the number of the parent items operation at which you want the system to backflush the material issues of this component item. Backflushing removes manufacturing allocations and creates material issues for the specified component item.

Quantity Per/Relative Quantity (15,6):

Use this field to specify the quantity of a child to create one parent. If the parent is a standard batch size, create one standard batch of the parent.

If the parent item is batched, specify the quantity to create one batch, not the quantity required to create one unit of the parent. If you do not specify a value in this field, the system defaults to blank.

In Mass Revise mode, this field represents the relative quantity (or multiplier factor) to use. See the BOM650D1 help text for further information.

Scrap Factor (5,4):

This value is factor that is multiplied by the quantity required (above) to get the true quantity used by all applications. A value of 1.0000 in this field indicates zero scrap. A value greater than one indicates positive scrap and a value less than one indicates negative scrap.

Type (1,A):

Specify one of the following values:

S

A standard component that you must select at features and options time during order entry, and which automatically has a forecast percentage of 100. All components of kit parents must be type S (standard).

O

An option that you can or cannot select. All components of assortment parents must be type O, options.

Other

A feature group. Use any letter or numeral to represent a group of options. When you select features and options, you can select only one member of each feature group. The forecast percentage for all feature groups must total 100.

Forecast % (3,0):

This value is a percent factor that the system uses during MPS generation. The quantity required is multiplied by the scrap factor and the forecast percentage to get the relative quantity for the component. Forecast percentages for all feature groups must total to 100. Forecast percentages for each kit component must be 100. Forecast percentages for assortment components are user-defined.

Date Effective (6,0):

This field displays the date from which this child item is implemented in the production process. The current processing date is the default. This date must precede the discontinue date. Specify the review date for the list screen to filter the approval process steps for this approval process.

Date Discontinued (6,0):

This field indicates the date after which a child item is not part of the production process. The system inserts a default value of 99/99/99 to indicate that a discontinue date is currently not assigned to this item. Specify the review date for the list screen to filter the approval process steps for this approval process.

The time span between the effective and discontinue dates determines the time period a component is used in production.

Invoice Flag (1,A):

This field controls how this item appears on printed acknowledgments and invoices and how it affects the pricing for the parent. Valid entries are:

Option	Add price to order	Print item on order docs
1	Yes	Yes
2	Yes	No
3	No	Yes
4	No	No

If you choose Option 2 for a component item, the system adds its extended amount to the extended amount of the parent in the order acknowledgment document. For example, the price of the parent is \$55 and the price of a component is \$10, and you select option 2 for the component. The order acknowledgment shows the extended amount of the parent as \$65, assuming quantities of 1 for all items.

If you choose option 1 or 2 for a component item, the system adds its extended amount to the parents extended amount when you view the parent in Sales Inquiry, SAL300.

This field does not apply to Kits for pricing. All pricing of a Kit is done at the parent level.

Offset (4,0):

This value is an adjustment to the parent lead time for this component, positive or negative. The system uses the offset by MRP and MPS when it calculates the lead time offset for the due date of a component requirement.

Start Lot (25,0):

Use this field as a reference-only optional starting lot number for the component.

End Lot (25,0):

Use this field as a reference-only optional ending lot number for the component.

Copy notes flag (1,0):

This field controls if the system should copy the notes for the original planning BOM to the notes for the target planning BOM. This field controls the copy of only M material notes.

Screen actions - BOM600D3-01**F14=Material Stock Status Inquiry**

Use to display Material Stock Status Inquiry, INV300D1.

F16=Manufacturing Data Notes Maintenance

Use to display Manufacturing Data Notes Maintenance, BOM190D1.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Use the delete structure screen

Use the Delete Structure Confirmation screen, BOM600D3-02, to confirm that the system mass deletes the entire single level Planning BOM/Recipe/Formula for this parent item. To complete the deletion, you must change the delete field value from the default of 0 to 1 and use F6=Accept. These steps prevent you from inadvertently deleting an entire structure.

Field descriptions - BOM500D3-02**Structure Delete Confirmation (1,0):**

Specify 1 and use F6 to complete the single-level BOM delete. Otherwise, use F12 to cancel and return to the selection screen, BOM600D1-01.

