Advanced Process Industries
Run Instructions

Change History

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Chapter 1
Introduction to Infor LX

1

Overview of Infor LX

This topic contains information that pertains to all applications of the Infor 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 LX

Navigation

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

Menus

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

Dates

Infor LX includes full support for dates up to and beyond the year 2000. Although most date fields display six characters, Infor 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 LX screen, press the Esc key.

The Webtop user interface uses the Quick Access icon to directly access programs. On an Infor 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 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 LX automatically retrieves this value from remember key memory. Infor LX updates this value on a continual basis.
- 1. Infor LX automatically retrieves the value you specify in Display Remembered Keys, SYS080. It does not update the value from any other program.
- 2. Infor 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 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 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 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 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 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 Warehouse Master Maintenance, INV110, you can display all records by warehouse or active records by warehouse or active records by description. Some filter screens provide sort or sequence options.

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 LX menus

This section describes the menus in Infor LX.

ERPLX main menu

The ERPLX Main Menu is the first of five master menus. You can access the four major Infor 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 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 LX manufacturing applications. Specify the application fast path code to access the desired Infor LX application menu.

Supply chain management master menu

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

Cross-product application menu

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

Commonly used terms in Infor LX

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.

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 defaults values or any other values specified to designate a range do not have to be valid values in a database file.

(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.

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 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 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.

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 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

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 ACP150.

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.

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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.

Chapter 2
API Overview

2

General Overview

This document contains the following sections:

System functions

This section contain information about the functions you can perform within API.

Run instructions overview

This section contains overview information on the screens you can access in API.

Programs

This section describes the individual programs and screens within the API application.

System functions

The System functions section describes major functions offered by the Advanced Process Industries application.

Potency

In a process environment, an ingredient's physical quantity may not adequately define the true quantity of the ingredient. The ingredient may have a potency that relates its physical quantity to the theoretical quantity of the ingredient.

For example, one component can be a solution that is 50% w/w sodium hydroxide. If sodium hydroxide is the active ingredient, you can define this component as having a potency of 50%.

The potency function is critical when the ratio of theoretical-to-physical quantity varies from lot to lot. The system compares the potency of a lot to the standard potency of the ingredient, which you define in the IDF Enterprise Item, to determine the physical quantity of the lot needed to meet formula requirements for the parent item. An item is a potency item when the standard potency percentage is

not zero. Specify a number in the Standard Potency % field to activate the potency functionality for this item throughout the system.

Potency is the ratio of the theoretical to the physical quantity expressed as a percentage.

Potency percentage = [(theoretical quantity/physical quantity) x 100]

The activity percentage ranges from .0001 to 999.9999.

If the potency and physical quantity of a lot is known, the theoretical quantity can be expressed with the following equation:

Theoretical quantity = [physical quantity x (lot potency %/100)]

If a shop order requires a potency item, the system expands the theoretical quantity by the order size, compared to the formula. The physical quantity of the activity material, if allocated by Infor LX is expressed as the following equation:

Lot phys qty = [(std potency %/lot potency %) x std phys qty order size]

You can set Batch Balancing, which adjusts compensating ingredients based on the potency of active ingredients on a Bill of Materials, at the system level in Advanced Process Industries Parameters, API820D-01. You can set usage of a potency item or a lot-controlled item to physical or theoretical quantity at the item level in the IDF Enterprise Item. You can stock the item in physical or theoretical quantities. After you define the method, Infor recommends that you not change it. The system currently does not recalculate inventory quantities if you change the method.

You can define an alternate unit of measure for each item to enter transactions for that item in the alternate mode. If you define the item in physical units, you can enter transactions in theoretical units with the alternate unit of measure label or the reverse. The system factors quantity by lot potency, if it is defined, or by standard potency to convert the transaction quantity to the reporting unit of measure.

Unit of measure conversions

Use the Unit of Measure conversion program to create unit of measure conversions for batch balancing applications. The system stores the conversion factors in the same file.

You must set up the conversion factors between the batch balancing U/M in the Parent Item Master Record and the stock U/M in the Component Item Master record before you perform batch balancing. You can set up global, leave the Item Number field blank on the Unit of Measure Maintenance screen API120D2-01, and item-by-item conversion factors.

The system does not link global units of measure to a specific item. Global units of measure should define standard conversions such as pounds to kilograms. You can link conversion factors to individual items to incorporate density or specific gravity in the conversion factor for that item.

Usage codes

You can create and maintain usage codes through the Usage Type Code Maintenance program, API110. Each usage code sets two fields to determine whether the system does one of the following tasks:

- Includes the component in the batch weight calculations if it performs batch balancing calculations
- Uses and adjusts the component to compensate for variations in the physical quantity of the active components allocated to the shop order

You must specify the ten usage codes below during implementation. Do not change the recommended settings.

0 = Fixed Quantity	B = By-Product (variable quantity)
1 = Active	C = Co-Product (variable quantity)
2 = Compensating	D = By-Product (fixed quantity)
3 = Filler	E = Co-Product (fixed quantity)
4 = Packaging	
9 = Miscellaneous	

The system associates usage codes with the components of an item through the formula, BOM500. A component can also have a default usage code defined in the IDF Enterprise Item for the components. The system determines the function of a particular usage code by one of the following observations:

The value in the Adjust During Batch Balancing field

The value in the Include in Batch Weight field, and whether you define a standard potency % in the - IDF Enterprise Item.

The Infor LX Batch Balancing Process filters out usage codes which exclude the item from batch weight calculation, yet list the item as an adjusting agent.

You can change a usage code after you create a formula. You can change a potency component to a compensating component or the reverse. A potency component cannot also be a compensating component.

You can provide a description of the usage code to sub-divide usage code functions into specific categories. For example, the packaging and miscellaneous reserved usage codes provide the same function but the system gives them different descriptions for application convenience.

Usage Code Functions

Usage Code 4, Packaging

Potency set in IIM: No

Adjust During Batch Balancing: No

Include in Batch Weight: No

Usage Code 9, Miscellaneous

Potency set in IIM: No

Adjust During Batch Balancing: No

Include in Batch Weight: No

Usage Code 3, Filler, non-compensating

Potency set in IIM: No

Adjust During Batch Balancing: No

Include in Batch Weight: Yes

Usage Code 2, Compensating

Potency set in IIM: No

Adjust During Batch Balancing: Yes

Include in Batch Weight: Yes

Usage Code 1, Active Potency Component

Potency set in IIM: Yes

Adjust During Batch Balancing: No

Include in Batch Weight: Yes

Usage Code 0, Fixed Quantity (special)

Potency set in IIM: No

Adjust During Batch Balancing: No

Include in Batch Weight: No

Below are descriptions of the usage codes.

4 Packaging

Use this code to set a component on the formula outside of batch quantity calculations and potency considerations. For components assigned this usage type function, the quantity varies directly with the shop order size.

9 Miscellaneous

Use this code to set a component on the formula outside of batch quantity calculations and potency considerations. For components assigned this usage code function, the quantity varies directly with the shop order size.

3 Filler/Non-Compensating

Use this code to include a component on the formula in the batch weight, but hold it constant in potency calculations. The Filler usage code is non-compensating. For components assigned this usage code, the quantity varies directly with the shop order size.

2 Compensating

Use this code to include a component on the formula in the batch weight and use it to compensate for variations in the batch physical quantity due to non-standard potency components. The compensating component provides a buffer for variations in the physical quantity of potency components. If the allocation of potency components produces a decrease in the required physical quantity of the potency component due to a higher than standard potency, the allocation of the compensating component increases to balance the deficiency. If the potency component physical quantity requires an increase, the system subtracts the net change from the compensating component.

