

# Run Instructions

---

© Copyright 2011 Infor

All rights reserved. The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or its affiliates and subsidiaries. All rights reserved. All other trademarks listed herein are the property of their respective owners.

### Important Notices

The material contained in this publication (including any supplementary information) constitutes and contains confidential and proprietary information of Infor.

By gaining access to the attached, you acknowledge and agree that the material (including any modification, translation or adaptation of the material) and all copyright, trade secrets and all other right, title and interest therein, are the sole property of Infor and that you shall not gain right, title or interest in the material (including any modification, translation or adaptation of the material) by virtue of your review thereof other than the non-exclusive right to use the material solely in connection with and the furtherance of your license and use of software made available to your company from Infor pursuant to a separate agreement ("Purpose").

In addition, by accessing the enclosed material, you acknowledge and agree that you are required to maintain such material in strict confidence and that your use of such material is limited to the Purpose described above.

Although Infor has taken due care to ensure that the material included in this publication is accurate and complete, Infor cannot warrant that the information contained in this publication is complete, does not contain typographical or other errors, or will meet your specific requirements. As such, Infor does not assume and hereby disclaims all liability, consequential or otherwise, for any loss or damage to any person or entity which is caused by or relates to errors or omissions in this publication (including any supplementary information), whether such errors or omissions result from negligence, accident or any other cause.

### Trademark Acknowledgements

All other company, product, trade or service names referenced may be registered trademarks or trademarks of their respective owners.

### Publication Information

---

<b>Document code</b>	UrmsA US
<b>Release</b>	Release Management System
<b>Publication date</b>	2011-04-19 20:21:08

---

---

## Change History

<b>Rv.</b>	<b>Date</b>	<b>Author</b>	<b>Name</b>	<b>Description</b>	<b>Reqmt.</b>	<b>Project</b>	<b>Page</b>
------------	-------------	---------------	-------------	--------------------	---------------	----------------	-------------

---

No changes.

---



---

# Table of Contents

## About this document

<b>Chapter 1 Introduction to Infor ERP LX.....</b>	<b>1-1</b>
Overview of Infor ERP LX.....	1-1
Navigation.....	1-1
Menus.....	1-1
Dates.....	1-1
Attention key and quick access icon.....	1-1
Look-up features.....	1-2
Remembered keys.....	1-2
Standard online help features.....	1-2
Generic help text for line actions.....	1-3
Line actions.....	1-3
Generic help text for screen actions.....	1-4
Enter.....	1-4
Enter.....	1-4
Enter.....	1-4
F1=Help.....	1-4
F3=Exit.....	1-5
F4=Prompt.....	1-5
F5=Refresh.....	1-5
F6=Accept.....	1-5
F7=Backward.....	1-5
F8=Forward.....	1-5
F11=Fold.....	1-5
F12=Cancel.....	1-5
F23=More Actions.....	1-5
F24=More Keys.....	1-6
Generic help text for standard screens.....	1-6
Generic help text for list screens.....	1-6

---

---

Generic help text for filter screens.....	1-6
Generic help text for the run time parameter.....	1-6
Infor ERP LX menus.....	1-6
ERP LX main menu.....	1-6
Configurable enterprise financials menu.....	1-7
Multi-mode manufacturing master menu.....	1-7
Supply chain management master menu.....	1-7
Cross-product application menu.....	1-7
Commonly used terms in Infor ERP LX.....	1-7
<b>Chapter 2 RMS Overview.....</b>	<b>2-1</b>
Product overview.....	2-1
Highlights:.....	2-1
Release Processing.....	2-2
Daily JIT Requirement Processing.....	2-2
Release Comparison Reporting.....	2-2
Exception Reporting.....	2-2
Product flow.....	2-3
How-to Index.....	2-3
Terms used in Release Management System.....	2-5
<b>Chapter 3 Programs.....</b>	<b>3-1</b>
Non-working days maintenance, RMS110.....	3-1
Screens.....	3-2
Add or select a calendar.....	3-2
Add or maintain non-working days calendar information.....	3-3
Copy a non-working days calendar.....	3-4
Non-working days maintenance - detail, RMS110D2.....	3-5
Maintain non-working days detail.....	3-5
Item families maintenance, RMS130.....	3-6
Screens.....	3-7
Add or select an item family.....	3-7

---

---

Add, maintain, or view item family information.....	3-8
Add or maintain user-defined item family information.....	3-9
Item families maintenance - selection, RMS130D2.....	3-10
Add or maintain item families members.....	3-10
Add, maintain, or view item family member detail.....	3-10
Family/group maintenance, RMS140.....	3-11
Screens.....	3-12
Add or select a model groups.....	3-12
Add, maintain, or view model groups.....	3-13
Model group item maintenance - selection, RMS140D2.....	3-14
Add or select items in a model group.....	3-14
Add, maintain, or view items in a model group.....	3-14
Shipment/delivery patterns maintenance, RMS150D1.....	3-15
Add or select a method code.....	3-16
Add, maintain, or view shipment/delivery patterns.....	3-16
Sequence mismatch/error reports, RMS200.....	3-17
Screens.....	3-17
Print a sequence mismatch/error report.....	3-18
Release comparison report, RMS210.....	3-18
Screens.....	3-20
Print a release comparison report.....	3-21
Select a tolerance override.....	3-23
Release detail report, RMS220.....	3-24
Contract details.....	3-24
Release details.....	3-25
Print a release detail report.....	3-26
JIT/Release variance report, RMS240.....	3-28
Print a JIT/release variance report.....	3-29
JIT reconciliation, RMS250.....	3-31
Print a JIT reconciliation report.....	3-32
Retro billing report, RMS260.....	3-33

---

---

Print a retro billing report.....	3-33
Pay as built invoice report, RMS262.....	3-36
Print a pay as built invoice backing sheet.....	3-36
Pay as built invoice exception report, RMS263.....	3-37
Print a pay as built exception report.....	3-37
Sequenced pack status report, RMS265.....	3-38
Print a sequenced pack status report.....	3-38
Requirement spreadsheet, RMS270.....	3-39
Screens.....	3-40
Print a requirement spreadsheet report.....	3-40
Select information for the requirement spreadsheet report.....	3-42
Multiple release comparison report, RMS280.....	3-44
Print a multiple release comparison report.....	3-45
Unconverted releases report, RMS290.....	3-47
Print an unconverted releases report.....	3-48
Release detail inquiry, RMS300.....	3-48
Screens.....	3-48
View release detail.....	3-49
Release detail inquiry, RMS300D2.....	3-50
Display release detail.....	3-50
Display contract header details.....	3-51
Display release authority detail.....	3-52
View additional release header detail.....	3-52
Sequenced pack inquiry, RMS310D1.....	3-53
Screens.....	3-53
Select a model group for inquiry.....	3-53
Sequenced pack inquiry, RMS310D2.....	3-53
Display pack sequence detail.....	3-54
Release reconciliation inquiry, RMS320.....	3-54
View releases for reconciliation.....	3-54
Release reconciliation inquiry - detail, RMS325.....	3-56

---



---

Screens.....	3-56
Compare daily JIT requirements.....	3-57
Change shipment quantity.....	3-60
Amend shipments selected for inquiry.....	3-61
Display release reconciliation contract details.....	3-62
Display release reconciliation release details.....	3-63
JIT reconciliation inquiry, RMS321.....	3-66
Screens.....	3-66
Display daily JIT reconciliation.....	3-66
Release comparison inquiry, RMS340.....	3-67
Screens.....	3-67
Select release comparisons for inquiry.....	3-67
Release comparison inquiry - lines, RMS340D2.....	3-68
Compare release lines.....	3-68
Compare release detail.....	3-69
Search/select customer item, RMS352.....	3-70
Search/select customer item.....	3-70
Item family search.....	3-71
Select an item family.....	3-71
Model family/group.....	3-72
Select a model family group.....	3-72
Active release search, RMS357.....	3-72
Search active releases.....	3-72
Release search, RMS358.....	3-73
Release search.....	3-73
Select daily JIT, WINDKHD1.....	3-74
Select daily JIT.....	3-74
Run rates by item - selection, RMS360.....	3-75
Screens.....	3-75
Display daily run rates by item.....	3-75
Display daily run rates by item.....	3-76

---

---

Run rates by item family selection, RMS361.....	3-77
Screens.....	3-77
Display daily run rates by item family.....	3-77
Display daily run rates by item family.....	3-78
Run rates by release - selection, RMS362.....	3-79
Screens.....	3-79
Select daily run rates by release.....	3-79
Display daily run rates by release.....	3-80
Release History Inquiry, RMS370D.....	3-81
Screens.....	3-81
Select multiple releases for comparison.....	3-82
Compare multiple releases.....	3-83
JIT/release comparison inquiry, RMS380.....	3-84
Selecting a release.....	3-84
Release versions.....	3-84
Screens.....	3-85
Select daily JIT requirements and releases for comparison.....	3-85
JIT/release comparison inquiry, RMS380D2.....	3-86
Display JIT/release comparisons.....	3-86
Contract/release maintenance, RMS500.....	3-88
Screens.....	3-88
Add or select contract releases.....	3-88
Filter contract or release records.....	3-90
Copy contract release information.....	3-91
Contract - static data, RMS500D2.....	3-92
Add or update static data.....	3-93
Add or maintain contract - reference data.....	3-98
Add or update user-defined contract data.....	3-102
Release - dynamic data screen, RMS500D3.....	3-103
Add or update dynamic data.....	3-104
Add or maintain fixed cumulative details.....	3-109

---

---

Add or maintain authorization/conversion period information.....	3-109
Release detail maintenance, RMS500D4.....	3-114
Maintain release details.....	3-115
Add or maintain release detail data.....	3-117
Release detail data fast entry.....	3-121
Shipment history maintenance, RMS510.....	3-125
Screens.....	3-125
Maintain shipment history.....	3-125
Maintain shipment adjustments.....	3-127
Insert miscellaneous adjustment.....	3-128
Adjust received all shipments.....	3-129
Mass release delete, RMS530.....	3-129
Screens.....	3-130
Select releases for deletion.....	3-130
Confirm the deletion.....	3-132
Mass cumulative reset, RMS535.....	3-133
Screens.....	3-133
Select releases for cumulative reset.....	3-134
Display releases for cumulative reset.....	3-135
Release conversion, RMS550.....	3-136
Screens.....	3-139
Release conversion - selection (RMS550D-01).....	3-139
Maintain release information for conversion.....	3-142
Automatic RMS conversion parameters, RMS551.....	3-143
Screens.....	3-146
Run the RMS conversion.....	3-146
JIT maintenance, RMS600.....	3-149
Screens.....	3-150
Add or maintain daily JIT requirements.....	3-150
Add or maintain daily JIT notes.....	3-151
Daily JIT maintenance - header, RMS600D2.....	3-152

---

---

Add or update daily JIT requirement, DCI, or DMR header details.....	3-153
Daily JIT maintenance - header details, RMS600D3.....	3-155
Add or update daily JIT requirements.....	3-155
Delete daily JIT maintenance requirements.....	3-157
Maintain daily JIT additional header information.....	3-157
JIT release search, WINDKHD2.....	3-159
Screens.....	3-159
JIT release search.....	3-160
Held invoice release, RMS610D1.....	3-160
Screens.....	3-160
Maintain pay as built held invoices.....	3-161
Pay as built detail exceptions, RMS610D2.....	3-161
Update pay as built invoices.....	3-161
Maintain pay as built invoice detail.....	3-162
Retro billing batch maintenance, RMS620D1.....	3-163
Screens.....	3-163
Add or update retroactive invoices.....	3-164
Retro billing batch maintenance, RMS620D2.....	3-164
Add, maintain, or view retroactive invoice batch information.....	3-164
Retro invoicing price change maintenance, RMS620D3.....	3-166
Select items to retroactive invoice.....	3-166
Retro invoicing price change maintenance, RMS620D4.....	3-168
Update price change details.....	3-168
Maintain retro invoices, RMS620D5.....	3-169
Maintain retroactive invoices list.....	3-169
Maintain retro invoices detail, RMS620D6.....	3-170
Update retroactive invoice detail.....	3-170
Shipping pull signal summary list, RMS640D1.....	3-170
Print a pull signal summary.....	3-171
Sequenced requirements maintenance, RMS650.....	3-172
Screens.....	3-172

---

---

Add or update a sequence number.....	3-173
Update sequence number information.....	3-174
Sequence number item maintenance, RMS650D2.....	3-175
Add or update sequence number item.....	3-176
Update sequence number item information.....	3-176
Sequenced packing release, RMS660.....	3-179
Screens.....	3-180
Select packs for shipment.....	3-180
Sequenced packing confirm, RMS665.....	3-182
Screens.....	3-183
Maintain pack information.....	3-183
Sequenced pack confirm, RMS665D2.....	3-184
Select pack details.....	3-184
Sequenced pack confirm item selection, RMS665D3.....	3-185
Add or update items.....	3-185
Packing stock selection, RMS665D4.....	3-186
Add or update stock selection for sequence packing.....	3-186
Stock selection window, RMS665D5.....	3-189
Select stock by location.....	3-189
Sequenced pick release, RMS670.....	3-190
Screens.....	3-192
Create sequenced pick release.....	3-192
Sequenced pick release, RMS670D2.....	3-194
Display and update sequenced pick release selections.....	3-195
Sequenced pack location transfer, RMS675.....	3-195
Screens.....	3-195
Transfer sequenced pack.....	3-196
EC sequence shipping interface, RMS740.....	3-197
Screens.....	3-197
Load sequence shipping messages.....	3-197
Process inbound pay as built, RMS750D.....	3-198

---

---

Screens.....	3-198
Load pay as built messages.....	3-199
RMS inbound self billing, RMS760.....	3-200
Screens.....	3-200
Print an inbound self billing report.....	3-200
Inbound RMS releases interface, RMS770.....	3-201
Screens.....	3-201
Load release messages from ECM.....	3-201
Inbound RMS JITs interface, RMS775.....	3-204
Screens.....	3-204
Load JIT messages from ECM.....	3-204
Update item family percentages, RMS910.....	3-206
Screens.....	3-206
Run the update item family percentages calculation.....	3-206
Reset contract in-use flag, RMS911.....	3-207
Screens.....	3-207
Specify contract information.....	3-207
Reorganize contract orders selection, RMS920D.....	3-208
Screens.....	3-208
Select contract orders for reorganization.....	3-208
Reorganize contract orders list.....	3-210
<b>Appendix A Glossary.....</b>	<b>A-1</b>

**Index**

---

---

# 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.



### Product overview

Release Management System (RMS) is an application that enables you to track the production and shipment of material that your customers have already ordered. RMS is designed for a repetitive, high volume contract-based order environment. RMS contains built in electronic communication processing that works with the Electronic Commerce Management (ECM) application. The design of RMS and ECM minimizes the overall system support requirements and maximizes the processing efficiencies within the receipt-to-order-fulfillment cycle.

High-volume, repetitive manufacturers use releases to communicate on-going requirements to suppliers by release schedules. The customer periodically, usually weekly or monthly, sends suppliers a statement of future requirement quantities and expected ship or delivery dates. A contract is typically negotiated for a given period, usually 12 months, based on an expected purchase volume at an agreed upon price. Periodically the customer sends the latest requirements for a given item to the supplier manually, by fax, or using Electronic Data Interchanges (EDI). Requirements may be for specific dates or summarized by week numbers. The customer transmits details related to the last shipments that they received. The supplier can include these details in the calculations for the new net requirements.

RMS enables you to perform day-to-day release management functions, for example, maintenance and tracking of releases and shipments. You can use the numerous reports in this product to evaluate the management of releases and the daily Just-in-Time (JIT) performance.

#### Highlights:

- Release Processing
  - Daily JIT Requirement Processing
  - Release Comparison Reporting
  - Exception Reporting
-

## Release Processing

Infor ERP LX provides a tightly integrated release process. Infor ERP LX supports the creation, tracking, and management of customer contract information through the Release Management, Order Processing, and Billing applications.

The contract header and release information automatically creates customer order lines during Release Conversion (RMS550), to the specified parameters within the contract. The list below describes the functions available through release processing:

- Customer item numbering
- Release maintenance by week number or date
- Release entry by cumulative or discrete quantity
- Non-working days processing
- Authorization processing for production and material purchase

## Daily JIT Requirement Processing

Infor ERP LX provides a daily JIT requirement process for customers who supplement weekly or monthly releases with daily JIT requirements (JITs), also known as Daily Call-Ins (DCIs), Daily Material Requests (DMRs), or Shipping Schedules. Customers often transmit these releases by EDI daily or several times a day. You can view the daily JIT requirement processing for the customer's latest delivery requirements over a short time horizon.

Infor ERP LX replaces order lines that are created during release conversion with the more detailed and up-to-date information supplied on the daily JIT requirement.

Infor ERP LX supports RAN number processing and sequence shipping.

## Release Comparison Reporting

Infor ERP LX provides various reports and inquiries to compare current and new versions of a release. You can use these reports and inquiries to evaluate changes in requirements before you accept the new requirements. You can compare shipments made to the same release requirements.

Use Release Comparison Inquiry, RMS340D1, to reconcile two versions of the release side by side, aligned by date. The screen highlights changes in cumulative or discrete requirements.

In Release Reconciliation Inquiry, you can reconcile release requirements and release shipments side by side, aligned by date. You can amend or remove shipment quantities that Infor ERP LX displays from the inquiry to facilitate reconciliation.

## Exception Reporting

Various reports are available to facilitate release comparison, and many are available only on an exception basis. The following reports are available:

---

- Release Comparison
- Daily JIT Requirement Exceptions
- Outstanding Daily JIT Requirements
- Release/JIT History Comparison

## Product flow

If you use RMS, you must also use the Inventory application, INV, because RMS records the issue of goods from inventory.

If Accounts Receivable (ACR) and RMS are installed, they use the same Customer Master file, RCM.

Complete the setup of Infor ERP LX applications in the following sequence:

1. General Ledger and Accounts Receivable.
2. Inventory. Set up the following fields in the Item Master Maintenance - Order screen, INV100D2-02, before you use RMS:
  - Stocking U/M. The item is stored, sold, or used in this unit.
  - Selling U/M. The item is sold in this unit.
  - Conversion Factor. The system uses this number to convert stocking units into selling units.

## 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

- Create Item Families - RMS130
  - Create Model Groups - RMS140
  - Create Non-working Days - RMS110
  - Inquiry, JIT/Reconciliation - RMS321
  - Inquiry, JIT/Release History - RMS370D
  - Inquiry, JIT/Release Reconciliation - RMS380
  - Inquiry, Pack Sequence Number - RMS310
  - Inquiry, Release Comparison - RMS340D1
  - Inquiry, Release Detail - RMS300D1
  - Inquiry, Release Reconciliation - RMS320D
  - Inquiry, Run Rates by Item - RMS360D
  - Inquiry, Run Rates by Item Family - RMS361D
  - Inquiry, Run Rates by Release - RMS362D
  - Maintain JIT Requirements - RMS600
  - Maintain Releases - RMS500D1
  - Maintain Sequenced Requirements - RMS650
  - Mass Cumulative Reset - RMS535
-

- Mass Release Delete - RMS530
- Pay As Built Processing/Exceptions - RMS610
- Print JIT Reconciliation Report - RMS250
- Print JIT/Release History Report - RMS280
- Print JIT/Release Variance Report - RMS240
- Print Pay As Built Exception Report - RMS263
- Print Pay As Built Invoice Report - RMS262
- Print Release Comparison Report - RMS210
- Print Release Detail Report - RMS220
- Print Release Spreadsheet Report - RMS270
- Print Retro Billing Report - RMS260
- Print Sequence Mismatch Report - RMS200
- Print Sequence Pack Status Report - RMS265
- Print Unconverted Releases Report - RMS290
- Release Conversion - RMS550D
- \* Setup-System Parameter Generation - SYS800D
- \* Set up Company Name & Date Format - SYS820D
- \* Set RMS to installed - SYS821D
- \* Set MLT to installed - SYS821D
- \* Set up RMS System Parameters - RMS820D
- \* Set up Billing System Parameters - BIL820D
- \* Set up Currency and Conversion Rates - CLD107D
- \* Set up Customer Type Maintenance - ACR170D
- \* Set up Warehouse Master Maintenance - INV110D
- \* Set up Container Master Maintenance - API140D
- \* Set up Document Sequence Maintenance - ACR160D
- \* Set up Customer Master Maintenance - ACR100D
- \* Set up Address Master Maintenance - ORD100D
- \* Set up Optionally, (Item) List Price Maintenance - MLT100D
- \* Set up Special Pricing Maintenance - PRO140D
- \* Set up Item X-Ref Maintenance - ORD150D
- Set up Item Family Maintenance - RMS130D
- Set up Non-Working Days Maintenance - RMS110D
- Sequence Packing Confirm - RMS665D
- Sequence Packing Release - RMS660D
- Sequence Pack Location Transfer - RMS675D
- Update Item Family Percentage - RMS910

Information about setting up fields and parameters in applications other than RMS that affect RMS is not included in this document. For detailed information about these programs, refer to the appropriate Infor ERP LX documentation for the other listed applications.

---

## Terms used in Release Management System

### Cumulatives (CUMS)

Use cumulatives to track and reconcile shipments against ongoing release requirements. The customer may reset the cumulatives periodically, but the adjustment activity is normally carefully coordinated with the supplier.

### Customer Supplied KANBAN and RAN Information:

RMS provides the ability to associate, and retain during the order fulfillment cycle, unique KANBAN and Release Authorization Number (RAN) release/demand relationships provided to the supplier by the customer. At the time of shipment, you can send the unique relationship data back to the customer as a data element of the Advance Ship Notice (ASN), as either a paper document or a bar coded label.

### Demand Reconciliation Methods

RMS automatically reconciles customer demand by taking into consideration goods that you shipped, but that the customer did not yet receive. Define the reconciliation method in the Customer Master, ACR100D1.

The following list describes valid Infor ERP LX reconciliation methods:

- Identifier. Reconciled by identifier (valid for JITs only).
  - Cumulative (Default). Releases/JITs are reconciled on a cumulative basis.
  - Discrete. Release/JITs are reconciled on a discrete basis.
  - None. Releases and JITs requirements are not reconciled.
-

## 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.

## Retroactive Invoicing

Typically the supplier agrees to prices on an annual basis, but price negotiations can be lengthy even though the activity may have started well in advance of the previous contract termination date. During the negotiation period, the supplier continues to ship and invoice at the old price with the understanding that the supplier can produce a supplementary invoice for the difference once the new price is established.

## Shipping Lead Time

If the requirement date that the customer supplies is a ship date, you should use a shipping lead time of 0. If the requirement date is the date the customer expects to receive the shipment at his or her specified location, you may optionally specify a shipping lead time. However, the shipping lead time value on the release header is the only value used to determine the ship date. The system dynamically calculates the ship date during contract/release maintenance by applying the shipping lead time in conjunction with the non-working day calendars. The system calculates the ship date as shipment arrival date minus (shipping lead time minus carrier non-working days).

---



## Non-working days maintenance, RMS110

Use this program to record holidays, shut-down periods, weekends, and other non-working days for both your company and customers. You can store customer non-working day calendars by country, sales organization parent, customer, or customer ship-to address. You can also set up a calendar to specify non-working days across the system. Infor ERP LX regards this as your company or internal shipping calendar.

To speed the addition of calendars, you can automatically create weekends and copy and amend existing calendars. The system uses the non-working days to determine the ship date if the customer specifies a receipt date and to determine the arrival date if the customer specifies a ship date. Infor ERP LX also uses calendars to determine which requirements on a release are replaced by the daily JIT requirement.

For example, where the Release Requirements are specified on Mondays and the last five Daily JIT Requirements stated by the customer are specified for Monday through Friday, the non-working days for the customer are accessed to determine whether or not the Daily JIT Requirements cover the Release Requirement. This is true where Saturday and Sunday are non-working days. However, if Saturday and Sunday are working days, the Daily JIT Requirement does not cover the period of the Release Requirement. The non-working days are also referenced during the creation or display of a requirement. The system displays a warning if the request date is a customer non-working day.

Release Requirements:

---

Mon	Tue	Wed	Thur	Fri	Sat	Sun	Mon
100							100

---

JIT Requirements

Mon	Tue	Wed	Thur	Fri	Sat	Sun	Mon
10	10	10	10	20			

If Sat/Sun are non-working days, the JIT requirement replaces the Release requirement. In this example, the JIT requirement for 60 replaces the Release requirement for 100. If Sat/Sun are working days, and the JIT requirement does not fulfill the Release requirement, a requirement is created for Saturday for the remaining quantity.

## Screens

Non-Working Days Maintenance - Selection, RMS110D1-01

Non-Working Days Maintenance, RMS110D1-02

Non-Working Days Maintenance - Copy, RMS110D1-03

Non-Working Days Maintenance - Detail, RMS110D2-01

Access: RMS menu

F15 from Run Rate Inquiry - by Item (RMS360D)

F15 from Run Rate Inquiry - by Item Family (RMS361D)

F15 from Run Rate Inquiry - by Release (RMS362D)

## Add or select a calendar

Use the Non-Working Days Maintenance - Selection screen, RMS110D1-01, to select a calendar to maintain or to create a new calendar.

### Field descriptions - RMS110D1-01

#### 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.

#### Line Actions (2,0):

The following line actions are available:

#### 11=Non-working Days

Maintain the Non-Working Days Maintenance - Detail screen, RMS110D2-01.

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.

**Year (4,0):**

Specify a valid year or the last two digits of the year you want to select. To maintain a system non-working days calendar specify only the year.

**Country (4,A):**

Specify a valid country code. To maintain a country-specific calendar, specify the year and the country code defined for the customer in the Customer Master File. Leave this field blank to maintain system non-working days.

**Sales Parent (8,0):**

To maintain sales parent non-working days, specify the year and the number of the sales parent. Leave this field blank to maintain system non-working days.

**Customer Number (8,0):**

To maintain the customer number non-working days, specify the year and the customer number. Leave this field blank to maintain system non-working days.

**Ship-to Number (4,0):**

To maintain the ship-to relating to the customer number non-working days, specify the year, the customer number, and the ship-to number. Leave this field blank to maintain system non-working days.

**Screen actions - RMS110D1-01****F13=Active Only**

Use F13 to display those non-working days with an active status only.

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 maintain non-working days calendar information**

Use the Non-Working Days Maintenance screen, RMS110D1-02, to enter the first Saturday on the calendar. You can also specify whether or not carriers work on Saturday and Sunday. You cannot specify the following information in the header: Year, Country, Sales Parent, Customer, and Ship-To.

**Field descriptions - RMS110D1-02****Date of First Saturday (6,0):**

Specify the date of the first Saturday in the year. Use F14 to automatically create the weekends.

---

**Carrier Work Saturday? (1,A):**

Specify the carrier you use to ship goods to a particular Country, Customer Group, Customer, or Ship-To.

1

The carrier for this country, sales parent, customer, or ship-to normally operates on Saturdays.

0

The carrier for this country, sales parent, customer, or ship-to does not normally operate on Saturdays.

Infor ERP LX does not display this field for the system non-working day calendar.

**Carrier Work Sunday? (1,A):**

Specify the carrier you use to ship goods to a particular Country, Customer Group, Customer, or Ship-To.

1

The carrier for this country, sales parent, customer, or ship-to normally operates on Sundays.

0

The carrier for this country, sales parent, customer, or ship-to does not normally operate on Sundays.

Infor ERP LX does not display this field for the system non-working day calendar.

**Screen actions - RMS110D1-02****F14=Create Weekends**

Use F14 to create weekends as non-working days. Infor ERP LX uses the date specified as the first Saturday with the year to create the weekend dates. You can view the results of the weekend creation by entering line action 11 on the Non-Working Days Maintenance - Selection screen, RMS110D1-01.

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.

**Copy a non-working days calendar**

Use the Non-Working Days Maintenance - Copy screen, RMS110D1-03, to copy non-working days to another calendar.

**Field descriptions - RMS110D1-03****Year (2,0):**

The system displays the year.

---

**Country (4,A):**

Specify a valid country code. To maintain a country-specific calendar, specify the year and the country code. Specify the country code defined in the Customer Master File for this customer. Leave this field blank to maintain system non-working days.

**Sales Parent (8,0):**

To maintain sales parent non-working days, specify only the year and the number of the sales parent. Leave this field blank to maintain system non-working days.

**Customer (8,0):**

To maintain the customer number non-working days, specify only the year and the customer number. Leave this field blank to maintain system non-working days.

**Ship-to (4,0):**

To maintain the ship-to relating to the customer number non-working days, specify only the year, the customer number, and the ship-to number. Leave this field blank to maintain system non-working days.

**Screen actions - RMS110D1-03****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.

## Non-working days maintenance - detail, RMS110D2

Use the Non-Working Days Maintenance - Detail program, RMS110D2-01, to add or revise the calendar.

Access:11=Non-working Days, RMS110D1-01

### Maintain non-working days detail

On this screen, you can add non-weekend holidays, specify whether the carrier operates on the holiday, and add any appropriate comment.

---

**Field descriptions - RMS110D2-01****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.

**Line Actions**

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.

**Date (6,0):**

Specify the date of the non-working day.

**Comments (30,A):**

Specify a description of the non-working date.

**Carrier Work Day (1,A)**

The following options are available:

1

The primary carrier for this sales parent, customer, or customer ship-to usually operates on this customer non-working day.

0

This carrier does not usually operate on this customer non-working day. The system uses this in the ship date calculation, not the OLM file.

Infor ERP LX does not display this field for the system non-working days.

**Screen actions - RMS110D2-01****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.

## Item families maintenance, RMS130

Use this program to maintain item families. Infor ERP LX uses item families to group items with similar production requirements, items for the same customer, and so forth. You can compare the combined requirements of item families to the maximum daily run rate defined for the family. Each Infor ERP LX item number can only belong to one family/group. There are no limits to the number of families

---

you can define or to the number of items within each family. You can also define the standard percentage contribution an item makes to the family.

The system also calculates the actual percentage contribution based on the average monthly usage. (The actual percentage contribution is distinct from the standard percentage contribution you forecast and enter.) Item families are a useful way to view consolidated information for a group of individual items. In addition, item family is a standard report selection criterion within RMS.

## Screens

Item Families Maintenance - Selection, RMS130D1-01

Item Families Maintenance, RMS130D1-02

Item Families Maintenance - Additional Information, RMS130D1-03

Item Families Member Maintenance - Selection, RMS130D2-01

Item Families Member Maintenance, RMS130D2-02

Access: RMS01 menu

## Add or select an item family

Use the Item Families Maintenance - Selection screen, RMS130D1-01, to select and maintain item families or to create a new item family.

### Field descriptions - RMS130D1-01

#### 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.

#### Line actions

The following line actions are available:

#### 11=Items

To create, revise or delete the items within this family.

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.

#### Family (15,A):

Specify the item family you want to maintain.

---

**Screen actions - RMS130D1-01****F13=Active Only**

Use F13 to display only those item families with an active status.

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, maintain, or view item family information**

Use the Item Families Maintenance screen, RMS130D1-02, to add or maintain item family information.

**Field descriptions - RMS130D1-02****Description (50,A):**

Specify a description of the item family.

**Comments (50,A):**

Specify any additional information to hold on record for the item family.

**Maximum Inventory (11,3):**

Specify the maximum inventory quantity held for the family. This field is for reference only.

**Daily Run Rate (11,3):**

Specify the maximum daily run rate for the family. The system uses this value in the daily run rate inquiry by item family. The system highlights any period with a calculated daily run rate greater than the value specified.

**Total Sales (11,3):**

Specify the estimated total annual sales for the family. This field is for reference only.

**Screen actions - RMS130D1-02****F14=User Defined Fields**

Use F14 to maintain user-defined fields on the Item Families Maintenance - Additional Information screen, RMS130D1-03.

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 maintain user-defined item family information

Use the Item Families Maintenance - Additional Information screen, RMS130D1-03, to add or maintain your own information or comments. .

Access: F14=User Defined Fields, RMS130D1-02

### Field descriptions - RMS130D1-03

#### Text Fields (20,A):

Specify additional information or comments to hold on file for the item family. Possible uses of these fields include scrap year-to-date or customer returns year-to-date.

#### Text Fields (20,A):

Specify additional information or comments to hold on file for the item family. Possible uses of these fields include scrap year-to-date or customer returns year-to-date.

#### Text Fields (20,A):

Specify additional information or comments to hold on file for the item family. Possible uses of these fields include scrap year-to-date or customer returns year-to-date.

#### Qty Fields (11,3):

Specify additional quantities to hold on file for the item family in Quantity Field Number 1, Quantity Field Number 2, and Quantity Field Number 3.

#### Qty Fields (11,3):

Specify additional quantities to hold on file for the item family in Quantity Field Number 1, Quantity Field Number 2, and Quantity Field Number 3.

#### Qty Fields (11,3):

Specify additional quantities to hold on file for the item family in Quantity Field Number 1, Quantity Field Number 2, and Quantity Field Number 3.

### Screen actions - RMS130D1-03

#### 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.

---

## Item families maintenance - selection, RMS130D2

Use the Item Families Maintenance - Selection screen, RMS130D2-01, to maintain the item family members.

### Add or maintain item families members

Add a new item family or update an existing family.

#### Field descriptions - RMS130D2-01

##### 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.

##### Line actions

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.

##### Item (35,A):

Specify the item number to maintain for this family.

#### Screen actions - RMS130D2-01

##### 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.

### Add, maintain, or view item family member detail

Use the Item Families Members Maintenance screen, RMS130D2-02, to maintain the detail of the item family members.

The following fields show as header information and display only:

- Item Family
- Description
- Item and Description

Access: Line actions 1, 2, 5, on Item Families Maintenance - Selection screen, RMS130D2-01

---

### Field descriptions - RMS130D2-02

**Start Date (6,0):**

Specify the date when the item becomes a family member. This field is for reference only.

**End Date (6,0):**

Specify the date when the item ceases to be a family member. This field is for reference only.

**Quality Control (1,A):**

Specify the quality control status of the family member. This field is user-defined and reference only. Possible uses include: P for production item, S for spares or O for obsolete.

**Standard (5,2):**

Specify the estimated percentage contribution of this family member to the total sales for the item family.

**Actual (5,2):**

Display the actual contribution of this family member to the total sales for item family. The system uses the Update Item Family Percentages to recalculate the Actual contribution.

**Variance (5,2):**

Display system calculated variance between the standard and actual values.

### Screen actions - RMS130D2-02

**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.

## Family/group maintenance, RMS140

Use this program to maintain Model Families and Model Groups with their associated items. Model families can have many Model Groups, and each Model Group can have many items. Model Groups define Standard Pack Size, Label and Pack Types, Model Year, and Control Numbers and also Items associated

---

with the Model Group. The system packs and ships sequential items by Model Group.

There must be one and only one Item for each Model Group for a Model Family.

## Screens

Model Group Maintenance - Selection, RMS140D1-01

Model Group Maintenance, RMS140D1-02

Model Group Item Maintenance - Selection, RMS140D2-01

Model Group Item Maintenance, RMS140D2-02

Access: RMS03 menu

## Add or select a model groups

Use the Model Groups Maintenance - Selection screen, RMS140D1-01, to select and maintain model groups or to create new model groups.