Screen actions - BOM500D3-02**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Copy a planning BOM structure

Use the Planning Bill of Material Copy screen, BOM600D4-01, to copy a planning BOM from one parent item number to another. The system copies the starting and ending effective dates from each component to the new planning bill. The system also copies these dates to each component line on the single level BOM.

Field descriptions - BOM600D4-01**Parent Item Number (35,A):**

Specify the parent item to which you want to copy the information.

Copy notes flag (1,0):

Specify whether to copy the associated notes. This notes flag controls the copy of only M material notes.

Date Effective (6,0):

This field displays the date from which this child item is implemented in the production process. This new date effective only applies to the single level planning BOM copy. This date must precede the discontinue date. Specify the review date for the list screen to filter the approval process steps for this approval process.

Date Discontinued (6,0):

This field indicates the date after which a child item is not part of the production process. The system uses a default value of 99/99/99 to indicate that a discontinue date is currently not assigned to this item. There must be at least one day between the date effective and the date discontinued. Specify the review date for the list screen to filter the approval process steps for this approval process.

The time span between the effective and discontinue dates determines the time period a component is used in production.

Screen actions - BOM600D4-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

ECO post, BOM610

Use this program to post the ECO and process it against the BOM files. This screen updates the Bill of Material file only if all required approval steps are in an Accepted status and the ECO current approval step is a valid step for posting.

This program only posts ECOs that are currently on an approval step that is valid for posting and whose required approval processing steps are accepted.

Access: Engineering Change Order Maintenance, BOM100, and Approval Processing, BOM550

Post an ECO

Use the ECO Post screen to post the specified engineering change orders to the Bill of Material file.

Field descriptions - BOM610D-01**Order Type (2,A):**

The system displays the order type for the ECO.

Order Type Description (30,A):

The system displays the order type description.

Facility (3,A):

The system displays the facility for the ECO.

Facility Description (30,A):

The system displays the facility description.

Engineering Change Order Number (15,A):

The system displays the ECO number.

ECO Description (30,A):

The system displays the ECO description.

Refresh Unreleased Shop Orders (1,0):

The system displays this field only if the LMP product is installed. You can use it to specify whether to update the shop orders that are related to the BOM being updated. Specify yes to allow eligible shop orders to be updated when you post the change.

To be refreshed, the shop orders must be for lean items that were built with the bill of materials and are eligible to be rebuilt.

Screen actions - BOM610D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

ECO stock-based effective processing, BOM620

Use this program to post the ECOs that use stock-based instruction effectivity codes, for example ECOs that the system posts when the on-hand balance of the parent or component item number is 0.

Access: Menu MDM02

Post an ECO with a stock-based effective code

Use the Stock-Based Effectivity Processing Prompt screen to post for processing ECOs with a stock-based instruction effective code.

The selection criteria on this prompt are setup to allow the batch job to be used in a job scheduler to automate this daily processing as well. The batch job is BOM620B and has a command that accepts the same parameters as displayed on the prompt.

Field descriptions - BOM620D-01

Facility (3,A):

To perform the post for ECOs that are associated with a specific facility, specify that facility here. When you specify an *A in this field, the system processes all facilities.

Approval Process Type (2,A):

To perform the post for ECOs that are associated with a specific approval process type, specify that process type here. When you specify an *A in this field, the system processes all approval process types.

Approval Process (15,A):

To perform the post for ECOs that are associated with a specific approval process, specify that process here. When you specify an *A in this field, the system processes all approval processes.

Approval Process Step (8,A):

To perform the post for ECOs that are associated with a specific approval process step, specify that step here. When you specify an *A in this field, the system processes all approval process steps.

This program posts only ECOs that are currently on a valid approval step; otherwise, the system skips the ECO despite inventory levels. We recommend that you create a step called Batch Post or Inventory Level Post, which is valid for posting, and leave the ECO in that status until the necessary conditions are met.

Process Partial Closed ECOs? (1,0):

Partially closed ECOs are stock-based ECOs that use the OR logic and are not fully implemented until a stocking condition or effectivity date is met. Initially the ECO is processing against the BOM files using effectivity date that is determined when you use the MRP300 inquiry. The effectivity date acts as an outside cut-off.