A formula can have more than one active potency and compensating component. In such cases, the system uses the following equation to distribute the compensating requirements proportionally among the components:

Compensating Component Requirements = [SUM (standard component requirement) + SUM (change from standard requirement x standard

component requirement)]

The system may reduce the allocated quantity of compensating components to zero if the difference between the required physical quantity of a potency component and the standard physical quantity equals the quantity of the component.

The system does not produce a negative allocation of a compensating component. If the required physical quantity of a potency item requires an increase beyond the quantity of compensating components, the system does not perform an allocation for this shop order and instead produces an error message. The system does not perform an allocation if the following condition is true:

Total standard compensating quantities < SUM [each potency component actual qty minus each component standard qty]

1 Active Potency Component

Use this code for an ingredient that bases the requirement on the theoretical quantity, the quantity of the active part of the ingredient. For example, if a component contains a mixture of 50% sugar, which is the active ingredient, the item has a potency of 50%. The requirement of the active ingredient in a potency component varies only with batch size. The system determines the physical quantity by the following equation:

Physical qty = SUM [(each lot theoretical qty x 100) / (lot activity percent)]

The system adds the difference between the standard physical quantity from the formulas and the calculated actual physical quantity to the requirement for the compensating components.

0 Fixed

The quantity of a component with this usage code is the quantity defined in the parent item formula, regardless of batch size or any other factors. This component must not have a potency or a scrap factor.

The fixed usage code is useful for components that are linked to a shop order, such as lubricants, cleaning fluids, surfactants, and so on, but are not related to the quantity of the other components or the parent item.

The following table shows settings that are invalid in Usage Code Maintenance, API110, and Manufacturing Data Maintenance, BOM500. The last column shows where specific settings are not allowed.

The table contains the following table heading abbreviations:

IIM Pot >0< = Potency in Item Master not equal to zero

Adjust BB = Adjust during Batch Balancing?

Incl. in B Wgt = Include in Batch Weight?

Prohibited = Not allowed in this program

IIM Potency >0<	Adjust BB	Incl. in B Wgt	Prohibited
	Y		IDF Enterprise Item
Y	Y		IDF Enterprise Item
Y	Y	Y	BOM500

Batch Balancing

The system uses several methods to perform allocations that incorporate variable lot potencies, as described in the following sections.

Fixed Batch

Use this method to define a constant unit or batch size at a standard active component potency. You must define at least one other component as compensating. If the system performs allocations, the proportion of the compensating components varies to compensate for lot variations in the active components.

No Balancing

Use this method to define the theoretical units of the potency item as a constant. Variations in the lot activity of active components result in adjustments to the physical quantity allocation of the active components and this adjustment alters the total batch size accordingly. The system does not require a compensating component because the batch size can vary.

If you print shop packets through Shop Packet Print, SFC520, or Print Released Orders, SFC550, the system checks the system parameters to determine whether it should automatically create inventory allocations. To allocate inventory other than automatically, you can perform batch allocations for selected orders through the Batch Allocations program, SFC730, or you can perform manual allocations through the On-Line Allocations, SFC720, or Inventory Transactions, SFC570, programs.

The system performs batch balancing only if the Potency field in the System Parameter file, ZPA, contains Yes.

Fixed Batch Balancing

Fixed batch balancing is a method of adjusting the mix of components for a batch of the parent item according to the actual quantity of the batch's potency component's active percentage. You can assign a standard potency in the Item Master and an actual lot potency to potency items after you test them and receive them into inventory.

To perform a batch balance, the system first compares the actual potency in the Lot Master file, ILN, for all potency components to the item standard potency recorded in the Item Master file, IIM. When an actual potency differs from the standard potency percentage, the system performs a unit of measure conversion to convert the component requirements into the parent items batch balancing units. The system uses the potency factors to compute the actual amount of the required potency ingredient.

An example of an actual requirement calculation follows.

100 standard units of component A required

75% standard potency, Item Master file - IIM

80% actual potency, Lot Master file - ILN

100 x (.75/.80) = 93.75 actual requirement

The system performs a similar calculation for all potency items in the batch. When the system calculates the actual requirements, it compares the standard batch weight for the parent item to the actual batch weight, which is the sum of the actual potency ingredient requirements along with the quantities of all other component items that contribute to the final batch weight.

The system computes the standard batch weight based on the amount of the components that would be required if only standard potency items were used. The system retrieves component requirement quantities from the Material Allocation file, FMA.

The system adjusts quantities of the compensating components in fixed proportion to offset the change in the batch weight from standard as a result of variations in the amount of potency ingredients used.

An example follows.

End item = D

Std Batch Size = 100

A (100), B (100), C (100)

Total standard batch weight = 300.00

Total actual batch weight as a result of potency variations = 293.75

Total difference = 6.25

If all components contribute to batch weight and component A is the active ingredient represented earlier and components B and C have usage type codes set to adjustable in batch balancing, the system adjusts the quantities for components B and C as follows:

B = 100 + (100/200 x 6.25) = 103.125

C = 100 + (100/200 x 6.25) = 103.125

Batch balancing occurs before the system creates the final allocations for a shop order. The system derives these allocations from preliminary allocations created directly from inventory reservations. Allocations are not final after batch balancing because you can update them manually during production reporting.

The system bases reservations on the parent item requirement, the formula quantity, and the formula scrap factor. The parent item requirement reflects yield adjustments if it is based on a planned or firm-planned order that you created from a customer order. Allocations incorporate batch balancing into the requirements calculation.

No Balancing

The system allocates potency items with usage codes set to not include the items in the batch weight calculation, based upon their actual potency. Production of parents has varying batch sizes as there are no compensating adjustments made.

Co/By-Products

The system holds co-products or by-products in the formula, similar to other components. The system identifies a co-product or by-product by one of the following component usage type codes:

B	By-Product variable quantity
C	Co-Product variable quantity
D	By-Product fixed quantity
E	Co-Product fixed quantity

The quantities in the formula are positive and represent potential receipts.

Co/By-product relationships are valid whenever the system accesses one of the following items:

- the formula
- scheduled receipts or issues
- planned receipts or issues

This includes MRP, CST, MDM, SFC, INV, and JIT.

When the system explodes planned orders through the formula, MRP and MPS, it tags co/by-products. The system treats these requirement data similar to planned orders for the Co/By-Product, shown as supply, not demand. From the point of view of the Co/By-Product, requirement records are similar to firm planned orders in the netting calculation. The system includes these types of data in the view of

the planned order file. The system designates these type of planned orders by PLN-CB on the reports and inquiries.

When you create a shop order, the system creates a normal material allocation for the Co/By-Product but sets the Co/By-Product field to yes. In addition, when you have a Co-Product with usage type codes C and E, the system adds the routing data to the shop order operations for the Co-Product. For identical operations with the same work center and operation number, the system adds in the required hours. For new operation numbers, the system adds those numbers to the shop order operations. For identical components with same item number and operations number, the system adds in the required quantity. For new components, the system adds these components to the material allocations for the shop order.

You maintain released shop orders from the component line for the shop order in Shop Order Maintenance, SFC540. If you change the due date on the parent, the system automatically changes the due date of the Co/By-Product. You can maintain regular planned orders for Co/By-Product items in MRP Maintenance, MRP510, and Planned Order Maintenance, DRP510.