### Field descriptions - RMS140D1-01

#### Line actions

The following line actions are available:

#### **11=Maintain Items**

Create, revise or delete the items within this family and group.

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.

#### **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.

#### **Model Family (10,A):**

Specify the model family you want to maintain.

#### **Model Group (10,A):**

Specify the model group you want to maintain.

---

## Screen actions - RMS140D1-01

### Standard screen actions

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, maintain, or view model groups

Use the Model Group Maintenance screen, RMS140D1-02, to maintain model group information.

## Field descriptions - RMS140D1-02

### Model Group Description (40,A):

The system displays the description of the model group.

### Standard Pack Size (11,3):

Specify the number of items packed together in a stack/pallet.

### Label Type (10,A):

Specify the user-defined label type to format the transport label. Attach the transport label to a stack or group of stacks on one pallet/container.

### Number of Copies (2,0):

Specify the number of copies required of each transport label.

### Container Type (10,A):

Specify a valid container type if you are shipping multiple groups on a pallet. The container type defined may not necessarily represent a physical package; it can merely represent a stack. If you are shipping multiple groups, the system uses the container type of the first item on the container. Define container types in Container Maintenance, API140.

You can use the container type as the carton type during sequenced pick release. If an item for the model group is container controlled, the system uses the value that you enter here as the container type. The system uses this container type when it creates containers representing sequenced stock for container controlled items during sequenced pack confirm.

### Next Control Number (10,A):

Specify the next control number. The system assigns a control number to each pack selected for sequenced packing and uses the control number to identify

---

that unique pack during packing confirm. Typically this is set to 1 for each model group and is then incremented by the system.

**Model Year Code (4,0):**

Specify the current model year for this model group. The system does not automatically update the model year. Maintain it manually. During the creation of a Model Group this value defaults from the value on the Customer Ship-to file if specified, or the Customer Master file.

**Screen actions - RMS140D1-02****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.

## Model group item maintenance - selection, RMS140D2

Use the Model Group Item Maintenance - Selection screen, RMS140D2-01, to select the items in the model group for maintenance.

Access: 11=Maintain Items (RMS140D1-01)

### Add or select items in a model group

Maintain the items in the item family.

**Field descriptions - RMS140D2-01****Item Number (35,A):**

Specify the item number added to this model group.

**Screen actions - RMS140D2-01****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.

### Add, maintain, or view items in a model group

Use the Model Group Item Maintenance screen, RMS140D2-02, to display model group item information.

---

The fields on this screen are display only but if you revise an inactive item, the system reactivates the item. Specify values in the Warehouse, Location, and Lot fields to indicate where the sequenced packing confirm operation consumes inventory.

### **Field descriptions - RMS140D2-02**

#### **Warehouse (3,A):**

Specify the warehouse from which to consume inventory during the sequence pack confirm process.

#### **Location (10,A):**

Specify the location from which to consume inventory during the sequence pack confirm process. You must specify a warehouse if you specified a value in this field.

#### **Lot (25,A):**

Specify the lot number used for inventory consumed during the sequence pack confirm process. If you specify a value, you must also specify a warehouse and location. The system only activates this field if the item is lot controlled and not container controlled.

#### **Container (10,A):**

Specify the container from which to take this item's stock during the sequence pack confirm process. The system activates this field if the item is container controlled. You must locate the container in a regular warehouse.

### **Screen actions - RMS140D2-02**

#### **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.

## Shipment/delivery patterns maintenance, RMS150D1

Use this program to select Shipment/Delivery patterns that are related to a method code. Method codes are EDI Message Standard codes. Infor ERP LX matches the method code against the Ship Pattern Code on the incoming EDI message and then uses the defined pattern to split the incoming EDI Release and/or JIT Requirements accordingly. Infor ERP LX supports the following delivery patterns:

W

---

Weekly. Defined as 7 days

T

Four weekly. Defined as 28 days

M

Monthly. Defined as 30 days

F

Flexi. Defined as 1 day

D

Discrete. Single delivery

Access: RMS01 menu

#### Add or select a method code

Use the Shipment/Delivery Patterns Maintenance screen, RMS150D1-01, to select a method code or to create a new code.

#### Field descriptions - RMS150D1-01

##### Code (5,A):

Specify the code that is associated with a shipment/delivery pattern.

#### Screen actions - RMS150D1-01

##### 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.

#### Add, maintain, or view shipment/delivery patterns

Use the View Shipment/Delivery Patterns Maintenance screen, RMS150D2-01, to define and maintain shipment/delivery patterns that are related to a method code. Method codes are EDI Message Standard codes. Infor ERP LX matches the method code against the Ship Pattern Code on the incoming EDI message and then uses the defined pattern to split the incoming EDI Release or JIT Requirements accordingly. Infor ERP LX supports weekly delivery patterns.

#### Field descriptions - RMS150D2-01

##### Shipment/Delivery Method Code (5,A):

Specify the EDI Message Standard code which acts as the internally defined Shipment/Delivery Pattern. The system matches this code against the Ship Pattern Code on the incoming EDI message.

---



**Method Description (30,A):**

Specify the description for the method code that this Shipment/Delivery Pattern represents.

**Number of Shipments/Deliveries**

Specify the number of shipments or deliveries required for this day. The system spreads multiple shipments/deliveries in a day evenly across the 24 hour day.

**Screen actions - RMS150D2-01****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.

## Sequence mismatch/error reports, RMS200

Use this program to determine if sequence records are in error and to correct/reset any that are in error. Infor ERP LX generates two error reports. The first report lists any outstanding errors that were not corrected; the second report lists missing sequence numbers. This program can run at any time and we recommend that you run it at least daily.

For each Customer/Ship-to on the Sequence Number Outstanding Error Report the report details the following:

- Model Year
- Sequence Number
- Item Number
- Item Description
- Customer Item Number
- Family/Group
- Model Family Problem

For each Customer/Ship-to on the Sequence Mismatch Report the report details:

- Model Year
- Missing Sequence Numbers

### Screens

Sequence Shipping Mismatch/Error Reports (RMS200D-01)

Access: RMS03 menu

---

## Print a sequence mismatch/error report

Use the Sequence Mismatch/Error Reports screen, RMS200D-01, to select the customer and ship-to customer for the report.

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 - RMS200D-01

#### Customer Number (8,0):

Specify a range of values to limit the customers to include in the report.

#### Customer Number (8,0):

Specify a range of values to limit the customers to include in the report.

#### Ship-to Number (4,0):

Specify a range of values to limit the ship-to locations to include in the report.

#### Ship-to Number (4,0):

Specify a range of values to limit the ship-to locations to include in the report. See the overview information in this document.

### Screen actions - RMS200D-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.

## Release comparison report, RMS210

If you receive a new version of a release from a customer, RMS stores this as the next version of the release. Typically, you can receive releases using EDI (Electronic Data Interchange) during the night or some other off-peak period. If you receive new customer releases (one per item), compare the new information (or next in RMS) to the current version of the release.

The Release Comparison Report compares the next version of a release to the current one on an exception basis. Run the report for all releases or restrict it to a range of customers, items, and so forth. Another option is to run the report only for updated releases (manually or via EDI) since the last RMS Conversion

---

was processed. This is particularly useful because you do not need to know the information you receive by EDI.

The Release Comparison Report lists releases that are in an exception condition. The system checks for the following conditions and, if it finds any one of them, the system prints the release information on the report.

1

One or more quantity values on the next release differ from current by more than a given tolerance percentage (positive or negative). As a default, the Release Comparison Report uses the tolerance percentage and number of days figures defined in the RMS parameters file. However, you can override these each time you request the report. Using the tolerance percentages and number of days fields, you can specify the exception processing to meet your specific requirements.

2

A cumulative mismatch exists between the customer's stated cumulative receipts up to and including a given shipment number and your own calculated cumulative shipments up to and including the same shipment number. If there is a mismatch, a box prints on the report after release detail information showing the customer stated receipts, your calculated shipments, and the difference between them.

3

There is a front-loading situation. Some customers quote an arrears or past-due figure on the release. Some of these customers try to increase or decrease this figure without having given you prior visibility of this change. For example, you owe the customer 500 pieces for last week, but on the new release the customer shows an arrears or past-due figure of 2000 pieces. In this instance the customer has front-loaded your organization with 1500 (2000 - 500) pieces. If this occurs, the Release Comparison Inquiry prints a box after the release details clearly showing the front-loaded quantity.

Each time you run the Release Comparison Report, you can automatically put releases on hold as well as print them if they meet any of the exception conditions. Releases on hold are not automatically included in the RMS Conversion program and, therefore, do not update Infor ERP LX sales orders unless the hold status is changed. You can decide whether or not to view any releases on hold that meet the specified selection criteria.

The following is a typical sequence of events for an organization that uses EDI:

1. Receive many new releases overnight.
  2. Schedule the Release Load program (RMS560D) to run in batch mode in the early morning.
  3. Automatically run the Release Comparison Report. Run the report for all releases updated since the last time the conversion was run and put exception releases on hold.
  4. Follow the Release Comparison Report with the RMS Conversion program, also running in batch mode, to update Infor ERP LX sales orders for releases not on hold.
-

In the morning, you can view the printed output from the Release Comparison Report and take any manual action required before removing the hold status from any held releases and running the conversion again.

This report is typically run to compare the next release with the current release but can also be run to compare any two versions of a release, for example, current with old.

The top of each page shows the selection criteria. For each release meeting the selection criteria, the report displays the following information:

- Customer number and name
- Item number and description
- Contract number
- Ship-to number and name
- Customer item number
- Sales Parent
- Release number and release date for each version of the release selected
- Customer stated arrears/past-due for each version of the release selected
- Customer stated cumulative receipts for each version of the release selected

The report prints all detail requirement lines for any release which meets at least one of the three exception conditions. The report lists the next release requirements first in ascending date sequence and then by current requirement for the same date. The report also calculates the difference in requirement quantity between the next quantity and the current release quantity for the same time period. In addition the report calculates a running Net Change figure, which is an arithmetical addition of the change in the requirements column. The Net Change calculation required because there may be differences between release requirements on a daily basis but, over a period of several days, the cumulative net change may be zero.

Finally, the report calculates a variance percentage for each line where the next and current release quantities differ. Infor ERP LX calculates the variance percentage as follows:

$$\text{Variance \%} = \frac{\text{Next Release Qty} - \text{Current Release Qty}}{\text{Current Release Qty}} \times 100\%$$

For each detail line, the report prints the following information: release requirement date, quantity and cumulative quantity, change in requirement, and cumulative net change percentage change.

Note: If there is a cumulative mismatch and/or front-loading situation, Infor ERP LX prints a box for each after the release details.

## Screens

Release Comparison Report - Selection, RMS210D-01

Release Comparison Report - Tolerance Override, RMS210D-02

Access: RMS menu

---

## Print a release comparison report

Use the Release Comparison Report - Selection screen, RMS210D-01, to select the information for the report.

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 - RMS210D-01**

#### **Sales Parent (from) (8,0):**

Specify a range of values to limit the number of sales parents to include in the report.

#### **Sales Parent (to) (8,0):**

Specify a range of values to limit the number of sales parents to include in the report.

#### **Customer (from) (8,0):**

Specify a range of values to limit the number of customers to include in the report.

#### **Customer (to) (8,0):**

Specify a range of values to limit the number of customers to include in the report.

#### **Ship-to (from) (4,0):**

Specify a range of values to limit the ship-to information to include in the report.

#### **Ship-to (to) (4,0):**

Specify a range of values to limit the ship-to information to include in the report.

#### **Item Family (from) (15,A):**

Specify a range of values to limit the item families to include in the report.

#### **Item Family (to) (15,A):**

Specify a range of values to limit the item families to include in the report.

#### **Item Number (from) (35,A):**

Specify a range of values to limit the item numbers to include in the report.

#### **Item Number (to) (35,A):**

Specify a range of values to limit the item numbers to include in the report.

---

**Contract (from) (15,A):**

Specify a range of values to limit the number of contracts to include in the report.

**Contract (to) (15,A):**

Specify a valid range to restrict the number of releases.

**Compare Releases:**

Specify the releases to compare. The system default is to compare the Next and Current releases. The two Compare Release fields cannot have the same value.

**Valid choices**

- **0**  
Compare the next version of the release.
- **1**  
Compare the current version of the release.
- **2**  
Compare the old version of a release.

**Compare Releases:**

Specify the releases to compare. The system default is to compare the Next and Current releases. The two Compare Release fields cannot have the same value.

**Valid choices**

- **0**  
Compare the next version of the release.
- **1**  
Compare the current version of the release.
- **2**  
Compare the old version of a release.

**Select only releases updated since last conversion**

Specify no to include all releases. Specify yes to select only those releases with some activity since the last conversion. You can generate the activity through manual maintenance or through EDI.

**Select all releases or only those Held?:**

Specify one of the following values:

---

**Valid choices**

- **0**  
Specify Held to select releases that meet the selection criteria and that are on hold.
- **1**  
Specify All to select all releases that meet the selection criteria. This is the system default value.

**Hold any release exceeding the tolerance percent:**

Specify yes to put on hold any releases which have exceptions and to print them on the Release Comparison Report. No is the system default value.

**Screen actions - RMS210D-01****F14=Release Search**

Use F14 to display the Active Release Search screen, RMS357D-01 to select the required release.

**F15=Tolerance Percentages**

Use F15 to display the View/Override Tolerance % screen, RMS210D-02.

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.

**Select a tolerance override**

Use the Release Comparison Report - Tolerance Override screen, RMS210D-02, to select additional information for the report.

Access: F15=Tolerance Percentages, RMS210D-01

**Field descriptions - RMS210D-02****Periods 1% (2,0):**

The default value for each period is the Release Entry Tolerance specified in RMS System Parameters, SYS800. You can specify new tolerances for this report.

**Periods 1 Days (3,0):**

The default value for each period is the Release Entry Tolerance specified in RMS System Parameters, SYS800. You can specify new tolerances for this report.

---

**Periods 2% (2,0):**

The default value for each period is the Release Entry Tolerance specified in RMS System Parameters, SYS800. You can specify new tolerances for this report.

**Periods 2 Days (3,0):**

The default value for each period is the Release Entry Tolerance specified in RMS System Parameters, SYS800. You can specify new tolerances for this report.

**Periods 3% (2,0):**

The default value for each period is the Release Entry Tolerance specified in RMS System Parameters, SYS800. You can specify new tolerances for this report.

**Periods 3 Days (3,0):**

The default value for each period is the Release Entry Tolerance specified in RMS System Parameters, SYS800. You can specify new tolerances for this report.

**Screen actions - RMS210D-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.

## Release detail report, RMS220

Use this program to list release details. You can select releases for the report by sales parent, customer number, customer ship-to number, item number, item family, contract number, and release version. You can specify a date of the first release requirement to include in the report.

The selection criteria print at the top of the report. The report displays the following information for each release that meets the selection criteria:

### Contract details

- Customer number
  - Ship-to number
  - Item number
  - Customer item number
-



- Contract number
- Packing method
- Pallet and carton type
- Quantity per carton and cartons per pallet
- Number of pallet labels/pallet and the number of carton labels/carton
- Consignment stock flag
- Warehouse
- To Warehouse
- Purchase order number and date
- Day of the week (for entry by week number)
- Display by dates or week numbers
- Phone number
- Fax number
- E-Mail number
- Infor ERP LX order number and order type
- Order class
- Backorder code
- Model year
- Currency
- Item status code
- Contact name
- Start date and expiry date
- Supplier code
- Cumulative shipments last year
- Total release quantity and capacity planned volume
- User defined text, quantity and reference fields

#### Release details

- Release number, date and time
- Fixed shipments quantity and date
- Customer stated cumulative receipts and arrears/past due
- Shipping ticket number, date, quantity and cross-reference of last shipment confirmed as received by customer
- Authorized production quantity or weeks
- Authorized material purchase quantity or weeks
- Convert to order lines quantity or weeks
- Release type code
- Shipping lead time
- Transport group number
- Date and time of last update
- Remaining order balance and minimum call-off

The report lists the following information for each requirement on or after the specified start date:

---

- Requirement start date and time
- Ship date
- Requirement end date
- Requirement quantity
- Inbound delivery number
- Engineering change level

Access: RMS menu

## Print a release detail report

Use the Release Detail Report - Selection screen, RMS220D-01, to select information for the report.

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.

Access: RMS menu

### Field descriptions - RMS220D-01

#### **Sales Parent (from) (8,0):**

Specify a range of values to limit the number of sales parents to include in the report. By default, the system selects all sales parents.

#### **Sales Parent (to) (8,0):**

Specify a range of values to limit the number of sales parents to include in the report. By default, the system selects all sales parents.

#### **Customer Number (from) (8,0):**

Specify a range of values to limit customer numbers to include in the report.

#### **Customer Number (to) (8,0):**

Specify a range of values to limit customer numbers to include in the report.

#### **Ship-to (from) (4,0):**

Specify a range of values to limit the ship-to locations to include in the report.

#### **Ship-to (to) (4,0):**

Specify a range of values to limit the ship-to locations to include in the report.

#### **Item Family (from) (15,A):**

Specify a range of values to limit the item families to include in the report.

---

**Item Family (to) (15,A):**

Specify a range of values to limit the item families to include in the report.

**Item (from) (35,A):**

Specify a range of values to limit the item numbers to include in the report.

**Item (to) (35,A):**

Specify a range of values to limit the item numbers to include in the report.

**Contract (from) (15,A):**

Specify a range of values to limit the contracts to include in the report.

**Contract (to) (15,A):**

Specify a range of values to limit the contracts to include in the report.

**Release Version:**

Specify a release version for this report. Specify one of the following values:

**Valid choices**

- **0**  
Select the next release version. This is the system default value.
- **1**  
Select the current release version.
- **2**  
Select an old release version.

**Level of Detail (1,A):**

Specify a release level of detail for this report. Specify one of the following values:

1

Select contract header details.

2

Select contract header and release header details.

3

Select all details. This is the system default value.

**Detail Start Date (6,0):**

Specify a date for the start release requirements that are included in the report.

---

## Screen actions - RMS220D-01

### F14=Release Search

Use F14 to display the Active Release Search screen, RMS357D-01 to select the required release.

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.

## JIT/Release variance report, RMS240

Use this program to print an exception report that displays the variance between a Daily JIT Requirement, DCI, or DMR (Daily call-in or Daily Material Request), and a corresponding release. This report only lists those releases and Daily JIT Requirements, DCIs or DMRs that meet the report selection criteria for one or both of the following conditions:

- A variance percentage difference exists between the Daily JIT Requirement, DCI, or DMR quantity, and the corresponding release quantity for the same time period. The variance percentage exceeds the tolerance percentage stipulated by the user for this report. If one or more requirement(s) exceed the specified tolerance the program prints the entire Daily JIT Requirement.
- The total cumulative receipts as stated by the customer on the Daily JIT Requirement, DCI, or DMR, up to and including the last shipping ticket number stated as received by the customer, are NOT equal to the calculated total cumulative shipments up to and including the same shipping ticket number. This process is a Cumulative reconciliation. If the cumulative figures do not match, the report displays the following message: Cumulative Receipts Do Not Match Shipments.

If more than one release for the Daily JIT Requirement, DCI, or DMR exists, then all releases for the Daily JIT Requirement, DCI, or DMR are printed together with the following message: This comparison is for an alternate release.

You can restrict the report to a range of sales parents, customers, ship-tos, item families, items, or contract numbers. You can specify a release type for the comparison with the default being the current version (as opposed to next or old). In addition you can define the tolerance percentage to use; otherwise the system defaults to the first tolerance percentage defined within the RMS parameters file.

The selection criteria print at the top of each page of the report. For each Daily JIT Requirement, DCI, or DMR and release combination that meets the selection criteria, the report lists the following information:

- Customer number and name
  - Ship-to number and name
  - Item number and description
-

- Customer item number
- Contract number and release date
- Daily JIT Requirement, DCI, or DMR number and release date
- Customer stated cumulative receipts and receipt date
- Cumulative shipments

The report prints a detail line for each individual requirement date for either the release or the Daily JIT Requirement, DCI, or DMR where one or more of the requirements have exceeded the user-defined tolerance percentage. Infor ERP LX first prints the release requirements in ascending date sequence, and then prints the Daily JIT Requirement, DCI, or DMR requirement for the same date or date range. The report also calculates the difference in requirement quantity between the Daily JIT Requirement, DCI, or DMR quantity and the release quantity for the same time period. For example, if there are several Daily JIT, DCI, or DMR requirements for the same day, these all print. For calculation purposes, however, they are summed up and compared to the release requirement for that day.

In addition to calculating the difference in quantity between the Daily JIT Requirement, DCI, or DMR and release requirements, the report calculates a running Net Change figure, which is an arithmetical addition of the change in requirements column. This is required because of the differences between release and Daily JIT Requirement, DCI, or DMR requirements on a daily basis. However, over a period of several days the cumulative net change can be zero.

Finally, the report calculates a variance percentage for each line where there is a difference between the Daily JIT Requirement, DCI, or DMR and release quantities. The system calculates the variance percentage as follows:

$$\text{Variance \%} = \frac{\text{Daily JIT Requirement Qty} - \text{Release Requirement Qty}}{\text{Release Qty}} \times 100\%$$

For each detail line, the report prints the following information:

- Release requirement date, time and quantity
- Daily JIT Requirement, DCI, or DMR requirement date, time and quantity
- Change in requirement
- (Cumulative) Net change
- Variance percentage

Access: RMS02 menu

## Print a JIT/release variance report

Use the JIT/Release Variance Report screen, RMS240D-01, to select the information to include on the report.

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 - RMS240D-01**

**Sales Parent (8,0):**

Specify a range of values to limit the sales parents to include in the report.

**Sales Parent (8,0):**

Specify a range of values to limit the sales parents to include in the report.

**Customer Number (8,0):**

Specify a range of values to limit the customer numbers to include in the report.

**Customer Number (8,0):**

Specify a range of values to limit the customer numbers to include in the report.

**Ship-To Number (4,0):**

Specify a range of values to limit the ship-to numbers to include in the report.

**Ship-To Number (4,0):**

Specify a range of values to limit the ship-to numbers to include in the report.

**Item Family (15,A):**

Specify a range of values to limit the item families to include in the report.

**Item Family (15,A):**

Specify a range of values to limit the item families to include in the report.

**Item Number (35,A):**

Specify a range of values to limit the item numbers to include in the report.

**Item Number (35,A):**

Specify a range of values to limit the item numbers to include in the report.

**Contract Number (15,A):**

Specify a range of values to limit the contract numbers to include in the report.

**Contract Number (15,A):**

Specify a range of values to limit the contract numbers to include in the report.

---

**Release to Compare (0=Next, 1=Current, 2=Old):**

Specify the releases to compare. Specify one of the following values:

**Valid choices**

- **1**  
Select the current release to compare. This is the system default value.
- **0**  
Select the next release to compare.
- **2**  
Select the old release to compare.

**Exception Tolerance (2,0):**

Specify the tolerance percentage for this report. Any Daily JIT Requirement, DCI, or DMRs/Releases which have one or more requirements that are different by more than this percentage print on the report. The system defaults to the first tolerance percentage defined on the RMS parameters file.

**Screen actions - RMS240D-01****F14= JIT Search**

Use F14 to display the JIT Search screen, WINDKHD1-01 to select the required JIT release.

**F15= Release Search**

Use F15 to display the Active Release Search screen, RMS357D-01 to select the required release.

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.

## JIT reconciliation, RMS250

The JIT Reconciliation Report shows the net quantity outstanding against each Daily JIT Requirement meeting the selection criteria. The report prints in a spreadsheet format. The report requires a printer that prints at a width of 198 characters. It shows the arrears/past due quantity and the outstanding quantities for the next 10 working days. The report does not print any requirements required on a Saturday or Sunday. If more than one release exists for a Daily JIT Requirement, the report groups all occurrences and includes the following message:

This is an alternate release.

---

For each item printed the report shows the item number, item description and customer item number on the first line and the quantities required on each day on the second line. The quantities displayed are the true net quantities outstanding at the time you generated the report. The system deducts any shipments made or in progress from the Daily JIT Requirement. Anything required prior to the report start date is included in the arrears/past-due column.

This program uses the JIT Reconciliation Report screen, RMS250D-01

Access: RMS02 menu

### Print a JIT reconciliation report

Use the JIT Reconciliation Report screen, RMS250D-01, to select information for the report.

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 - RMS250D-01**

##### **Sales Parent (8,0):**

Specify a range of values to limit the sales parents to include in the report.

##### **Sales Parent (8,0):**

Specify a range of values to limit the sales parents to include in the report.

##### **Customer Number (8,0):**

Specify a range of values to limit the customer numbers to include in the report.

##### **Customer Number (8,0):**

Specify a range of values to limit the customer numbers to include in the report.

##### **Ship-To Number (4,0):**

Specify a range of values to limit the ship-to numbers to include in the report.

##### **Ship-To Number (4,0):**

Specify a range of values to limit the ship-to numbers to include in the report.

##### **Item Family (15,A):**

Specify a range of values to limit the item families to include in the report.

##### **Item Family (15,A):**

Specify a range of values to limit the item families to include in the report.

---



**Item Number (35,A):**

Specify a range of values to limit the item numbers to include in the report.

**Item Number (35,A):**

Specify a range of values to limit the item numbers to include in the report.

**Report Start Date (6,0):**

Specify the first date to include in the JIT Reconciliation report.

**Report Sequence (1,A):**

Specify a report sequence. Specify one of the following values:

0

Sequence the report by Customer/Ship-to/Item. This is the system default value.

1

Sequence the report by Item/Customer/Ship-to.

**Screen actions - RMS250D-01****F14=JIT Search**

Use F14 to display the JIT Search screen, WINDKHD1 to select the required JIT.

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.

## Retro billing report, RMS260

Use this program to produce a report detailing the extracted invoice lines and price adjustments for batches of Retroactive Billing that are available for verification.

This program uses the Retro Billing Report screen, RMS260D

Access: RMS04 menu

### Print a retro billing report

Use the Retro Invoice Report screen, RMS260D-01, to enter the selection criteria for the retro billing report.

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 - RMS260D-01****From Batch Number (6,0):**

Specify a range of values to limit the batch numbers to include in the report. The batch number is reference for the price change processing.

**To Batch Number (6,0):**

Specify a range of values to limit the batch numbers to include in the report. The batch number is a reference for the price change processing.

**From Customer Number (8,0):**

Specify a range of values to limit the customer numbers to include in the report.

**To Customer Number (8,0):**

Specify a range of values to limit the customer numbers to include in the report.

**From Ship-to Number (4,0):**

Specify a range of values to limit the ship-to information to include in the report.

**To Ship-to Number (4,0):**

Specify a range of values to limit the ship-to information to include in the report.

**From Item Number (35,0):**

Specify a range of values to limit the item numbers to include in the report.

**To Item Number (35,0):**

Specify a range of values to limit the item numbers to include in the report.

**From Document Prefix (2,0):**

Specify a range of values to limit the required document sequence prefixes to include in the report. The system selects invoices based on the prefix code range you specified in the Customer Master.

**To Document Prefix (2,0):**

Specify a range of values to limit the required document sequence prefixes to include in the report. The system selects invoices based on the prefix code range you specified in the Customer Master.

**From Document Date (6,0):**

Specify a range of dates to limit the documents to include in the report.

---

**To Document Date (6,0):**

Specify a range of dates to limit the documents to include in the report.

**From Invoice Number (6,0):**

Specify a range of values to limit the invoice numbers to include in the report.

**To Invoice Number (6,0):**

Specify a range of values to limit the invoice numbers to include in the report.

**Report Sequence (1,A):**

To list the records by item or invoice, specify one of the following values:

**Valid choices**

- **0**  
Sequence records by item.
- **1**  
Sequence records by invoice.

**Record Status (1,A):**

Include either all records or only the active records in the report.

**Valid choices**

- **0**  
Include all records.
- **1**  
Include only the active records.

**Run time 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 - RMS260D-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.

---

## Pay as built invoice report, RMS262

Use this program to print the outstanding pay as built invoices. The report is then used as an invoice backing sheet report.

This program uses the Pay as Built Invoice Backing Sheet screen, RMS262D-01

Access: RMS04 menu

### Print a pay as built invoice backing sheet

Use the Pay As Built Invoice Backing Sheet screen, RMS262D1-01, to specify the selection criteria for the pay as built invoice report.

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 - RMS262D

**From Customer (8,0):**

Specify a range of values to limit the customer numbers to include in the report.

**To Customer (8,0):**

Specify a range of values to limit the customer numbers to include in the report.

**From Ship-to (4,0):**

Specify a range of values to limit the ship-to information to include in the report.

**To Ship-to (4,0):**

Specify a range of values to limit the ship-to information to include in the report.

**From Invoice Number (6,0):**

Specify a range of values to limit the invoice number to include in the report.

**To Invoice Number (6,0):**

Specify a range of values to limit the invoice number to include in the report.

**From Invoice Date (8,0):**

Specify a range of values to limit the invoice dates to include in the report.

**To Invoice Date (8,0):**

Specify a range of values to limit the invoice dates to include in the report.

---

## Screen actions - RMS262D1-01

### 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.

## Pay as built invoice exception report, RMS263

Use this program to provide a report of all Pay as Built Exceptions within a range of customers and customer ship-tos. The Pay as Built Exceptions are sequence numbers set up for an item within sequence shipping and with no generated invoice; however, Infor ERP LX generates an invoice for a later sequence of that Customer/Ship-to/Item.

This program uses the Pay as Built Exception Report screen, RMS263D-01

Access: RMS04 menu

### Print a pay as built exception report

Use the Pay As Built Exception Report screen, RMS263D-01, to select the customer and the customer ship-to ranges for the exception report.

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 - RMS263DD-01

#### From Customer (8,0):

Specify a range of values to limit the customers to include in the report.

#### To Customer (8,0):

Specify a range of values to limit the customers to include in the report..

#### From Ship-to (4,0):

Specify a range of values to limit the ship-to information to include in the report.

#### To Ship-to (4,0):

Specify a range of values to limit the ship-to information to include in the report..

---

## Screen actions - RMS263D-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.

## Sequenced pack status report, RMS265

The Sequenced Pack Status Report prints the detailed sequence pack status by model family, model group, and status.

An example of a model family/group is an assembly that contains a variety of colors and a number of color-coordinated components. The color-coordinated components are the left-hand and right-hand components, for example. A model family represents the assembly or parent item and a sequence header record exists for each model family and sequence. Two model groups represent the left and right hand components and a sequence detail record exists for each model group and sequence. The color-coordinated component options are defined within each model group. For each assembly there must only be one sequence detail record for each model group; that is the assembly can not have two right-hand components.

This program uses the Sequenced Pack Status Report screen, RMS265D-01  
Access: RMS03 menu

### Print a sequenced pack status report

Use the Sequenced Pack Status Report screen, RMS265D-01, to define the selection criteria for the sequenced pack status report based on the model family, model group and the status required, for example, awaiting pack confirm or awaiting shipment.

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 - RMS265D-01

#### From Model Family (10 A):

Specify a range of values to limit the model families to include in the report.

#### To Model Family (10 A):

Specify a range of values to limit the model families to include in the report.

---

**From Model Group (10 A):**

Specify a range of values to limit the model groups to include in the report.

**To Model Group (10 A):**

Specify a range of values to limit the model groups to include in the report.

**Status (1 A):**

Specify the required status. Specify one of the following values:

**Valid choices**

- **0**  
Select awaiting pack confirm.
- **1**  
Select awaiting shipment.

**Screen actions - RMS265D-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.

## Requirement spreadsheet, RMS270

The Requirement Spreadsheet Report prints the outstanding release requirements in a spreadsheet type format. Outstanding requirements are those quantities waiting for shipment. For example, if a customer release quantity is 3000 and 1000 are shipped, then the outstanding quantity is only 2000 and that figure prints on the Requirement Spreadsheet Report.

You can choose to list the information on the report by item within customer or customer within item. The report consolidates the release requirements into a number of time buckets. You can vary the length of each of these time buckets by using the Infor ERP LX time frame codes (see MRP for further details of time frame codes).

For example, you can first run the Requirement Spreadsheet Report with a daily time frame code and request 19 time buckets with a start date of today. For each item, the report shows the outstanding quantity required for today and each of the next 18 days. You can then specify to run the Requirement Spreadsheet Report with the same selection criteria but using a weekly Infor ERP LX time frame code for 9 time buckets. For each item the report now shows requirements for this week and each of the next 8 weeks. It automatically consolidates individual requirements into weeks, months or any number of days up to 999.

---

You can run the Requirement Spreadsheet Report for any or all versions of a release either interactively or in batch mode. The selection criteria print at the top of each page of the report. For each release meeting the selection criteria, the report shows the following information:

- Customer number and name
- Ship-to number and name
- Item number and description
- Customer item number
- Contract number
- Pack Quantity
- Release version (NXT, CUR or OLD), number and date
- Customer stated arrears/past-due
- Customer stated cumulative receipts
- Calculated cumulative shipments and any difference
- Last shipment number received, date and quantity
- Quantity in progress in shipping and Goods-In-Transit
- Warehouse code
- On Hand Quantity
- Stock Unit of Measure

The report prints a detail line for each item or customer. If you select nine time buckets, you get one row of requirements, if 19 time buckets then two rows, and if 29 time buckets then three rows. Each row of information consists of two detail lines, one showing discrete quantity required in each time bucket and the other showing a cumulative quantity. The cumulative quantity starts at zero and arithmetically adds each subsequent requirement. It does not show the cumulative quantities from the release information. The start date of each time bucket also prints as well as totals for each customer or each item depending upon the specified sequence.

## Screens

Requirement Spreadsheet Report (RMS270D-01)

Requirement Spreadsheet Report (RMS270D-02)

Access: RMS menu

## Print a requirement spreadsheet report

Use the Requirement Spreadsheet Report screen, RMS270D-01, to specify the information to include on the report.

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 - RMS270D-01****Sales Parent (8,0):**

Specify a range of values to limit the sales parents to include in the report.

**Sales Parent (8,0):**

Specify a range of values to limit the sales parents to include in the report.

**Customer Number (8,0):**

Specify a range of values to limit the customer numbers to include in the report.

**Customer Number (8,0):**

Specify a range of values to limit the customer numbers to include in the report.

**Ship-To Number (4,0):**

Specify a range of values to limit the ship-to numbers to include in the report.

**Ship-To Number (4,0):**

Specify a range of values to limit the ship-to information to include in the report.

**Item Family (15,A):**

Specify a range of values to limit the item families to include in the report.

**Item Family (15,A):**

Specify a range of values to limit the item families to include in the report.

**Item Number (35,A):**

Specify a range of values to limit the item numbers to include in the report.

**Item Number (35,A):**

Specify a range of values to limit the item numbers to include in the report.

**Contract Number (15,A):**

Specify a range of values to limit the contract numbers to include in the report.