In the interim, if you specify yes, the ECO checks the stocking level of the parent or component based on the effectivity code, and if the stocking conditions are met, it changes the BOM starting effectivity date to the date the stocking level was met. This approach provides MRP visibility of the ECO, by future effectivity date. It also provides support for stocking level effectivity if the date occurs sooner than the specified effectivity date. This functionality can replace the use of phantom BOMs for stockouts. Specify no to not process the partial-close ECOs.

Run Time Parameter (1,0):

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM620D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Unpost/revise posted ECOs, BOM621

You can access this program from Posted ECO Maintenance Detail, BOM150D2. The system displays this program when you are in Unpost mode or when you use F16=Copy Header Dates, press Enter, and then use F6=Accept.

You can also access this program when in Revise mode by using function F6=Accept after you complete your date changes.

Use this program to execute the appropriate changes through bills of material lines. You can use Unpost mode to discontinue bill of material lines, MBM, where the ECO is the same as the one being unposted, and change the original component discontinue date to the original discontinue date. If there is no original record, the discontinue date is the current date. You can use Revise mode to adjust the effective dates on the bill of materials lines according to the changes you made in Posted ECO Maintenance Detail, BOM150D2.

Access: BOM150

Unpost an engineering change order

Use this screen to unpost or review a specified ECO.

Field descriptions - BOM621D-01**Run Time Parameter (0 or 1):**

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM621D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Planning BOM mass update, BOM650

Use this program to update specific components on all planning bills of material with new components. You might perform this when production materials, forecast items, or your product design and specifications change in, for example, a manufacturing environment.

In Mass Create mode, you can specify an absolute quantity per for the new component. In Mass Revise mode, you can specify a relative quantity per for the new component. The system uses the relative quantity per as a multiplier. For each instance of a component in a specified planning BOM, the new quantity per is the old quantity per times the multiplier.

For example, if you replace every occurrence of a thick washer with two thin washers, you specify the relative quantity per of two. The update logic works as follows:

Planning BOM #1, Seq #1, old washer qty per: 1.0, new washer qty per: 2.0

Planning BOM #1, Seq #2, old washer qty per: 4.0, new washer qty per: 8.0

Planning BOM #2, Seq #1, old washer qty per: 6.0, new washer qty per: 12.0

Access: Menu MDM

Add additional components to a bill of material component

Use the Planning BOM Mass Update selection screen to update the specified bill of material components with additional components.

Field descriptions - BOM650D1-01

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. Choose from the following actions:

12=Material Status Inquiry

Use to display the Material Status Inquiry, INV300D1, for this parent item number.

13=Where Used

Use to display the parent item numbers for the component where-used. You can use this line action to determine the impact of the change or update by displaying all of the parent items where the component occurs.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Component (Child) Item Number (35,A):

The component item number is the item number that the system displays on the planning BOM master record. If you specify the component item number, it must be a valid item in the item master.

Screen actions - BOM650D1-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Mass update a planning BOM where-used list

This screen lists the parent items located on the where-used search for the component item number specified on the selection screen, BOM650D1.

Use the Planning BOM Mass Update-Where Used screen, BOM650D2-01, to individually update each parent BOM by specifying an line action 1, 2, or 4 next to the desired record or to mass update the BOMs in the list.

Use one of the screen actions below to mass update the BOMs.

- F16=Mass Create
- F17=Mass Revise (same component or replace with new one)
- F18=Mass Delete

If an error occurs when you update one parent in the list, the program stops on the parent BOM in error and does not proceed.

Field descriptions - BOM650D2-01**Action (2,0):**

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

When you use line action 1, 2, or 4, the action applies only to a single record. If you use F16, F17, or F18, the action applies to the corresponding Mass Add, Mass Revise, or Mass Delete.

Choose one of the following actions:

12=Material Status Inquiry

Use to display the Material Status Inquiry, INV300D1, for this parent item number.

16=Notes

Use to display the Manufacturing Data Notes, BOM190, for the parent item number.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Parent Item Number (35,A):

The system displays the parent item for the existing BOMs. You can use the top field with a line action.

Sequence Number (3,0):

The system displays the sequence number for the existing BOMs. You can use the top field with a line action.