If you perform a standard cost rollup, the system subtracts component by-product costs from the total cost of the parent item. Component co-product costs have no effect on the non-actual cost of the parent.

You must manually update by-product actual costs because the system posts the total shop order cost to co-product and parent production.

The system bases co-product actual costing upon an allocation percentage maintained in the formula. If this percentage is greater than zero, the co-product production absorbs that percentage of the total shop order cost and the system posts the remaining cost to the parent product.

Below are two examples.

Parent A Product C actual cost in item master = $8 each

Component B Co-Product C cost% = 25

If the total order production is 100 As and 10 Cs at a total shop order cost of $400, the actual costs to post are:

A = $ 3.00 each ($400 x (100 - 25) / 100) / 100

C = $10.00 each ($400 x 25 / 100) / 10

If the percentage is 0, the system subtracts the current actual cost of the co-product production from the total shop order cost and posts the remaining cost to the parent product.

Parent A Product C actual cost in item master = $8 each

Component B Co-Product C cost % = 0

If the total order production is 100 As and 10 Cs at a total cost of $400, the actual costs to post are:

A = $ 3.20 each ($400 - (10 x $8)) / 100

C = $ 8.00 each, no cost update required

The shop order cost variance reports, both CST and API versions, show the co/by-product costs, co-product percentage, and reported production under the parent item data.

You can manually close orders. The automatic close includes production for all Co/By-Products at quantities equal to or greater than the quantity of the material allocations.

Currently, there are no usage code functions or Co/By-Product functions for planning formulas.

API run instructions overview

This document contains the detailed operating instructions for each program flow, or menu option, in the application. The information for each screen in a program flow contains three sections:

- Introduction
- Field descriptions
- Screen actions

For a high-level overview of API and its major functionality, as well as general Infor LX navigation and documentation, see the introductory information in this Infor LX Advanced Process Industries Document

API application parameters

This Advanced Process Industries System Parameters program, API820D, allows you to maintain system-wide parameters that affect API. These parameters are options that establish basic processing information for Infor LX.

Refer to the System Parameters Documentation for details of the API System Parameters.

Item master maintenance

The IDF Enterprise Item, allows you to define items for use throughout Infor LX. To define an item, assign it an item number and enter basic information about the item in this program. The system uses this information to identify the item throughout all processing, to plan production, and to track the item through manufacturing and distribution cycles. You can also copy one item to another to enter a new item in Add mode.

An item applies to parent items and component items.

The API and INV applications share the IDF Enterprise Item. See the Inventory Management documentation for detailed information about the Item Master screens.

Chapter 3
Programs

3

Usage codes

The Usage Code program, API110D, determines how the system uses a component within a bill of materials. A usage code has a direct influence on how the system treats that component during MPS or MRP processing and in shop order component picking. The system associates usage codes with the components of an item through Manufacturing Data Maintenance, BOM500, and uses them to plan material requirements and to control the inventory of process industry manufacturers during shop floor release and production reporting.

Access: API menu

Add, maintain or view usage codes

Use Usage Code Selection, INV110D1-01, to create, maintain, copy, delete, display, or print usage codes.

Field descriptions - API110D1

Fields	Description
Component Usage Code (1,A)	The system uses ten reserved usage codes. You can create and maintain new codes to meet the needs of your business. The system provides the capability to change or edit reserved codes 0 1, 2, 3, 4, and 9. You cannot change reserved codes B, C, D, and E. Infor recommends that you reserve

the remaining numeric values 5, 6, 7, and 8 for future enhancements and change the reserved codes only if necessary.

Screen actions - API110D1

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Usage code maintenance

Use Usage Code Maintenance, API110D2-01, to process or view the usage code you selected.

Field descriptions - API110D2-01

Fields	Description
Component Usage Code (1,A)	The system displays the component usage code.
Description (30,A)	Specify a description for the component usage code. You cannot change this field if you are working with a reserved code or you are in display mode.
Adjust during Batch Balancing (1,A)	Specify Yes to use a component with this usage code to adjust the batch weight due to potency variances in the active components. Specify No to indicate that the system does not perform batch balancing for this component. Assign codes to components through the Manufacturing Data Maintenance program, BOM500.
Include in Batch Weight (1,A)	Specify Yes to indicate to include the physical quantity of components with this usage code into the sum of component quantities that represents the batch weight of the parent item. Specify Yes for potency components and for components that will be adjusted due to differences between actual and standard potencies of the active ingredients. You can also include non-compensating components in the batch weight. They do not affect batch balancing.
	Specify No to exclude components with this usage code in the batch weight.

Screen actions - API110D2-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Container maintenance

To access Container Master Maintenance, choose Container Maintenance from the API main menu.

Warehouse Management uses this program to update container dimensions if you set the Pallet Container field to yes on the last screen of this program.

This program provides inventory control and tracing for storage or transportation of items in labeled containers. The system provides this degree of control at the container level.

You can replace the term container throughout the system with a user-defined term such as serial # or an abbreviation such as CNTR. You define the literal for container and its abbreviation in the System Parameter file, ZPA.

When you create a container, the system automatically generates a unique identifier for each container. You can allocate more than one container to a single order and you can allocate a specific container to multiple shop orders.

Container Examples:

- Bulk storage tanks, Tank trucks rail cars
- Serialized, reusable containers for chemical shipments
- Serialized, non-reusable containers for medical packaging
- Serialized parts or machines

The system activates container control selectively by item in the same manner as lot control. Container control is available for lot or non-lot controlled items. The system posts all opening balances, receipts, allocations, issues, and adjustments to the system by container, from initial receipt through cycle count and physical inventory. The system provides forward and backward tracing of lot controlled items by lot with container records included for container controlled items.

The system facilitates the efficient receiving, inspection, put away, transfer, allocation, issue, back flushing, and counting of container-controlled stock through barcode scanning, automatic container numbering, and data entry by container number range. These features minimize data entry by requiring manual input on an exception-only basis. The system provides full screen and automated assistance for issue and receipt in manufacturing and distribution resources planning transactions.

The system clears container data when the following conditions are met:

- On-hand, which is open balance minus issue plus receipt plus adjustment, is 0

- Order allocations is 0
- The reusable code is 0 or 1
- The available status is 0

The system clears the following fields: Item Number, Lot, Warehouse, Location, Open balance, Issue, Receipt, and Adjustment Quantity.

The system displays the Lot field in the list as QMS when the item is a non-lot-controlled QMS item for which the Lot field is not blank. The value in the field is the QMS sequence number. The system clears this number from the quantity of inventory it tracks when quality processing is complete.

You can perform the following functions for non-reusable, in-use, and reusable-with-action-required containers:

- Correct inventory mistakes or transaction entry timing problems for container level inventory
- Manually preserve a perpetual inventory for their containers

In the first function, timing problems allow the inventory of non-reusable or not immediately reusable containers to reach zero when inventory exists because data entry is behind schedule. The system preserves the quantity and item information if you ensure that the container is set to non-reusable before you change the status to available. After the system posts inventory transactions, you can change the Reusable field back to 1.

For immediately reusable containers, when the inventory reaches zero with no allocations present, the system clears container quantity and item fields immediately and you cannot makes adjustments to preserve data.

In the second function, you want repeated reuse of a container and to track the cumulative quantity of inventory that has flowed through the container. If you leave the container reusable field value at 2, the system does not clear the quantity and item fields, and as the system processes receipts, they will be cumulative receipts. You can monitor receipts and change the reusable type on the container to 1 or 0 to preserve the container ID, but clear the quantity and item fields.

Any transaction that causes the container inventory to go negative will also result in turning the cycle count field for the item.