**Contract Number (15,A):**

Specify a range of values to limit the contract numbers to include in the report.

---

## Screen actions - RMS270D-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 information for the requirement spreadsheet report

Use the Requirement Spreadsheet Report screen, RMS270D-02, screen to further specify information to include in the report.

## Field descriptions - RMS270D-02

### Release Version:

Specify one or all release versions for this report. Specify one of the following values:

#### Valid choices

- **0**  
Select the next release version. This is the system default value.
- **1**  
Select the current release version.
- **2**  
Select all release versions.

### Report Sequence (0 or 1):

Specify a report sequence. Specify one of the following values:

#### Valid choices

- **0**  
Sequence the report by customer then item.
- **1**  
Sequence the report by item then Customer.

### Time Frame Code (1,A):

Specify an Infor ERP LX time frame code for the format in which to print the report.

### Number of Periods (9, 19 or 29):

Specify the number of time periods or time buckets to print for each detail line. The system default is 9.

---

**Report Start Date (6,0):**

Specify the start date for the report. The system defaults to the start date of the selected time frame code. You can override the value in this field.

**Releases updated since last conversion:**

Specify one of the following values:

**Valid choices**

- **0**  
This is the system default value.
- **1**  
Select releases with some activity since the last time conversion. You can generate the activity through manual maintenance or through EDI.

**All releases or only those Held?:**

Specify one of the following values:

**Valid choices**

- **1**  
Select all releases that meet the selection criteria. This is the system default value.
- **0**  
Select releases that meet the selection criteria and that are on hold.

**Select Firm Lines Only (1,A):**

Specify yes to include only firm lines in the report. If you specify yes, you must specify no for Include Forecast. The report will include only lines with a forecast type 1, Firm.

If Release Authorizations are not set, the report can include a forecast type 0, Unknown, or a blank code but show the line as firm. Use the Release - Authorizations screen, RMS500D3-03, to make sure order lines are created within the authorized period or quantity.

If you specify no for this field and specify yes for Include Forecast, the report includes all forecast type lines.

If you specify no for this field and specify no for Include Forecast, the report includes all forecast type lines except 4, Forecast during RMS Conversion.

**Include Forecast (1,A):**

Select order lines by Forecast Type. You can specify Yes only if Select Firm Lines Only is set to No. Specify one of the following values:

1

---

Display lines with all Forecast Types.

0

Do not include all forecast types. If you specify no and if Select Firm Lines Only is yes, the report includes only firm lines with forecast types of 0, Unknown, or 1, Firm.

If Release Authorizations are not set, the report can include a forecast type 0, Unknown, or a blank code but show the line as firm. Use the Release - Authorizations screen, RMS500D3-03, to make sure order lines are created within the authorized period or quantity.

If you specify no and if Select Firm Lines Only is no, the report includes all forecast type lines except 4, Forecast during RMS Conversion.

### **Screen actions - RMS270D-02**

#### **F14=Release Search**

Use F14 to display the Active Release Search screen, RMS357D-01, to select the required release.

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.

## Multiple release comparison report, RMS280

Use this report to view the release requirements for an individual week, for a particular customer/item combination across multiple versions of the release, or an individual day across multiple versions of the Daily JIT requirements (or Daily Call-Ins).

For example, with releases, you receive release number 1 for a particular customer/item combination that displays a requirement of 500 and a cumulative requirement of 10000 in week number 10. Next week you receive release number 2 for the same customer/item combination, but the quantity in week 10 changed to 600 and the cumulative requirement is now 10100. This means that the quantity required for week 10 has increased by 100. It is often useful to view the fluctuations in a specific weekly requirement over several versions of the release (release numbers 1 and 2 in this example). The Release/JIT History Report allows you to view the fluctuations.

Note: If you are viewing JIT requirement information, the program displays daily requirements. In release mode, it displays a weekly quantity. In order to make the comparison, you must have Release and/or JIT requirements history. Infor ERP LX creates these history records during the conversion process if you specify yes for Write Release history details in the Address Master file (ORD100), or the Customer Master (ACR100).

The report contains the following header information:

---

- Range of customer numbers,
- Range of ship-to numbers
- Range of item numbers
- Range of customer item numbers
- Range of contract numbers
- Comparison date and week
- Release type
- Release date range.

The report includes the following header information for each release version:

- Release number
- Release date and week
- Quantity due
- Cumulative quantity required
- Net change quantity.

The net change is a calculated value, based on the difference between the cumulative quantity required for this release and the previous release. The following table provides an example of release quantities and the net change.

Release number	Cumulative qty	Net change qty
1	10,000	
2	10,100	100
3	10,300	200

This program uses the Multiple Release Comparison Report screen, RMS280D-01.

Access: RMS menu

### Print a multiple release comparison report

Use the Multiple Release Comparison Report screen, RMS280D-01, to select information for the report.

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 - RMS280D-01

##### **Customer (from) (8,0):**

Specify a range of values to limit the customer numbers to include in the report.

**Customer (to) (8,0):**

Specify a range of values to limit the customer numbers to include in the report.

**Ship-To (from) (4,0):**

Specify a range of values to limit the ship-to information to include in the report.

**Ship-To (to) (4,0):**

Specify a range of values to limit the ship-to information to include in the report.

**Item Number (from) (35,A):**

Specify a range of values to limit the item numbers to include in the report.

**Item Number (to) (35,A):**

Specify a range of values to limit the item numbers to include in the report.

**Customer Item Number (from) (35,A):**

Specify a range of values to limit the customer item numbers to include in the report.

**Customer Item Number (to) (35,A):**

Specify a range of values to limit the customer item numbers to include in the report.

**Contract Number (15,A):**

Specify a range of values to limit the contract numbers to include in the report.

**Contract Number (15,A):**

Specify a range of values to limit the contract numbers to include in the report.

**Comparison Date (6,0):**

For JIT Requirements, specify the specific date for which you want to print requirements. For releases, specify either a date in the week or a week number.

**Week (4,0):**

For releases, if you did not specify an individual date in the comparison date field, specify a week number in Year Year/Week Week format. For example, week 10 in 2005 is 0510. The report shows requirements for this specific week across multiple release versions.

---

**Release Date (6,0):**

Specify a range of dates to limit the release dates to include in the report.

**Release Date (6,0):**

Specify a range of dates to limit the release dates to include in the report.

**Release Type (0=Release, 1=JIT):**

Specify the release type to include in the report. Specify one of the following values:

0

Include release information.

1

Include Daily JIT Requirements.

**Report Sequence (0=Item, 1=Customer):**

Specify one of the following values:

0=Item

1=Customer

**Screen actions - RMS280D-01****F14=Active Release Search**

Display the Active Release Search screen, RMS357D-01 to select the required release.

**F15=JIT Search**

Display the JIT Search screen, WINDKHD1-01 to select the required JIT release.

**F16=Active/Inactive Release Search**

Display the Active/Inactive Release Search screen, RMS358D-01 to select the required release.

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.

## Unconverted releases report, RMS290

Use this report to track all changes for the releases and JITs since the last conversion. The report lists these changed releases.

---

Access: RMS menu

## Print an unconverted releases report

Use the Unconverted Releases Report screen, RMS290D-01, to select the customer and ship-to information to include in the report.

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 - RMS290D-01

#### **Customer (8,0):**

Specify a range of values to limit the customers to include in the report.

#### **Customer (8,0):**

Specify a range of values to limit the customers to include in the report.

#### **Ship-to (4,0):**

Specify a range of values to limit the ship-to information to include in the report.

#### **Ship-to (4,0):**

Specify a range of values to limit the ship-to information to include in the report.

### Screen actions - RMS290D-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.

## Release detail inquiry, RMS300

Use this program to display full details of individual release versions. You cannot change any data within this program.

### Screens

Release Detail Inquiry - Selection (RMS300D1-01)

Release Detail Inquiry (RMS300D2-01)

Release Detail Inquiry - Header (RMS300D2-02)

Release Detail Inquiry - Authority (RMS300D2-03)

---



**Release Detail Inquiry - Header Detail (RMS300D2-04)**

Access: RMS menu

**View release detail**

Use the Release Detail Inquiry - Selection screen, RMS300D1-01, to select release detail information for inquiry.

**Field descriptions - RMS300D1-01****Customer Number (8,0):**

Specify the customer number of the required release.

**Ship-To (4,0):**

If the release is for a specific customer ship-to, specify the number.

**Item Number (35,A):**

Specify the item number and/or the customer item number of the release.

**Customer Item Number (35,A):**

Specify the item number and/or the customer item number of the release.

**Contract Number (15,A):**

Specify the contract number associated with the release where required.

**Release Type (0=Next, 1=Current, 2=Old):**

Specify the release type. Specify one of the following values:

**Valid choices**

- **0**  
View the next version of the release.
- **1**  
View the current version of the release. This is the system default value.
- **2**  
View the old version of the release.

**Screen actions - RMS300D1-01****F14=Active Release Search**

Display the Active Release Search screen, RMS357D-01 to select the required release.

---

**F15-ATP Inquiry**

Use F15 to display the ATP Inquiry screen, MRP310-01 to view the available to promise situation.

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.

## Release detail inquiry, RMS300D2

Use the Release Detail Inquiry program, RMS300D2, to display full details of individual release versions. You cannot change any data within this program.

### Display release detail

Use the Release Detail Inquiry screen, RMS300D2-01, to view details of the release.

Infor ERP LX displays the following fields as header information:

- Customer Number and Name
- Ship-to Number and Name
- Item Number and Description
- Customer Item Number
- Contract Number
- Release Version
- Shipping Lead Time
- Release Type Code

Release lines display in a table beginning with the current date. Use the arrow keys to view release lines with earlier start dates. Infor ERP LX displays the following reference fields for each release line: Start Date and Week, Time, End Date and Week, Required Quantity, Cumulative Quantity, and Analysis of Days Over Which the Requirement is Spread (total, working, holiday).

Access: F16=Release Inquiry (RMS340D2-01)

F14=Release Inquiry (RMS380D2-01)

### Screen actions - RMS300D2-01

**F14=Show Ship Date**

Use F14 to toggle between the ship date and the ship week.

**F15=Contract Header**

Use F15 to display the contract header screen, RMS300D2-02.

---

**F16=Authority Details**

Use F16 to display the authority details screen, RMS300D2-03.

**F17=Release Header**

Use F17 to display the release header screen, RMS300D2-04.

**F18=Material Inquiry**

Use F18 to displays the Material Status Inquiry screen, INV300.

**F21=ATP Inquiry**

Use F21 to display the ATP Inquiry screen, MRP310-01 to view the available to promise situation.

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 contract header details**

Use the Release Detail Inquiry - Header screen, RMS300D2-02, to display contract header details. Infor ERP LX displays the following reference contract header fields:

- Contract Date
- Call-Off Day
- Customer Purchase Order Number and Date
- Infor ERP LX Order Number
- Warehouse Number and Name
- To Warehouse Number and Name
- Contact Name
- Phone Number
- Fax Number
- E-Mail Number

Access: F15=Contract Header, RMS300D2-01

**Screen actions - RMS300D2-02****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.

---

## Display release authority detail

Use the Release Detail Inquiry - Authority screen, RMS300D2-03, to display release authority detail.

Infor ERP LX displays the following reference authorization details as a number of weeks or as a quantity:

- Authorized Production
- Material Purchases
- Convert to order lines
- Release Date

Access: F16=Authority Details, RMS300D2-01

### Screen actions - RMS300D2-03

#### 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.

## View additional release header detail

Use the Release Detail Inquiry - Header Detail screen, RMS300D2-04, to display release detail information for inquiry.

Infor ERP LX displays the following reference fields:

- Release Number
- Release Date
- Last Update (Date on which release was last updated)
- Cust Stated Cum Receipts (Customer-stated cumulative receipts)
- Customer Stated Arrears
- Last Packing Group Received (Last packing group confirmed as received by the customer and date)
- Cum Shipments Fixed At (Quantity and date at which cumulative shipments were fixed)
- Shipping Lead Time

Access: F17=Release Header, RMS300D2-01

### Screen actions - RMS300D2-03

#### 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.

---

## Sequenced pack inquiry, RMS310D1

Use this inquiry program to display the model year, sequence number, item number, and vehicle identification for a control number or stack. The program also displays status for selected for packing, pack confirmed, and so on.

### Screens

Pack Sequence Number Inquiry - Selection (RMS310D1-01)

Pack Sequence Number Inquiry (RMS310D1-02)

Access: RMS03 menu

### Select a model group for inquiry

Use the Pack Sequence Number Inquiry - Selection screen, RMS310D1-01, to select a model group and a control number.

#### Field descriptions - RMS310D1-01

##### Model Group (10,A):

Specify the model group for the inquiry.

##### Control Number (10,A):

Specify a control number for the inquiry. This is a user-defined number.

##### Item Number (35,A):

Specify the item number to limit the selection.

#### Screen actions - RMS310D1-01

##### 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.

## Sequenced pack inquiry, RMS310D2

The Sequenced Pack Inquiry program, RMS310D2-01, displays the detail sequence by group/control number.

---

## Display pack sequence detail

Use the Sequenced Pack Inquiry screen, RMS310D2-01, to review detail information.

This screen displays the detail information for the packing sequence of the selected model group, control number, and item.

### Screen actions - RMS310D-02

#### **F14=Next Consolidated Model Group/Control**

Use F14 to display the next model group/control number with a packing sequence.

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.

## Release reconciliation inquiry, RMS320

Use the Release Reconciliation Inquiry program, RMS320, to reconcile the release by displaying details of release requirements and release shipments side-by-side, aligned by date. You can amend displayed shipment quantities and remove shipments to facilitate reconciliation.

These amendments are for the purposes of calculations carried out within this inquiry only, and do not make any permanent amendments to the shipment records.

This program uses the Release Reconciliation Inquiry screen, RMS320D-01.

Access: RMS menu

## View releases for reconciliation

Use the Release Reconciliation Inquiry screen, RMS320D-01, to select releases for reconciliation.

### Field descriptions - RMS320D-01

#### **Customer Number (8,0):**

Specify the customer number of the required release.

#### **Ship-To Number (4,0):**

If the release is for a specific customer ship-to, specify the number.

#### **Item Number (35,A):**

Specify the item number and/or the customer item number of the release.

---

**Customer Item Number (35,A):**

Specify the item number and/or the customer item number of the release.

**Contract Number (15,A):**

Specify the contract number associated with the release where required.

**Release Type (0=Next, 1=Current):**

Specify the release type. Specify one of the following values:

**Valid choices**

- **0**  
View the next version of the release.
- **1**  
View the current version of the release. This is the system default value.

**Select Firm Lines Only (1,A):**

Specify yes to include only firm lines. If you specify yes, you must specify no for Include Forecast. The screen will include only lines with a forecast type 1, Firm. If Release Authorizations are not set, the can display a forecast type 0, Unknown, or a blank code but show the line as firm. Use the Release - Authorizations screen, RMS500D3-03, to make sure order lines are created within the authorized period or quantity.

If you specify no for this field and specify yes for Include Forecast, the screen displays all forecast type lines.

If you specify no for this field and specify no for Include Forecast, the screen displays all forecast type lines except 4, Forecast during RMS Conversion.

**Include Forecast (1,A):**

Select order lines by Forecast Type. You can specify yes only if Select Firm Lines Only is set to no. Specify one of the following values:

1  
Display lines with all Forecast Types.

0  
Do not include all forecast types. If you specify no and if Select Firm Lines Only is yes, the screen displays only firm lines with forecast types of 0, Unknown, or 1, Firm.

If Release Authorizations are not set, the screen can display a forecast type 0, Unknown, or a blank code, but show the line as firm. Use the Release Authorizations screen, RMS500D3-03, to make sure order lines are created within the authorized period or quantity.

---

If you specify no and if Select Firm Lines Only is no, the screen displays all forecast type lines except 4, Forecast during RMS Conversion.

### **Screen actions - RMS320D-01**

#### **F14=Active Release Search**

Use F14 to display the Active Release Search screen, RMS357D-01 to select the required release.

#### **F15=ATP Inquiry**

Use F15 to display the ATP Inquiry screen, MRP310-01 to view the available to promise situation.

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.

## Release reconciliation inquiry - detail, RMS325

Use this program to compare Daily JIT Requirements to the shipments made against the Daily JIT Requirement. This program calculates a net quantity outstanding and displays it in the arrears/past-due column. Infor ERP LX aligns the requirements and shipments by date. You can change the shipment quantities or exclude them from the screen to facilitate reconciliation. These changes affect the calculations carried out within this inquiry; the system does not make permanent changes to the shipment records.

The inquiry starts at the Daily JIT Requirement release date or the date of last shipment, whichever is earlier.

### Screens

JIT Reconciliation - Detail, RMS325D-01

Change Shipment Quantity, RMS325D-02

Amend Shipments Selected for Inquiry, RMS325D-03

Contract Details, RMS325D-04

Release Details, RMS325D-05

Access: Release Reconciliation Inquiry (RMS320D-01)

Daily JIT Reconciliation Inquiry (RMS321D-01)

F19=Release Reconciliation Inquiry (RMS500D4-01)

---



## Compare daily JIT requirements

Use the JIT Reconciliation - Detail screen, RMS325D-01, to display daily JIT requirement details for comparison.

A table shows Daily JIT Requirements and shipments. The final column of the table shows shipment arrears/past-due. The table aligns requirements and shipments by date. Infor ERP LX calculates arrears by subtracting cumulative shipments from cumulative requirements on any given date. Use Release Maintenance, RMS500, to adjust cumulative requirements and shipments.

### Field descriptions - RMS325D-01

#### **Customer Number**

The system displays the unique customer number from the Customer Master file, ACR100.

#### **Customer Name**

The system displays the customer name associated with the Customer Number.

#### **Type**

The system displays the user defined code that defines a customer group. A customer type is required for each currency in use. Define customer types in Customer Types, ACR170D1.

#### **Ship-To Number**

The system displays the unique ship-to number from the Address Master file (ORD100).

#### **Ship-To Name**

The system displays the ship-to name associated with the Ship-To Number.

#### **Item Number**

The system displays the item number from the Item Master file (INV100).

#### **Item Description**

The system displays the item description associated with the Item Number.

#### **Customer Item**

The system displays the customer item number.

---

**Contract**

The system displays the contract number associated with this customer and item combination.

**Last Shipment Received**

The system displays the packing group number/IDN of the last shipment confirmed as received by the customer.

**Quantity**

The system displays the quantity the customer received on the last shipment.

**Date**

The system displays the date the customer received the last shipment.

**Release Date**

The system displays the date on which the customer submitted the purchase order.

**Release Type**

The system displays the release type, which is either current (default), next, old, or history.

Release data is entered into the next area (bucket) either manually or through EDI. If you convert releases, the data in next moves to current, current moves to old, and old moves to history, if history is set to on. As the system moves data to current, it updates the order lines. Therefore, it is the current data that matches the order lines (except for adjustments made for lead time and standard pack rounding.) The next bucket is not cleared, until new data is entered (next=current).

**Stated Receipts**

The system displays the customer's stated cumulative receipts up to and including the last shipment received, if the customer uses cumulative quantity information.

**Prior Shipments**

The system displays the customer's shipments prior to the last shipment received, if the customer uses cumulative quantity information.

**Date**

The system displays the date of the shipment in the time zone for the ship-to number or the ship-to customer.

---

**Time**

The system displays the shipment time.

**Required Quantity**

The system displays the item quantity required by the customer for the shipment.

**Cumulative Quantity**

The system displays the cumulative quantity of this item required by the customer.

**Forecast Type**

The system displays the forecast type of this item required by the customer.

**Pack Group**

The system displays the system-assigned packing group number which represents a selection of items/packages that are grouped together for purposes of transportation/document control.

**Shipment Quantity**

The system displays the quantity of the shipment.

**Cumulative Quantity**

The system displays the cumulative quantity of this item actually sent to the customer.

**Status**

The system displays the status of the shipment.

**Valid choices**

- **0**  
The shipment was not received.
- **1**  
The shipment was excluded.
- **7**  
The shipment was received.

**Arrears**

The system displays the amount of any net quantity outstanding resulting from shipping an amount less than the required amount.

---

### **Screen actions - RMS325D-01**

#### **F11=View**

Use F11 to display the RAN/Consignment number for each JIT line.

#### **F14=Amend Shipments**

Use F14 to display the Amend Shipments screen, RMS325D-03.

#### **F16=Load Inquiry**

Use F16 to display the Load Inquiry screen, OLM352D-01.

#### **F18=Contract Details**

Use F18 to display the Contract Details screen, RMS325D-04.

#### **F21=Release Details**

Use F21 to display the Release Details screen, RMS325D-05.

#### **F22=Run Rate Inquiry**

Use F22 to display the Daily Run Rates by Release selection screen, RMS362D-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.

### **Change shipment quantity**

Use the Release Reconciliation Inquiry - Change Shipment Quantity screen, RMS325D-02, to change shipment quantity details for comparison.

### **Field descriptions - RMS325D-02**

#### **Quantity to ship (11,3):**

Specify the new shipment quantity for this inquiry.

### **Screen actions - RMS325D-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.

---

## Amend shipments selected for inquiry

Use the Amend Shipments Selected For Inquiry screen, RMS325D-03, to include/exclude shipment details for the inquiry.

The following fields display for reference:

- Shipment Date and Time
- Packing Group Number
- Order Number
- Line Number
- Ship Quantity
- Include/Exclude Flag

### Field descriptions - RMS325D-03

#### Line Actions (2,0):

The following line actions are available:

##### **11=Include**

Include a shipment for this inquiry.

##### **12=Exclude**

Exclude a shipment for this inquiry.

#### 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.

#### Date

The system displays the date of the shipment in the time zone for the shipping warehouse.

#### Time

The system displays the time you sent the shipment to the customer.

#### Packing Group

The system displays the packing group number for this order line.

#### Order

The system displays the order number for the shipment.

---

**Line**

The system displays the order line number.

**Status**

The system displays the status of the shipment.

**Valid choices**

- **0**  
The customer did not receive the shipment.
- **1**  
The shipment was excluded.
- **7**  
The customer received the shipment.

**Ship Quantity (11,3):**

This column displays the shipment quantity. You can overwrite the value with the quantity you want to appear in the reconciliation display. This simulates the situation in which the customer does not receive the same quantity as you shipped. When you return to the reconciliation inquiry screen, the screen displays the shipping ticket number and revised quantity. An A in the status column indicates that you amended the ship quantity.

The Fixed Shipments Quantity includes any agreed discrepancies that exist following this reconciliation.

**Screen actions - RMS325D-03****F14=Cancel ALL Changes**

Use F14 to return to the previous screen without saving any changes.

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 release reconciliation contract details**

Use the Release Reconciliation Inquiry - Contract Details screen, RMS325D-04, to display the contract details.

**Field descriptions - RMS325D-04****Contract Start Date**

The system displays the start date of the contract.

---

**Customer P.O. Number**

The system displays the customer purchase order number.

**P.O. Date**

The system displays the date of the customer's purchase order.

**Contact Name**

The system displays the name of the customer's contact person.

**From Warehouse Name**

The system displays the code or name of the warehouse from which the shipment originates.

**To Warehouse**

The system displays the code or name of the warehouse to which you are sending the shipment.

**Call-Off Day**

The system displays the day of the week on which the release is called off, if release information is by week number on Contract - Static Data screen, RMS500D2-01.

**Screen actions - RMS325D-04****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 release reconciliation release details**

Use the Release Reconciliation Inquiry - Release Details screen, RMS325D-05, to display the release details.

**Field descriptions - RMS325D-05****Release Number**

The system displays the number assigned to the current version of the release.

**Release Date**

The system displays the date of the release as supplied by the customer.

---

**Last Update Date**

The system displays the date on which the release was last updated.

**Customer Stated Receipts**

The system displays the number of items that the customer reported as received.

**Customer Stated Arrears**

The system displays the discrepancy, that the customer reported, between the number of items received and the number of items needed to meet requirements.

**Last Packing Group Received**

The system displays the shipment date and packing group number of the last packing group that the customer has confirmed as received.

**Last ASN Confirmed as Received**

This function is for future use.

**Last Packing Group Received (date)**

The system displays the shipment date and packing group number of the last packing group that the customer has confirmed as received.

**Cumulative Shipments Fixed**

The system displays the date and quantity values from Release - Fixed Cumulatives, RMS500D3-02. Infor ERP LX uses Cumulative Shipments Fixed to calculate cumulative shipments of an item sent to a customer/ship-to. The screen displays this information for customers who use cumulative information.

**Fixed Quantity**

The system displays the quantity of the cumulative shipments received by the customer.

**Shipping Lead Time**

The system displays lead time you can specify to determine the ship date if a customer specifies the date on which the goods must arrive at its facility. The system uses the shipping lead time value with non-working days to calculate the ship date.

**Convert to Orders (Weeks)**

The system displays the number of weeks limiting production authorization. This value limits the number of weeks converted to order lines (transfer of next data to the current area).

---



This limit is useful if customer release detail requirements are well past your normal planning horizon. By limiting the number of weeks to convert to order lines, you reduce Master Production Schedule (MPS)/Material Requirements Planning (MRP) run times.

#### **Convert to Orders (Quantity)**

The system displays the cumulative quantity limiting production authorization. This value limits the total quantity of an item converted to order lines (transfer of next data to the current area).

This limit is useful if customer release detail requirements are well past your normal planning horizon. By limiting the total quantity to convert to order lines, you reduce Master Production Schedule (MPS)/Material Requirements Planning (MRP) run times.

#### **Authorized Production (Weeks)**

The system displays the cumulative (cum) number of production weeks that the customer has authorized. This represents the number of weeks of requirements from the Release Date for which the supplier is authorized to produce product.

#### **Authorized Production (Quantity)**

The system displays the cumulative production quantity that the customer has authorized.

#### **Material Purchase (Weeks)**

The system displays the material cumulative weeks that the customer has authorized. This represents the number of weeks of requirements from the Release Date for which the supplier is authorized to purchase components for production.

#### **Material Purchase (Quantity)**

The system displays the material cumulative quantity that the customer has authorized.

#### **Screen actions - RMS325D-05**

##### **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.

---

## JIT reconciliation inquiry, RMS321

Use this program to compare Daily JIT Requirements to shipments made against the Daily JIT Requirement. This program calculates a net quantity outstanding and displays it in the arrears/past-due column. The program aligns the requirements and shipments by date. To facilitate reconciliation, you can change or exclude shipment quantities displayed on the screen. These changes affect the calculations carried out within this inquiry; the system does not make permanent changes to the shipment records.

### Screens

Daily JIT Reconciliation Inquiry (RMS321D-01)  
Release Reconciliation - Detail (RMS325D-01)  
Release Reconciliation - Change Shipment Quantity (RMS325D-02)  
Amend Shipments Selected for Inquiry (RMS325D-03)  
Release Reconciliation - Contract Details (RMS325D-04)  
Release Reconciliation - Release Details (RMS325D-05)  
Access: RMS02 menu  
F20=Reconciliation Inquiry (RMS600D3-01)

### Display daily JIT reconciliation

Use the Daily JIT reconciliation inquiry screen, RMS321D-01, to display and compare daily JIT requirements.

#### **Field descriptions - RMS321D-01**

##### **Customer Number (8,0):**

Specify the customer number for this Daily JIT Requirement.

##### **Ship-To Number (4,0):**

Specify the ship-to number if the Daily JIT Requirement is for a specific customer ship-to address.

##### **Item Number (35,A):**

Specify either the item number or the customer item number for the Daily JIT Requirement.

##### **Customer Item Number (30,A):**

Specify either the item number or the customer item number for the Daily JIT Requirement.

---

**Screen actions - RMS321D-01****F14=Daily JIT Search**

Use F14 to display the Daily JIT Search screen, WINDKHD1-01 to select the required daily JIT.

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.

## Release comparison inquiry, RMS340

Use this program to compare two versions of a release by displaying release detail lines side by side on the screen. For example, you can compare the next version of a release to the current version. This is an online dynamic inquiry.

The Release Comparison Report can compare many releases on an exception basis.

### Screens

Release Comparison Inquiry - Selection (RMS340D1-01)

Release Comparison Inquiry- Lines (RMS340D2-01)

Release Comparison Inquiry- Details (RMS340D2-02)

Access: RMS menu

### Select release comparisons for inquiry

Use the Release Comparison Inquiry - Selection screen, RMS340D1-01, to select release comparison information for inquiry.

**Field descriptions - RMS340D1-01****Customer Number (8,0):**

Specify the customer number of the required release.

**Ship-to (4,0):**

Specify a ship-to number, if the release is for a specific customer.

**Item Number (35,A):**

Specify the item number and/or the customer item number of the release.

**Customer Item Number (35,A):**

Specify the item number and/or the customer item number of the release.

---

**Contract Number (15,A):**

Specify the contract number associated with the release where required.

**Release To Compare:**

Specify the release types for comparison: 0=Next, 1=Current, 2=Old

**Release To Compare:**

Specify the release types for comparison: 0=Next, 1=Current, 2=Old

**Screen actions - RMS340D1-01****F14=Active Release Search**

Use F14 to display the Active Release Search screen, RMS357D-01 to select the required release.

**F15=ATP Inquiry**

Use F15 to display the ATP inquiry screen, MRP310-01.

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.

## Release comparison inquiry - lines, RMS340D2

Use the Release Comparison Inquiry - Lines screen, RMS340D2-01, to display JIT/Release comparison information.

### Compare release lines

If you access this screen from RMS340, JIT/Release Comparison Inquiry, the system displays a comparison between the release information and the JIT information for each release period (the period from one release requirement to the next).

You can also use this screen to compare two versions of a release by displaying release detail lines side by side. For example, you can compare the next version of a release to the current version and view the results on the screen.

Release Comparison Inquiry and Reports marks as an exception any change in requirements that exceeds the Release Tolerances. Specify the Release Tolerances in RMS System Parameters. JIT/Release Comparison Inquiry and Reports marks as an exception any change that exceeds the first of the entry tolerances. The programs mark exceptions with a less than (<) symbol.

You can also use the Release Comparison Report to compare many releases on an exception basis.

---

The system displays release requirement lines with requirements for the same dates aligned side by side on the screen. The system displays the following reference fields for each requirement line:

- Start date
- Time
- Required quantity
- Cumulative requirement quantity

A seventh column shows the change in requirements (either cumulative or discrete, toggle by pressing F14). The system calculates the discrete figure by subtracting the current cumulative requirements from the next cumulative requirements. If there is a difference, the value, positive or negative, displays. The cumulative change in requirement is the sum of the discrete change in requirements up to and including the requirement detailed on that line.

### **Screen actions - RMS340D2-01**

#### **F14=Show Discrete Quantities**

Use F14 to toggle between discrete and cumulative quantities.

#### **F15=Release Details**

Use F15 to display the Release Comparison Inquiry - Details screen, RMS340D2-02.

#### **F16=Release Inquiry**

Use F16 to display the Release Detail Inquiry screen, RMS300D2-01.

#### **F17=ATP Inquiry**

Use F17 to display the ATP Inquiry screen, MRP310-01 to view the available to promise situation.

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.

### Compare release detail

Use the Release Comparison Inquiry - Detail screen, RMS340D2-02, to display release comparison detail information.

The following fields display for the next and current versions of the release and are display only:

- Last Update Date
  - Customer Stated Receipts
  - Customer Stated Arrears
  - Last Shipment Confirmed as Received Date
-

- Packing Group Number
- IDN
- Cumulative Shipments Fixed Date
- Fixed Cumulative Shipped

#### **Screen actions - RMS340D2-02**

##### **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.

## Search/select customer item, RMS352

This program displays a list of all Item Cross-reference records for the specified Customer and all Ship To numbers. If accessed from another program, you can use the search/select Customer Item to select a customer item number for transfer back to that program. This search displays your own item number first.

Note: Selections are only valid from the specified Ship-to and Ship-to = 0 to conform to the Customer Item Hierarchy. You can set up Item Cross-reference records at a Customer Level and override them at a Ship-to Level if necessary.

This program uses the Search/Select Customer Item screen, RMS352D-01

Access: Prompt on Customer Item Number in various RMS screens.

### Search/select customer item

Use the Search/Select Customer Item screen, RMS352D-01, to select customer item information.

The screen displays the following fields for each customer item:

- Item Number
- Ship To
- Customer Item Number

#### **Field descriptions - RMS352D-01**

##### **Item (35,A):**

Specify the item number for the search selection.

##### **Ship-to (4,0):**

Specify the ship-to number for the search selection.

---

**Customer Item Number (35,A):**

Specify the customer item number for the search selection.

**Screen actions - RMS352D-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.

## Item family search

This program displays a list of item families. If accessed from another program, you can use the Active Release Search to select an item family for transfer back to that program. You can use the search from a variety of RMS programs.

This program uses the Item Family Search screen, WINDHFD-01.

### Select an item family

Use the Item Family Search screen, WINDHFD-01, to select item family search information.

The system displays the following non-maintainable fields for each item family in the table:

- Item family name
- Item family description

**Field descriptions - WINDHFD-01****Item Family (15,A):**

Select an item family to return to the Family field in the original screen.

**Screen actions - WINDHFD-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.

---

## Model family/group

This program displays a list of model families/groups. If you access this screen from another program, you can select a model family or a model group to transfer back to that program.

This program uses the Model Family/Group Search screen, WINDMGD.

### Select a model family group

Use the Model Family/Group screen to select model group search information.

#### Field descriptions - WINDMGD

##### Model Family/Group (10,A):

Select a model family/group to return to the model or family field in the original screen.

#### Screen actions - WINDMGD

##### 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.

## Active release search, RMS357

This program displays a list of active customer releases. If you access the program from another program, you can select a customer release for transfer back to that program. This program does not display inactive releases.

This program uses the Active Release Search screen, RMS357D-01.

Access: Function key in various RMS screens.

### Search active releases

Use the Active Release Search screen, RMS357D-01, to select release search information.

This screen presents the following display-only fields:

- Customer number
  - Ship-to number
  - Item number
  - Contract number
-



**Field descriptions - RMS357D-01****Customer Number (8,0):**

Specify the customer number for the search selection.

**Ship-To Number (4,0):**

Specify the ship-to number for the search selection.

**Item Number (35,A):**

Specify the item number for the search selection.

**Contract (15,A):**

Specify the contract for the search selection.

**Screen actions - RMS357D-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.

## Release search, RMS358

This program displays a list of active and inactive customer releases. If accessed from another program, you can select a customer release for transfer back to that program. Inactive releases display with an inactive status on the extreme right of the screen.

This program uses the Release Search screen, RMS358D.

Access: F16=Active/Inactive Release Search (RMS280D-01)

F16=Active/Inactive Release Search (RMS370D-01)

### Release search

Use the Release Search screen, RMS358D, to select release search information for active and inactive records.

The system displays the following non-maintainable fields for each customer release listed:

- Customer number
  - Ship-to number
  - Item number
  - Contract number
-

**Field descriptions - RMS358D****Customer Number (8,0):**

Specify the customer number for the search selection.

**Ship-To Number (4,0):**

Specify the ship-to number for the search selection.