Screen actions - BOM650D2-01**F16=Mass Create**

Access the Planning Bill Component Line Detail screen, BOM600D3-01, to specify data for a new component.

F17=Mass Revise

Use to display the BOM Component Detail screen, BOM510D3-01, to specify changes in the To Component field.

F18=Mass Delete

Use to display the delete confirmation window.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Optiva download selection, BOM701D

Use this program to select information in Infor ERP LX and download it to data files. You must manually extract the data files to a spreadsheet or a comma delimited text file and then use the Optiva Bulk Data Loader to import the information into Infor PLM Optiva.

You can download the following information from Infor ERP LX:

- Items from the Item Master file (IIM). The program downloads the item, stocking unit of measure, and the item description to the MOI file. Download items before you attempt to download costs or the bills of material.
- Bills of material. You can download global bills of material or limit the download to BOMs for a single facility. The program downloads the formula master data to the MFH and MFI files.
- Costs from a specific cost set. Define the cost set in PLM Integration System Parameters, BOM820D. The program downloads costs for purchased items to the MOI file.
- Vendor and customer ship-to addresses. The program downloads all active records to the MOC file.

Access: MDM03

Specify information to download

Use the Optiva Integration Download ERP to PLM screen, BOM701D-01, to select the information to download.

Field descriptions - BOM701D-01

LX Item Type for Optiva Download (1,A):

Specify an item type or leave the field blank to select items by item class or to download other data. If this is the initial download, and if you have multiple item types or item classes, download all items.

Note: You can run this process multiple times to select items from one or more classes and then one or more item types. If an item meets both a type and a class criteria, it will not be duplicated in the download file. Select all the items to send to Infor PLM Optiva before you select costs and bills of material.

LX Item Class for Optiva Download (2,A):

Specify an item class or leave the field blank to select items by item type or to download other data. If this is the initial download, and if you have multiple item types or item classes, download all items.

Note: You can run this process multiple times to select items from one or more classes and then one or more item types. If an item meets both a type and a class criteria, it will not be duplicated in the download file. Select all the items to send to Infor PLM Optiva before you select costs and bills of material.

Download Bills of Material (1,A):

Specify 1=Yes to download bills of material.

From Facility (3,A):

Specify a facility to download the BOMS for that facility. Leave the field blank to download global BOMS.

Download Costs (1,A):

Specify 1=Yes to download costs. The program downloads costs for purchased items from the cost set that you defined in PLM Integration System Parameters, BOM820D.

Download Company Addresses (1,A):

Specify 1=Yes to download customer and vendor addresses from the customer master (RCM), vendor master (AVM), and ship to (EST) files. Infor ERP LX allows for six lines of address data with additional fields for state, postal code, and country code. Infor PLM Optiva allows for five address lines. The integration download sends the first four address lines to the first four lines in Infor PLM Optiva and puts the state, postal code, and country code on the Infor PLM Optiva fifth line.

Note: You can only extract the company data once. If a failure occurs or if you make corrections in Infor ERP LX, clear the MOC file before you rerun the download.

Print Details (1,A):

The integration download generates a log that lists the types and number of records downloaded. To obtain a more detailed log, specify 1=Yes. The log includes the following information for the records downloaded:

- Item, description, stocking unit of measure
 - BOM file data
 - Item and associated cost data
 - Address file data
-

Run Time Parameter (1,0):

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM701D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

PLM integration system parameters, BOM820D

Use this program to set system parameters for a Product Lifecycle Management (PLM) integration.

Access: ERP LX System Parameter Generation, SYS800D-01

Select a PLM integration

The PLM Integration System Parameter screen, BOM820D-01, displays a list of the available PLM integrations. Use this screen to select an integration.

Field descriptions - BOM820D-01**Optiva Integration Parameters (1,0):**

Specify 1=Yes to use the Infor PLM Optiva integration.

Screen actions - BOM820D-01**F15=Installed Products**

Display a list of installed products.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Specify integration parameters

Use the Optiva Integration System Parameter screen, BOM820D-02, to enter the parameters for the integration.