Item and lot always remain with containers with a reusable field value of 2.

The availability field is set as follows:

0 if Reusable is also set to 0

1 if Reusable is set to 1 or 2

To access Container Master Maintenance, choose Container Maintenance from the API main menu.

Container master maintenance - selection

Use Container Master Maintenance - Selection, API140D, to create new containers or to select a container to view or maintain.

Field descriptions - API140D-01

Fields	Description
Act (2,A)	Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.
	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 15)* in the overview information in this document.
Container (10,A)	To create or position to a container, specify a container identifier.
	Do not define a container as *MULTIPLE. This container is reserved for allocations to more than one container in Kit Allocation Maintenance, ORD728D-01.
Type (10,A)	To create or position to a container, specify a container type.
	Do not define a container type as *MULT. This container type is reserved for allocations to more than one container in Kit Allocation Maintenance, ORD728D-01.

Screen actions - API140D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Container master maintenance

Use the Container Master Maintenance screen, API140D-01, to define the characteristics of a container or container type. If you use Warehouse Management, you can create a range of preassigned containers on this screen.To create a container, the system uses the container type you specified on the previous screen.

Field descriptions - API140D-02

Fields	Description
From Container ID (10,A)	
	Specify a range of values to limit the list of container IDs. For information on range fields, see the *Ranges* topic in the overview section of this document.
	The range information displays only if you use Warehouse Management and the container ID is numeric. Data in this field defaults to the From Container ID value. To maintain information for a range of containers, type the highest number in the range. If you specify a range, you generate a range of pre-assigned containers. However, if any containers within the range already exist, the system does not include them.
	When you specify a range, you must type leading zeros on numbers less than 1,000,000,000 to create, revise, or delete containers. All ten positions in the field must contain numeric integers.
Type (10,A)	The system displays the container type created on the Container Master Maintenance - Selection screen, API140D-01.
Description (30,A)	Specify the container description.
Quality code (6,A)	This is a user-defined reference-only field.
Vendor Number (8,0)	Specify a valid vendor number.
Container Inventory Status (2,A)	The value in this field comes from the Advanced Process Industries Parameters, API820D. The value you specify must exist in the Inventory Lot Status file, IST.
	The system does not display this field if you set the Use Status for Sales/Mfg Availability field to No in the Advanced Process Industries Parameters, API820D.
Vendor Serial Number (10,A)	Specify the vendor serial number for this container.
Item Number (35,A)	The system displays the item number.
Warehouse (3,A)	The system displays the warehouse that stores the inventory.
Capacity - Weight (11,3)	Specify the weight capacity of the container. This must be a positive number. Warehouse Management uses this data in the Pallet/Location weight calculation.

Capacity - Volume (11,3) This is a user-defined, reference-only field.

On-Hand (11,3) The system displays the on-hand quantity of the item in this container. This system calculates this value as the opening balance minus issues plus receipts plus adjustments.

Issues (11,3) The system displays the quantity of the item from this container that it issued out of stock to fill shop order requests and customer orders. The quantity is stated in stocking unit of measure and represents activity since the item was specified in this container.

Adjustments (11,3) The system displays the quantity of the item in this container that it adjusted due to a change in lot potency, a re-designate transaction, substitutiom of an alternate item, or any other transaction that is set up to affect adjustments in Transaction Effect Maintenance, INV150. The value in this field represents activity since the item was entered in this container.

Receipts (11,3) The system displays the quantity of the item received into stock (into this lot) from shop order receipts and purchase order receipts. It states the quantity in stocking unit of measure. The value represents activity since the item was entered in this container.

Allocated to Orders (9,2) The system displays the quantity of the item in this container that it allocated to customer orders, if it is a finished good, or to shop orders, if it is a component.

Reusable (1,A) Specify a code to indicate container reusability, as described in the following section.

Valid choices

- **0 Immediate**

  Container is available for reuse when on-hand inventory reaches zero. The system clears the Inventory and Location fields.

- **1 Action Required**

  Container is available immediately. If you change available from 1 to 0, the system clears inventory information.

- **2 Non-reusable**

  Not available. The system retains inventory information.

Availability Status (1,A) Specify a code to indicate container availability:

Valid choices

- **0 Available**

  Indicates whether the container accepts inventory when on-hand is zero.

- **1 Unavailable**

  The container is not available to accept inventory.

Comments (50,A) Add any comments or additional descriptions related to this container.

Print Label (1,0) The system does not display this field if you are maintaining a container type. Specify 1 to print container labels or 0 to not print labels.

Lot/QMS Sequence (25,A) The system displays this field for lot-controlled container contents.

The system displays the Lot field as QMS Sequence when the item is a non-lot-controlled QMS item for which the Lot field is not blank. The value in the field is the QMS sequence number. The system clears this number from the quantity of inventory it tracks when quality processing is complete.

Location (10,A) The system displays the location for contents.

Unit of Measure (2,A) Specify the unit of measure for this container for Cap-Wt. For reference only.

Pallet (1,0) For managed warehouses, this field displays the pallet on which the container is stored. This field does not display if you are maintaining a container type.

Unit of Measure (2,A) Specify the unit of measure for this container for Cap-Vol. For reference only.

Container Available Date (6,0) This is a user-defined, reference-only field.

Container Retest Date (6,0) This is a user-defined, reference-only field.

Container Expiration Date (6,0) This is a user-defined, reference-only field.

Screen actions - API140D-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Container master maintenance - dimensions

The system displays the Container Master Maintenance dimensions screen, API140D-03, after you press Enter on the Container Master Maintenance screen.

Use this screen to specify the length, width, height, and tare weight of a container.

Field descriptions - API140D-03

Fields	Description
Net Weight /Container (10,A)	Specify the total weight of the container contents, excluding the weight of the container.
Container Length (11,3)	Specify the total length of the container. This must be a positive number. Warehouse Management uses this data in the Pallet/Location weight calculation.
Length Unit of Measure (2,A)	Specify the code that identifies the length's unit of measure.
Container Width (11,3)	Specify the total width of the container. This must be a positive number. Warehouse Management uses this data in the Pallet/Location weight calculation.
Width Unit of Measure (2,A)	Specify the code that identifies the width's unit of measure.
Container Height (11,3)	Specify the total height of the container. This must be a positive number. Warehouse Management uses this data in the Pallet/Location weight calculation.
Height Unit of Measure (2,A)	Specify the code that identifies the height's unit of measure.

Tare Weight (11,3)   Specify the weight of the empty container. This must be zero or a positive number. Warehouse Management uses this data in the Pallet/Location weight calculation.

Tare Weight Unit of Measure (2,A)   Specify the code that identifies the unit of measure used for tare weight.

Container Marking 1 (30,A)   Specify the first identification marking of the container.

Container Marking 2 (30,A)   Specify the next identification marking of the container.

Container Marking 3 (30,A)   Specify the next identification marking of the container.

Container Marking 4 (30,A)   Specify the next identification marking of the container.

Container Marking 5 (30,A)   Specify the next identification marking of the container.

Container Marking 6 (30,A)   Specify the next identification marking of the container.

Packaging Item Number (35,A)   Optional. Specify a valid item number to represent this container type, not the container contents. If a packaging item number exists for this container type and the Issue Packaging value is 1 for the ship-to customer, the system automatically reduces inventory of the packaging item number during pick confirm when it uses this container type for packaging.