**Item Number (35,A):**

Specify the item number for the search selection.

**Contract (15,A):**

Specify the contract for the search selection.

**Screen actions - RMS358D-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 daily JIT, WINDKHD1

This program displays a list of Daily JIT Requirements, Daily Call-Ins (DCIs) or Daily Material Requests (DMRs). If you access this screen from another program, you can select a Daily JIT Requirement, DCI, or DMR for transfer back to that program.

This program uses the Select Daily JIT screen, WINDKHD1.

Access: F14 or F15=JIT Search in various RMS screens.

### Select daily JIT

Use the Select Daily JIT screen, WINDKHD1, to select daily JIT requirement search information.

The system displays the following information for each Daily JIT Requirement:

- Customer Number
  - Ship-to Number
  - Item Number
  - Customer Item Number
-

**Field descriptions - WINDKHD1****Customer Number (8,0):**

Specify the customer number for the search selection.

**Ship-to Number (4,0):**

Specify the ship-to number for the search selection.

**Item Number (35,A):**

Specify the item number for the search selection.

**Screen actions - WINDKHD1****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.

## Run rates by item - selection, RMS360

This program calculates and displays daily run rates required to meet total release requirements for a specified item. The calculation considers all releases for the item, and sums up total requirements for each specific week. The calculation divides this total by the number of working days for that week as defined by the system calendar held in the Non-Working Days file.

### Screens

Daily Run Rates by Item - Selection (RMS360D-01)

Daily Run Rates by Item (RMS360D-02)

Access: RMS menu

### Display daily run rates by item

Use the Daily Run Rates By Item - Selection screen, RMS360D-01, to select the release to display for daily run rates by item.

**Field descriptions - RMS360D-01****Item Number (35,A):**

Specify the item number for which daily run rates are required.

---

**Release Type:**

Specify the release type. Specify one of the following values:

**Valid choices**

- **0**  
Select the next release type.
- **1**  
Select the current release type.

**Screen actions - RMS360D-01****F14=ATP Inquiry**

Use F14 to display the ATP Inquiry screen, MRP310-01.

**F15=Non-Working Days**

Use F15 to display the Non-Working Days screen, RMS110D1-01.

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.

**Display daily run rates by item**

Use the Daily Run Rates By Item screen, RMS360D-02, to display the detail for daily run rates by item.

The following fields display as header information but are display only:

- Item Number
- Description
- Release Type

A table displays details of total release requirements for the specified item and the daily run rates required to meet the requirements. The following fields display for each line and are display only:

- Start Date/Week
- Required Quantity
- Cumulative Quantity
- Number of Working Days in the Week
- Daily Run Rate Required to Meet the Requirement

An additional column, Week No, displays if you use F14. This column displays the week number followed by the last two digits of the start date year.

---

### Screen actions - RMS360D-02

#### F14=Remove Week Numbers

Use F14 to toggle between displaying and removing the start week number.

#### F15=Non-Working Days

Use F15 to display the Non-Working Days screen, RMS110D1-01.

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.

## Run rates by item family selection, RMS361

This program calculates and displays daily run rates required to meet total release requirements for a specified item family. The calculation uses the total requirements from all of the items, and their corresponding releases, to sum up total requirements for the family in each week. The system then divides the weekly total by the number of working days in the week as defined within the Non Working Days file.

### Screens

Daily Run Rates by Item Family - Selection (RMS361D-01)

Daily Run Rates by Item Family (RMS361D-02)

Access: RMS menu

### Display daily run rates by item family

Use the Daily Run Rates By Item Family - Selection screen, RMS361D-01, to select the item family and release to display for daily run rates by item family.

### Field descriptions - RMS361D-01

#### Item Family Name (15,A):

Specify the item family name for which daily run rates are required.

#### Release Type:

Specify the release type. Specify one of the following values:

#### Valid choices

- 0  
Select the next release type.
-

- **1**  
Select the current release type.

### **Screen actions - RMS361D-01**

#### **F14=ATP Inquiry**

Use F14 to display the ATP Inquiry screen, MRP310-01.

#### **F15=Non-Working Days**

Use F15 to display the Non-Working Days screen, RMS110D1-01.

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.

### Display daily run rates by item family

Use the Daily Run Rates By Item Family screen, RMS361D-02, to display the item family detail for daily run rates by item family.

The system displays the following information for each item family:

- Item family code
- Description
- Release type
- Maximum run rate for the item family

A table displays details of total release requirements for the specified item family and the daily run rates required to meet the requirements. The following fields display for each line and are display only:

- Start Date/Week
- Required Quantity
- Cumulative Quantity
- Number of Working Days in the Week
- Daily Run Rate Needed to Meet the Requirement

Use F14 to display an additional column, Week No. This column displays the week number followed by the last two digits of the start date year.

### **Screen actions - RMS361D-02**

#### **F14=Remove Week Numbers**

Use F14 to toggle between displaying and removing the start week number.

#### **F15=Non-Working Days**

Use F15 to display the Non-Working Days screen, RMS110D1-01.

---

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.

## Run rates by release - selection, RMS362

This program calculates and displays daily run rates required to meet individual release requirements. The authorization level for each release requirement line also displays. The calculation of daily run rate involves dividing the release quantity for each period by the number of working days in the period as defined in the Non Working Days file.

### Screens

Daily Run Rates by Release - Selection (RMS362D-01)

Daily Run Rates by Release (RMS362D-02)

Access: RMS menu

### Select daily run rates by release

Use the Daily Run Rates By Release - Selection screen, RMS362D-01, to select customer, ship-to, item number, contract number, and release type to display for daily run rates by release.

#### Field descriptions - RMS362D-01

**Customer Number (8,0):**

Specify the customer number of the release for which daily run rates are required.

**Ship-To Number (4,0):**

Specify the ship-to number if the release is for a specific customer ship-to address.

**Item Number (35,A):**

Specify the release item number.

**Contract Number (15,A):**

Specify the contract number to view daily run rates.

**Release Type:**

Specify the release type. Specify one of the following values:

---

**Valid choices**

- **0**  
Select the next release type.
- **1**  
Select the current release type.

**Screen actions - RMS362D-01****F14=Release Search**

Use F14 to display the Active Release Search screen, RMS357D-01, to select the required release.

**F15=Non-Working Days**

Use F15 to display the Non-Working Days screen, RMS110D1-01.

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.

**Display daily run rates by release**

Use the Daily Run Rates By Release screen, RMS362D-02, to display detail information for daily run rates by release.

The following fields display as header information but are display only:

- Customer Number and Name
- Ship-to Number and Name
- Item Number and Description
- Customer Item Number
- Contract Number
- Release Type

A table displays details of release lines and the daily run rates needed to meet the release requirements. The system displays following information for each release line:

- Start Date/Week
- End Date
- Required Quantity
- Cumulative Quantity
- Authorization (prod for production, material for material purchase)
- Number of Working Days Between the Start and End Dates
- Daily Run Rate Needed to Meet the Requirement

Use F14 to display an additional column, Week No. This column displays the week number followed by the last two digits of the start and end dates year.

---



### Screen actions - RMS362D-02

#### F14=Remove Week Numbers

Use F14 to toggle between displaying and removing the start week number.

#### F15=Non-Working Days

Use F15 to display the Non-Working Days screen, RMS110D1-01.

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.

## Release History Inquiry, RMS370D

Use this inquiry to view and compare multiple releases.

This program has the following inquiry options:

- Release requirements for an individual week (for a particular customer/item combination) across multiple versions of the release
- An individual day across multiple versions of the Daily JIT requirements (or Daily Call-Ins)

For example, with releases you can receive release number 1 for a particular customer/item combination, showing a requirement of 500 and a cumulative requirement of 10000 in week number 10. Next week you receive release number 2 for the same customer/item combination, but the quantity in week 10 is now 600 and the cumulative requirement is 10100. This increases the quantity required for week 10 by 100. It is often useful to view the fluctuations in a specific weekly requirement over several versions of the release (release numbers 1 and 2 in this example). The Release/JIT History Inquiry allows you to do this.

Note: If viewing JIT requirement information, the program displays daily requirements. However, in release mode it displays a weekly quantity. In order for these inquiries to work, the Release and/or JIT requirements history is necessary. Infor ERP LX creates these history records during the conversion process if the history flag is set to 1 (Yes) in the Customer Ship-to file, or the Customer Master file.

### Screens

Multiple Release Comparison - Selection (RMS370D-01)

Multiple Release Comparison (RMS370D-02)

Access: RMS menu

---

## Select multiple releases for comparison

Use the Multiple Release Comparison - Selection screen, RMS370D-01, to select customer, ship-to, item number, customer item number, contract number, release, comparison date or weeks, and release date range for display.

### Field descriptions - RMS370D-01

#### **Customer Number (8,0):**

Specify the customer number of the required release.

#### **Ship-To (4,0):**

Specify the ship-to number if the release is for a specific customer.

#### **Item Number (35,A):**

Specify the item number and/or the customer item number of the release.

#### **Customer Item Number (35,A):**

Specify the item number and/or the customer item number of the release.

#### **Contract Number (15,A):**

Specify the contract number for the release if the inquiry is restricted to a specific contract number.

#### **Or All (releases):**

Specify 1 to view all releases for a specific item/customer/ship-to combination, regardless of contract number.

If you use model year or another user-defined term for contract number, leave contract number blank and specify a 1 in this field. You can see information across model years for the same item/customer/ship-to combination.

#### **Comparison Date (6,0):**

Specify the specific date for the JIT requirements to view. To view releases, you can either specify a date in the week or a week number.

#### **Or Week (4,0):**

For releases, if you have not entered an individual date in the comparison date field, specify a week number in Year Year/Week Week format. For example, week 10 in 2005 is 0510. The inquiry shows requirements for this specific week across multiple release versions.

---

**Release Date (From and To) (6,0):**

Specify a range of dates to limit the releases to include in the inquiry.

**Release Date (From and To) (6,0):**

Specify a range of dates to limit the releases to include in the inquiry.

**Release Type (0 or 1):**

Specify a release type. Specify one of the following values:

**Valid choices**

- **0**  
View release information.
- **1**  
View Daily JIT Requirements.

**Screen actions - RMS370D-01****F14=Active Release Search**

Use F14 to display the Active Release Search screen, RMS357D-01 to select the required release.

**F15=JIT Search**

Use F15 to display the JIT Search screen, WINDKHD1-01.

**F16=Active/Inactive Release Search**

Use F16 to display the Active/Inactive Release Search screen, RMS358D to select the required release.

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.

**Compare multiple releases**

Use the Multiple Release Comparison screen, RMS370D-02, to display detail release/JIT history information.

The screen displays the following header information:

- Customer number and name
  - Ship-to number and name
  - Item number and description
  - Customer item number
  - Contract number
  - Comparison date
-

- Release type
- Release date range

The screen displays the following header information for each release version:

- Release number
- Release date
- Release week and year
- Quantity due
- Cumulative quantity required
- Net Change quantity

Net change is a calculated value, based on the difference between the cumulative quantity required for this release and the previous release. For example, release 1 cumulative quantity is 10,000, release 2 cumulative quantity is 10,100, net change quantity is 100. Release 3 cumulative quantity is 10,300, net change quantity is 200.

Note: The screen displays 12 records. Use the initial selection screen to change the release date ranges and to display another set of records.

### Screen actions - RMS370D-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.

## JIT/release comparison inquiry, RMS380

This inquiry compares the Daily JIT Requirement, DCI, or DMR requirements to release requirements for a corresponding time period. This is a dynamic inquiry. Infor ERP LX recalculates information each time you specify a request.

### Selecting a release

A Daily JIT Requirement is specific to a customer, ship-to, and item number combination. Therefore, you can use more than one corresponding release. A window displays with all releases for that customer, ship-to, and item number combination. You must select the appropriate release.

### Release versions

RMS retains three versions of a release: current, next, and old. You can compare Daily JIT Requirements to the current, next, or old version of the release. Current is the default.

The first time you receive incoming release information for the customer/ship-to/item the information goes into the next version. If you convert

---

the release to apply this incoming information to the order lines, the versions roll down a generation and next becomes current. The order lines always represent the current release.

At this stage, both the next and current versions are the same, but the next is now available to receive the information for the second phase. If the second release is converted, current becomes old and next becomes current. The system updates the order lines accordingly.

## Screens

Daily JIT/Release Comparison Inquiry (RMS380D1-01)

Daily JIT/Release Comparison Inquiry - Detail (RMS380D2-01)

Access: RMS02 menu

### Select daily JIT requirements and releases for comparison

Use the Daily JIT/Release Comparison Inquiry screen, RMS380D1-01, to select daily JIT requirements for comparison.

#### Field descriptions - RMS380D1-01

##### **Customer Number (8,0):**

Specify the customer number for this Daily JIT Requirement.

##### **Ship-To Number (4,0):**

Specify the ship-to number if the Daily JIT Requirement is for a specific customer ship-to address.

##### **Item Number (35,A):**

Specify either the item number or the customer item number for the Daily JIT Requirement.

##### **Customer Item Number (30,A):**

Specify either the item number or the customer item number for the Daily JIT Requirement.

##### **Release to Compare (3,A):**

Specify the release version to compare against the Daily JIT Requirements. Specify one of the following values:

#### Valid choices

- 0  
Next
-

- **1**  
Current. This is the system default value.
- **2**  
Old

### Screen actions - RMS380D1-01

#### F14=Daily JIT Search

Use F14 to display the daily JIT search screen, WINDKHD1.

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.

## JIT/release comparison inquiry, RMS380D2

Use this screen to select daily JIT requirements for comparison.

This screen displays detailed information comparing Daily JIT Requirements for a specific Customer, Ship-to, and item number combination to its corresponding release requirements.

Customers often send a release weekly or monthly, but they update Daily JIT Requirements daily, or even several times a day. Therefore, it is necessary to know the extent to which the two requirement types differ.

If the Daily JIT Requirements for a specific day differ from corresponding release requirements by more than the first specified tolerance percentage in the RMS parameters file, Infor ERP LX displays an arrow (<) on the vertical line separating the Daily JIT Requirement quantity from the change in requirement column. By viewing these arrows, you can easily pinpoint discrepancies.

### Display JIT/release comparisons

The JIT/release comparison inquiry screen, RMS380D2-01, displays information about the releases.

The following fields display reference information:

- Customer Number and Description
- Ship-to Number and Description
- Item Number and Description
- Customer Item Number
- Contract Number

The remainder of the screen displays the following columns:

Column 1:

- Release Requirements
  - Version of Release (e.g. current or next)
-

- Release number
- Release date

The remainder of the column shows release requirement dates and quantities. The inquiry always starts from the Daily JIT Requirement release date and not from the release date (unless they are the same).

Column 2:

- Daily JIT Requirements
- Daily JIT Requirement release number
- Daily JIT Requirement release date (the inquiry always starts from this date)

The remainder of the column shows requirement dates and quantities. You can have more than one Daily JIT Requirement on a given date.

Column 3:

Change in Requirement

This column compares the Daily JIT Requirements on each day to the release requirements and calculates the difference (Daily JIT Requirement Quantity - Release Quantity).

If the release expresses requirements as a weekly quantity but the Daily JIT Requirements are in daily requirements, Infor ERP LX adds together all the Daily JIT Requirements for the corresponding release period (for example, a week) and compares them to the release quantity.

The change in requirement is either positive or negative (negative if the release requirement is greater than Daily JIT Requirement).

Column 4:

(Cumulative) Net Change Quantity

This column is a straight arithmetical addition of the previous change in requirement column. It indicates whether the general trend in difference between the Daily JIT Requirement and release requirements is increasing or decreasing. You can readily see if you have significant fluctuations in individual daily requirement quantities but over a month the total Daily JIT Requirement and release requirements are the same. If so, the (cumulative) net change figure returns to zero.

## Screen actions - RMS380D2-01

### F14=Release Inquiry

Use F14 to display the Release Detail Inquiry screen, RMS300D2-01.

### F15=Release Maintenance

Use F15 to display the Release Detail Maintenance screen, RMS500D4-01.

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.

---

## Contract/release maintenance, RMS500

Use this program to create and maintain contract headers and release information. A contract header consists of purchase order details and conditions of supply, including package details. Each contract/release is unique to a combination of customer, ship-to, item, and contract number. Therefore, you can have multiple contracts for the same item and customer/ship-to.

The contract header details display on two screens:

- Contract Header - Static Data
- Contract Header - Reference Data

The release information displays on two additional screens:

- Release Header - Dynamic Data
- Release Detail Maintenance

Whenever you create or maintain a release you always maintain the next version of the release. You cannot manually maintain either the current version or old version although the system updates the current information.

If you run the RMS Conversion program, the current version becomes the old and the next information becomes current. If this is a new release and a first-time conversion, the conversion program also creates a sales order or maintains the sales order previously created by conversion.

You manually create the contract number (which is optional) and start date if you create a contract. These remain fixed for the life of the contract. You can assign a new release number and a new release date each time you update a release. You cannot create a contract for items that are phantoms, assortments, kits, features and options, or non-inventory items.

### Screens

Contract Release Maintenance - Selection (RMS500D1-01)

Contract Release Maintenance - Copy (RMS500D1-02)

Contract - Static Data (RMS500D2-01)

Contract - Reference Data (RMS500D2-02)

Contract - User Data (RMS500D2-03)

Release - Dynamic Data (RMS500D3-01)

Release - Fixed Cumulatives (RMS500D3-02)

Release - Authorizations (RMS500D3-03)

Release Detail Maintenance (RMS500D4-01)

Access: RMS menu

### Add or select contract releases

Use the Contract Release Maintenance - Selection screen, RMS500D1-01, to select release information to maintain or to create new release information.

---



## Field descriptions - RMS500D1-01

### 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.

### Line actions

The following line actions are available:

#### 11=Revise Release

Display the Release - Dynamic Data screen, RMS500D3-01.

#### 13=Shipments

Display the Shipment History Maintenance - Selection screen, RMS510D-01.

#### 18=Convert Release

Convert the chosen release.

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.

### Customer Number (8,0):

Specify the customer number to create or revise the contract.

You can only create contracts for customers with an organization type of 00. You cannot create contracts for customers under the following circumstances:

- Promotion Pricing is selected
- No RMS parameters are defined for the ship-to or the customer.

### Ship-to (4,0):

If required, specify the ship-to number to create or revise the contract.

### Item Number (35,A):

Specify either the item number or the customer item number to create or revise the contract.

If you specify an item number, the system provides the customer item number for this item, if one exists. Conversely, when you specify the customer item number, the system supplies the item number.

Use F15 to toggle between the item number and the customer item number. The system controls the entry of a customer item number by the Customer Item Xref Flag setting on the Customer Master record. Specify one of the following setting values:

0

---

Specify only an internal item number.

1

Specify either the customer's external item number or an internal item number.

2

Specify only the customer's external item number. The system only creates contracts for items that are specified as included or excluded on the Customer Item XRef file.

You cannot create contracts for items of type: phantom, assortment kit, features and options or for items with manufacturing mode 7 = Configured.

You can create a contract for a non-inventory item type only if Self Billing Allowed is At Invoice, 1.

### **Contract Number (15,A):**

Specify the contract number to create or revise the contract. If you specify a contract number in create mode, you must always specify that contract number to retrieve the contract. Failure to specify the contract number can result in the system creating a new contract/release rather than revising the existing one.

Note: Infor ERP LX requires this field if you specify no in the Contract Number Optional field on the RMS Parameter Maintenance screen, RMS820D-01.

Conversely, if you specify yes in the Contract Number Optional field, specifying a contract number on this screen is optional.

The Contract Number field is a user-defined value. Therefore, many users often incorporate purchase order number, model year, or customer name within this number.

### **Screen actions - RMS500D1-01**

#### **F13=Filters**

Use F13 to display the filters screen.

#### **F15=Toggle Item Number/Customer Item**

Use F15 to toggle between the item number and the customer 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.

### **Filter contract or release records**

Use the Contract Maintenance Filter screen to select and sort the contract/release records.

---

### Field descriptions - RMS500D1-01 Filter

#### Select a Sort:

Select one of the following filter options:

0

View all Contracts/Releases.

1

View only active Contracts/Releases.

#### Select a Sequence:

Specify a code to sort the records you want to view. The sequence numbers are based on the fields listed on Contract Release Maintenance - Selection, RMS500D1-01. Specify one of the following values:

#### Valid choices

- 0  
Customer/Ship-to/Item/Contract
- 1  
Item/Contract/Customer/Ship-to
- 2  
Customer Item/Contract/Customer/Ship-to
- 3  
Contract/Item/Customer/Ship-to
- 4  
Contract/Customer Item/Customer/Ship-To
- 5  
Customer/Ship-To/Customer Item/Contract

### Screen actions - RMS500D1-01 Filter

#### Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See the overview information in this document.

#### Copy contract release information

Use the Contract Release Maintenance - Copy screen, RMS500D1-02, to copy release information. The screen displays the customer number, ship-to number, item number, and contract number for the release that you are copying. You can select the level of detail to copy.

---

**Field descriptions - RMS500D1-02****Copy to Customer (8,0):**

Specify the customer number for the new release.

**Copy to Ship-to (4,0):**

If required, specify the ship-to number for the new release.

**Copy to Item Number (35,A):**

Specify the item number for the release.

**Copy to Customer Item Number (30,A):**

Specify the customer item number for the release.

**Copy to Contract (15,A):**

Specify the contract number for the release.

**Level of Detail to Copy (1,0):**

Specify the level of detail to copy. Specify one of the following values:

1

Copy the contract header only.

2

Copy the contract and release.

3

Copy all details.

**Screen actions - RMS500D1-02****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.

## Contract - static data, RMS500D2

Use the Contract - Static Data screen, RMS500D2-01, to create or maintain static data. If you create a new release, this is the first of three contract/release header screens. You can access these screens if you revise, or display an existing release. Most of the information on this screen seldom changes and is, therefore, referred to as static data.

---

The following fields display as header information but are display only:

- Customer Number and Name
- Ship-to Number and Description
- Item Number and Description
- Customer Item Number
- Contract Number
- Release Status
- Release Number

### Add or update static data

Use the header screens to add or update information for the release. Most of the information stays the same for the life of the contract.

### Field descriptions - RMS500D2-01

#### **Release Number:**

This is the version number for the release. When you set up a contract header, this field is blank. Enter the release number on the Release - Dynamic Data screen, RMS500D3-01. Release date defaults to the current date in create mode. In revise mode, the Release Detail Maintenance screen, RMS500D4-01, displays current requirements from the release date onward.

For consolidated multiple model year processing, this field displays the release number of the last release processed during the Release Load. If details for more than one incoming release have been consolidated onto one RMS Release, the screen displays \*MULTI\* to the right of the field. If details from only one incoming release have been processed, then only the release number displays.

#### **Order Number:**

This field is for reference only. When you set up a contract header, this field is blank. After the RMS conversion is processed for the first time, the system assigns an order number that permanently links with the specific contract number. The order number and contract number retain a one-to-one relationship.

#### **Model/Year (8,A):**

This field is for reference only. You can specify the model year for this particular item and customer. For example, an automotive company often makes minor design modifications annually. Because of this, their supplier can send two end items with the same item number but are slightly different parts in the supplier's bill of material, one for a 2004 car model and one for the 2005 model.

---

**Start Date (6,0):**

The system assigns the release start date when you create a new contract. This date remains fixed for all future updates/releases of the contract. You can override the current date in create mode.

**Customer Order Class (3,0):**

The order class defaults to the order class associated with the default order type selected on customer master record if the default order class is in the range 1-8 or 10. If the default order type is not in the range 1-8 or 10, you have a user-defined order type. The system uses the default order class on your user-defined order type.

Order classes with a base order class of 010 are only valid if Consignment Stock is Yes. If Consignment Stock is No, the base order class selected must include invoicing, for example, the base order class is 001, 002, 004, or 005.

After you convert the release, you cannot change the value in this field.

If the release reconciliation method is 4 (None) and the pre-assign invoice numbers flag is set to 0, you can change the order class to any other order class when the base order class is 001, 002, 004, 005, or 010.

If the release reconciliation method is 4 (None) and the pre-assign invoice numbers flag is set to 1, you can change the order class to any other order class when the base order class is 004 or 005. You must include Pick Release in the required events to ensure that the system invokes the RMS Load Build and Invoice Number assignment processes.

If the release reconciliation method is not equal to 4, you can change the order class to any other order class when the base order class includes dispatching, for example, the base order class is 005 or 010.

Order Class 10 is a reserved order class. It is the same as order class 5 but without the invoicing event. If the order class is 10, and the order type is 3, and the match consignment/invoice flag in the Customer Master File (RCM) is set to 1, the system displays a warning message that you can override.

**Order Type (1,A):**

Specify the Infor ERP LX sales order type for the conversion program to use when it creates a sales order for this release. You can only change the order type prior to initial conversion. After the release is converted, you cannot change the value.

The default value is the order type from the customer master, or 1 if the customer default order type is blank. The order type specified must update inventory. In addition, if Consignment Stock is Yes, the order type you specify must be a base order type of 3.

Note: Order Type 9 is an Infor ERP LX resupply order. If you use Order Type 9, you must specify a value in the Warehouse To field on this screen. See Order Type Maintenance, ORD180D1, for more information about order types.

---

**Backorder Code (1,0):**

Specify one of the following values:

**Valid choices**

- **0**  
Back orders are allowed. This is the system default value.
- **1**  
No back orders are allowed. All order lines on an order must be picked complete.
- **2**  
Back order for incomplete lines. Not valid for RMS.
- **3**  
Cancel for incomplete lines. Not valid for RMS.
- **4**  
Ship available orders, cancel remaining orders if incomplete. Back order code 4 is only valid if you specify Identifier in the JIT Reconciliation Method field in Customer Master, ACR100D1.

**Update Date (6,0):**

The system displays the date of the last release update. You can overwrite this value. This field defaults to the current date in create and revise modes.

**PO Number (23,A):**

If a customer purchase order contains the contract/release as an attachment, specify the purchase order number, if known. The system copies this information to the Infor ERP LX Sales Order and references it on the Shipping Ticket and Invoice. This field is mandatory if P.O. Required in the Customer Master file is Yes.

**PO Date (6,0):**

If a customer purchase order contains the contract/release as an attachment, specify the purchase order date, if known. The system copies this information to the Infor ERP LX Sales Order and references it on the Shipping Ticket and Invoice.

**Currency Code (3,A):**

The system displays the currency code from the ship-to record or the customer master record if the ship-to is blank. You can overwrite this value in create mode or in revise mode prior to initial conversion.

---

**Seq Ship (Sequence Ship):**

Specify 1=yes if this release is sequence shipped. This prevents release requirements that are sequence shipped from displaying during Shipment Release unless specifically requested on the selection screen.

**Self Bill Flag (1,0):**

The system displays the Self Bill Reference Flag value. Maintain this field after you convert the release to an order. You can change the data to match or override the set up in the Customer Master (ACR100).

Specify one of the following values:

0

Do not create LXB. The customer does not allow self-billing.

1

Create LXB at invoice.

2

Create LXB at dispatch.

Note: The Self Bill flag cannot 1 or 2 if the Base Class (Customer Master Order Class) is not equal to 10.

**Total Contract Quantity (11,3):**

(Reference Only) You can specify the quantity limit for this contract if your customer has defined one on the purchase order or contract.

**Contract Expiry Date (6,0):**

(Reference Only) You can specify the date on which this contract expires. You can display this date on the customer's purchase order or contract, or set it as the expiry date.

**Warehouse (3,A):**

Specify the code of the warehouse that supplies the contract. This warehouse defaults using the following hierarchy:

Item Master Maintenance - Order screen, INV100D2-02

Default Forced Ship From Warehouse field

Item X-Reference Maintenance screen, ORD150D1-01

Ship-From Warehouse field for the Ship-To Customer's Ship-to address

Item X-Reference Maintenance screen, ORD150D1-01

Ship-From Warehouse for the Ship-To Customer

Address Master Maintenance - Address screen, ORD100D2-01

Address Type 01: Customer Ship-To, or Address Type 00: Customer Global

Customer Master Maintenance - Shipping screen, ACR100D2-02

---



(Ship-From) Warehouse for the Ship-To Number (Customer Ship-To Address)  
Customer Master Maintenance - Shipping screen, ACR100D2-02

(Ship-From) Warehouse for the Ship-To Number (Customer Global Address)

For sequence shipped releases, this warehouse represents the warehouse containing the packed sequenced stock ready for shipment.

If this is a resupply order ( Infor ERP LX Order Type 9) or a consignment contract, you must also specify a warehouse in the To field. Infor ERP LX only accepts a value in the To field if the contract is for Order Type 9 or is a consignment contract.

If Seq Ship is Yes, then this field must match the Sequence Ship From Warehouse for the customer.

### **To Warehouse (3,A):**

You must specify a warehouse in the To field if this is a resupply order ( Infor ERP LX Order Type 9) or if this is a consignment contract.

The To Warehouse value must match the Pay-As-Built Warehouse for the Customer Number if the Consignment Stock and Sequence Ship are Yes.

The To Warehouse value must match the Self-Billing Warehouse for the Customer Number if Consignment Stock is Yes and the customer can use Self-Billing processing.

### **Entry by Week or Date (1,A):**

Specify one of the following values:

#### **Valid choices**

- **1=Week number**  
Specify whether the release is by week number. Entry by week only allows one call-off or requirement per week.
- **0=Date**  
Specify whether the release is by date.

### **Consignment Stock:**

Specify one of the following values:

0=No

1=Yes

Use Consignment Stock Contracts to supply a remote, third party, or customer warehouse. The stock belongs to your company until the customer withdraws the stock for use. You are notified so that you can invoice the customer at that time.

If this is a Consignment Stock Contract, perform the following steps:

1. Specify 3 in the Order Type field. This affects inventory only.
-

2. Specify the Consignment Stock warehouse in the To warehouse.
3. Specify 1 in the Consignment Stock field.

Infor ERP LX processes consignment stock contracts in exactly the same manner as any contract until shipment confirmation. Shipment confirmation reduces inventory at the base warehouse, but also increases inventory at the To warehouse. This creates two T-transactions; one negative T-transaction for the base warehouse and a positive T-transaction for the To warehouse.

In addition, the system does not pass the Shipping Ticket to Invoice Release. Instead, if you are notified that stock is removed from the To or consignment warehouse, you can manually raise a post ship invoice, order type 1, supplied from the To warehouse. If you are using EDI, Self billing and Pay as Built processing, which follow the same cycle, automatically handle invoicing.

#### **Day-of-Week (3,A):**

If the release is by week number, specify the first three characters of the week day on which the release is called off. For example, specify MON if the weekly delivery takes place on a Monday. Leave this field blank if the release is by date.

#### **Screen actions - RMS500D2-01**

##### **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.

#### **Add or maintain contract - reference data**

Use the Contract - Reference Data screen, RMS500D2-02, to maintain or create additional reference data information.

The following fields are display only and contain reference data header information:

- Customer Number and Name
- Ship-to Number and Description
- Item Number and Description
- Customer Item Number
- Contract Number
- Order Number
- Release Status
- Order Type

The screen displays the order number of the release if this is a converted release.

---

## Field descriptions - RMS500D2-02

### **Order Number:**

This field is for reference purposes only. If a contract header is initially set up, this field does not contain any information. After you process the RMS conversion for the first time, the system assigns an order number and permanently links it with the specific contract number. Therefore, order number and contract number retain a one-to-one relationship.

### **PO Number (23,A):**

If a customer purchase order contains the contract/release as an attachment, specify the purchase order number, if known. The system copies this information across to the Infor ERP LX Sales Order and references it on the Shipping Ticket and Invoice. This field is mandatory if P.O. Required is Yes in the Customer Master file.

### **PO Date (6,0):**

If a customer purchase order contains the contract/release as an attachment, specify the purchase order date, if known. The system copies this information to the Infor ERP LX Sales Order and references it on the Shipping Ticket and Invoice.

### **Supplier Code (17,A):**

The Supplier Code defaults from the Customer/Ship To Parameters, or you can specify the code by which the customer recognizes your company. This field is useful for doing business via EDI. The Shipping Ticket contains a reference to the Supplier Code.

### **Return Warehouse (3,A):**

(Reference Only). The Return Warehouse value defaults from the warehouse to the contract header. Upon conversion, it populates the corresponding Return Warehouse on the Order Header (ECH) where it is over-ridden. If the customer is flagged to write release history records (RCM), the Return Warehouse value is written to that file.

### **Contact Name (50,A):**

(Reference Only) The system retrieves the contact name from the customer/ship-to file. You can override the value in this field.

### **Phone Number (25,A):**

(Reference Only) The system retrieves the telephone number from the Customer/Ship-To file. You can override the value in this field.

---

**Fax Number (25,A):**

(Reference Only) The system retrieves the fax number from the Customer/Ship To Parameters. You can override the value in this field.

**E-Mail (25,A):**

(Reference Only) The system retrieves the E-Mail number from the Customer/Ship To Parameters. You can override the value in this field.

**Use Capable To Promise Date as Request Date:**

Specify one of the following values:

0=Never

1=Always

2=If After

The Use CTP Date as Request Date default value is Never for RMS orders. This field determines whether the CTP calculated dates can override the order line request and schedule dates, and whether the system performs cell capacity checking.

You cannot override order line dates for RMS orders, as the conversion process matches the order line schedule date to the release start date based on revisions to order lines from RMS. If it cannot make a match, RMS deletes the unmatched order line and creates a new line to match the Release information.

All orders that you release through the following programs use this field:

- RMS Release Conversion, RMS550
- Process Inbound RMS Release, RMS770
- Process Inbound JIT Requirements, RMS600

Note: The data in this field is valid only if you have LMP (Lean Manufacturing Process) installed.

**Use OLM Dock Scheduling Date (1,A):**

Specify yes or no to use the OLM Dock Scheduling dates in the CTP date calculations. The data in this field is valid only if you have installed LMP (Lean Manufacturing Process).

If you do not enter a value in this field the value defaults from the Item/Facility Planning Data file.

Specify one of the following values:

0=No

Do not use the OLM Dock Scheduling date in Lean CTP date scheduling.

1=Yes

Use the OLM Dock Scheduling date in Lean CTP date scheduling.

---

**Shop Order Horizon Days (3,0):**

This field limits the creation of Shop Orders for an RMS Order Line. The system uses this field in conjunction with Lean Items (Shop Order Generate = Yes) to prevent the generation of shop orders over the whole RMS schedule. Specify a value so that the next RMS schedule occurs before the end of this horizon.

**Item Status Code (2,0):**

Specify the item status code. Certain EDI standards, for example, ODETTE, use this value to identify an item. Specify one of the following values:

01= New Item

02= Obsolete Item

03= Current Production Item

04= Revised Design

05= Reinstated Item

06= Current Spares Item

07= Balance Out Item

An item status of 07 indicates that the item is a balance out item or that the item will become obsolete. The system does not round it according to the rules defined for the Customer Ship-to file or the Customer Master - Release Management screen, ACR100D2-10, but rather converts the exact quantities ordered by the customer to order lines for planning and shipping.