Field descriptions - BOM820D-02**Optiva Integration Active (1,0):**

Specify 1=Yes to activate the integration. When you activate the integration, the system creates the LXPLMQ data queue in the default ERPLXF files library for the environment that you are setting up.

Optiva active PLC code (10,0):

The system displays the default PLC code, OPTIVA ACT. If you do not use the default value, enter a PLC code that you defined in Product Lifecycle Code Maintenance, INV112D. The PLC code that you defined must have the PLM Data Restriction parameter set to 2=Not allowed.

If you are using Infor ERP LX 8.3.2 and have not installed the Product Lifecycle Enhancement, the prompt on this field is not active.

Optiva obsolete PLC code (10,A):

The system displays the default PLC code, OPTIVA OBS. If you do not use the default value, enter a PLC code that you defined in Product Lifecycle Code Maintenance, INV112D. The PLC code that you defined must have the PLM Data Restriction parameter set to 1=Allowed.

If you are using Infor ERP LX 8.3.2 and have not installed the Product Lifecycle Enhancement, the prompt on this field is not active.

LX Item type for Optiva type 1 (1,A):

Specify an item type that is valid in Infor ERP LX. In Infor PLM Optiva, type 1 applies to material that is manufactured internally by a company.

LX Item class for Optiva type 1 (2,A):

Specify an item class that is valid in Infor ERP LX. In Infor PLM Optiva, type 1 applies to material that is manufactured internally by a company.

LX Item type for Optiva type 2 (1,A):

Specify an item type that is valid in Infor ERP LX. In Infor PLM Optiva, type 2 applies to material that is manufactured internally by a company.

LX Item class for Optiva type 2 (2,A):

Specify an item class that is valid in Infor ERP LX. In Infor PLM Optiva, type 2 applies to material that is manufactured internally by a company.

LX Item type for Optiva type 8 (1,A):

Specify an item type that is valid in Infor ERP LX. In Infor PLM Optiva, type 8 applies to material that is manufactured internally by a company.

LX Item class for Optiva type 8 (2,A):

Specify an item class that is valid in Infor ERP LX. In Infor PLM Optiva, type 8 applies to material that is manufactured internally by a company.

Cost set for Optiva PLM Costs (2,0):

Specify a cost set code for global costs. The integration downloads this cost set to Infor PLM Optiva.

IFS Directory Path For Overflow (256,A):

Specify the pathway for a folder in the IFS directory on the iSeries. If the LXPLMQ data queue overflows, the integration writes the overflow to this directory.

The default directory is /ssaix. This directory is created on the iSeries when you install the Screen Navigation API (SNAPI).

Screen actions - BOM820D-02**F15=Installed Products**

Display a list of installed products.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Bill of material reorganization, BOM900

Use this program to reorganize bill of material low-level codes and sequence codes. This program can also process a physical delete of all discontinued components prior to the date specified in the Remove All Components Discontinued Before This Date field on the Bill of Material Reorganization screen, BOM900D-01.

You can use this program to periodically reorganize bill of material data. You can also run this program after conversion to Infor ERP LX to reorganize your converted MRP data.

Before you run this program

The information below is important to understand before you continue with this program.

- This program purges file information. Before you press Enter to run this program, consult the project manager or the appropriate department supervisor.
 - Depending on the size of the BOM file, this program can process for a long time.
-

- This procedure re-organizes five files. You cannot share these files with any job. Back up these files before you run this program.

File Extension- File Name

MBM	Standard Bill of Material file
MPB	Planning Bill file
IIM	Item Master file
MPN	Bill of Material Notes File
MBZ	BOM Reference Designators

Access: Menu SYS01

Reorganize the bill of material codes

Use the BOM Reorganization screen to reorganize the code levels for the bill of material.

Field descriptions - BOM900D-01

Do you Wish to Run the Reorganization?:

Specify 1 to run the reorganization. Otherwise, specify 0.

Remove all Cmpnts Discont. Before this Date:

You must specify 1 in the Do You Wish to Run the Reorganization? field to remove components. To purge obsolete components from the bill of material, specify a date. The system purges all components discontinued before the specified date from the files. You must specify a date earlier than the current date. Specify the review date for the list screen to filter the approval process steps for this approval process.

Run Time Parameter (1,0):

Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - BOM900D-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

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