If a packaging item number exists for this container type and the Invoice Packaging value is 1 for the ship-to/customer, the system automatically creates an invoice line following pick confirm for the packaging item number when it uses this container type for packaging. The item you specify cannot be a phantom, an assortment, a kit, features and options, or a non-inventory item type. The lot-control field must be set as not lot controlled, and the container-controlled field must be set as not container controlled.

Stacking Limit (2,0)   Optional. Specify a stacking limit for this container type.

Customer Pack Type (35,A)   Optional. Specify a customer pack type for this container type.

Screen actions - API140D-03

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Container master maintenance -- container type

Use Container Master Maintenance - Container Type, API140D-04, to define a container or container type as a pallet so that the container is the move unit in the managed warehouse.

Field descriptions - API140D-04

Fields	Description
Container ID (10,4)	The system displays the container ID from the previous screen.
Type (10,A)	The system displays the container type whose characteristics you defined on the previous screen.
Pallet Container (1,0)	This field is required if you create a container type. Specify 1 to define this container/container type as a pallet , or Specify 0 to not define the container as a pallet. This field defaults to 0.
	WARNING: If you revise a container type, be sure no containers or open movements currently exist for this container type. If records exist, they will not reflect the change. If movements exist and you change the Pallet Container field, unpredictable results may occur.
Pre-assigned Container IDs (1,0)	This field is required if you maintain a container type. Specify 1 to use pre-assigned container IDs for this container/container type, or Specify 0 to not use pre-assigned container IDs.

Screen actions - API140D-04

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Container master

The Container Master program prints a listing of selected containers to facilitate container management.

You can use default settings to access the Container Master Listing, which do not restrict the selection. You can use the Sequence By field to modify the report sequence to select the listed report formats.

To access Container Master Listing, choose Container Master from the API main menu.

Container master listing

The Container Master Listing screen, API145-01, 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 - API145-01

Fields	Description
Container (10,A)	Specify a range of valid container numbers. To include all containers, leave the default values.
Item (35,A)	Specify a range of valid items. To include all items, leave the default values.
Warehouse (3,A)	Specify a range of valid warehouses. To include all warehouses, leave the default values.
Container Status (1,0)	Specify a container status code to include only those containers with this status.

Valid choices

- **0**
  All

- **1**

  Available

- **2**

  Unavailable

- **3**

  CycCnt-Lost

Container Condition (1,0)

Specify a container condition code to include only those containers with this condition code.

Valid choices

- **0**

  All

- **1**

  Empty

- **2**

  In Use

Sequence by (1,0)

Specify a code to determine how to sequence the report.

Valid choices

- **0**

  Container

- **1**

  Cont Type

- **2**

  Item

- **3**

  Warehouse

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 - API145-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Customer/group item qualifiers maintenance

Use Customer/Group Item Qualifiers Maintenance, API160D1, to specify restrictions for a customer or customer group to place on quality data for items they order. For example, if a customer cannot use an item that is within 90 days of expiration, you can create that restriction here. An allocation or shipment of the item for this customer checks the expiration date of the lot before it determines whether it can allocate the lot and send it to this customer.

To access Customer/Group Item Qualification Selection, API160D1-01, choose Customer/Group Item Qualifiers Maintenance from the API main menu.

Customer/group item qualification selection

Use Customer/Group Item Qualification Selection, API160D1-01 to create or process a qualification record.

Field descriptions - API160D-01

Fields	Description
Line Actions	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 15)* 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.
Customer (8,0)	Specify the customer for which you are creating the qualification record. The value in this field must be a valid record in the Customer Master file, RCM. If you specify a value in this field, you cannot specify a value in the Group field.
	The Order Management product expects this value to be the sold-to customer.

Group (8,A)	Specify the customer quality group for which you are creating the qualification record. This value must exist in the Table Code Master file, ZCC, with Table ID of CUSTQUAL. If you specify a value in this field, you cannot specify a value in the Customer field.
Item (35,A)	Specify the item for which you are creating this qualification record for the customer or customer group. The value you specify must be a valid lot-controlled item in the Item master file, IIM.

Screen actions - API160D-01

Commands	Description
F13 = Filter	Access a filter screen and specify whether to view all records or only active records.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Customer/group item qualifications maintenance

Use Customer/Group Item Qualifications Maintenance, API160D2-01, to continue to create a new qualification record or to update the selected record. In this screen, you can specify the specific restrictions to apply to this item with this customer or customer group.

Field descriptions - API160D2-01

Fields	Description
Customer (8,0)	The system displays the customer you specified on the previous screen, along with the description from the Customer Master file, RCM. You can change this value. If you specify a value in this field, you cannot specify a value in the Group field.
Group (8,A)	The system displays the group you specified on the previous screen. You can change this value. If you specify a value, it must exist in the Table Code Master file, ZCC, with Table ID of CUSTQUAL. If you specify a value in this field, you cannot specify a value in the Customer field.
Item (35,A)	The system displays the item entered on the previous screen. You can change this value. The value you specify must be a valid lot-controlled item in the Item master file, IIM.

User Attribute 1 (10,A)   Specify the desired user attribute to consider when you allocate or release the specified lot-controlled item to this customer or customer group. Up to four user-defined attributes are available, depending on the fields set in the API Parameters Maintenance program, API820D. You can leave this field blank, but if you specify a value, the value must equal the one in the corresponding numbered User Attribute field in the Lot Master record, ILN, for the lot to pass the specification test for this customer or customer group.

For example, the customer or group for which you create this qualification record requires that the specified item come from a specific country of origin. If you specify USA as the value in this field, the corresponding attribute in the Lot Master record must also be USA, or you cannot use this lot for this customer or group.

User Attribute 2 (10,A)   Specify the desired user attribute to consider when you allocate or release the specified lot-controlled item to this customer or customer group. Refer to the User Attribute 1 field help for detailed information.

User Attribute 3 (10,A)   Specify the desired user attribute to consider when you allocate or release the specified lot-controlled item to this customer or customer group. Refer to the User Attribute 1 field help for detailed information.

User Attribute 4 (10,A)   Specify the desired user attribute to consider when you allocate or release the specified lot-controlled item to this customer or customer group. Refer to the User Attribute 1 field help for detailed information.

Days allowed before Expire (5,0)   This is the minimum number of days until expiration that a customer will accept for a lot of this item. Any lot that expires in fewer than the specified number of days is unacceptable for that customer or group. When you create a new record, this field defaults to zero. A zero value indicates that the expiration date is not considered during the allocation or shipping for lots of this item for this particular customer or group.

Min Potency Allowed (9,4)   This is the minimum item potency that a customer will accept for a lot of this item. Any lot that has a potency less than this value is unacceptable for that customer or group. When you create a new record, this field defaults to zero. A zero value indicates that potency is not considered during the allocation or shipping for lots of this item for this particular customer or group.

Max Potency Allowed (9,4)   This is the maximum item potency that a customer will accept for a lot of this item. Any lot that has a potency greater than this value is unacceptable for that customer or group. When you create a new record, this field defaults to zero. A zero value indicates that potency is not considered during the allocation or shipping for lots of this item for this particular customer or group.

If the value in the Min Potency field is greater than zero, the Max Potency value must be greater than that of the Min Potency field.

Test ID 1 (10,A)

Specify a test ID to include in this customer/group item qualification. The test ID you specify must exist in the Customer Quality Test Master file, ETM. You can specify up to ten test IDs for this record. You must specify the lower and upper alpha and/or numeric ranges for this test for this particular record. You can use any values as long as you stay within the allowable range of values defined in the ETM record for this test.