**Capacity Planned Volume (11,2):**

(Reference only.) You can specify the total annual quantity required by the customer. In some countries, major automotive manufacturers publish this information as the basis for price negotiations.

**Last Activity Status (1,0):**

The system displays the current status of the contract.

0= Release Entered

1=Release Converted

2=JIT Entered

3=JIT Reconciled

R=Release update by ECM

The system maintains this reference field.

**Last Activity Date (6,0):**

The system displays the date and time of the last release conversion. The system maintains this reference field.

---

**Last Activity Time (4,0):**

The system displays the date and time of the last release conversion. The system maintains this reference field.

**Screen actions - RMS500D2-02****F15=User Defined Fields**

Use F15 to display the user-defined text entry screen, RMS500D2-03.

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 user-defined contract data**

Use the Contract - User Data screen, RMS500D2-03, to maintain or create additional user-defined text and quantity information. You can, for example, store customer returns year-to-date.

**Field descriptions - RMS500D2-03****Text x 3 (30,A):**

Specify free format text, quantity, and reference information.

**Quantity x 3 (11,3):**

Specify free format text, quantity, and reference information.

**Reference x 3 (12,A):**

Specify free format text, quantity, and reference information.

**Text x 3 (30,A):**

Specify free format text, quantity, and reference information.

**Quantity x 3 (11,3):**

Specify free format text, quantity, and reference information.

**Reference x 3 (12,A):**

Specify free format text, quantity, and reference fields for any additional user-defined information. For example, you can store customer returns year-to-date.

---

**Text x 3 (30,A):**

Specify free format text, quantity, and reference fields for any additional user-defined information. For example, you can store customer returns year-to-date.

**Quantity x 3 (11,3):**

Specify free format text, quantity, and reference fields for any additional user-defined information. For example, you can store customer returns year-to-date.

**Reference x 3 (12,A):**

Specify free format text, quantity, and reference fields for any additional user-defined information. For example, you can store customer returns year-to-date.

**Screen actions - RMS500D2-03****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.

## Release - dynamic data screen, RMS500D3

Use the Release - Dynamic Data screen, RMS500D3-01, to create or revise information that changes on a regular basis. The following information is an important part of the RMS Conversion program: customer-stated arrears/past due, last shipment confirmed as received, and customer-stated cumulative receipt fields.

The following fields display as header information only:

- Customer Number and Name
- Ship-to Number and Description
- Item Number and Description
- Customer Item Number
- Contract Number
- Order Number
- Order Type
- Contract Status

If the release is converted, the screen also displays the order number of the release.

---

## Add or update dynamic data

Add or update the contract information that can change with each release.

### Field descriptions - RMS500D3-01

#### **Model/Year (8,A):**

Reference only. You can specify the model year for this particular item and customer. For example, an automotive company often makes minor design modifications annually. Because of this, their supplier can send two end items with the same item number but are slightly different parts in the supplier's bill of material, one for a 2004 car model and one for the 2005 model.

#### **Start Date (8,0):**

The release start date, assigned on creation of a new contract, remains fixed for all future updates/releases of the contract.

#### **Update Date (8,0):**

The system displays the date of the last release update. You can overwrite this value.

#### **Hold for Conversion:**

Specify one of the following values:

1

Place a hold on this release to prevent the RMS Conversion from processing it.

0

The release is not on hold.

This facility is useful if you receive releases using EDI. If you receive releases via EDI, you can run the Release Comparison Report to compare the requirements for any two version of a release. Infor ERP LX selects any release in which the change in quantity exceeds the front-loaded tolerances specified on the RMS System Parameters or where the customer stated cumulative receipts do not match the supplier-calculated cumulative shipments. In addition, you have the option to manually place releases in a held status. If the discrepancy is resolved to your satisfaction, you can change the held value and process the data during the next execution of the RMS Conversion program. You can also view all releases that are on hold.

Infor ERP LX also holds the release if it cannot find a price for the item and customer specified. The system uses the following hierarchy to determine the price:

- Price Type field in the Special Price Maintenance screen, PRO140D2-01, for the Customer/Item and Currency specified, Price Type 4 Only (discount amount based on quantity)
-



- Multi-currency list price as defined in List Price Maintenance, MLT100D-01, for the currency entered, including base currency, if multi-currency is installed. Maintain MLT100D-01 through the Item Master, INV100.
- List price in the Item Master, INV100D1, if multi-currency is not installed
- RMS considers no other pricing methods valid

**Contract Status:**

Infor ERP LX displays the reference contract status. The system default is active. If the contract is inactive, it no longer appears on searches except those stating active and inactive contracts. In addition, Infor ERP LX interactively sets the outstanding quantities on the associated Infor ERP LX sales order to zero or deletes it, unless there are some order lines still in the shipping or invoicing process. These lines remain active to complete shipping or invoicing.

**Release Number (17,A):**

Specify the release number for this version of the release. Usually, the customer quotes the date. Release date defaults to the current date in create mode. In revise mode, the Release Detail Maintenance screen, RMS500D4-01, displays current requirements from the release date onward.

For consolidated multiple model year processing, this field displays the release number of the last release processed during the Release Load. If details for more than one incoming release have been consolidated onto one RMS Release, the \*MULTI\* displays at the extreme right of the field. If details from only one incoming release have been processed, then only the release number displays.

**Release Date (8,0):**

Infor ERP LX updates the release date as you specify each new version of a release. Specify the start date of the requirements for this version of the release. Usually, the customer quotes these values. In the revise mode, the Release Detail Maintenance screen, RMS500D4-01, displays requirements from the release date onward.

For consolidated multiple model year processing, this field displays the release date of the last release processed during the Release Load. If details for more than one incoming release have been consolidated onto one RMS Release, the value \*MULTI\* displays at the extreme right of the field. If details from only one incoming release have been processed, then only the release date displays.

**Release Time (5,0):**

Specify the entry or receipt time of the release in the time zone for the ship-to number or the ship-to customer. This field is especially useful if you receive releases by EDI.

**Transport Group Number (17,A):**

This field is reference only.

---

**Shipping Lead Time (3,0):**

Specify the number of days that you require to ship this item to the customer. This field defaults to the shipping lead time on the Customer Ship-to file if entered, or the Customer Master Release Management file (ACR100D2-09). Infor ERP LX uses this value to determine the ship date if the customer specifies a receive by date for the requirements. If the customer specifies a ship by date for the requirements, leave this field blank.

Infor ERP LX calculates the ship date as the customer request date minus the shipping lead time minus any carrier non-working days during the shipping period. In addition, if the proposed ship date falls on an internal non-working day, system adjusts the ship date to the last working date prior to this date. Infor ERP LX calculates the ship date from a requirement date, adds it to the release, and holds it in the request date field on the order line following conversion. Therefore, both shipping and planning use the ship date (order line request date) rather than the customer request date.

**Release Type Code (1,0):**

This field is reference only unless you use time zone conversion. See the discussion of time zone conversion below. Some EDI standards, for example, ODETTE, use this field to define whether the requirement date and time are the date and time by which the goods are shipped, received by the customer, or arrive in manufacturing. This field does not impact on the calculation of the ship date.

Specify one of the following values:

0

Shipment Based

1

Delivery Based

2

Production Sequence

3

Kanban Signal

4

Broadcast Based

If you use time zone conversion, the system uses your entry to determine the time zone that applies to the incoming dates and times. If the incoming EDI value is in system time, Infor ERP LX stores the date and time as received; if the incoming value is not in system time, Infor ERP LX converts it to system time. The system converts the stored values (system date and time) into the date and time appropriate for the time zone for display on screens and reports. The system also converts the system times for customer orders and for use within OLM.

Specify one of the following values:

0

---

The arrival date and time are in the system time zone. The system stores the date and time as received but converts these values to the time zone for the warehouse or for the ship-to customer as appropriate.

1

The dispatch date and time are in the system time zone. The system stores the date and time as received but converts these values to the time zone for the warehouse or for the ship-to customer as appropriate.

2

The arrival date and time are in the time zone for the ship-to customer. Infor ERP LX converts the date and time and stores them as system date and time.

3

The dispatch date and time are in the time zone for the warehouse. Infor ERP LX converts the date and time and stores them as system date and time.

4

The time zone conversion program does not use this field.

**Packaging Group Number (6,0):**

Specify the number of the packaging group the customer confirmed as received.

**Date (8,0):**

The screen displays, for reference only, the date the customer received the last shipment. This value defaults to the shipment date, unless you override it in Shipment Receipt Maintenance. The system does not use this information in any calculations.

**Inbound Delivery Number (17,0):**

Specify any customer cross-reference for the receipt of this shipment, typically the customer's receiver number. This defaults to the consignment number (for example, RAN #) specified for the requirement shipped if one was specified on the release detail line notes. The system does not validate this field if the Release Reconciliation method is 4 (None).

**Quantity Received (11,3):**

(Display) The quantity the customer received on the last shipment displays for reference. This defaults to the ship quantity unless overridden using Shipment Receipt Maintenance.

**Customer Stated Cumulative Receipts (11,3):**

If a customer uses cumulative quantity information, specify the customer's stated cumulative receipts up to and including the last shipment received. If you press Enter, RMS checks that the calculated cumulative shipments, up to and including the same shipment number, are the same as the customer stated cumulative

---

receipts. If they are not the same, the system displays a warning message that you can override. The system uses the value specified in this field as the starting value for any cumulative requirements calculations. If you do not specify a value in this field, the system assumes that the customer does not use cumulative information. The system does not validate this field if the Release Reconciliation method is none (4).

**Customer Stated Arrears/Past Due (11,3):**

Specify any customer-stated arrears/past due specified here. Many customers do not state a separate arrears/past due figure, instead, they incorporate the arrears/past due into the first requirement. In this case, leave this field blank. The system uses any figures you specify here in the RMS Conversion program calculations. If the Release Reconciliation method is none (4), the data you specify here has no impact on the order line quantities. The parameters are setup on Address Master - Release Management, ORD100D2-03.

**Customer Stated Arrears Date (8,0):**

This is the date the customer gave as the date the arrears were calculated. The system uses this date in the RMS Conversion program arrears calculations.

**Screen actions - RMS500D3-01**

**F10=Shipment History**

Use F10 to display the Shipment History Maintenance screen, RMS510D-01.

**F15=Notes**

Use F15 to display the Notes screen, SYS181-01.

**F16=Fixed Shipment Details**

Use F16 to display the Release - Fixed Cumulatives screen, RMS500D3-02.

**F17=Authorizations**

Use F17 to display the Release - Authorizations screen, RMS500D3-03.

**F21=Material Status**

Use F21 to displays the Material Status Inquiry screen, INV300.

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 maintain fixed cumulative details

Use the Release - Fixed Cumulatives screen, RMS500D3-02, to maintain or create fixed shipment details.

### Field descriptions - RMS500D3-02

#### **Cumulative Shipments Fixed Quantity (11,3):**

The system uses the information in this field to calculate cumulative shipments made of an item to a customer/ship-to. The calculation takes the quantity specified here and adds to it any shipments made on or after the specified date. If you use cumulative information to set up RMS for the first time, you need to specify a value here unless your cumulative shipments to date are actually zero. Use this field to reset cumulatives in line with any returns or if the customer resets the cumulatives to zero. In addition, the Purge Shipping Files program updates this field automatically.

#### **Date (8,0):**

The system uses this screen to calculate cumulative shipments made of an item to a customer/ship-to. The calculation takes the quantity that you specified in the Cumulative Shipments Fixed Quantity field and adds to it any shipments made on or after the date specified here. Specify a date if you specified a quantity.

#### **Cumulative Shipments Last Year (11,2):**

This field is reference only. Specify the total shipments of this item to this customer last year.

### Screen actions - RMS500D3-02

#### **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.

## Add or maintain authorization/conversion period information

Use the Release - Authorizations screen, RMS500D3-03, to create or maintain the production authorizations and cumulative requirements for a release.

Use the Production Authorization fields to define either the period or the quantity for the release. Customers usually quote either an authorization period or a cumulative quantity. The authorization period can be a production, firm, or fabrication (fab) period. Usually, customers are legally bound to reimburse you for any items you produce to meet the requirements within this time period or cumulative quantity. If you view or maintain a release, the system displays the authorization period within which a particular requirement occurs.

---

Customers typically quote either a material purchase quantity or material purchase period. Usually, customers are legally bound to reimburse your company for any materials purchased to fulfill requirements due within this period or cumulative quantity.

The Cumulative Requirements, Fabrication Authorization, and Material Authorization fields are useful in North America where it is common practice to record the highest and lowest cumulative requirements for these periods and quantities. Release Load, RMS560D, updates these fields if you use EDI.

### **Field descriptions - RMS500D3-03**

#### **Convert to Order Lines Quantity (11,2):**

Specify either the cumulative quantity converted to sales order lines or the number of weeks converted to sales order lines if the release is given current status.

The screen gives you more visibility than you require for planning purposes. As a result, you can use it to limit how far into the future you create the sales order lines to reduce MPS/MRP run times, and so on. If these fields are left blank, then the system converts all release lines to sales order lines. For number of weeks, the start date is the release date or the system date depending on the RMS System parameters on ORD100D2-03.

If a requirement has a forecast type=0 (not known), and falls within the convert to order lines period or quantity, the requirement is treated as if the forecast type=1 (Firm) during RMS Conversion. If the forecast type is not zero, the system ignores the authorization.

#### **Convert to Order Lines Weeks (3,0):**

Specify either the cumulative quantity converted to sales order lines or the number of weeks converted to sales order lines if the release is given current status. The screen gives you more visibility than you require for planning purposes. As a result, you can use it to limit how far into the future the sales order lines are created to reduce MPS/MRP run times and so on. If these fields are left blank then all release lines are converted to sales order lines.

#### **Production Authorization Quantity (11,2):**

Specify the production cumulative quantity authorized by the customer. You can specify the authorization as either weeks or cumulative quantity.

If a requirement has a forecast type=0 (not known), and falls within the production period or quantity, the system treats the requirement as if the forecast type=2 (Production) during RMS Conversion. If the forecast type is not zero, the system ignores the authorization.

#### **Production Authorization Weeks (3,0):**

Specify the production weeks authorized by the customer. You can specify the authorization as either weeks or cumulative quantity.

---

If a requirement has a forecast type=0 (not known), and falls within the production period or quantity, the system treats the requirement as if the forecast type=2 (Production) during RMS Conversion. If the forecast type is not zero, the system ignores the authorization.

**Material Purchase Quantity (11,2):**

Specify the material cumulative quantity authorized by the customer. You can specify the authorization as weeks or cumulative quantity but not both.

If a requirement has a forecast type = 0 (not known), and falls within the material purchase period or quantity, the requirement is treated as if the forecast type=3 (Material) during RMS Conversion. If the forecast type is not zero, the system ignores the authorization.

**Material Purchase Weeks (3,0):**

Specify the material cumulative (Cum) quantity or weeks authorized by the customer. You can specify the authorization as weeks or cumulative quantity but not both.

If a requirement has a forecast type = 0 (not known), and falls within the production period or quantity, the requirement is treated as if the forecast type = 3 (material) during RMS conversion. If the forecast type is not zero, the authorizations are ignored.

**Convert to Forecast Quantity (11,2):**

The system assumes forecast information is available for any requirement supplied with a forecast type=4 (Forecast) during RMS Conversion. If no forecast type is supplied, any requirement that falls within the authorization period or quantity is treated as if the forecast type supplied = 4 (forecast).

If a requirement has a forecast type = 0 (not known), and falls within the production period or quantity, the requirement is treated as if the forecast type = 4 (forecast) during RMS conversion. If the forecast type is not zero, the authorizations are ignored.

If a requirement with a forecast type = 0 (not known) falls outside the forecast period it is ignored during RMS conversion and treated as a forecast type = 5 (future) on inquiries. Reports and inquiries are selected to include forecast requirements that fall within this period. Requirements that fall outside this period are treated in the same way.

**Convert to Forecast Weeks (3,0):**

Forecast information is assumed if any requirement supplied with a forecast type = 4 (Forecast) during RMS Conversion. If no forecast type is supplied, any requirement that falls within the authorization period or quantity is treated as if the forecast type supplied = 4 (forecast).

If a requirement has a forecast type = 0 (not known), and falls within the production period or quantity, the requirement is treated as if the forecast type

---

= 4 (forecast) during RMS conversion. If the forecast type is other than zero, the authorizations are ignored.

If a requirement with a forecast type = 0 (not known) falls outside the forecast period it is ignored during RMS conversion and treated as a forecast type = 5 (future) on inquiries. Reports and inquiries are selected to include forecast requirements that fall within this period. Requirements that fall outside this period are treated in the same way.

**Cumulative Requirements - Release Number (15,A):**

Specify details of the highest and lowest cumulative requirements for the release. The customer usually quotes this information.

**Cumulative Requirements - Date (6,0):**

Specify details of the highest and lowest cumulative requirements for the release. Usually the customer quotes this information.

**Cumulative Requirements - Highest Qty (10,0):**

Specify the highest cumulative quantity requirements for the release. The customer usually quotes this information.

**Cumulative Requirements - Lowest Qty (10,0):**

Specify the lowest cumulative quantity requirements for the release. Usually the customer quotes this information.

**Cumulative Requirements - Release Number (15,A):**

Specify details of the highest and lowest cumulative requirements for the release. Usually the customer quotes this information.

**Cumulative Requirements - Date (6,0):**

Specify details of the highest and lowest cumulative requirements for the release. Usually the customer quotes this information.

**Fabrication Authorization - Highest Qty (10,0):**

Specify details of the highest cumulative requirements for the release. Usually the customer quotes this information.

**Fabrication Authorization - Release Number (15,A):**

Specify details of the highest and lowest cumulative requirements for the release. Usually the customer quotes this information.

---



**Fabrication Authorization - Date (6,0):**

Specify details of the highest and lowest cumulative requirements for the release. Usually the customer quotes this information.

**Fabrication Authorization - Lowest Qty (10,0):**

Specify details of the lowest cumulative requirements for the release. Usually the customer quotes this information.

**Fabrication Authorization - Release Number (15,A):**

Specify details of the highest and lowest cumulative requirements for the release. Usually the customer quotes this information.

**Fabrication Authorization - Date (6,0):**

Specify details of the highest and lowest cumulative requirements for the release. Usually the customer quotes this information.

**Material Authorization - Highest Qty (10,0):**

Specify details of the highest cumulative requirements for the release. Usually the customer quotes this information.

**Material Authorization - Release Number (15,A):**

Specify details of the highest and lowest cumulative requirements for the release. Usually the customer quotes this information.

**Material Authorization - Date (6,0):**

Specify details of the highest and lowest cumulative requirements for the release. Usually the customer quotes this information.

**Material Authorization - Lowest Qty (10,0):**

Specify details of the lowest cumulative requirements for the release. Usually the customer quotes this information.

**Material Authorization - Release Number (15,A):**

Specify details of the highest and lowest cumulative requirements for the release. Usually the customer quotes this information.

**Material Authorization - Date (6,0):**

Specify details of the highest and lowest cumulative requirements for the release. Usually the customer quotes this information.

---

## Screen actions - RMS500D3-03

### 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.

## Release detail maintenance, RMS500D4

Use this program to define individual requirement dates and quantities. You can create, revise, copy, or delete requirements. Each requirement can optionally have an inbound delivery number or engineering change level associated with it. The Entry by Week or Date field on the Contract Header - Static Data screen determines whether the system prompts you to specify dates or week numbers. In revise mode a table displays the data forwarded from the release date. You only change the requirement lines for the new release that are different from the current version of the release.

There are two methods to create new release detail lines. You can either specify line action 1 to display the Release Detail Data screen, RMS500D4-02, and enter data in the input fields or use F9 to display the Release Detail Fast Entry screen, RMS500D4-03. A data entry line displays at the top of the table so you can add a new release detail line.

Start Date and Time are key fields for each detail line. If you revise the start date and time values on a detail line record, you are, in effect, creating a new detail line record that is different from the one you originally selected. If you press Enter to process the revision, the system displays the message Record not found.

To revise the Start Date and Time values of a detail line record, perform the following steps:

1. Copy the detail line record and specify the new Start Date and Time.
2. Press Enter to create the new record.
3. Revise the new duplicate record to amend any other details requiring change.
4. Delete the old record.

The arrears are adjusted by netting off any requirements dated prior to the release date. The result is applied to the cumulative quantity of the first requirement after the arrears date. During RMS conversion a similar process is applied with the addition of netting off any previous requirements in-transit shipments.

The screen displays the following header information:

- Customer Number and Name
  - Ship-to Number and Description
  - Item Number
  - Customer Item Number
-

- Update Date
- Contract Number
- Release Date

## Maintain release details

Use the Release Detail Maintenance screen, RMS500D4-01, to view and update release details.

### Field descriptions - RMS500D4-01

#### **Sel (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.

#### **3=Delete**

Display the Release Detail Data screen, RMS500D4-02.

#### **5=Revise**

Display the Release Detail Data screen, RMS500D4-02.

#### **11=Line Notes**

Display the Notes Maintenance screen, SYS181.

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.

#### **Start Week (4,0):**

Specify the start week. Specify week numbers as a four digit number; the first two digits for the week number, the last two for the year number. For example, 2199 represents week 21 for the year 1999. You cannot have a mixture of entries with both week numbers and dates on the same release.

#### **Start Date (8,0):**

Specify the start date in the time zone for the ship-to number or the ship-to customer. You cannot have a mixture of entries with both week numbers and dates on the same release.

#### **Day (3,A):**

The system displays the day of the week (MON, TUE) for the requirement. If entry is by week number, this is the day of the week specified on the Contract Header - Static Data screen, RMS500D2-01. If you specified a date range, the day relating to the start date displays.

---

**Time (5,0):**

Specify the time of the requirement, if required, using the 24 hour clock, for example, specify 1630 for 4:30 P.M. Only specify a time if the customer specifies a delivery time for the requirement on the release and does not transmit a Daily JIT Requirement.

**End Week (4,0):**

You can leave the End Week or Date blank. Specify an end week or date for the last call-off included in the run-rate inquiry. Specify week numbers as a four digit number, the first two digits for the week, and the last two for the year. For example, 2105 represents week 21 for the year 2005. You cannot enter both week numbers and dates on the same release.

**End Date (8,0):**

You can leave the End Week or Date blank. Specify an end week or date for the last call-off included in the run-rate inquiry. You cannot enter both week numbers and dates on the same release.

**Requirement Quantity:**

The system displays the discrete release quantity required in the date/week range or the cumulative quantity to reach in the date/week range. Use F14 to toggle between cum and discrete quantity entry.

**Cumulative Quantity:**

The system displays the discrete release quantity required in the date/week range or the cumulative quantity to reach in the date/week range. Use F14 to toggle between cum and discrete quantity entry.

**Forecast Type and Authorization :**

The system displays the authorization code for the forecast on the detail line. The value displayed is the first four characters of the short description for the corresponding value in the System Code table RMS Forecast Type, RMSFORTP. If the forecast type is 0 , the system performs an internal calculation and sets the description using a forecast type calculated from the release authorization periods/quantities. In this case the forecast type displayed on the screen is 0, identifying the applied authorizations.

**Forecast Type (1,A):**

The system displays the forecast type for this release detail line. The System Code table for RMS Forecast Type, RMSFORTP, holds the valid forecast values.

---

## Screen actions - RMS500D4-01

### **F9=Fast Entry**

Use F9 to display the Fast Entry screen, RMS500D4-03 to select the release data.

### **F15=Delete all Lines**

Use F15 to delete all release detail lines. F9 is required to confirm the deletion.

### **F17=Material Status Inquiry**

Use F17 to display the Material Status Inquiry screen, INV300.

### **F18=ATP Inquiry**

Use F18 to display the ATP Inquiry screen, MRP310-01.

### **F20=Shipment History**

Use F20 to display the Shipment History Maintenance screen, RMS510D-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.

## Add or maintain release detail data

Use the Release Detail Data screen, RMS500D4-02, to display, revise, delete, or copy requirement details of the release line that you selected on the previous screen.

On this screen, a table displays data forward from the release date. Therefore, you only change requirement lines for the new release which are different from the current version of the release. In create mode the table is blank. Use the data entry line at the top of the table to add new lines to the release.

Start Date and Time are the key fields for each detail line. If you revise the start date and time values on a detail line record, you are, in effect, creating a new detail line record that is different from the one you originally selected. Therefore, if you press Enter to process the revision, the system displays the message: Record not found.

To revise the Start Date and Time values of a detail line record, perform the following steps:

1. Copy the detail line record and specify the new Start Date and Time.
  2. Press Enter to create the new record.
  3. Revise the new duplicate record to amend any other details that require change.
  4. Delete the old record.
-

If you make a change (either + or -) to an existing requirement line that exceeds the tolerance percentage for a particular time horizon (as defined in the RMS System Parameters maintenance), the system displays a warning message at the bottom of the screen.

Specify release weeks/dates in any of the following ways:

- Specify the start week/date. This becomes the order request date if the release is converted. The system calculates the daily run rate needed to meet this requirement. The system bases the calculation on the assumption that the entire quantity is due on the start date.
- Specify start and end weeks/dates to spread the requirements over a time period. The start date becomes the order request date if the release is converted. The system calculates the daily run rate needed to meet this requirement by spreading the requirement over the whole period.
- Specify the start and end weeks/dates and the number of call-offs. The system creates a release line for each call off, spreading the start dates as evenly as possible over the period. Separate order lines are created for each call off if the release is converted. Run-rates needed to meet the requirements of each of these release lines are calculated.

You can specify either the discrete release requirement quantity for the period or the cumulative quantity achieved by the end of the period.

If you specify a requirement that falls due on the customer's holiday (as defined in the Non Working Days file) an \* appears on the extreme right of the screen. A warning message also appears at the bottom of the screen. This is for reference purposes only, the requirement still appears as a sales order line.

The screen displays the following header information:

- Customer Number and Name
- Ship-to Number and Description
- Item Number and Description
- Infor ERP LX Engineering Change Level
- Customer Item Number
- Update Date
- Contract Number
- Release Date

Access: Actions 1, 2, 3 or 4 on Release Detail Maintenance screen, RMS500D4-01

### **Field descriptions - RMS500D4-02**

#### **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.

---

**11=Line Notes**

Display the Notes Maintenance screen, SYS181.

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.

**Start Week (4,0):**

The Entry by Week or Date field on the Contract Header - Static Data screen determines whether the system prompts you to specify dates or week numbers. Specify the start week as a four digit number; the first two digits for the week number, the last two for the year number. For example, 2105 represents week 21 for the year 2005. You cannot enter both week numbers and dates on the same release.

**Start Date (8,0):**

The Entry by Week or Date field on the Contract Header - Static Data screen determines whether the system prompts you to specify dates or week numbers. Specify the start date in the time zone for the ship-to number or the ship-to customer. You cannot enter both week numbers and dates on the same release.

Start Date and Time are key fields for each detail line. If you revise the start date and time values on a detail line record, you are, in effect, creating a new detail line record that is different from the one you originally selected. Therefore, if you press Enter to process the revision, the system displays the message Record not found.

To revise the Start Date and Time values of a detail line record, perform the following steps:

1. Copy the detail line record and specify the new Start Date and Time.
2. Press Enter to create the new record.
3. Revise the new duplicate record to amend any other details requiring change.
4. Delete the old record.

**Time (4,0):**

Specify the time of the requirement, if required, using the 24 hour clock. For example, specify 1630 for 4:30 P.M. Only specify a time if the customer specifies a delivery time for the requirement on the release and does not transmit a Daily JIT Requirement.

**End Week (4,0):**

The field information specified on the Contract Header - Static Data screen determines whether the system prompts you to specify dates or week numbers. You can leave the End Week or Date blank. Specify an end week or date be for the last call-off included in the run-rate inquiry. Specify week numbers as a four digit number, the first two digits for the week, and the last two for the year. For

---

example, 2105 represents week 21 for the year 2005. You cannot have a mixture of entries with both week numbers and dates on the same release.

**End Date (8,0):**

The field information specified on the Contract Header - Static Data screen determines whether the system prompts you to specify dates or week numbers. You can leave the End Week or Date blank. Specify an end week or date for the last call-off included in the run-rate inquiry. Specify week numbers as a four digit number, the first two digits for the week, and the last two for the year. For example, 2105 represents week 21 for the year 2005. Specify the end date in the time zone for the ship-to number or the ship-to customer. You cannot have a mixture of entries with both week numbers and dates on the same release.

**Requirement Quantity:**

In create/revise mode specify the release quantity required in the date/week range or the cumulative quantity to reach in the date/week range.

Otherwise, the system displays the discrete release quantity required in the date/week range or the cumulative quantity to reach in the date/week range.

**Cumulative Quantity:**

In create/revise mode specify the release quantity required in the date/week range or the cumulative quantity to reach in the date/week range.

Otherwise, the system displays the discrete release quantity required in the date/week range or the cumulative quantity to reach in the date/week range.

**Call Offs:**

Specify the number of call-offs (or separate individual requirements) required in the date/week range for the release quantity. The system default value is 1. For example, if you are manually specifying daily requirements for a week, then specify Mondays date as the start date and Fridays date as the end date with a discrete release quantity of 5000 pieces for five separate call-offs. After pressing Enter, the system automatically produces a requirement for each day of the week for a quantity of 1000. This facility works equally well for week numbers.

For each detail line, the system displays the authorization period within which a particular requirement falls. This is PROD (Production authorization), MATL (Material authorization), or FCST (Forecast authorization). These fields are display only.

**Inbound Delivery Number:**

Specify the inbound delivery number for this release.

**Engineering Change Level (35,A):**

Specify the customer's engineering change details for this release line detail

---



**Forecast Type (1,A):**

The system displays the forecast type for this release detail line. The System Code table for RMS Forecast Type, RMSFORPT, holds the valid forecast values.

**Self Bill Reference Number (35,A):**

The screen displays this field if the value of the Self Bill Flag on Contract - Static Data screen, RMS500D2-01, is 1 or 2.

**Dock Code (35,A):**

Specify the point of unloading within the customer's ship-to address. This field changes from one requirement to the next if there are two assembly lines at the same customer/ship-to address using a common item supplied through one RMS contract.

**Line Feed Location (35,A):**

Specify the final delivery point on the assembly line. This field changes from one requirement line to the next if there are two assembly lines at the same customer/ship-to address using a common item supplied through one RMS contract. This field can also change if the process of Kaizen (worker-led continuous improvement) changes when an item is added to the operation of building the car.

**Kanban Card Description (35,A):**

This is the reason code referring to the identity of the bin where items are specified and withdrawn. Typically, this field is a shortened form of the customer's item number. This field can change from one requirement line to the next if a surge in demand causes a depletion of both the main and safety stock bins.

**Screen actions - RMS500D4-02****F6=Accept**

Use F6 to validate and accept the release details.

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.

**Release detail data fast entry**

Use the Release Detail Data Fast Entry screen, RMS500D4-03, for fast entry of release information.

Specify release weeks/dates in any of the following ways:

- Specify the start week/date. This becomes the order request date if the release is converted. The system calculates the daily run rate needed to
-

meet this requirement assuming that the entire quantity is due on the start date.

- Specify start and end weeks/dates to spread the requirements over a time period. The start date becomes the order request date if the release is converted. The system calculates the daily run rate needed to meet this requirement by spreading the requirement over the whole period.
- Specify the start and end weeks/dates and the number of call-offs. The system creates a release line for each call off, spreading the start dates as evenly as possible over the period. Separate order lines are created for each call off if the release is converted. Run-rates needed to meet the requirements of each of these release lines are calculated.

You can specify either the discrete release requirement quantity for the period or the cumulative quantity expected by the end of the period.

If you specify a requirement that falls due on the customer's holiday (as defined in the Non Working Days file) an \* appears on the extreme right of the screen. A warning message also appears at the bottom of the screen. This is for reference purposes only, the requirement still appears as a sales order line.

The screen displays the following header information:

- Customer Number and Name
- Ship-to Number and Description
- Item Number
- Infor ERP LX Engineering Change Level
- Customer Item Number
- Update Date
- Contract Number
- Release Date

Access: F9 on Release Detail Maintenance screen, RMS500D4-01

### **Field descriptions - RMS500D4-03**

#### **Start Week (4,0):**

Specify the start week. Week numbers specify as a four digit number; the first two digits for the week number, the last two for the year number. For example, 2105 represents week 21 for the year 2005. You cannot have a mixture of entries with both week numbers and dates on the same release.

The Entry by Week or Date field on the Contract Header - Static Data screen determines whether the system prompts you to specify dates or week numbers.

#### **Start Date (8,0):**

Specify the start date in the time zone for the ship-to number or the ship-to customer. You cannot have a mixture of entries with both week numbers and dates on the same release.

---

The Entry by Week or Date field on the Contract Header - Static Data screen determines whether the system prompts you to specify dates or week numbers. Start Date and Time are key fields for each detail line. If you revise the start date and time values on a detail line record, you are, in effect, creating a new detail line record that is different from the one you originally selected. Therefore, if you press Enter to process the revision, the system displays the message Record not found.

**Time (5,0):**

Specify the time of the requirement, if required, using the 24 hour clock. For example, specify 1630 for 4:30 P.M. Only specify a time if the customer specifies a delivery time for the requirement on the release and does not transmit a Daily JIT Requirement.

**End Week (4,0):**

The field information specified on the Contract Header - Static Data screen determines whether the system prompts you to specify dates or week numbers. You can leave the End Week or Date blank.

Specify an end week or date for the last call-off included in the run-rate inquiry. Specify week numbers as a four digit number, the first two digits for the week, and the last two for the year. For example, 2105 represents week 21 for the year 2005.

You cannot have a mixture of entries with both week numbers and dates on the same release.

**End Date (8,0):**

The field information specified on the Contract Header - Static Data screen determines whether the system prompts you to specify dates or week numbers. You can leave the End Week or Date blank.

Specify an end week or date for the last call-off included in the run-rate inquiry. Specify week numbers as a four digit number, the first two digits for the week, and the last two for the year. For example, 2105 represents week 21 for the year 2005. Specify the end date in the time zone for the ship-to number or the ship-to customer. You cannot have a mixture of entries with both week numbers and dates on the same release.

**Requirement Quantity:**

Specify the release quantity required in the date/week range or the cumulative quantity to reach in the date/week range.

The system displays the discrete release quantity required in the date/week range or the cumulative quantity to reach in the date/week range. Use F14 to toggle between cum and discrete quantity entry.

---

**Cumulative Quantity:**

Specify the release quantity required in the date/week range or the cumulative quantity to reach in the date/week range.

The system displays the discrete release quantity required in the date/week range or the cumulative quantity to reach in the date/week range. Use F14 to toggle between cum and discrete quantity entry.

**Call Offs:**

Specify the number of call-offs, or separate individual requirements, required in the date/week range for the release quantity. The system default value is 1. For example, if you are manually specifying daily requirements for a week, then specify Mondays date as the start date and Fridays date as the end date with a discrete release quantity of 5000 pieces for five separate call-offs. After pressing Enter, the system automatically produces a requirement for each day of the week for a quantity of 1000. This facility works equally well for week numbers.