All ten Test ID fields can be blank if this customer/group had no particular test requirements for this item. For example, the customer might only be interested in restriction by expiration date, which is already covered in the Days before Expire field.

Test ID 2 (10,A)

Specify a test ID to include in this customer/group item qualification. Refer to the Test ID 1 field help for detailed information.

Test ID 3 (10,A)

Specify a test ID to include in this customer/group item qualification. Refer to the Test ID 1 field help for detailed information.

Test ID 4 (10,A)

Specify a test ID to include in this customer/group item qualification. Refer to the Test ID 1 field help for detailed information.

Test ID 5 (10,A)

Specify a test ID to include in this customer/group item qualification. Refer to the Test ID 1 field help for detailed information.

Test ID 6 (10,A)

Specify a test ID to include in this customer/group item qualification. Refer to the Test ID 1 field help for detailed information.

Test ID 7 (10,A)

Specify a test ID to include in this customer/group item qualification. Refer to the Test ID 1 field help for detailed information.

Test ID 8 (10,A)

Specify a test ID to include in this customer/group item qualification. Refer to the Test ID 1 field help for detailed information.

Test ID 9 (10,A)

Specify a test ID to include in this customer/group item qualification. Refer to the Test ID 1 field help for detailed information.

Test ID 10 (10,A)

Specify a test ID to include in this customer/group item qualification. Refer to the Test ID 1 field help for detailed information.

Lower Alpha Value 1 (2,A)

Specify the lower allowable alpha value for this test in this customer/group item qualification. You must specify lower and upper alpha and/or numeric ranges for this test for this particular record. You can use any values as long

as you stay within the allowable range of values defined in the ETM record for this test.

Lower Alpha Value 2 (2,A)	Specify the lower allowable alpha value for this test in this customer/group item qualification. Refer to the Lower Alpha Value 1 field help for detailed information.
Lower Alpha Value 3 (2,A)	Specify the lower allowable alpha value for this test in this customer/group item qualification. Refer to the Lower Alpha Value 1 field help for detailed information.
Lower Alpha Value 4 (2,A)	Specify the lower allowable alpha value for this test in this customer/group item qualification. Refer to the Lower Alpha Value 1 field help for detailed information.
Lower Alpha Value 5 (2,A)	Specify the lower allowable alpha value for this test in this customer/group item qualification. Refer to the Lower Alpha Value 1 field help for detailed information.
Lower Alpha Value 6 (2,A)	Specify the lower allowable alpha value for this test in this customer/group item qualification. Refer to the Lower Alpha Value 1 field help for detailed information.
Lower Alpha Value 7 (2,A)	Specify the lower allowable alpha value for this test in this customer/group item qualification. Refer to the Lower Alpha Value 1 field help for detailed information.
Lower Alpha Value 8 (2,A)	Specify the lower allowable alpha value for this test in this customer/group item qualification. Refer to the Lower Alpha Value 1 field help for detailed information.
Lower Alpha Value 9 (2,A)	Specify the lower allowable alpha value for this test in this customer/group item qualification. Refer to the Lower Alpha Value 1 field help for detailed information.
Lower Alpha Value 10 (2,A)	Specify the lower allowable alpha value for this test in this customer/group item qualification. Refer to the Lower Alpha Value 1 field help for detailed information.
Upper Alpha Value 1 (2,A)	Specify the upper allowable alpha value for this test in this customer/group item qualification. You must specify lower and upper alpha and/or numeric ranges for this test for this particular record. You can use any values as long as you stay within the allowable range of values defined in the ETM record for this test.
	If the value in the Lower Alpha Value field is greater than zero, the Upper Alpha Value must be greater than that of the Lower Alpha Value field.

Upper Alpha Value 2 (2,A) Specify the upper allowable alpha value for this test in this customer/group item qualification. Refer to the Upper Alpha Value 1 field help for detailed information.

Upper Alpha Value 3 (2,A) Specify the upper allowable alpha value for this test in this customer/group item qualification. Refer to the Upper Alpha Value 1 field help for detailed information.

Upper Alpha Value 4 (2,A) Specify the upper allowable alpha value for this test in this customer/group item qualification. Refer to the Upper Alpha Value 1 field help for detailed information.

Upper Alpha Value 5 (2,A) Specify the upper allowable alpha value for this test in this customer/group item qualification. Refer to the Upper Alpha Value 1 field help for detailed information.

Upper Alpha Value 6 (2,A) Specify the upper allowable alpha value for this test in this customer/group item qualification. Refer to the Upper Alpha Value 1 field help for detailed information.

Upper Alpha Value 7 (2,A) Specify the upper allowable alpha value for this test in this customer/group item qualification. Refer to the Upper Alpha Value 1 field help for detailed information.

Upper Alpha Value 8 (2,A) Specify the upper allowable alpha value for this test in this customer/group item qualification. Refer to the Upper Alpha Value 1 field help for detailed information.

Upper Alpha Value 9 (2,A) Specify the upper allowable alpha value for this test in this customer/group item qualification. Refer to the Upper Alpha Value 1 field help for detailed information.

Upper Alpha Value 10 (2,A) Specify the upper allowable alpha value for this test in this customer/group item qualification. Refer to the Upper Alpha Value 1 field help for detailed information.

Lower Numeric Value 1 (13,6) Specify the lower allowable numeric value for this test in this customer/group item qualification. You must specify lower and upper alpha and/or numeric ranges for this test for this particular record. You can use any values as long as you stay within the allowable range of values defined in the ETM record for this test.

Lower Numeric Value 2 (13,6) Specify the lower allowable numeric value for this test in this customer/group item qualification. Refer to the Lower Numeric Value 1 field help for detailed information.

Lower Numeric Value 3 (13,6)   Specify the lower allowable numeric value for this test in this customer/group item qualification. Refer to the Lower Numeric Value 1 field help for detailed information.

Lower Numeric Value 4 (13,6)   Specify the lower allowable numeric value for this test in this customer/group item qualification. Refer to the Lower Numeric Value 1 field help for detailed information.

Lower Numeric Value 5 (13,6)   Specify the lower allowable numeric value for this test in this customer/group item qualification. Refer to the Lower Numeric Value 1 field help for detailed information.

Lower Numeric Value 6 (13,6)   Specify the lower allowable numeric value for this test in this customer/group item qualification. Refer to the Lower Numeric Value 1 field help for detailed information.

Lower Numeric Value 7 (13,6)   Specify the lower allowable numeric value for this test in this customer/group item qualification. Refer to the Lower Numeric Value 1 field help for detailed information.

Lower Numeric Value 8 (13,6)   Specify the lower allowable numeric value for this test in this customer/group item qualification. Refer to the Lower Numeric Value 1 field help for detailed information.

Lower Numeric Value 9 (13,6)   Specify the lower allowable numeric value for this test in this customer/group item qualification. Refer to the Lower Numeric Value 1 field help for detailed information.

Lower Numeric Value 10 (13,6)   Specify the lower allowable numeric value for this test in this customer/group item qualification. Refer to the Lower Numeric Value 1 field help for detailed information.

Upper Numeric Value 1 (13,6)   Specify the upper allowable numeric value for this test in this customer/group item qualification. You must specify lower and upper alpha and/or numeric ranges for this test for this particular record. You can use any values as long as you stay within the allowable range of values defined in the ETM record for this test.

If the value in the Lower Numeric Value field is greater than zero, the Upper Numeric Value must be greater than that of the Lower Numeric Value field.

Upper Numeric Value 2 (13,6)   Specify the upper allowable numeric value for this test in this customer/group item qualification. Refer to the Upper Numeric Value 1 field help for detailed information.