For each detail line, the system displays the authorization period within which a particular requirement falls. This is PROD (Production authorization), MATL (Material authorization), or FCST (Forecast authorization). These fields are display only.

**Inbound Delivery Number:**

Specify the inbound delivery number for this release.

**Engineering Change Level (35,A):**

Specify the customer's engineering change details for this release line detail.

**Forecast Type (1,A):**

Specify the forecast type for this release. Specify one of the following values:

**Valid choices**

- **0**  
Not known (default value)
  - **1**  
Firm
  - **2**  
Authorized for Production
  - **3**  
Authorized for Material Purchase
  - **4**  
Forecast
-

### Screen actions - RMS500D4-03

#### F6=Accept

Use F6 to validate and accept the release details.

#### F14=Switch

Use F14 to switch views between cumulative and required quantities.

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.

## Shipment history maintenance, RMS510

You can use Cumulative Requirements and Cumulative Shipments to maintain releases.

Infor ERP LX provides the following functionality:

- Provides a start-up mechanism that initializes the cumulative figures
- Automatically maintains a record of the cumulative figures
- Provides a mechanism to adjust these cumulative figures if for any reason they are deemed incorrect

You can adjust the cumulative requirements by changing the Customer Stated Cumulative Receipts on RMS500D3-01. However, the adjustment of the Cumulative Shipments figure must be capable of being effected at a particular point in the Shipment History, and a visible and auditable record of the adjustment must be made.

### Screens

Shipment History Maintenance - Selection (RMS510D-01)

Maintain Shipment Adjustments (RMS510D-02)

Insert Miscellaneous Adjustment (RMS510D-03)

Received All Shipments (RMS510D-04)

Access: Action 13 on RMS500D1-01

### Maintain shipment history

Use the Shipment History Maintenance screen, RMS510D-01, to select shipments for history maintenance.

---

**Field descriptions - RMS510D-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.

**11=Receive**

Record that the customer received this delivery and all previous deliveries.

**16=Include**

Include this delivery if it was excluded.

**17=Exclude**

Exclude this delivery from a received delivery. Use this option to exclude a delivery after it was marked as received.

**18=Adjust Cumulative**

Display the Maintain Shipment Adjustments screen, RMS510D-02. Use this screen to adjust cumulative amounts without adjusting the shipment value.

**19=Insert Miscellaneous Adjustment**

Display the Insert Miscellaneous Adjustment screen, RMS510D-03.

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.

**Shipment Date (8,0):**

Specify the shipment date in the time zone for the warehouse.

**Shipment Time (5,0):**

Specify the shipment time in the time zone for the warehouse.

**Packing Group (8,0):**

Specify the packing group number to maintain.

**Inbound Delivery Number (17,A):**

Specify the inbound delivery number to maintain.

---

### Screen actions - RMS510D-01

#### **F14=Receive All**

Use F14 to display the Received All Shipments screen, RMS510D-04, to mark all deliveries as received.

#### **F17=Shipped Qtys**

Use F17 to display the Shipped Quantity and Shipped Cumulative headers and columns on the screen.

#### **F18=Receipt Qtys**

Use F18 to display the Receipt Quantity and Receipt Cumulatives headers and columns on the screen.

#### **F17=Release Header**

Use F17 to display the release header screen, RMS530D2-04.

#### **F19=Cumulative Qtys**

Use F19 to display the Shipped Cumulatives and Received Cumulatives headers and columns on the screen.

#### **F20=Line Qtys**

Use F20 to display the Shipped Qty and Received Qty headers and columns on the 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.

### Maintain shipment adjustments

Use the Maintain Shipment Adjustments screen, RMS510D-02, to adjust cumulative values without adjusting shipment values.

### Field descriptions - RMS510D-02

#### **Adjustment Quantity (11,3):**

Specify the revised shipment quantity of the selected shipment line.

#### **Receipt Quantity (11,3):**

Specify the receipt quantity of the selected shipment line. You can only amend this quantity if the line is updated as received.

---

**Receipt Date (8,0):**

Specify the receipt date of the selected shipment line. You can only amend this date if the line is updated as received.

**Reason Code (A,2):**

Specify a reason code for a valid shipment return.

**Notes (A,50):**

Specify comments for the reason code regarding the shipment return.

**Screen actions - RMS510D-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.

**Insert miscellaneous adjustment**

Use the Insert Miscellaneous Adjustment screen, RMS510D-03, to maintain the quantity for the shipment. If you enter an adjustment quantity the system calculates the new cumulative shipped quantity. Use F14 to toggle between the adjustment quantity and the resulting cumulative quantity.

**Field descriptions - RMS510D-03****Adjustment Quantity (11,3):**

Specify the revised shipment quantity of the selected shipment line. Use F14 to toggle between this field and Resulting Shipped Quantity field. Specify a value in either field. The system then calculates the other field value.

**Resulting (11,3):**

The system displays the new cumulative shipped quantity after the Adjustment Quantity procedure is complete. Use F14 to toggle between this field and Adjustment Shipped Quantity field. Specify a value in either field. The system then calculates the other value.

**Reason Code (A,2):**

Specify a reason code for a valid shipment return.

**Notes (A,50):**

Specify comments for the reason code regarding the shipment return.

---



### Screen actions - RMS510D-03

#### F14=Adjustment/Resulting

Use F14 to toggle between the Adjustment Quantity or Resulting fields.

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.

### Adjust received all shipments

Use the Received All Shipments screen, RMS510D-04, to include any previously excluded lines in the Receive All operation.

### Field descriptions - RMS510D-04

#### Re-instate Excluded Lines (A,1):

Specify 1=Yes to include all excluded lines that are not previously received in the Receive All operation. The system default value is 0=No.

### Screen actions - RMS510D-04

#### 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 release delete, RMS530

Use this program to automatically delete or purge a range of releases. After an update, Infor ERP LX automatically creates an audit report detailing the deleted or purged releases.

Note: Make a full backup of your Infor ERP LX and RMS files prior to deleting; and run this option in dedicated mode.

If you delete a range of releases, the releases no longer appear on searches except on those searches that state active and inactive releases. All outstanding quantities on the associated Infor ERP LX sales order are interactively set to zero or deleted unless there are some order lines still in the shipping or invoicing process. These lines remain to complete shipping or invoicing. If you subsequently change the status from inactive to active, you must run RMS Conversion in order to rebuild the corresponding sales order lines.

If you purge a range of releases, Infor ERP LX physically deletes the entire release (next, current, and old versions) including the corresponding Infor ERP LX sales order and any Daily JIT Requirement. If any sales order lines are in

---

shipping, you can delete but not purge the release. Sales order lines at the invoicing stage remain but delete after invoicing per Infor ERP LX sales order processing.

Note: Consider changing active releases to an inactive status prior to purging them. Typically you can leave them as inactive for 3 to 6 months. You can easily reactive the releases in the event they become active again.

## Screens

Mass Release Delete - Selection (RMS530D-01)

Mass Release Delete (RMS530D-02)

Access: RMS01 menu

### Select releases for deletion

Use the Mass Release Delete - Selection screen, RMS530D-01, to select releases for deletion.

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 - RMS530D-01

##### **Customer Number (8,0)**

Specify a range of customer numbers for which releases are deleted/purged.

##### **Customer Number (8,0)**

Specify a range of customer numbers for which releases are deleted/purged.

##### **Ship-To Number (4,0)**

Specify a range of ship-to numbers for which releases are deleted/purged.

##### **Ship-To Number (4,0)**

Specify a range of ship-to numbers for which releases are deleted/purged.

##### **Model Year (8,A)**

Specify a range of model years for which releases are deleted/purged.

##### **Model Year (8,A)**

Specify a range of model years for which releases are deleted/purged.

---

**Item Number (35,A)**

Specify a range of item numbers for which releases are deleted/purged.

**Item Number (35,A)**

Specify a range of item numbers for which releases are deleted/purged.

**Contract Number (15,A)**

Specify a range of contract numbers for which releases are deleted/purged.

**Contract Number (15,A)**

Specify a range of contract numbers for which releases are deleted/purged.

**Include Releases Last Updated Before (6,0)**

Use this field to include all releases last updated before a specific date. You can also use this field in conjunction with the Include Releases with Contract Expiry Before field. The releases must meet both criteria.

**Include Release w/Contract Expiry Before (6,0)**

Use this field to include all releases with a contract expiry date before a specific date. This field can also be used in conjunction with the Include Releases Last Updated Before field. The releases must meet both criteria.

**Include Releases w/no Contract Expiry Date (1,A)**

Specify one of the following values:

**Valid choices**

- **1**  
Include releases with no expiry date.
- **0**  
Exclude releases with no expiry date. This is the system default value.

**Delete or Purge Releases (1=Delete, 2=Purge):**

Specify one of the following values:

- 1  
Delete the releases.
- 2  
Purge the releases.

Note: Deleted records are only logically (soft delete) removed from the data base, where purged records are physically (hard delete) removed from the data base.

---

## Screen actions - RMS530D-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.

## Confirm the deletion

Use the Mass Release Delete screen, RMS530D-02, to review the releases that meet the selection criteria for deactivation/deletion. The screen displays the Customer, Ship-to, Item Number, Contract Number, and Model Year for each release. In addition Infor ERP LX sets the status of the releases included in the deletion to \*INCLD.

## Field descriptions - RMS530D-02

### 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.

### 16=Include

Include an individual record for mass release delete/purge.

### 17=Exclude

Exclude an individual record from mass release delete/purge.

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.

## Screen actions - RMS530D-02

### F16=Include All

Use F16 to include all records for mass release delete/purge. The status for all records is set to 0 (Include).

### F17=Exclude All

Use F17 to exclude all records from mass release delete/purge. The status for all records is set to 1 (Exclude).

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.

---

---

## Mass cumulative reset, RMS535

Use this program to automatically reset the cumulative shipments fixed quantity to zero as of a user-specified date for a range of releases. You can use this program if your customers notify you that they are resetting their cumulatives as of a specified date, for example December 31. Following the update, Infor ERP LX automatically produces an audit report detailing the updated releases. The report includes the previous cumulative shipments fixed quantity and date so that you can manually correct any releases that are accidentally selected.

All shipping tickets, that are printed or re-printed after the cumulative reset, include the new cumulative shipped quantity.

Note: The Mass Cumulative Reset process assumes that the customer has taken into account all the shipments for which they have received an ASN even if they have not physically received them. If you have not sent an ASNs, you can take into account the effect of goods in transit and manually reset the cumulatives.

Example

Shipment #	Ship Date	Expected Receipt Date	Qty	Cum Shipped
12531	01/31/97	02/01/97	100	12200

If the customer resets the cumulatives to zero as of 00.00 hours on 02/01/97, then they consider the cumulative is 100 following receipt of shipment 12531 and expects this to reflect on the next shipping ticket. When the next shipping ticket is created, the system-calculated cumulative shipments are still zero as no shipping tickets have been confirmed since the cumulative reset date of 02/01/97. To accurately reflect the customer's cumulative, the cumulative shipments fixed reset date is 01/31/97.

The Mass Cumulative Reset cannot process the resetting of cumulatives as of current time. Infor ERP LX:

- Sets the cumulative to zero as of the beginning of the current day
- Sums all shipping tickets confirmed on that day
- Adds them to the cumulative shipments fixed quantity to give the actual cumulative shipments

If the cumulative shipments fixed quantity needs to be zero as of the current time, then perform the reset manually. Set the cumulative shipments fixed quantity to the converse of the sum of the shipping tickets confirmed on that day.

### Screens

Mass Cumulative Reset - Selection (RMS535D-01)

Mass Cumulative Reset (RMS535D-02)

Access: RMS01 menu

---

## Select releases for cumulative reset

Use the Mass Cumulative Reset - Selection screen, RMS535D-01, to select releases for cumulative reset.

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 - RMS535D-01

#### **Customer Number (8,0)**

Specify a range of customer numbers to limit the releases that the system updates.

#### **Customer Number (8,0)**

Specify a range of customer numbers to limit the releases that the system updates.

#### **Ship-To Number (4,0)**

Specify a range of ship-to numbers to limit the releases that the system updates.

#### **Ship-To Number (4,0)**

Specify a range of ship-to numbers to limit the releases that the system updates.

#### **Model Year (8,A)**

Specify a range of model years to limit the releases that the system updates.

#### **Model Year (8,A)**

Specify a range of model years to limit the releases that the system updates.

#### **Item Number (35,A)**

Specify a range of item numbers to limit the releases that the system updates.

#### **Item Number (35,A)**

Specify a range of item numbers to limit the releases that the system updates.

#### **Contract Number (15,A)**

Specify a range of contract numbers to limit the releases that the system updates.

#### **Contract Number (15,A)**

Specify a range of contract numbers to limit the releases that the system updates.

---

**Date Cumulative Reset to be effective (6,0)**

Specify the date the cumulative reset is effective. Cumulative resets are effective at 00.00 hours, that is, the system adds any shipments made on the cumulative shipments fixed date to the cumulative shipments fixed quantity. If the reset is effective as of midnight, set the reset date to one day later.

**Screen actions - RMS535D-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 releases for cumulative reset**

Use the Mass Cumulative Reset screen, RMS535D-02, to review the releases selected for cumulative reset. The screen displays the Customer, Ship-To, Item Number, Contract Number, and Model Year for each release that meets the selection criteria. In addition, Infor ERP LX sets the status of the releases included in the update to \*INCLD.

**Field descriptions - RMS535D-02****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.

**16=Include**

Include an individual record in the mass release.

**17=Exclude**

Exclude an individual record from the mass release.

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.

**Screen actions - RMS535D-02****F16=Include All**

Use F16 to include all records for mass release. The status for all records is set to 0 (Include).

---

**F17=Exclude All**

Use F17 to exclude all records from mass release. The status for all records is set to 1 (Exclude).

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.

## Release conversion, RMS550

There are three stages in the life of a release: next, current, and old. Infor ERP LX creates and updates next releases in Release Entry/Maintenance or copies them in Copy Releases.

The system processes releases in the following program stages:

- If an old release exists, the system deletes it. However, you can optionally maintain Release History if the customer or customer ship-to write release details flag is set to 1 (Yes)
- If there is a current release, the system converts it to the old release

Infor ERP LX copies the newest version of the release to the current release. The system then creates, revises, and deletes Infor ERP LX sales order lines as necessary to conform to the specifications of the current release. The initial run of the RMS Conversion process for a release allocates the next available order number from the Infor ERP LX ORD System Parameters. Infor ERP LX uses this sales order number for all order lines created during the life of a release.

At this point the next and current releases are identical.

Infor ERP LX then performs the following actions:

- Assigns the order class and order type that is specified on the contract header to the sales orders for the created conversion
- Sets the back order code on the order header and the order lines to the back order code on the contract header
- Sets the shipped-to warehouse value on the order header and order lines to the To Warehouse value on the contract header, only if the base order type for the contract header order type is 9
- Triggers in contrast to the above, the RMS Consignment stock processing in Pick Confirm directly from the contract header fields, not from the order header and order lines

The conversion process automatically deletes the outstanding requirements for all order lines dated prior to the release date if the retain past due order lines for the ship-to/customer is No. If the past due order lines are retained, Infor ERP LX disregards any customer stated arrears/past due detailed on the release header. If the past due order lines are not retained, Infor ERP LX converts any customer stated arrears/past due detailed on the release with a requirement date one day earlier than the release date.

---



The conversion process automatically ignores any order lines for items other than those found on the contract. RMS created orders contain one item, but other items can be added during order entry or by the carton order line generator.

You can optionally limit the number or weeks for which requirements are converted to order lines. The conversion process determines the start date for the number of weeks converted as either the release date or the system date depending on the ship-to/customer conversion horizon parameter.

The drop code on the order line is always set to Yes.

If an order line number exceeds the order line number for re-use processing defined in the RMS parameters, the conversion process deletes all logically deleted order lines where the invoice quantity is equal to the shipped quantity and renumbers the remaining order lines from 1. This enables the system to use the same order for the entire life of the contract.

Pick Release only considers order lines, so JIT conversion is not optional. Instead, if a customer's release requirements closely mirror their JIT requirements, you can choose to limit the number of JIT requirements to convert to order lines. To do this, specify the number of days of JIT requirements to convert into the required number of order lines. Specify a JIT conversion horizon on the Customer/Ship-to Master files. This ensures that you have sufficient order lines available for shipping and for detailed planning. Infor ERP LX always converts the release and then overlays the JIT requirements within the user-defined number of days converted for the customer/ship-to being processed.

The following information refers to the Kanban processes:

- If the Kanban details are supplied and the JITs reconciliation is by an identifier, the JIT conversion creates one order line per Kanban.
- If a range of Kanban numbers is transmitted, the system determines the number of packs required equals the requirement quantity divided by the standard pack quantity for the JIT.
- If the number of packs required is more than the number of Kanbans supplied, the system creates (n-1) order lines for the first (n-1) Kanbans where the order quantity is the standard pack quantity and one order line for the last Kanban where the quantity is the requirement quantity - (n-1 \* the standard pack quantity), where n is the number of Kanbans supplied.
- If the number of packs required is less than the number of Kanbans supplied, the system creates an order line for each pack or part of a pack and assigns Kanban numbers in sequence ignoring any excess Kanbans.

If Inbound Delivery Number Processing is used, the conversion process matches demand with other order lines based on the inbound delivery number in addition to the date and time. Infor ERP LX changes the existing key structure to order, date, time, inbound delivery number, and line to ensure that demand and order lines correctly match.

You can run the RMS Conversion process either interactively or in batch mode for a single release or for several releases. Alternately, you can use the RMS System parameter to schedule RMS Conversion to run automatically. You can use a number of parameters to restrict your selection process, including customer

---

and sales parent ranges. There are further options to convert only those releases with some activity since the last conversion (either via manual maintenance or via an EDI update). In addition, you can convert only those releases with Daily JIT Requirements. This last option is typically used in Infor ERP LX following the receipt of Daily JIT Requirements via EDI.

The following processes occur during conversion:

- Infor ERP LX reconciles the release.
- Where the JIT quantity or period covers release requirements, Infor ERP LX uses the JIT (allowing for non-working days). For any partially covered release requirements, Infor ERP LX creates an additional line for the remaining quantity within the JIT horizon date. Infor ERP LX leaves any release requirements outside of the JIT horizon unchanged. In addition, if the Customer Ship-to file or the Customer Master file parameters show that this customer/ship-to uses rounding to multiples of pack size, the conversion calculates and applies the rounding to order lines. Infor ERP LX carries forward any over or under shipment occurring as a result of rounding a requirement forward to the next release requirement.
- Infor ERP LX then converts the reconciled requirements to order lines by updating, adding, or deleting existing order lines, based upon the authorization period or quantity for the reconciled data.

The quantity ordered is never less than the quantity shipped, plus the total quantity that passed through pick release, for example, if 100 are in pick confirm and 50 are in pick release and the quantity shipped is 0, then the order quantity can not be less than 150. If the order quantity is reduced, Infor ERP LX removes any allocations that exist.

The conversion program checks order lines forward of the release date and considers the following factors:

- Changes to call-offs
- Arrears/past due figure stated separately or included in the first call-off
- Goods in transit
- Changes to arrears/past due figure (either plus or minus)
- Over-shipments (early or excess quantity)
- Out of sequence shipments

If you convert only those releases with Daily JIT Requirements and receive no new release information, set the Move Current to Old flag to 0 (No).

You can also decide whether to view all releases for the selection criteria, held releases only, or none at all.

The reconciliation program RMS710 performs the detailed calculations and processes required to update sales order lines depending on the reconciliation flag for the customer or ship-to. Specify one of the following values:

1=ID (JIT only)

2=Cumulative

3=Discrete

---

#### 4=None

Optionally, the conversion process produces an audit report displaying releases converted and any errors or exceptions. The report also displays releases that are not converted with an explanation as to why the conversion failed.

For unconverted releases, RMS automatically sets these releases to a held status. If you experience any problems during conversion, read the audit report carefully. Keep the audit report on hand if you make a HelpLine call in connection with the conversion process.

You can rerun the conversion on a regular basis, without moving current to old, even if release information is not changed.

#### Forecast Types

Release Conversion, RMS 550, converts requirements to order lines if the forecast type is 1. If releases are authorized in the RMS500 contract, the conversion program reviews the authorizations for forecast type 0 before creating the order line.

If the forecast types 0 or blank are within the authorized time period (in weeks) or within authorized quantity defined, the system creates the order lines.

If the time period or quantities are equal to or greater than the authorization, the system does not create the order lines.

For Requirements with Forecast Types = 2, 3 or 4, Daily Material Requirements (KMT) and Material Requirements (KMR) are created that are utilized later by the Material Requirements Planning (MRP) product. For this to happen MRP must be installed and the MRP system parameter Update Forecast from RMS is set to 1 (Yes).

Note: If you use the planned order capability and then change Maintain RMS Planned Orders to No, the system deletes all of the planned orders. We do not recommend this.

Converting a release using RMS Conversion, RMS550, adds a JIT. Requirements maintained in JIT Maintenance, RMS600, always forecast type 1 (Firm), and therefore the requirement becomes an order line following RMS550 conversion.

## Screens

Release Conversion - Selection (RMS550D-01)

Release Conversion (RMS550D-02)

Access: RMS menu

18=RMS Conversion from RMS500D1-01

### Release conversion - selection (RMS550D-01)

Use this screen to select the sales parent, customer number, ship-to, item family, item number, contract number, type of release, and type of report to use for the RMS Conversion.

---

**Field descriptions - RMS550D-01**

**Sales Parent Range (8,0):**

Specify a valid range to limit the number of converted releases by sales parent.

**Sales Parent Range (8,0):**

Specify a valid range to limit the number of converted releases by sales parent.

**Customer Number Range (8,0):**

Specify a valid range to limit the number of converted releases by customer number.

**Customer Number Range (8,0):**

Specify a valid range to limit the number of converted releases by customer number.

**Ship-To Number Range (4,0):**

Specify a valid range to limit the number of converted releases by ship-to number.

**Ship-To Number Range (4,0):**

Specify a valid range to limit the number of converted releases by ship-to number.

**Item Family Range (15,A):**

Specify a valid range to limit the number of converted releases by item family.

**Item Family Range (15,A):**

Specify a valid range to limit the number of converted releases by item family.

**Item Number Range (35,A):**

Specify a valid range to limit the number of converted releases by item number.

**Item Number Range (35,A):**

Specify a valid range to limit the number of converted releases by item number.

**Contract Number Range (15,A):**

Specify a valid range to limit the number of converted releases contract number.

**Contract Number Range (15,A):**

Specify a valid range to limit the number of converted releases by contract number.

---

**Releases to Select:**

Specify one of the following values:

**Valid choices**

- **0**  
Convert all releases selected since the last conversion. This is the system default.
- **1**  
Convert releases with some activity since the last conversion. The activity is either manually maintained or by EDI.

**Selected Releases to Display:**

Specify one of the following values:

**Valid choices**

- **2**  
Display all releases which meet the selection criteria. This is the system default.
- **1**  
Display releases which meet the selection criteria and are on hold.
- **0**  
Exclude from display any of the releases which meet the selection criteria.

**Move Current to Old :**

Specify one of the following values:

**Valid choices**

- **1**  
Convert new releases and change the current release to the old release and the new release to the current release. This is the system default.
- **0**  
Refresh the current release without affecting the old release. This is particularly useful if you detect an error after conversion of a new release. You can correct the problem and re-convert without losing details of the previous or old release.

**Audit Report Required:**

Specify yes to create an audit report. This report prints a message for each release/JIT that was successfully converted. The system default is no.

---

### Screen actions - RMS550D-01

#### **F6=Accept**

Use F6 to accept the release conversion.

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 release information for conversion

Use this screen to maintain the release information used for RMS Conversion.

### Field descriptions - RMS550D-02

#### **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.

#### **14=Hold**

Hold the release from conversion.

#### **15=Release Held**

Release all held releases for conversion.

#### **16=Include**

Include all releases for conversion.

#### **17=Exclude**

Exclude all releases for conversion.

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.

#### **Customer (8,0):**

The field displays for reference only.

#### **Ship-to (4,0):**

The field displays for reference only.

#### **Item Number (35,A):**

The field displays for reference only.

---

**Contract Number (15,A):**

The field displays for reference only.

**Excluded (1,0):**

Specify one of the following values:

**Valid choices**

- **1**  
Exclude a release from the conversion.
- **0**  
Include a release in the conversion.

**Held (1,0):**

Specify one of the following values:

**Valid choices**

- **1**  
The release is on hold.
- **0**  
The release is not on hold.

**Screen actions - RMS535D-02****F15=Release All Held**

Use F15 to release all held releases for conversion.

**F16=Include All**

Use F16 to include all releases for conversion.

**F17=Exclude All**

Use F17 to exclude all releases from conversion.

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.

## Automatic RMS conversion parameters, RMS551

There are three stages in the life of a release: next, current, and old. Infor ERP LX creates and updates next releases in Release Entry/Maintenance.

---

The system processes releases in the following program stages:

- The system deletes old releases. You can, however, maintain release history if Write Release history details is Yes for the customer or customer ship-to. Maintain Write Release history details in Customer Master, ACR100, or Address Master Maintenance, ORD100.
- If a release is current, the system converts it to the old release.

Infor ERP LX copies the newest version of the release to the current release. The system then creates, revises, and deletes Infor ERP LX sales order lines as necessary to conform to the specifications of the current release. The initial run of the RMS Conversion process for a release allocates the next available order number from the Infor ERP LX ORD System Parameters. Infor ERP LX uses this sales order number for all order lines created during the life of a release.

At this point the next and current releases are identical.

Next, Infor ERP LX does the following:

- Assigns the order class and order type specified on the contract header to the sales orders for the created conversion
- Sets the back order code on the order header and the order lines to the back order code on the contract header
- Sets the shipped-to warehouse value on the order header and order lines to the To Warehouse value on the contract header, only if the base order type for the contract header order type is 9
- Triggers, in contrast to the above, the RMS Consignment stock processing in Pick Confirm directly from the contract header fields, not from the order header and order lines

The conversion process automatically deletes the outstanding requirements for all order lines dated prior to the release date if the retain past due order lines for the ship-to/customer is set to 0(No). If the past due order lines are retained, Infor ERP LX disregards any customer stated arrears/past due detailed on the release. If the past due order lines are not retained, Infor ERP LX converts any customer stated arrears/past due detailed on the release with a requirement date one day earlier than the release date.

The conversion process determines the start date for the number of weeks converted as either the release date or the system date depending on the ship-to/customer conversion horizon parameter.

The drop code on the order line is always set to No.

If an order line number exceeds the order line number for re-use processing defined in the RMS parameters, the conversion process deletes all logically deleted order lines and renumbers the remaining order lines from 1. This enables you to use the same order for the entire life of the contract.

Pick Release only considers order lines, so JIT conversion is no longer optional. Instead, if a customer's release requirements closely mirror their JIT requirements, you can choose to limit the number of JIT requirements that are converted to order lines by specifying the number of days of JIT requirements are converted into sufficient order lines. To do this, you can specify a JIT conversion horizon

---



on the customer/ship-to master files. This ensures that sufficient order lines are available for shipping and for detailed planning. Infor ERP LX always converts the release and then overlays the JIT requirements within the user-defined number of days converted for the customer/ship-to it is processing.

The following information refers to the Kanban processes:

- If the Kanban details are available, the JIT conversion creates one order line per Kanban.
- If a range of Kanban numbers is transmitted the system determines the number of packs required equals the requirement quantity divided by the standard pack quantity for the JIT.
- If the number of packs required is more than the number of Kanbans supplied the system creates (n-1) order lines for the first (n-1) Kanbans where the order quantity is the standard pack quantity and one order line for the last Kanban where the quantity is the requirement quantity - (n-1 \* the standard pack quantity), where n is the number of Kanbans supplied.
- If the number of packs required is less than the number of Kanbans supplied the system creates an order line for each pack or part of a pack and assigns Kanban numbers in sequence ignoring any excess Kanbans.

You can use a number of parameters to restrict your selection process, including customer and sales parent ranges. There are further options to convert only those releases with some activity (either via manual maintenance or via an EDI update) since the last conversion. In addition, you can convert only those releases with Daily JIT Requirements. Use this last option after receipt of Daily JIT Requirements by EDI.

The conversion consists of the following steps:

1. Infor ERP LX reconciles the release.
2. If a JIT exists, then Infor ERP LX overlays the previously reconciled JIT release. Infor ERP LX uses the JIT horizon date to control the overlay. The system uses the JIT, allowing for non-working days, if the JIT quantity or period covers release requirements. For any partially covered release requirements, the system creates an additional line for the remaining quantity within the JIT horizon and leaves unchanged any release requirements outside of the JIT horizon. In addition if the Customer Ship-to file, or the Customer Master file parameters show that this customer/ship-to uses rounding to multiples of pack size, the conversion calculates and applies the rounding to order lines. Any over or under shipment occurring as a result of rounding a requirement is carried forward to the next release requirement.
3. Infor ERP LX then converts the reconciled requirements to order lines by updating, adding, or deleting existing order lines based upon the authorization period or quantity for the reconciled data.

The quantity ordered is never less than the quantity shipped. If the order quantity is reduced, Infor ERP LX removes any allocations that exist.

---

The conversion program checks order lines forward of the release date and considers the following factors:

- Changes to call-offs
- Arrears/past due figure stated separately or included in the first call-off
- Goods in transit
- Changes to arrears/past due figure (either plus or minus)
- Over-shipments (early or excess quantity)
- Out of sequence shipments

If you convert only those releases with Daily JIT Requirements and receive no new release information, set the Move Current to Old flag to 0 (No).

You can also decide whether to view all releases for the selection criteria, held releases only, or none at all.

The reconciliation program RMS710 performs the detailed calculations and processes required to update sales order lines depending on the reconciliation flag for the customer or ship-to. Specify from the following flags:

1=ID (JIT only)

2=Cumulative

3=Discrete

4=None

The conversion process optionally produces an audit report displaying releases converted and any errors or exceptions. The report also displays releases that are not converted, together with an explanation as to why the conversion failed.

For releases that are converted, RMS automatically sets these releases to a held status. If you experience any problems during conversion, read the audit report carefully.

You can rerun the conversion on a regular basis, without moving current to old, even if release information is not changed.

## Screens

RMS Automatic RMS Conversion (RMS551D-01)

Access: RMS menu

## Run the RMS conversion

Use the RMS conversion screen, RMS551D-01, to select the sales parent, customer number, ship-to, item family, item number, contract number, type of release, and type of report to use for the automatic RMS Conversion.

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 - RMS551D-01****Sales Parent Range (8,0):**

Specify a valid range to restrict the number of converted releases by sales parent.

**Sales Parent Range (8,0):**

Specify a valid range to restrict the number of converted releases by sales parent.

**Customer Number Range (8,0):**

Specify a valid range to restrict the number of converted releases by customer number.

**Customer Number Range (8,0):**

Specify a valid range to restrict the number of converted releases by customer number.

**Ship-To Number Range (4,0):**

Specify a valid range to restrict the number of converted releases by ship-to number.

**Ship-To Number Range (4,0):**

Specify a valid range to restrict the number of converted releases by ship-to number.

**Item Family Range (15,A):**

Specify a valid range to restrict the number of converted releases by item family.

**Item Family Range (15,A):**

Specify a valid range to restrict the number of converted releases by item family.

**Item Number Range (35,A):**

Specify a valid range to restrict the number of converted releases by item number.

**Item Number Range (35,A):**

Specify a valid range to restrict the number of converted releases by item number.

**Contract Number Range (15,A):**

Specify a valid range to restrict the number of converted releases by contract number.

---

**Contract Number Range (15,A):**

Specify a valid range to restrict the number of converted releases by contact number.

**Releases to Select:**

Specify one of the following values:

**Valid choices**

- **0**  
Convert all releases since the last conversion. This is the system default.
- **1**  
Convert releases with some activity since the last time you ran the conversion. The activity is either manually maintained or by EDI.

**Move Current to Old (0=No, 1=Yes):**

Specify one of the following values:

**Valid choices**

- **1**  
Convert new releases; change the current release to the old release and the new release to the current release. This is the system default.
- **0**  
Refresh the current release without affecting the old release. This is particularly useful if you detect an error after conversion of a new release. You can correct the problem and re-convert without losing details of the previous or old release.

**Audit Report Required:**

Specify 1 to create an audit report. This report prints a message for each release/JIT that was successfully converted. The system default is 0.

**Screen actions - RMS551D-01****F6=Accept**

Use F6 to accept the release conversion.

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.

---

---

## JIT maintenance, RMS600

Many customers now supplement weekly or monthly releases with Daily JIT Requirements (JITs) also known as Daily Call-Ins (DCIs), Daily Material Requests (DMRs) or Shipping Schedules. Customers transmit them by EDI daily or several times a day. The Daily JIT Requirement message usually displays the customer's latest delivery requirements over a short time horizon, typically 10 working days. Use this program to add and maintain these Daily JIT even though EDI updates this information.

You can create a Daily JIT Requirement only if a converted release exists for the customer/ship-to/item combination specified. Infor ERP LX holds any Daily JIT Requirement information specified separate from the release information. RMS contains comparison inquiries and reports to highlight any difference in requirements.

Each Daily JIT Requirement is unique to a customer/ship-to/item number combination and consists of header and detail information. A customer/ship-to parameter defines whether or not Infor ERP LX converts Daily JIT Requirements for this customer/ship-to to replace order lines created during RMS Conversion with the more detailed and up-to-date information supplied on the Daily JIT Requirements.

Two options are available for conversion:

- Convert the requirements individually using F18 from Daily JIT Requirement Maintenance
- Convert a range by selecting releases affected by JITs in RMS Conversion

Infor ERP LX performs the following processing during conversion:

- Reconciles the existing order lines up to the first release date, which is either the earlier of the release or the Daily JIT Requirements.
- Generates or changes order lines to reflect the reconciled Daily JIT Requirement quantities.
- Converts a Daily JIT Requirement only if the release requirement it is replacing is fully covered.

If the Daily JIT Requirements do not fully cover a release requirement, Infor ERP LX calculates the total Daily JIT Requirement quantity. If it is greater than the corresponding release requirement, the Daily JIT Requirement quantity is used instead of the release quantity. If it is less than the corresponding release requirement, Infor ERP LX creates an order line for the unconsumed forecast.

If you defined non-working days for the customer/ship-to (weekends) and the Daily JIT Requirements run from Monday to Friday, the non-working days for Saturday and Sunday result in an implied end date of Sunday for the Daily JIT Requirements. As a result, Daily JIT Requirements for Monday through Friday replace a release requirement whose end date is Sunday.

---

## Screens

Daily JIT Maintenance - Selection (RMS600D1-01)  
Daily JIT Maintenance - Additional Notes (RMS600D1-02)  
Daily JIT Maintenance - Header (RMS600D2-01)  
Daily JIT Maintenance - Header Details (RMS600D3-01)  
Daily JIT Maintenance - Delete (RMS600D3-02)  
Daily JIT Maintenance - Additional Header (RMS600D3-03)  
Access: RMS02 menu

## Add or maintain daily JIT requirements

Use the Daily JIT Maintenance - Selection screen, RMS600D1-01, to select daily JIT requirements for maintenance or to create new daily JIT requirements.

### Field descriptions - RMS600D1-01

#### Line actions:

The following line actions are available:

#### 11=Revise Lines

Display the Daily JIT Maintenance - Header Details screen, RMS600D3-01.

#### 12=Select Releases

Display the JIT Release Search screen, WINDKHD2-01.

#### 13=Convert to Order

Perform JIT conversion.

#### 14=Notes

Enter JIT 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.

#### 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.

#### Customer Number (8,0):

Specify the customer number to maintain for the Daily JIT Requirement.

---

**Ship-to Number (4,0):**

Specify the ship-to number if the Daily JIT Requirement is for a specific customer ship-to address.

**Item Number (35,A):**

Specify either the item number or the customer item number for the Daily JIT Requirement.

**Screen actions - RMS600D1-01****F15=Toggle Item Number/Customer Item**

Use F15 to toggle between the item number and the customer 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.

**Add or maintain daily JIT notes**

Use the Daily JIT Maintenance - Additional Notes screen, RMS600D1-02, to maintain or to create additional daily JIT requirement information.

**Field descriptions - RMS600D1-02****Info Field 1 (30,A):**

Specify free format text, quantity, and reference data for any additional user-defined information. For example, you can store customer returns year-to-date.

**Qty Field 1 (11,3):**

Specify free format text, quantity, and reference data for any additional user-defined information. For example, you can store customer returns year-to-date.

**Info Field 2 (30,A):**

Specify free format text, quantity, and reference data for any additional user-defined information. For example, you can store customer returns year-to-date.

**Ref Field 1 (12,A):**

Specify free format text, quantity, and reference data for any additional user-defined information. For example, you can store customer returns year-to-date.

---

**Info Field 3 (30,A):**

Specify free format text, quantity, and reference data for any additional user-defined information. For example, you can store customer returns year-to-date.

**Ref Field 2 (12,A):**

Specify free format text, quantity, and reference data for any additional user-defined information. For example, you can store customer returns year-to-date.

**Standard Pack Quantity (6,0):**

Specify the standard pack quantity for this JIT line.

**Standard Pack Quantity Unit of Measure (2,A):**

Specify the standard pack quantity unit of measure.

**Kanban Description Text (30,A):**

Specify the Kanban description.

**Screen actions - RMS600D1-02****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.

## Daily JIT maintenance - header, RMS600D2

Use the Daily JIT Maintenance - Header screen, RMS600D2-01, to add or maintain Daily JIT Requirement, DCI, or DMR header details. You can manually revise the information on the screens even though you received it by EDI.

If a customer uses cumulative (or cum) quantity information, you must specify the customer's stated cumulative receipts up to and including the last shipment received in the Customer Stated Cumulative Receipts field. Infor ERP LX uses this value to reconcile the Daily JIT Requirements with the cumulative shipments to date to determine the true outstanding requirements in a situation where goods are in transit.

You must also specify a Daily JIT Requirement release date for use as the start date for a number of Daily JIT Requirement inquiries and reports.

---



## Add or update daily JIT requirement, DCI, or DMR header details

The Daily JIT Maintenance - Header screen, RMS600D2-01 displays the following fields for reference:

- Customer Number and Name
- Ship-to Number and Description
- Item Number and Description
- Customer Item Number
- Order Number
- Last Update Date

### Field descriptions - RMS600D2-01

#### **Daily JIT Number (17,A):**

Specify the issue number of this Daily JIT. The customer usually quotes this number.

#### **JIT Release Date (6,0):**

Specify the date the customer releases JIT Requirements. The customer usually quotes this required date in the documentation. The system displays the current release date for reference.

#### **JIT Horizon Date (6,0):**

Specify the date that represents the period the JIT Requirements cover. The system uses the JIT Horizon date to determine the period of the release converted by the JIT, if converted to order-lines. If the JIT horizon does not fully cover the release, the system creates unconsumed forecast.

#### **Release Type Code (1,A):**

This field is reference only. Some EDI standards (for example, ODETTE) use this field to define whether the requirement date and time are the date and time for the goods shipment, customer receipt, or manufacturing receipt. This field does not impact on the calculation of the ship date.

Specify one of the following values:

0

Shipment Based

1

Delivery Based

2

Production Sequence

3

Kanban Signal

---

4

Broadcast Based

**Shipping Lead Time (3,0):**

Specify the number of days required to ship this item to the customer. This field defaults to the shipping lead time on the Release Header - Dynamic Data screen, and the system uses it to determine the ship date if the customer specifies a receive by date for the requirements. If the customer specifies a ship-by date for the requirements, leave this field blank.

The system calculates the ship date as the customer request date minus the shipping lead time minus any carrier non-working days during the shipping period. In addition, if the proposed ship date falls on an internal non-working day, the system further adjusts the ship date to the last working date prior to this date. The system calculates the ship date as a requirement added to the Daily JIT Requirement and holds the ship date in the request date field on the order line following conversion. Both planning and shipping use the ship date rather than the customer request date.

**Supplier Code (17,A):**

Specify the supplier code associated with this daily JIT.

**Packing Group Number (6,0):**

Specify the last packing group number received by the customer.

**Inbound Delivery Number (6,0):**

Specify the inbound delivery number as stated by the customer.

**Quantity Received (11,3):**

Specify the quantity confirmed as received for the last shipment number.

**Customer Stated Cumulative Receipts (11,3):**

Specify the customer's stated cumulative receipts up to and including the shipping ticket number quoted. The system uses this field to calculate the JIT cumulative requirements and to determine the true outstanding requirements where goods are in transit.

**Screen actions - RMS600D2-01****F10=Shipment History**

Use F10 to display the Shipment History Maintenance - Selection screen, RMS510D-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.

## Daily JIT maintenance - header details, RMS600D3

Use this program to create, revise, or delete the Daily JIT Requirements. Typically, Infor ERP LX receives the displayed data electronically using EDI, but you can manually revise it.

You can specify more than one requirement per day by stipulating the time of each delivery. Specify Daily JIT Requirement, DCI, or DMR quantities as discrete quantities for which the system calculates the cumulative requirements by successively adding these discrete quantities to the customer-stated cumulative receipts. Alternately, you can specify quantities as cumulative requirements. In this case the system calculates the individual discrete requirements.

Each requirement can optionally have two lines of text and or a consignment number associated with it.

The following fields display on the screen but are display only:

- Customer Number and Name
- Ship-to Number and Name
- Item Number and Description
- Customer Item Number
- Customer Stated Cumulative Receipts
- Signal Flag - appears against each line that has an SSP (Sequence Shipment Processing) pull signal range entered against it

### Add or update daily JIT requirements

Use the Daily JIT Maintenance - Header Details screen, RMS600D3-01, to add daily JIT requirements or to update existing requirements.

#### Field descriptions - RMS600D3-01

##### Line actions:

The following line actions are available:

##### 11=Line Notes

Display the Daily JIT Maintenance - Additional Notes screen, RMS600D1-02.

##### 12=Packing Info

Display the Daily JIT Maintenance - Additional Header screen, RMS600D3-03.

---

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.

**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.

**Date (6,0):**

Specify the date of each individual Daily JIT Requirement, DCI, or DMR.

**Time (4,0):**

Specify the time of each requirement. Alternately, leave this field blank to indicate an unspecified time for the requirement.

**JIT Quantity (11,3):**

Specify the individual JIT quantity. (You can calculate this quantity if you are specifying cumulative quantities).

**Cumulative Qty (11,3):**

Specify the cumulative quantity if you are entering by cumulative quantity. (Otherwise, the system calculates this field by taking the customer's stated cumulative receipts and successively adding each discrete Daily JIT Requirement).

**Inbound Delivery Number (17,A):**

Specify an identifier for referencing the individual requirement (in shipping). If the JIT has a reconciliation method of ID based, this field is mandatory. The value must be unique within this JIT. If a shipment already exists for the entered identifier, a warning message informs you that the system is reconciling the existing shipment quantity against the new requirement. This identifier can be a consignment number, shipping control number, manifest number, or RAN number in customer-supplied documentation.

**Signal Range (30,A):**

Specify a pull signal range for the requirement. This field only appears if SSP (Sequence Shipment Processing) is active; in which case, it is mandatory.

**Signal Range (30,A):**

Specify a pull signal range for the requirement. This field only appears if SSP processing is active; in which case, it is mandatory.

---

**Screen actions - RMS600D3-01****F14=Toggle Cumulative/Discrete**

Use F14 to toggle between displaying cumulative or discrete quantities.

**F17=Delete All Requirements**

Use F17 to display the Daily JIT Maintenance - Delete screen, RMS600D3-02 to confirm deletion of all the displayed requirement lines.

**F19=Material Status Inquiry**

Use F19 to display the Material Status Inquiry screen, INV300-01.

**F20=Reconciliation Inquiry**

Use F20 to display the Daily JIT Reconciliation Inquiry screen, RMS321D-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.

**Delete daily JIT maintenance requirements**

Use the Daily JIT Maintenance - Delete screen, RMS600D3-02, to confirm the deletion of all JIT detail requirements with F17.

**Screen actions - RMS600D3-02****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 daily JIT additional header information**

Use the Daily JIT Maintenance - Additional Header screen, RMS600D3-03, to maintain additional header information.

The following fields display on the screen but are display only:

- Customer Number and Description
  - Ship-To Number and Description
  - Item Number and Description
-

**Field descriptions - RMS600D3-03****Final Delivery Point (17,A):**

The final delivery point field exists to contain the dock gate value loaded through EDI.

**Package Label Text (80,A):**

The package label text fields are loaded via EDI and hold package data that prints on the SSP pull signal labels.

**Package Label Text (80,A):**

The package label text fields are loaded via EDI and hold package data that prints on the SSP pull signal labels.

**Package Label Text (80,A):**

The package label text fields are loaded via EDI and hold package data that prints on the SSP pull signal labels.

**Package Label Text (80,A):**

The package label text fields are loaded via EDI and hold package data that prints on the SSP pull signal labels.

**Package Label Text (80,A):**

The package label text fields are loaded via EDI and hold package data that prints on the SSP pull signal labels.

**Package Label Text (80,A):**

The package label text fields are loaded via EDI and hold package data that prints on the SSP pull signal labels.

**Package Label Text (80,A):**

The package label text fields are loaded via EDI and hold package data that prints on the SSP pull signal labels.

**Dock Code (35,A):**

The dock code is the point of unloading within the customer's ship-to address. This field changes from one requirement to the next if there are two assembly lines at the same customer/ship-to address using a common item supplied through one RMS contract.

---

**Line Feed Location (35,A):**

This is the final delivery point on the assembly line. This field changes from one requirement line to the next if there are two assembly lines at the same customer/ship-to address using a common item supplied through one RMS contract. This field also changes if the process of Kaizen (worker-led continuous improvement) changes when an item is fitted within the operation of building the car.

**Kanban Card Description (35,A):**

This is the reason code that refers to the identity of the bin where items are entered and withdrawn. Typically, this field is a shortened form of the customer's item number. This field can change from one requirement line to the next if a surge in demand causes depletion in both the main and safety stock bins.

**Screen actions - RMS600D3-03****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.

## JIT release search, WINDKHD2

This screen automatically appears if there is more than one release with the same customer number, ship-to number, and item number as the selected Daily JIT Requirement.

(This is possible because a release is unique not only to customer, ship-to, and item number but also to a contract number). Before proceeding with any maintenance or an inquiry, you must select the release to which you want to attach this Daily JIT Requirement.

### Screens

The following fields display for reference only:

- Customer Number and Name
- Ship-to Number and Name
- Item Number
- Current Order Number to Which the Daily JIT Requirement is Tied

JIT Release Search (WINDKHD2-01)

Access: 12=Select Releases (RMS600D1-01)

---

## JIT release search

The system displays the JIT Release Search screen, WINDKHD2-01, automatically if it finds multiple release information.

### Field descriptions - WINDKHD2

#### **Contract Number (15,A):**

Specify the contract number.

### Screen actions - WINDKHD2

#### **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.

## Held invoice release, RMS610D1

Held Invoice Release - Pay as Built processing provides functionality for customers who elect to pay for sequenced items as they complete the corresponding assembly at their plant. On completion of an assembly, the consumption of the items required for the assembly is assumed and the pay as built messages are transmitted to you indicating that payment for the sequenced items can now take place. The system uses this information to create an internal invoice against which the customer's payment is matched and to verify that the customer pays for all shipped sequences.

Pay as Built provides the functionality to create post ship invoices from payment information that the customer supplies for sequenced items consumed at their assembly plant. The customer transmits detailed payment information via EDI. Infor ERP LX presumes that the incoming EDI data is verified during the Pay as Built load and any errors or warnings are detailed at this stage. If errors exist, then the whole invoice is rejected during the Pay as Built load. If warnings exist, the system processes the invoices but holds them pending correction or acceptance of the warnings. If no warnings exist, Infor ERP LX automatically creates post ship invoices from data supplied during the load. The program allows you to release the held invoices and to accept warnings.

## Screens

Pay as Built Held Invoice Release (RMS610D1-01)

Pay as Built Detail Exceptions (RMS610D2-01)

Pay as Built Detail Exceptions (RMS610D2-02)

Access: RMS04 menu

---



## Maintain pay as built held invoices

Use the Pay As Built Held Invoice Release screen, RMS610D1-01, to perform corrective action at the header or detail level and/or for release held invoices. If you want, create post ship orders for the corrected invoices by using RMS610B.

### Field descriptions - RMS610D1-01

**Customer (8,0):**

Specify the customer number to process.

**Ship-To (4,0):**

Specify the ship-to number to process.

**Invoice (6,0):**

Specify the invoice number to process.

### Screen actions - RMS610D1-01

**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.

## Pay as built detail exceptions, RMS610D2

Use the program to correct held Pay as Built invoices at the detail level.

## Update pay as built invoices

Use the Pay As Built Detail Exceptions screen, RMS610D2-01, to correct held Pay as Built invoices at the detail level.

### Field descriptions - RMS610D2-01

**Customer (8,0):**

Display the customer number from entry parameters.

**Ship-to (4,0):**

Display ship-to number from entry parameters.

---

**Invoice (6,0):**

Display invoice number from entry parameters.

**Model Year (4,0):**

Specify the model year to process.

**Sequence (12,A):**

Specify the sequence number to process.

**Item (35,A):**

Specify the item number to process.

**Screen actions - RMS610D2-01**

**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 pay as built invoice detail

Use the Pay As Built Detail Exceptions screen, RMS610D2-02, to correct held Pay as Built invoices at the detail level.

Infor ERP LX displays the following fields:

- Reason
  - Invoice
  - Sequence
  - Model Year
  - Customer
  - Customer Name
  - Ship-to
  - Ship-to Name
  - Item
  - Customer Item
  - Quantity Billed
  - Price
-

## Screen actions - RMS610D2-02

### 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.

## Retro billing batch maintenance, RMS620D1

The retroactive billing procedure applies a price adjustment to historical invoices. The procedure is common in the automotive industry where a supplier continues to ship and invoice a customer for products using prices from expired contracts. After the supplier and customer agree on a new contract and price adjustment, applicable from a date in the past, the supplier can raise supplementary invoices for the resulting price differences. Use this program to create a retroactive invoice to correct the amount originally charged. The program does not adjust the units for each item.

This program provides the flexibility to manage one or more retroactive invoices for a customer and ship-to using a batch header to control the processing of a group of invoices. This batch header determines the format of the invoices created. It is possible to produce one retroactive invoice for each original invoice or each item. In addition, if Infor ERP LX creates one retro invoice for each original invoice, you can specify whether the retroactive invoice uses the original invoice number or the next invoice number. The batch header also specifies whether the base price is the original price or the last retroactive price, thereby using multiple price adjustments. If the base is the original price, Infor ERP LX calculates the price adjustment as the new price minus the original price. If the base price is the last retro price, the system calculates the price adjustment as the new price minus the price on the last retroactive invoice or a percentage change of the price on the last retroactive invoice.

### Screens

Retro Invoicing Batch Maintenance (RMS620D1-01)

Retro Invoicing Batch Maintenance (RMS620D2-01)

Price Change Maintenance (RMS620D3-01)

Price Change Maintenance (RMS620D4-01)

Maintain Retro Invoices (RMS620D5-01)

Maintain Retro Invoices (RMS620D6-01)

Access: RMS04 menu

---

## Add or update retroactive invoices

Use the Retro Invoicing Batch Maintenance screen, RMS620D1-01, to select and maintain retroactive invoices or to create new retroactive invoices.

### Field descriptions - RMS620D1-01

#### Line actions:

The following line actions are available:

#### 14=Price Change Details

Display the Price Change Maintenance screen, RMS620D3-01.

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.

#### 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.

#### Batch Number (6,0):

Specify the batch number to process. The batch number references the price change processing.

### Screen actions - RMS620D1-01

#### All Screen Actions

All screen actions on this screen perform standard Infor ERP LX functions. See the overview information in this document.

## Retro billing batch maintenance, RMS620D2

This program enables you to update the retroactive invoice batch information.

### Add, maintain, or view retroactive invoice batch information

Use the Retro Invoicing Batch Maintenance screen, RMS620D2-01, to maintain the detail retroactive invoice batch information.

### Field descriptions - RMS620D2-01

#### Batch Number (6,0):

You can specify a batch number in create mode. Specify a unique batch number.

---

**Description (30,A):**

Specify a description to identify the batch.

**Customer Number to Use (1,A):**

Specify which customer number to use.

1=Sold to Customer

2=A/R Customer

**Customer (8,0):**

Specify the customer number for the retro invoice batch to process.

**Ship-To (4,0):**

If required, specify the ship-to number for the retro invoice batch to process.

**Retro Invoice Format (1,A):**

Specify the retro invoice format for the batch to process.

1

Create one retro invoice for each original invoice.

2

Create one retro invoice for item number.

The retro invoice format determines the manner in which the system groups invoice lines with price adjustments. You can create a retro invoice to mirror each original invoice, for example, one invoice per original, or you can create a retro invoice for each item processed.

**Retro Invoice Number (1,A):**

Specify the retro invoice number for the batch to process.

1

Use the original invoice number for the retro invoice.

2

Use the next invoice number for the retro invoice.

You can create the retro invoice with the same invoice number as the original invoice in the same manner that you can assign a post ship order to a document number that is an existing invoice number. The system creates a debit or credit memo against the original invoice. Alternately, you can create a new invoice.

You cannot specify 1, use the original invoice number, if the retro invoice format is 2, create one retro invoice for each item.

**Price Change Date (1,0):**

Specify one of the following values:

---

1

Use the invoice date as the price change date.

2

Use the ship date as the price change date.

The system uses this date with the start and end dates.

**Base Price (1,A):**

Specify the base price for the batch to process.

1

Original Price

2

Last Retro Price

**Currency (3,A):**

Specify the currency for the batch to process.

**Order Class (3,0):**

Specify the order class to use if the system creates a retro order.

**Screen actions - RMS620D2-01**

**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.

## Retro invoicing price change maintenance, RMS620D3

Use this program to select the items for retroactive invoicing. You can use up to five price changes with corresponding effective dates for each item. The prices specified are either the new system-determined price change, or the percentage change applied to the base price. The system creates a retroactive credit in which the new price is less than the original price.

Access: Line action 14, Price Change Details on Retro Invoicing Batch Maintenance, RMS620D2-01

### Select items to retroactive invoice

Use the Price Change Maintenance screen, RMS620D3-01, to specify which items to retro invoice.

---

## Field descriptions - RMS620D3-01

### Line actions:

The following line actions are available:

#### 14=Review Invoices

Display the Maintain Retro Invoices screen, RMS620D5-01. You must extract invoice details before you can review the invoice.

#### 17=Clear Invoice Details

Clear the invoice details after you extract them.

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.

### 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.

### Item Number (35,A):

Specify an item number. The item number must exist in the system.

### Status:

The system displays the status for each batch.

Created

Price change details exist for this item.

Pending

The batch is pending extraction by the retroactive invoicing batch program.

Extracted

The retroactive invoicing batch program completed processing and the records found in SIH and SIL match the selection criteria for this batch.

Selected

The batch is selected from order generation but the system has not yet created order details.

Generated

The retroactive invoicing batch program completed processing and order details exist in ECH and ECL for this batch.

Inactive

The system logically deleted the record.

---

**Screen actions - RMS620D3-01****F15=Extract Invoice Details**

Use F15 to display the extract invoice details screen.

**F16=Create Retro Invoices**

Use F16 to create retro invoices.

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.

## Retro invoicing price change maintenance, RMS620D4

Use this program to maintain pricing changes.

### Update price change details

Use the Price Change Maintenance screen, RMS620D4-01, to add or update the price change details.

**Field descriptions - RMS620D4-01****Item Number (35,A):**

The screen displays the item number for the price changes.

**Start Date (8,0):**

Specify a valid date. The start date must be less than or equal to the end date and a date range must not overlap. You must specify at least the first line start date.

**End Date (8,0):**

Specify a valid end date. Ranges must not overlap.

**Price/Percentage (14,4):**

Specify the price/percentage if you specified a start date.

If Price Type is new price, the value must be positive.

If the Price Type is percentage, the value must be between -100 and +100.

**Price Type (1,A):**

Specify one of the following values:

---



1=New Price

This is the system default value.

2=Percentage Change.

#### **Screen actions - RMS620D4-01**

##### **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 retro invoices, RMS620D5

Use the Maintain Retro Invoices screen, RMS620D5-01, after you run Batch Maintenance and extract the retroactive invoice details.

### Maintain retroactive invoices list

Use the Maintain Retro Invoices List screen, RMS620D5-01, to update quantities or unit prices for the retroactive invoices.

#### **Field descriptions - RMS620D5-01**

##### **Yr (2,0):**

Specify the year associated with this invoice.

##### **Dpfx (2,A):**

Specify the invoice prefix.

##### **Original Invoice (6,0):**

Specify the invoice to process.

#### **Screen actions - RMS620D5-01**

##### **F14=Shipment Inquiry**

Use F14 to display the shipment inquiry screen.

##### **F15=Material Status**

Use F15 to display the material status inquiry screen.

---

**F16=Sales History**

Use F16 to display the sales history 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.

## Maintain retro invoices detail, RMS620D6

This program updates the retroactive invoice detail.

### Update retroactive invoice detail

Use the Maintain Retro Invoices Detail screen, RMS620D6-01, to maintain the detail of the retroactive invoices.

**Field descriptions - RMS620D6-01****New Invoice Quantity (11,3):**

The system displays the new invoice quantity for update. This field must not be zero.

**New Invoice Unit Price (14,4):**

The system displays the new invoice unit price for update. This value must be positive.

**Screen actions - RMS620D6-01****F14=Price changes**

Use F14 to display the price changes 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.

## Shipping pull signal summary list, RMS640D1

Use this program if a customer sends Kanban numbers in their JIT schedules. This program generates a pull signal summary list detailing this information for either Kanban requirements not yet assigned to a shipment or for Kanban requirements already assigned to a shipment.

---

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.

### Print a pull signal summary

Use the Shipping Pull Signal Report screen, RMS640D-01, to enter the criteria for the pull signal summary report.

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 - RMS640D1-01**

##### **From/To Customer Number (8,0):**

Specify the range of values to limit the customer numbers to include in the selection.

##### **From/To Customer Number (8,0):**

Specify the range of values to limit the customer numbers to include in the selection. The To Customer Number cannot be blank.

##### **From/To Ship-To Number (4,0):**

Specify the range of values to limit the ship-to numbers to include in the selection.

##### **From/To Ship-To Number (4,0):**

Specify the range of values to limit the ship-to numbers to include in the selection. The To Ship-To Number cannot be blank.

##### **From/To Ship Date (8,0):**

Specify the range of values to limit the shipment dates to include in the selection.

##### **From/To Ship Date (8,0):**

Specify the range of values to limit the shipment dates to include in the selection. The To Ship Date cannot be blank.

##### **From/To Inbound Delivery Number (17,A):**

Specify the range of values to limit the inbound delivery numbers to include in the selection. The system sets the lower and upper limit values to blank by default. If the upper limit is blank, the system sets the upper limit equal to the lower limit.

---

**From/To Inbound Delivery Number (17,A):**

Specify the range of values to limit the inbound delivery numbers to include in the selection. The system sets the lower and upper limit values to blank by default. If the upper limit is blank, the system sets the upper limit equal to the lower limit.

**From/To Packing Group Number (8,0):**

Specify the range of values to limit the packing group numbers to include in the selection. The system sets the lower and upper limit values to blank by default. If the upper limit is blank, the system sets the upper limit equal to the lower limit.

**From/To Packing Group Number (8,0):**

Specify the range of values to limit the packing group numbers to include in the selection. The system sets the lower and upper limit values to blank by default. If the upper limit is blank, the system sets the upper limit equal to the lower limit.

**Screen actions - RMS640D-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.

## Sequenced requirements maintenance, RMS650

Use this program to create and maintain Sequenced Shipping Records. You can maintain the records using this program if errors exist or if the sequence record is designated as a pilot record. You can run the Sequence Mismatch/Error Report any time to determine which sequence records are in error and to correct/reset any necessary corrective action. You can also create records manually.

Note: The Transmission Number and Date are on the file for reference but do not appear on the screen.

### Screens

Sequence Number Maintenance - Selection (RMS650D1-01)

Sequence Number Maintenance (RMS650D1-02)

Sequence Number Item Maintenance - Selection (RMS650D2-01)

Sequence Number Item Maintenance (RMS650D2-02)

Access: RMS03 menu

---

## Add or update a sequence number

Use the Sequence Number Maintenance - Selection screen, RMS650D1-01, to select and maintain sequence numbers or to create new sequence numbers.

The screen displays a message code if an error exists at the header or line level. If a Model Family error exists, the screen displays 1 in the Header column. If an error exists at the line level, the screen displays 1 in the Line column.

### Field descriptions - RMS650D1-01

#### Line Actions (2,0):

The following line actions are available:

#### 11=Maintain Items

Create, revise or delete items within this sequence record. This line action also displays items in Sequence Number Inquiry.

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.

#### 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.

#### Customer (8,0):

Specify the customer number of the sequence record to create or maintain.

#### Ship-to (4,0):

Specify the ship-to number of the sequence record to create or maintain.

#### Model Year (4,0):

Specify the model year of the sequence record to create or maintain.

#### Sequence Number (12,0):

Specify the sequence number of the sequence record to create or maintain.

### Screen actions - RMS650D1-01

#### 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.

---

## Update sequence number information

Use the Sequence Number Maintenance screen, RMS650D1-02, to select and maintain sequence number information.

### Field descriptions - RMS650D1-02

#### **Customer (8,0):**

Specify the customer number of the sequence record to create or maintain.

#### **Ship-to (4,0):**

Specify the ship-to number of the sequence record to create or maintain.

#### **Model Year (4,0):**

Specify the model year of the sequence record to create or maintain.

#### **Sequence Number (12,0):**

Specify the sequence number of the sequence record to create or maintain.

#### **Status (1,A):**

Specify the status code for the sequence header.

#### **Valid choices**

- **0=Created**  
0=Created
- **1=In**  
1=In Progress
- **7=Authorized**  
7=Authorized for invoicing by Pay as Built
- **9=Invoicing**  
9=Invoicing Complete

#### **Header Error (1,A):**

Specify the Header Error Status code for the sequence header.

0=No Errors

1=Model Family Problem

The following list includes examples of model family problems:

- There are not enough items to make up the model family.
  - There are too many items for the model family.
  - There are items from more than one model family.
-

- The model family/group does not exist.

**Line Error (1,A):**

Specify the Line Status Code for the sequence header.

0=No Errors.

1=Errors exist at the line level.

View the line errors when you maintain the items.

**Model Family (10,A):**

Specify the model family for this sequence record.

**Normal/Pilot (1,A):**

Specify 1 if this sequenced record is for a pilot vehicle. The system processes pilot records in exactly the same manner as normal records but ships them separately from normal records.

**Valid choices**

- **0**  
Normal
- **1**  
Pilot

**Job Number (30,A):**

Specify the job number for this sequence record as assigned by the customer.

**Vehicle Number (35,A):**

Specify the vehicle number for this sequence record as assigned by the customer.

**Screen actions - RMS650D1-02****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.

## Sequence number item maintenance, RMS650D2

This program defines the items associated with the sequence number.

Access: 11=Maintain Items, RMS650D1-01

---

### Add or update sequence number item

Use the Sequence Number Item Maintenance screen, RMS650D2-01, to create or maintain the items associated with the sequence number.

#### **Field descriptions - RMS650D2-01**

##### **Item Number (35,A):**

Specify the Item Number of the record to create or maintain.

#### **Screen actions - RMS650D2-01**

##### **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.

### Update sequence number item information

Use the Sequence Number Item Maintenance screen, RMS650D2-02, to maintain detail sequence item number information.

#### **Field descriptions - RMS650D2-02**

##### **Customer (8,0):**

The system displays the customer number of the sequence record to create or maintain.

##### **Ship-To (4,0):**

The system displays the ship-to number of the sequence record to create or maintain.

##### **Model Year (4,0):**

The system displays the model year of the sequence record to create or maintain.

##### **Sequence Number (12,0):**

The system displays the sequence number of the sequence record to create or maintain.

##### **Item Number (35,A):**

The system displays the Item Number of the record to create or maintain.

---



**Customer Item Number (35,A):**

Specify the customer item number for this item. If you do not know the item number, use the Customer Item Number Cross Reference to find it. Shipping and Invoicing always refer to the Customer Item Cross Reference file to determine the Customer Item Number from the Infor ERP LX Item Number. The system verifies this value against the Customer Item Cross Reference table.

**Status (1,A):**

Specify or maintain the status code for the item. Specify one of the following values:

0=Created

2=Selected for Packing

3=Packed

5=Selected for Shipping

6=Shipped

7=Authorized for invoicing by Pay as Built

9=Invoicing Complete

**Line Error (1,A):**

Specify the line error code for the item. Specify one of the following values:

**Valid choices**

- **0**  
No Errors.
- **1**  
No current RMS Release.
- **2**  
No matching Customer Item Number on the Customer Item Number Cross Reference and no Sellers Item Number defined.
- **3**  
Sellers Item Number is an invalid Infor ERP LX Item Number.
- **4**  
No Model Group.

**Packing Group/Line (6,0/3,0):**

Specify the packing group number and line assigned to this item if selected for sequenced shipping.

---

**Packing Group/Line (6,0/3,0):**

Specify the packing group number and line assigned to this item if selected for sequenced shipping.

**Control Number (10,0):**

Specify the control number assigned to this item if selected for sequenced packing release.

**Carton Number (10,0):**

Specify the carton number assigned to this item. This value is assigned during sequenced packing release. You can change this value during sequence packing confirm if this item is consolidated onto a different carton with other items from the same model family.

**Quantity (11,3):**

Specify the required quantity of this item.

**Model Family/Group (10,A):**

Specify the model family and group relating to this item.

**Model Family/Group (10,A):**

Specify the model family and group relating to this item.

**Shipment Date (6,0):**

Specify the date the item was shipped.

**Invoice Number/Price (6,0/13,3):**

Specify the invoice number and unit price assigned by RMS or the customer (less any alpha identifiers in the invoice number) where the item is a pay-as-built customer.

**Invoice Number/Price (6,0/13,3):**

Specify the invoice number and unit price assigned by RMS or the customer (less any alpha identifiers in the invoice number) where the item is a pay-as-built customer.

**Invoice Date (6,0):**

Specify the date of the invoice.

**Dock Gate (35,A):**

Specify the location of the dock to which to ship the item.

---

## Screen actions - RMS650D2-02

### 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.

## Sequenced packing release, RMS660

Use this program to select sequenced packs for shipment by customer, ship-to, model year and either the number of packs and model group or the sequence number and model family and/or model group.

If you specify the criteria for sequenced packing release, Infor ERP LX determines which sequenced records to release.

If you specify a number of packs, Infor ERP LX determines the standard pack size for the model group and calculates the number of records for release. If you only want to release complete packs, Infor ERP LX then determines if sufficient sequence records in the detail file (DSD or Sequence Shipping Detail File) are available for release and that no header or line errors exist on the sequence header.

If insufficient records exist, Infor ERP LX determines the number of complete packs that it can release as being the integer of the number of records available to release divided by the standard pack quantity. It then releases the corresponding number of sequence records on the DSD. If you do not require complete packs, Infor ERP LX releases the lower of the corresponding number of sequence records on the DSD or all available sequence records.

If you specify a last sequence number and want to release only complete packs, Infor ERP LX determines the number of sequences released, that is, the number of records in the DSD available for release. The sequences must meet both of the following conditions:

- No header or line errors exist on the sequence header
- The sequence number is less than or equal to the last sequence number specified plus one standard pack quantity

This ensures that, if possible, the pack containing the last sequence number specified is also released.

Infor ERP LX then determines the number of complete packs that are released as the integer of the number of records released divided by the standard pack quantity. It then releases the corresponding number of sequence records on the DSD. If you do not require complete packs, Infor ERP LX releases all available sequence records in the DSD up to and including the last sequence number specified or the last available sequence record whichever is the lower.

For each pack or partial pack released, Infor ERP LX updates the control number, with the next control number, for all records related to that pack and updates the

---

DSD to Selected for Packing. Infor ERP LX also updates the status on the sequenced header to In Progress. Infor ERP LX increments the DMG by 1 and the process repeats for each pack released.

Infor ERP LX automatically generates a sequenced packing list for the shipment that details the sequences required for each model group and control number. Infor ERP LX lists the sequences in reverse order so that the first item packed, which goes on the bottom of the carton, is the highest sequence, and the last item packed, which goes on the top of the carton, is the lowest sequence number.

Infor ERP LX also creates label data for each piece, also in reverse sequence within model group and control, and model group label data.

## Screens

Sequenced Pack Release (RMS660D-01)

Access: RMS03 menu

## Select packs for shipment

Use the Sequenced Pack Release screen, RMS660D-01, to select packs for shipment.

For the Enter Combination of Values for Pack Slip group of fields, specify one of the following options:

- A number of packs and a model group

or

- A last sequence number and a model family and/or a model group

Specify the following values to release all of the complete packs for a model family that are available for packing:

- Specify 999999999999 in the Last Sequence Number field
- Specify the Model Family
- Leave the Model Group field blank
- Specify Yes for Complete Packs Only

### Field descriptions - RMS660D-01

#### **Customer (8,0):**

Specify the customer number for which you want to release pack slips.

#### **Ship-To Number (4,0):**

If required, specify the ship-to number for which you want to release pack slips.

#### **Model Year (4,0):**

Specify the model year for which you want to release sequences.

---

If you leave this field blank the system defaults the value from the Model Year, on the ship-to address master file or the global address master, if no parameters are defined for the ship-to address master file.

**Normal or Pilot (1,A):**

Specify whether the sequences are releasing for normal production sequences or pre-production pilot sequences. Specify one of the following values:

**Valid choices**

- **0**  
Use this value for normal production sequences. This is the system default value.
- **1**  
Use this value for pre-production pilot sequences.