Upper Numeric Value 3 (13,6) Specify the upper allowable numeric value for this test in this customer/group item qualification. Refer to the Upper Numeric Value 1 field help for detailed information.

Upper Numeric Value 4 (13,6) Specify the upper allowable numeric value for this test in this customer/group item qualification. Refer to the Upper Numeric Value 1 field help for detailed information.

Upper Numeric Value 5 (13,6) Specify the upper allowable numeric value for this test in this customer/group item qualification. Refer to the Upper Numeric Value 1 field help for detailed information.

Upper Numeric Value 6 (13,6) Specify the upper allowable numeric value for this test in this customer/group item qualification. Refer to the Upper Numeric Value 1 field help for detailed information.

Upper Numeric Value 7 (13,6) Specify the upper allowable numeric value for this test in this customer/group item qualification. Refer to the Upper Numeric Value 1 field help for detailed information.

Upper Numeric Value 8 (13,6) Specify the upper allowable numeric value for this test in this customer/group item qualification. Refer to the Upper Numeric Value 1 field help for detailed information.

Upper Numeric Value 9 (13,6) Specify the upper allowable numeric value for this test in this customer/group item qualification. Refer to the Upper Numeric Value 1 field help for detailed information.

Upper Numeric Value 10 (13,6) Specify the upper allowable numeric value for this test in this customer/group item qualification. Refer to the Upper Numeric Value 1 field help for detailed information.

Screen actions - API160D2-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot status code listing

The Lot Status Code listing produces a report that displays all lot status code records in the Inventory Lot Status Code field that fall within the requested range. The report includes the values for all fields in each included record.

To access this screen, choose Lot Status Codes, API155D, from the API main menu.

List lot status codes

Use the Lot Status Code Listing screen, API155D-01, to specify lot status codes to include in a list.

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 - API155D

Fields	Description
Lower Lot Status Code (2,A)	Specify the lowest lot status code to include in this report.
Upper Lot Status Code (2,A)	Specify the highest lot status code to include in this report.
Run Time Parameter (1,0)	Specify interactive to process the data in real time or specify batch to process the data in the job queue. If you specify interactive, your workstation is unavailable for other tasks until the job finishes.

Screen actions - API155D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Customer/group item qualification

Use Customer/Group Item Qualification, API165D, to define a range of Customer or Customer Group and Item Qualifier values to include in a listing. These records specify the restrictions that apply to the allocation or release of an item to a customer or customer group. The system selects records from the Customer/Group Item Requirements file, ECI, and prints all fields for the selected records.

To access the Customer/Group Item Qualifiers List screen, choose Customer/Group Item Qualification from the API main menu.

Customer/group item qualifiers list

Customer/group item qualifiers list, API165D-01, 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 - API165D-01

Fields	Description
Customer (lower value) (8,0)	Specify the lower customer value to include in this listing. If you specify a customer range, do not specify values in the Customer Quality Group or Item Number fields.
Customer To (upper value) (8,0)	Specify the upper customer value to include in this listing. If you specify a customer range, do not specify values in the Customer Quality Group or Item Number fields.
Customer Quality Group (lower value) (8,A)	Specify the lower customer quality group value to include in this listing. If you specify a customer quality group range, do not specify values in the Customer or Item Number fields.

Customer Quality Group To (upper value) (8,A)	Specify the upper customer quality group value to include in this listing. If you specify a customer quality group range, do not type values in the Customer or Item Number fields.
Item Number (lower value) (35,A)	Specify the lower item number value to include in this listing. If you specify an item number range, do not specify values in the Customer or Customer Quality Group fields.
Item Number To (upper value) (35,A)	Specify the upper item number value to include in this listing. If you specify an item number range, do not specify values in the Customer or Customer Quality Group fields.
Run Time Parameter (1,0)	Specify interactive to process the data in real time or specify batch to process the data in the job queue. If you specify interactive, your workstation is unavailable for other tasks until the job finishes.

Screen actions - API165D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot test master

Use Lot Test Master, API170D, to specify the types of tests that the system can use as customer lot qualification tests. A Test ID description must exist here before the system can use it for Customer/Group Item Qualification, API160D. The values you enter on the Lot Test Master record define the extreme values that the system can include in individual customer's qualification records for a specific lot-controlled item when the records include this test. You can further restrict the allowable values within the customer/group item qualification.

To access the selection screen, choose Lot Test Master from the API main menu.

Lot test master listing

Use Lot Test Master Listing, API170D-01, to create a new lot test master or to revise an existing one.

If you revise an existing lot test master record that has already been used in Customer/Group Item Qualification records, you must go back and verify that the values in the qualification records are still within the allowable range for this test.

Field descriptions - API170D-01

Fields	Description
Line Actions	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 15)* 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.
Test ID (10,A)	Specify a test ID to create or maintain. If you copy an existing record, the system displays a copy screen with the values of the original record. You can overwrite these fields to create the new test ID. If you revise an existing record that you used in customer/group item qualification records, you must verify that the values in the qualification records are still within the allowed ranges as defined here.
Description (50,A);	The system displays the description of existing records from the Customer/Group Test Master file, ETM.
Status (8,A)	The system displays the status of all existing records.

Screen actions - API170D-01

Commands	Description
F13 = Filter	Use to limit the list by test ID for all lot quality tests or for active tests only. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot quality test master maintenance

Use Lot Quality Test Master Maintenance, API170D2-01, to type detail information for the lot quality test record. Specify descriptive information as well as the test result ranges that the system allows for this test ID. The system validates customer/group item qualification data against the data in this record.

Field descriptions - API170D2-01

Fields	Description
Test ID (10,A)	The system displays the test ID you specified in the Lot Test Master Selection screen.
Description (50, A)	Specify a description of the test.
Extended Description (50, A)	Optional. Specify additional descriptive information about the test.
Specification (15,A)	Use this user-defined field to give a descriptive specification name to this test. You can group results entry by the value in this field. If you have a series of tests that you commonly run on the same item, you can give them all the same descriptive specification value so you can call them together when you are ready to specify test results for the item. the system does not edit this field, but your user site may want to establish rules for entries in this field.
Results Type (1,A)	Specify which type of results you expect in this test. Specify one of the following values:

1

Numeric

2

Alpha

3

Both |
Lower Limit Alpha (2,A)	Specify the lowest alpha value this test ID allows. The alpha values are user-defined and allow you to record test results from a variety of testing systems and link them to lot-controlled items in Infor LX.
Upper Limit Alpha (2,A)	Specify the highest alpha value this test ID allows. The alpha values are user defined and allow you to record test results from a variety of testing systems and link them to lot-controlled items in Infor LX.
Lower Limit Numeric (13,6)	Specify the lowest numeric value this test ID allows. The numeric values are user defined and allow you to record test results from a variety of testing systems and link them to lot-controlled items in Infor LX.
Upper Limit Numeric (13,6)	Specify the highest numeric value this test ID allows. The numeric values are user defined and allow you to record test results from a variety of testing systems and link them to lot-controlled items in Infor LX.

Screen actions - API170D2-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot Test Master

Use Lot Test Master, API175D, to create a listing of tests available in the Customer/Group Test Master file, ETM. The listing includes all field values from the ETM file, specifically, the test ID and two lines of description, specification , result type, and minimum and maximum alpha and numeric values.

To access the listing screen, choose Lot Test Master, API175D from the API main menu.