**Complete Packs Only (1,A):**

Specify whether to release only complete packs. Specify one of the following values:

- 0  
No
- 1  
Yes (Default)

If you select 0 (No), then the system releases all sequences selected even if this results in the last pack being a partial pack. If you select 1 (Yes), then the system only releases complete packs for each model group included in the selection criteria.

**Number of Packs (5,0):**

Specify the number of packs to create. If you specify a value in this field, you must also specify a model group in the next field.

**Model Group (10,A):**

Specify the model group for the packs you want to release.

**Last Sequence Number (12,0):**

Specify the last sequence number released for packing by the system. If you specify a value in this field, you must also specify a model family and/or model group and specify if the packs released are complete packs only.

---

**Model Family (10,A):**

Specify the model family for which you want to release the packs. If only the model family is specified any sequence for this model family that is less than or equal to the last sequence specified in the Last Sequence Number field is released regardless of model group.

**Model Group (10,A):**

Specify the model group for which you want to release the packs.

**Pack Slip Output Queue (10,A):**

Specify a pack slip output queue to print the pack slips.

If you leave this field blank the system defaults the value from the ship-to address master. If no parameter exists for the ship-to address master, the system uses the output queue for the global address master, or the Customer Master.

**Screen actions - RMS660D-01****F6=Accept**

Use F6 to accept the release criteria.

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.

## Sequenced packing confirm, RMS665

Use this program to distinguish sequenced and non-sequenced stock of the same item by maintaining a separate inventory for sequenced stock in a user-specified logical warehouse. Sequenced Packing Confirm notifies the system that the sequenced stock is available for shipping and processes the associated inventory movements.

Infor ERP LX uses stock from the default user-defined stock locations for each item, where defined, or uses the standard allocation logic unless you override it. The system adjusts the stock that it uses out of the warehouse/location/lot/container specified and into a sequenced warehouse/location/lot and/or container after sequenced packing confirmation.

In addition, you can consolidate two or more model groups into a single pack to optimize each pack.

You can remove one or more items from the sequenced pack prior to packing confirm where either the customer or the supplier experiences a production issue with that item.

---

## Screens

Sequenced Pack Confirm - Selection (RMS665D1-01)  
Sequenced Pack Confirm - Details (RMS665D2-01)  
Sequenced Pack Confirm Item Selection (RMS665D3-01)  
Packing Stock Selection (RMS665D4-01)  
Stock Selection Window (RMS665D5-01)  
Access: RMS03 menu

## Maintain pack information

Use the Sequenced Pack Confirm screen, RMS665D1-01, to specify the model group and control number for the pack being confirmed and optionally specify another model group and control number to consolidate with this pack to maximize each pallet. The model group and control number used for consolidation must be confirmed and available for shipping. Once selected from this screen, Infor ERP LX protects the packs from selection by another workstation.

### Field descriptions - RMS665D1-01

#### **Model Group (10,A):**

Specify the model group to confirm the pack.

#### **Control Number (10,0):**

Specify the control number to confirm the pack. The status of the model group and control number specified must be 2, Selected for Packing. If the Model Group and Control Number are not at this status, the system displays an error message:

#### **Pack with Model Group :**

To pack multiple model groups together, specify the previously packed model group and control number with which you want to consolidate this shipment. The pack with model group and control number must be at status Packed. Use F14 to automatically insert the last Model Group and Control Number packed during this program.

#### **Control Number (10,0):**

To pack multiple model groups together, specify the previously packed model group and control number with which you want to consolidate this shipment. The pack with model group and control number must be at status Packed. Use F14 to automatically insert the last Model Group and Control Number packed during this program.

---

### Screen actions - RMS665D1-01

#### **F14=Default Last Model Group/Control Number**

Use F14 to insert the last model group and control number packed during this session in the Pack with Model Group and Control Number fields.

#### **F15=Delete Pack**

Use F15 to reset the status, for all the sequences related to this model group and control number to 0. The sequences are then available for reprocessing through packing release if required. The system does not reset the next control number for the model group. If you do not reset the control number manually, where appropriate, control numbers are not consecutive.

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.

## Sequenced pack confirm, RMS665D2

The sequenced packing confirmation program selects the inventory you require to create a sequenced pack.

### Select pack details

Use the Sequenced Pack Confirm screen, RMS665D2-01, to specify the pack details. Infor ERP LX displays any errors in your inventory selections. You can confirm the pack or review the inventory selected to correct any errors or make necessary amendments.

Select the inventory at item level. The same item can occur multiple times within a control number. In such a case, each occurrence is a different sequence number.

Infor ERP LX creates records in the Pack Build Work file to indicate the location from which you selected the stock. Infor ERP LX can create the following record layouts:

- A header record at item level for display in Sequenced Pack Confirm Item Selection (RMS665D3-01)
  - One or more detail level records for each header at warehouse/location/lot/container level for display in Packing Stock Selection (RMS665D4-01) and for use in the RMS665B batch program that creates inventory transactions
-



### Field descriptions - RMS665D2-01

#### To Warehouse

This field defaults to the Sequence Ship From Warehouse on the Ship-to Address master or the Sequence Ship From Warehouse on the Customer master.

#### To Location (10,A):

Specify the location in which the sequenced pack is located prior to shipment. The location must be valid for the To Warehouse. This field is display only if this model group and control are consolidated with another model group and control number.

#### Packer ID (10,A):

The system defaults the user as the Packer ID but you can override the ID.

### Screen actions - RMS665D2-01

#### F14=Accept with Changes

Use F14 to display the Sequenced Pack Confirm Item Selection screen, RMS665D3-01 to override the default warehouse/location/lot/container defined for each item on the Model Group Item Maintenance, or selected by the system using standard allocation logic, prior to pack confirm processing. If any allocation errors exist, you can take corrective action prior to processing the pack confirm. 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.

## Sequenced pack confirm item selection, RMS665D3

The Sequence Pack Confirm Item Selection screen, RMS665D3-01, enables you to correct errors that occurred during selection of inventory to fulfill pack requirements.

Access: F14=Accept with Changes from screen (RMS665D1-02)

### Add or update items

Use this screen to delete items from or add items to the pack you are confirming.

### Field descriptions - RMS665D3-01

#### Line actions:

The following line actions are available:

---

**12=Select Inventory**

Display the Packing Stock Selection screen, RMS665D4-01.

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

**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.

**Item Number:**

Specify the pack item number.

**Screen actions - RMS665D3-01****F15=Select Inventory for ALL & Process**

Use F15 to assign line action 12 to all records and to display the Sequence Pack Confirm - Detail screen, RMS665D2-01 for the first record.

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.

## Packing stock selection, RMS665D4

Use this program to select the stock that matches the sequenced pack requirements. Infor ERP LX displays any stock already located. You can amend the stock, specify new data to select the stock, or use the stock selection window to select stock.

The system displays the selected inventory. For example if inventory from three locations satisfies the item quantity then Infor ERP LX adds three lines where the sum of the quantity equals the item quantity. This assumes that sufficient inventory is available.

Access: Action code 12=Select Inventory screen (RMS665D3-01)

F15=Select Inventory from screen (RMS665D3-01)

### Add or update stock selection for sequence packing

Use the Packing Stock Selection screen, RMS665D4, to add or update stock to meet the sequenced packing requirements.

The screen displays the default warehouse and location as defined on the Model Group Item Maintenance file for the item you are processing. If the item is lot or container controlled, the screen displays the default values as defined on the Model Group Item Maintenance file. If the defaults are undefined, Infor ERP

---

LX uses the standard allocation logic to determine the warehouse, location, lot, and container.

To override the system defaults, you can use F14 to select stock for the sequenced pack.

#### **Field descriptions - RMS665D4-01**

##### **Model Family (10,A):**

The system displays the model family that is pack confirmed.

##### **Model Group (10,A):**

The system displays the model group that is pack confirmed.

##### **Control Number (10,0):**

The system displays the control number related to the model group. The status of the model group and control number specified must be 2, (Selected for Packing).

##### **Item Number (35,A):**

The system displays the item number for this model group.

##### **Item Description (50,A):**

The system displays the item description for the Item Number.

##### **Item Quantity (15,3):**

The system displays the quantity required to meet packing requirements.

##### **Outstanding Quantity (15,A):**

The system displays the quantity remaining in inventory that is available to meet packing requirements. If an insufficient quantity exists, the system displays a quantity outstanding. You can use F14 to select available stock and override the outstanding quantity.

##### **Model Year (4,A):**

The system displays the model year of the item for this model group.

##### **Begin Sequence (12,A):**

The system displays the beginning sequence number selected for packing.

##### **End Sequence (15,A):**

The system displays the ending sequence number selected for packing.

---

**To Warehouse (3,A):**

The system displays the warehouse the items are shipped to.

**To Location (10,A):**

The system displays the code identifying the location of the warehouse.

**Warehouse (3,A):**

The screen displays the default warehouse for the item. You can override the warehouse to select stock for the sequenced pack. This field is inactive if the item is container controlled.

**Location (10,A):**

The screen displays the default location for the item. You can override the location to select stock for the sequenced pack. This field is inactive if the item is container controlled.

**Lot Number (25,A):**

The screen displays this column if the item is lot controlled. You can override the lot to select stock for the sequenced pack. This field is active if the item is lot controlled but not container controlled. If the item is both lot and container controlled, the field is inactive.

**Container Number (10,A):**

The screen displays this column if the item is container controlled. You can override the container to select stock for the sequenced pack.

**Quantity (11,3):**

The system displays the quantity of the item taken from this warehouse/location/lot/container to create the sequenced pack. If the warehouse/location/lot/container are fully defined on the Model Group Item Maintenance file, the system adjusts all requirements for this item from this warehouse/location/lot/container regardless of available stock. Stock can be a negative quantity. If the warehouse/location/lot/container are not fully defined the system uses standard allocation logic and available stock to create the pack. If insufficient stock is available then an Outstanding Quantity exists. You can override the quantity.

**Screen actions - RMS665D4-01****F14=Available Stock**

Use F14 to display the Stock Selection Window screen, RMS665D5-01.

---

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.

## Stock selection window, RMS665D5

Use this program to select stock by location.

The program displays locations that contain stock for the relevant item with the following exceptions:

- Locations in sequenced warehouses
- Inactive lots, if the item is lot controlled
- Non-allocatable warehouses
- Locations and warehouses to which you do not have authority.

The locations are from the location inventory or container control files depending on the item type.

Access: F14=Available Stock from screen, RMS665D4-01.

### Select stock by location

Use the Stock Selection Window, RMS665D5-01, to display and select the stock of the item available for sequence packing. The screen displays the available stock in warehouse/lot/location/container sequence. The screen does not include available stock in Sequenced Warehouses.

#### Field descriptions - RMS665D5-01

##### **Warehouse (3,A):**

Specify the warehouse from which to remove this item to create the sequenced pack. If the item is container controlled, you cannot specify a warehouse.

##### **Lot Number (25,A):**

Specify the lot for this item to create the sequenced pack. This field is active if the item is lot controlled but not container controlled.

##### **Location (10,A):**

Specify the location from which to remove this item to create the sequenced pack. This field is active if the item is not container controlled.

##### **Container Number (10,A):**

Specify the container from which to remove this item to create the sequenced pack. The system displays this column if the item is container controlled.

---

## Screen actions - RMS665D5-01

### 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.

## Sequenced pick release, RMS670

Use this program to select sequenced packs for shipment by customer, ship-to, model year, and either the number of packs and model group, or through a sequence number and model family and/or model group. Use this program in place of pick release ORD550D1 for sequenced shipments. Sequenced Pick Release triggers any pick release documents associated with the order classes processed.

Specify the criteria for sequenced pick release and the system determines which sequenced records to select for the release.

If you specify more than one pack, the system selects the next model groups, control numbers, and corresponding sequences with status Packed. The system also selects any model groups/control numbers/sequences that are consolidated with a model group/control number/sequence already selected as sequenced packs that cannot be partially released for shipping.

If you specify a last sequence number, the system selects all sequences less than or equal to the last sequence number specified with status Packed. The system also selects any remaining sequences from the last model group and control number selected as well as any model groups/control numbers/sequences that are consolidated with a model group/control number/sequence already selected as sequenced packs cannot be partially released for shipping.

You can create a new shipment or add the sequenced packs released for shipment to an existing Load or Load and Shipment Number. If you add the sequenced packs to an existing Load/Shipment, that Load/Shipment must be for the same customer/ship-to for which sequenced packs are shipped and not yet confirmed.

You can create a new shipment order to represent the items and quantities being shipped and reduce the original orders created during release conversion by the quantities picked. Infor ERP LX compares the order headers for each order number to ensure that the following load consolidation fields are consistent across all order headers:

- Carrier
  - Route
  - Means of Transport
  - Freight Terms Code
  - Shipping Zone
-

- Delivery Terms
- Order Class

If the base order class on any of the order headers is not 010 and Match Packing Group/Invoice on the customer parameters is Yes, then the following invoice consolidation fields must also be consistent across all headers:

- Transaction Currency
- Reason Code
- A/R Customer
- Payment Type
- Use Order Type
- Document Prefix
- Invoice to Customer
- Invoice to Number
- Exchange Rate
- Global Exchange Rate
- Customer Exchange Rate

If any load or invoice consolidation fields are not consistent across all headers, or there is one or more orders with an insufficient open order quantity, then Infor ERP LX generates an error report that details the selection criteria and the order header details, and no further processing occurs. If no errors exist, the pick release processing continues.

The system can receive an EDI message to determine the contract number to use for the customer and ship-to, and to determine the original order number and the PO number for each item and contract on the shipment. In addition, the system also determines the order class, the order type, the currency, and the ship from warehouse for the first item and contract being processed. The PO number on the order header is blank, but all other header details are defaulted from the customer master.

The system then determines the earliest open order line awaiting pick release for each original order associated with the shipment to determine the price and inbound delivery reference for the new shipment order line. If no open order lines exist, the system determines the current price, if any, from special pricing, and the inbound delivery reference is blank. Infor ERP LX reduces the order quantity on the earliest open order line and subsequent order lines for the original order, as required, for the quantity being pick released. Where Infor ERP LX reduces the original order line quantity to zero, it deletes the order line. Infor ERP LX does not reduce the original order line quantity to less than zero even if insufficient open order lines awaiting pick release are available. Where more than one order line per original order is adjusted by the quantity picked, the system creates one order line on the new shipment order for each combination of customer item number/price/inbound delivery number processed and sum the associated order quantities.

If the order numbers selected for Sequences Pick Release already exist on the Packing Group, then the load and invoice consolidation fields must be consistent. Order numbers that do not already exist on the Packing Group must be consistent

---

with each other and with an existing order on the packing group using the previous rules.

Infor ERP LX retrieves the picker number from the Warehouse master file and increases it by 1 for the warehouse being processed. Infor ERP LX creates IPP records for each order line selected during the order consolidation validation and the quantity picked on the last order line selected. The IPP record reflects the balance required. The IPP load policy flag is set to 1 irrespective of the value defined on the address/customer master.

For each original order line processed the system determines if allocation records exist. Where allocations do exist the system reduces the allocations by the quantity selected for picking using the standard allocation logic in reverse. The system then creates records for the new shipment order and line for the inventory that is selected for sequenced pick release. One record is created for each item/warehouse/lot/location/container from which inventory is allocated where the quantity allocated is a summation of the requirements from that stock location. The system ensures that no batch allocation processing is carried out for sequenced shipments by forcing the allocations required flag to No.

The system automatically creates records for the sequenced packs being released. Where model groups are consolidated for pack utilization only one carton is created per consolidation number.

Back order, credit checking, consolidation logic, and batch allocation processing for sequenced pick release is the same as for regular pick release.

Infor ERP LX calls the Sequence Carton Build server program instead of OLM559B3 to build carton records for sequenced pick release. Sequenced carton records are always generated regardless of the Auto Create Packaging Flag on the Address/Customer master files.

## Screens

Sequenced Pick Release - Selection (RMS670D1-01)

Sequenced Pick Release (RMS670D2-01)

Access: RMS03 menu

## Create sequenced pick release

Use the Sequenced Pick Release - Selection screen, RMS670D1-01, to define the items for the sequenced pick release.

Specify one of the following combinations of values for pick release:

- A number of packs and a model group, or
- A last sequence number and a model family and/or a model group

The program selects any additional model group/control number consolidated with a sequence.

---



**Field descriptions - RMS670D1-01****Warehouse (3,A):**

Specify the warehouse for which a sequenced shipment is created. The warehouse must be a valid sequenced warehouse (for example, Warehouse type = 2).

**Customer (8,0):**

Specify the customer number for whom a sequenced shipment is created.

**Ship-To Number (4,0):**

Specify the ship-to number, if contracts are held at ship-to level, for which a sequence shipment is created.

**Model Year (4,0):**

Specify the model year for which sequenced packs are released for shipment. If you do not enter a value, the system defaults the value from the Model Year on the Customer master.

**Normal or Pilot (1,A):**

Specify whether the sequences are releasing for normal production sequences or pre-production pilot sequences. Specify one of the following values:

**Valid choices**

- **0=Normal**  
0=Normal production sequences. This is the system default value.
- **1=Pre-production**  
1=Pre-production pilot sequences.

**Number of Packs (5,0):**

Specify the number of packs released for shipment. If you specify a value is in this field you must also specify a model group in the next field.

**Model Group (10,A):**

Specify the model group for which the packs, specified in the previous field, are released for shipment.

**Last Sequence Number (12,0):**

Specify the last sequence number released for shipment by the system. If you specify a value in this field you must also specify a model family and/or model

---

group. If the sequence number you specify here is part way through a sequenced pack, the system selects the entire pack.

**Model Family (10,A):**

Specify the model family for which packs are released for shipment. If only the model family is specified any pack containing a sequence less than or equal to the last sequence specified in the Last Sequence Number field is released for shipment regardless of model group.

**Model Group (10,A):**

Specify the model group for which packs are released for shipment.

**Ship Date (6,0):**

The system date is the default ship date but you can override it. The system uses this value as the ship date if a new shipment is created.

**Ship Time (4,0) :**

Specify the expected shipment time for the requirements that are to be sequenced pick released. The time defaults to 00:00 but you can change it. Infor ERP LX saves this time as XX.XX.XX. In the time on the screen, the system assumes the seconds are 00.

**Add to Packaging Group Number (8,0):**

Specify the packaging number to which you want to add this sequence pick release if you are not creating a new shipment. The packing group number must be a valid packing group number for the same warehouse, customer, and ship-to and not released.

**Screen actions - RMS670D1-01**

**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.

## Sequenced pick release, RMS670D2

Use the sequenced pick release program, to select or de-select packs included in the shipment.

Note: If you select or deselect a consolidated pack, all other packs associated with that consolidation are automatically selected or de-selected.

---

Access: F6 from screen Sequenced Pick Release (RMS670D1-01)

## Display and update sequenced pick release selections

Use the Sequenced Pick Release screen, RMS670D2-01, to display the packs that meet the selection criteria that you entered on the Sequenced Pick Release screen, RMS670D1-01. You can select or deselect the packs to include in the shipment.

### Field descriptions - RMS670D2-01

#### 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.

#### 11=Select

Re-select a previously de-selected pack. The status changes to \*.

#### 13=De-select

Select or exclude a pack from the shipment. The status of the sequences contained within the pack remain as 3, Packed, and the pack is not included in the current shipment. The status on the screen changes to -.

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

### Screen actions - RMS670D2-01

#### 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.

## Sequenced pack location transfer, RMS675

Use this program to print a report detailing sequenced pack status by model family, model group, and status.

### Screens

Sequenced Pack Location Transfer, RMS675D-01

---

## Transfer sequenced pack

Use the Sequenced Pack Location Transfer screen, RMS675D-01, to enter the model group, control number and the new location for the sequenced pack. When you submit the job, the system transfers all of the stock associated with the sequenced pack from the current location to the new location.

If the model group and control number specified represent a sequenced pack that is consolidated with one or more additional model groups, the system also transfers the stock associated with the consolidated model groups and control numbers. You can transfer from one location to another within the sequenced from warehouse only where the status of the model group and control number is 3, packed.

The system creates T transactions in Inventory Transaction file (ITH) for each item moved and updates the location for all associated sequences to the new location. Following the transfer, the system generates an audit report that details the model group, control numbers and items transferred, as well as the from and to locations.

Access: RMS03 menu

### Field descriptions - RMS675D-01

#### **Model Group (10,A):**

Specify the model group that you are transferring.

#### **Control Number (10,0):**

Specify the control number that you are transferring. The status of the model group and control number specified must be 3, Packed.

#### **To Location (10,A):**

Specify the location in which you are transferring the sequenced pack. The location must be a valid location for the warehouse in which the model group and control number is currently located.

### Screen actions - RMS675D-01

#### **F6=Accept**

Use F6 to accept the transfer.

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 sequence shipping interface, RMS740

Use this program to control the load of sequence shipping messages from the ECM Data Dock into the RMS files. Infor ERP LX checks for logical errors in the specified parameters but does not validate the data.

### Screens

EC Sequenced Shipping Interface, RMS740D-01

### Load sequence shipping messages

Use the EC Sequenced Shipping Interface screen, RMS740D-01, to enter the range of customers and other parameters that define the message upload.

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 - RMS740D-01

##### **Customer Number (From) (8,0):**

Specify a valid range to limit the customer numbers to include in the process.

##### **Customer Number (To) (8,0):**

Specify a valid range to limit the customer numbers to include in the process.

##### **Ship To (From) (4,0):**

Specify a valid range to limit the ship-to included in the process.

##### **Ship To (To) (4,0):**

Specify a valid range to limit the ship-to included in the process.

##### **Process New, Retry, or Both (1,0):**

This field controls which records the system attempts to load into the RMS system. Specify one of the following values:

1

The system loads only records received since the last time the program ran. This is the system default value.

2

The system loads only records that failed validation from a previous process.

3

---

The system loads both new and failed records since the last time the program processed.

**Purge Invoiced Sequences (1,0):**

Specify whether to purge sequence shipping records invoiced from the sequence shipping files.

**Valid choices**

- **0**  
The system does not purge invoiced records. This is the system default value.
- **1**  
The system purges invoiced records.

**Purge Records Older Than XX Days (3,0):**

Specify a quantity of days if the records are expired. The system purges the sequence shipping records from the sequence shipping files. The system default value is 999.

**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 - RMS740D-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.

## Process inbound pay as built, RMS750D

Use this program to control the load of Pay As Built messages from the ECM Data Dock into the RMS files. Infor ERP LX checks for logical errors in the specified parameters but does not validate the data.

### Screens

RMS Inbound ECM Pay As Built, RMS750D-01

---

## Load pay as built messages

Use the RMS Inbound ECM Pay As Built screen, RMS750D-01, to enter the range of customers and other parameters that define the message upload.

### Field descriptions - RMS750D-01

#### **Customer Number (From) (8,0):**

Specify a valid range to limit the customer numbers to include in the process.

#### **Customer Number (To) (8,0):**

Specify a valid range to limit the customer numbers to include in the process. The system default value is 999999.

#### **Ship To (From) (4,0):**

Specify a valid range to limit the ship-to included in the process.

#### **Ship To (To) (4,0):**

Specify a valid range to limit the ship-to included in the process. The system default value is 9999.

#### **Process New, Retry, or Both (1,0):**

This field controls which records the system attempts to load into the RMS system. Specify one of the following values:

1

The system loads only records received since the last time the program processed. This is the system default value.

2

The system loads only records that failed validation from a previous process.

3

The system loads both new and failed records since the last time the program processed.

#### **Purge Invoiced Records (1,0):**

Specify whether to purge Pay As Built records invoiced from the Pay As Built files.

#### **Valid choices**

##### ■ 0

The system does not purge invoiced records. This is the system default value.

---

- **1**  
The system purges invoiced records.

**Purge Records Older Than XX Days (3,0):**

Specify a number of days for expired records. The system purges the sequence shipping records from the sequence shipping files. The system default value is 999.

**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 - RMS750D-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.

## RMS inbound self billing, RMS760

Use this program to compare the self billing invoice messages in the ECM data dock with the receipt confirmation messages in the ECM data dock. Infor ERP LX produces a report that list any differences. Infor ERP LX checks for logical errors in the specified parameters but does not validate the data.

### Screens

RMS Inbound Self Billing, RMS760D-01

### Print an inbound self billing report

Use the RMS Inbound Self Billing screen, RMS760D-01, to enter a range of customers to include in the report.

**Field descriptions - RMS760D-01****Customer Number (From) (8,0):**

Specify a range of values to limit the customer numbers to include in the report.

---



**Customer Number (To) (8,0):**

Specify a range of values to limit the customer numbers to include in the report.

**Ship To (From) (4,0):**

Specify a range of values to limit the ship-to numbers to include in the report.

**Ship To (To) (4,0):**

Specify a range of values to limit the ship-to numbers to include in 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 - RMS760D-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.

## Inbound RMS releases interface, RMS770

Use this program to control the load of release messages from the ECM Data Dock into the RMS files. Infor ERP LX checks for logical errors in the specified parameters but does not validate the data.

### Screens

Inbound RMS Releases Interface, RMS770D-01

### Load release messages from ECM

Use the Inbound RMS Releases Interface screen, RMS770D-01, to specify criteria to control the load of release messages.

**Field descriptions - RMS770D-01****Customer Number (From) (8,0):**

Specify a range of values to limit the customer numbers to include in the process.

---

**Customer Number (To) (8,0):**

Specify a range of values to limit the customer numbers to include in the process.

**Ship To (From) (4,0):**

Specify a range of values to limit the ship-to numbers to include in the process.

**Ship To (To) (4,0):**

Specify a range of values to limit the ship-to numbers to include in the process.

**Process New, Retry, or Both (1,0):**

This field controls which records the system attempts to load into the RMS system. Specify one of the following values:

1

The system loads only records received since the last time the program processed. This is the system default value.

2

The system loads only records that failed validation from a previous process.

3

The system loads both new and failed records since the last time the program processed.

**Releases Exceeding Tolerances**

Specify one of the following values:

1

The system holds the releases that exceed the tolerances and does not process them.

2

The system does not hold the releases that exceed the tolerances, but processes them.

**Run Comparison Report**

Specify one of the following values:

**Valid choices**

■ 1

The system produces a Comparison Report.

■ 0

The system does not produce a report.

---

**List Releases**

This field controls whether the program generates a report for the processed releases. Specify one of the following values:

**Valid choices**

- **0**  
The program does not generate a report.
- **1**  
The program generates a report with the updated releases.
- **2**  
The program generates a report with the releases not updated.
- **3**  
The program generates a report with all the releases.

**Run RMS Conversion**

Specify whether to enable the Release Conversion program, RMS550, to automatically convert releases into Infor ERP LX orders after RMS770 produces the inbound release data. Specify one of the following values:

**Valid choices**

- **0**  
The system does not automatically run a release conversion.
- **1**  
The system automatically runs a release conversion.

**Period 1 Percentage (3,0)**

This value controls the threshold level by which a release quantity must increase in order to be held and excluded from processing during Period 1. For the release to be held, Releases Exceeding Tolerances must be 1.

**Period 1 Days**

This value defines the length of Period 1 in days from today's date.

**Period 2 Percentage**

This value controls the threshold level by which a release quantity must increase in order to be held and excluded from processing during Period 2. For the release to be held, Releases Exceeding Tolerances must be 1.

**Period 2 Days**

This value defines the length of Period 2 in days from today's date.

---

**Period 3 Percentage**

This value controls the threshold level by which a release quantity must increase in order to be held and excluded from processing during Period 3. For the release to be held, Releases Exceeding Tolerances must be 1.

**Period 3 Days**

This value defines the length of Period 3 in days from today's date.

**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 - RMS770D-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.

## Inbound RMS JITs interface, RMS775

Use this program to control the load of JIT messages from the ECM Data Dock into the RMS files. Infor ERP LX checks for logical errors in the specified parameters but does not validate the data.

### Screens

Inbound RMS JITs Interface (RMS775D-01)

### Load JIT messages from ECM

Use the Inbound RMS JITs Interface screen, RMS775D-01, to specify criteria to control the load of JIT messages from ECM.

**Field descriptions - RMS775D-01****Customer Number (From) (8,0):**

Specify a range of values to limit the customer numbers to include in the process.

**Customer Number (To) (8,0):**

Specify a range of values to limit the customer numbers to include in the process.

---

**Ship To (From) (4,0):**

Specify a range of values to limit the ship-to numbers to include in the process.

**Ship To (To) (4,0):**

Specify a range of values to limit the ship-to numbers to include in the process.

**Process New, Retry, or Both (1,0):**

This field controls which records the system attempts to load into the RMS system. Specify one of the following values:

1

The system loads only records received since the last time the program processed. This is the system default value.

2

The system loads only records that failed validation from a previous process.

3

The system loads both new and failed records since the last time the program processed.

**List JITs (1,0):**

This field controls whether the program generates a report for the processed releases. Specify one of the following values:

**Valid choices**

- **0**  
The program generates a report.
- **1**  
The program generates a report with the updated releases.
- **2**  
The program generates a report with the releases that are not updated.
- **3**  
The program generates reports for updated releases and for releases that are not updated.

**Run RMS Conversion (1,0):**

Specify a value to enable the Release Conversion program, RMS550, to automatically run after the system processes the inbound release data to convert JITs into Infor ERP LX orders. Specify one of the following values:

---

**Valid choices**

- **0**  
The system does not automatically run a release conversion.
- **1**  
The system automatically runs a release conversion.

**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 - RMS775D-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.

## Update item family percentages, RMS910

Use this program to calculate item family percentage contribution.

This program calculates the actual percentage contribution of each item to the item family based on average monthly usage. Infor ERP LX calculates average monthly usage during Inventory Month End Close (INV900) using MTD issues and the alpha smoothing factor defined in the system parameters. As a result, the update item family percentages run immediately following inventory month end. The program sums the average monthly usage for all items in the family and calculates the percentage contribution of each item.

### Screens

Update Item Family Percentage, RMS910D-01

Access: RMS01 menu

### Run the update item family percentages calculation

Use the Update Item Family Percentage screen, RMS910D-01, to submit the job to calculate the item family percentages.

This screen contains no data input fields.

---

## Screen actions - RMS910D-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.

## Reset contract in-use flag, RMS911

Use this program to reset the in use flag for a contract/release.

### Screens

Reset Contract In-use Flag, RMS911D-01

Access: Menu XPA SYS SYS01

### Specify contract information

Use the Reset Contract Inuse Flag screen, RMS911D-01, to specify the customer and contract to reset.

### Field descriptions - RMS911D-01

#### Customer:

Specify the customer number for the contract/release for which to reset the in use flag.

#### Ship To:

Specify the ship to number for the contract/release for which to reset the in use flag.

#### Item Number:

Specify the item number for the contract/release for which to reset the in use flag.

#### Contract:

Specify the contract number, if one exists, for the contract/release for which to reset the in use flag. This field is optional.

---

### Screen actions - RMS911D-01

#### **F6=Accept and Exit**

Use F6 to submit the job to reset the contract in use flag and exit the program.

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.

## Reorganize contract orders selection, RMS920D

Use this program to select contracts for manual reorganization.

### Screens

Re-Organize Contract Orders Selection (RMS920D-01)

Re-organize Contract Orders List (RMS920D-02)

Access: RMS01 menu

### Select contract orders for reorganization

Use the Re-Organize Contract Orders Selection screen, RMS920D-01, to specify the range of sales parents, item numbers, and so forth, to include in the reorganization.

You can include contracts that are close to the maximum number of lines and contracts over the maximum number of lines. If both Select Contracts Close to the Max Lines and Select Contracts Over the Max Lines are set to No, the program selects all the contracts within the selection range that include orders. If both options for selecting contracts are set to Yes, the program selects contracts within the selection range that include orders within max lines of 600 or more.

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 - RMS920D-01

#### **Sales Parent (From) (8,0):**

Specify a range of values to limit the sales parents to include in the process.

#### **Sales Parent (To) (8,0):**

Specify a range of values to limit the sales parents to include in the process.

---



**Customer Number (From) (8,0):**

Specify a range of values to limit the customer numbers to include in the process.

**Customer Number (To) (8,0):**

Specify a range of values to limit the customer numbers to include in the process.

**Ship To (From) (4,0):**

Specify a range of values to limit the ship-to numbers to include in the process.

**Ship To (To) (4,0):**

Specify a range of values to limit the ship-to numbers to include in the process.

**Item Family (From) (15,0):**

Specify a range of values to limit the item families to include in the process.

**Item Family (To) (15,0):**

Specify a range of values to limit the item families to include in the process.

**Item Number (From) (4,0):**

Specify a range of values to limit the item numbers to include in the process.

**Item Number (To) (4,0):**

Specify a range of values to limit the item numbers to include in the process.

**Contract Number (From) (15,0):**

Specify a range of values to limit the contract numbers to include in the process.

**Contract Number (To) (15,0):**

Specify a range of values to limit the contract numbers to include in the process.

**Select Contracts Close to the Max Lines (1,0):**

Specify Yes to include only contracts with orders that are within 600 lines of the max lines. Otherwise, specify No.

**Select Contracts Over the Max Lines (1,0):**

Specify Yes to include only contracts with orders that are over the max lines. Otherwise, specify No.

---

**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 - RMS920D-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.

**Reorganize contract orders list**

The Reorganize Contract Orders List screen, RMS920D-02, displays the contracts that meet your selection criteria. Use a line action to display or select contracts to include or exclude for processing.

**Field descriptions - RMS920D-02****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. The following actions are available:

**16=Include**

Mark the selected contract to include it for processing.

**17=Exclude**

Mark the selected contract to exclude it from processing.

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.

**Customer Number (8,0):**

The system displays the sold to customer number on the selected contract.

**Ship To (4,0):**

The system displays the ship to address number on the selected contract.

**Item Number (4,0):**

The system displays the item number on the selected contract.

---

**Contract Number (15,0):**

The system displays the RMS contract number on the selected contract.

**Exclude (1,0):**

The value in this field determines whether or not the program excludes a contract from processing. The screen displays one of the following values:

**Valid choices**

- **0**  
The program will process the contract.
- **1**  
The program will exclude the contract from processing.

**Order (8,0):**

The system displays the order number on the selected contract.

**Lines (4,0):**

The system displays the number of lines on the order for the selected contract.

**Screen actions - RMS920D-02****F6=Accept**

Use F6 to accept selected contracts for processing.

**F16= Include All**

Use F16 to select all contracts as available for processing.

**F17=Exclude All**

Use F17 to select all contracts excluded from processing.

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.

---



---

# Appendix A

## Glossary



### 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.

---



---

# Index

**(Y/blank), 1-7**

**A/R, A/P, 1-7**

**Alphanumeric, 1-8**

**Cumulatives (CUMS), 2-5**

**Customer Supplied KANBAN and RAN**

**Information:, 2-5**

**Demand Reconciliation Methods, 2-5**

**Extreme values by default, 1-8**

**Ranges, 1-1**

**Reference only, 1-9**

**Retroactive Invoicing, 2-6**

**Shipping Lead Time, 2-6**