Lot Test Master Listing

The Lot Test Master Listing screen, API175D-01, 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 - API175D-01

Fields	Description
Lot Test ID (lower value) (10,A)	Specify the value to use as the start of the range of test IDs to include in this listing.
Lot Test ID (upper value) (10,A)	Specify the value to use as the end of the range of test IDs to include in this listing.
Specification (15,A)	Specify the specification, if any, to which you want to restrict this listing.
Run Time Parameter (1,0)	Specify interactive to process the data in real time or specify batch to process the data in the job queue. If you specify interactive, your workstation is unavailable for other tasks until the job finishes.

Screen actions - API175D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot tracing report

This program prints a lot tracing report for all lots within the range you specify, sequenced by lot number and item number. The lot tracing report is inclusive of inventory information regarding production, manufacturer, and supplier lots.

This program prints all ITH records first and prints all archived transaction.

To access the report, choose Lot Tracing Report, API200D, from the API main menu.

Lot tracing report selection

The Lot Tracing Report Selection screen, API200D-01, 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.

The report includes:

- Transaction type
- Transaction comment
- Transaction
- Transaction date
- Warehouse
- Quantity
- Reference number
- Location
- Container ID
- Lot status
- Total of transaction quantities

Field descriptions - API200D-01

Fields	Description
From Item Number (35,A)	Specify a value to use as the start of the range of item numbers to print on the report.
To Item (35,A)	Specify a value to use as the end of the range of item numbers to print on the report.
From Lot Number (25,A)	Specify a value to use as the start of the range of lot numbers to print on the report.
To Lot Number (25,A)	Specify a value to use as the end of the range of lot numbers to print on the report.
From Manufacturer Number (8,A)	Specify a value to use as the start of the range of manufacturer numbers to print on the report.
To Manufacturer Number (8,A)	Specify a value to use as the end of the range of manufacturer numbers to print on the report.
From Manufacturer Lot Number (25,A)	Specify a value to use as the start of the range of manufacturer lot numbers to print on the report.
To Manufacturer Lot Number (25,A)	Specify a value to use as the end of the range of manufacturer lot numbers to print on the report.
From Vendor Number (8,0)	Specify a value to use as the start of the range of vendor numbers to print on the report.
To Vendor Number (8,0)	Specify a value to use as the end of the range of vendor numbers to print on the report.
From Vendor Lot Number (25,A)	Specify a value to use as the start of the range of vendor lot numbers to print on the report.
To Vendor Lot Number (25,A)	Specify a value to use as the end of the range of vendor lot numbers to print on the report.
Transaction Status (1,0)	Specify 0 to include only active records. Specify 1 to include only archived records. Specify 2 to include both active and archived records.

Screen actions - API200D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lots by expiration date

Lots By Expiration Date, API210D, prints a report showing the expiration dates of all lots within a specified range of expiration dates.

To access the Lots by Expiration Date Listing, API210D-01, choose Lots by Expiration Date from the API main menu.

Lots by expiration date listing

Lots by Expiration Date Listing, API210D-01, 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.

The report is sequenced by date, item number, and lot number and includes the following data:

- Item class
- Lot status
- Allocations
- Retest date
- Adjustments
- Lot on-hand
- QA date
- Issues
- Date received
- Receipts

Field descriptions - API210D-01

Fields	Description
From Expiration Date (6,0)	Specify a value to use as the start of the range of expiration dates to print on the report.
To Expiration Date (6,0)	Specify a value to use as the end of the range of expiration dates to print on the report.
From Item (35,A)	Specify a value to use as the start of the range of items to print on the report.
To Item (35,A)	Specify a value to use as the end of the range of items to print on the report.
From Lot Number (25,A)	Specify a value to use as the start of the range of lot numbers to print on the report.
To Lot Number (25,A)	Specify a value to use as the end of the range of lot numbers to print on the report.
Warehouse (3,A)	If you specify a value, the system limits the lot numbers on this report to those created for that particular warehouse. Leave this field blank to include all warehouses on the report.

Screen actions - API210D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot inventory costs by expire/retest

The Lot Inventory Costs by Expire/Retest program, API215D, prints a report of lot inventory costs by expire or retest dates. You can limit the report by item number, warehouse, and retest or expiration date ranges. This report enables you to book an accrual for scrap in advance for budget purposes. The report prints the calculated dollar value of expiring lots or lots that are due to be retested that fall within the specified ranges.

Access: API menu

Specify selection criteria for the lot inventory costs report

The Lot Inventory Costs by Expire/Retest screen, API215D-01, 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.

You can choose to sequence rhe report by lot or item number.

Field descriptions - API215D-01

Fields	Description
Use Expiration Date or Retest Date (1,0)	Specify 1 to print a report that uses expiration dates. Specify 2 to use retest dates.
From Expire/Retest Date (8,0)	Specify a value to use as the start of the range of available dates to print on the report.
To Expire/Retest Date (8,0)	Specify a value to use as the end of the range of available dates to print on the report.
From Item Number (35,A)	Specify a value to use as the start of the range of item numbers to print on the report.
To Item Number (35,A)	Specify a value to use as the end of the range of item numbers to print on the report.
From Warehouse (3,A)	Specify a value to use as the start of the range of warehouses to print on the report.
To Warehouse (3,A)	Specify a value to use as the end of the range of warehouses to print on the report.
Print by Lot or Item (1,0):	Specify 1 to sort the report by Lot Number. Specify 2 to sort by Item Number.
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 select interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - API215D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot status report

The Lot Status Report program, API220D, produces a report of quarantined lots, which are lots with status Q. The system sequences the report by status code, item number, and lot number. You can restrict the report by these fields. The report includes transaction totals for adjustments, issues, receipts, allocations, and on-hand quantity, as well as retest, expiration, QA, and receipt dates.

To access the report selection screen, choose Lot Status Report from the API main menu.

Lot status report selection

The Lot Status Report Selection screen, API220D-01, contains range fields to 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 - API220D-01

Fields	Description
From Status (1,A)	Specify a value to use as the start of the range of statuses to print on the report.
To Status (1,A)	Specify a value to use as the end of the range of statuses to print on the report.
From Lot Number (25,A)	Specify a value to use as the start of the range of lot numbers to print on the report.
To Lot Number (25,A)	Specify a value to use as the end of the range of lot numbers to print on the report.
From Item Number (35,A)	Specify a value to use as the start of the range of item numbers to print on the report.

To Item Number (35,A)   Specify a value to use as the end of the range of item numbers to print on the report.

Warehouse (3,A)   If you specify a value, the system limits the lot numbers on this report to those created for that particular warehouse. Leave this field blank to include all warehouses on the report.

Screen actions - API220D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lots by retest date

The Lots by Retest Dat program, API230D, prints a report with the retest dates of all lots within a specified range of retest dates.

To access this report, choose Lots by Retest Date from the API main menu.

Lots by retest date selection

The Lots By Retest Date selection screen, API230D-01, contains range fields to use to limit the data the system selects. For information on range fields, see the *Ranges* topic in the overview section of this document.

The report is sequenced by expiration date, item number, and lot number and includes the following data:

- Item class
- Lot status
- Allocations
- Expiration date
- Adjustments
- Total on-hand
- QA date
- Issues
- Date received
- Receipts

Field descriptions - API230D-01

Fields	Description
From Due Date (6,0)	Specify a value to use as the start of the range of due dates to print on the report.
To Due Date (6,0)	Specify a value to use as the end of the range of due dates to print on the report.
From Item Number (35,A)	Specify a value to use as the start of the range of item numbers to print on the report.
To Item Number (35,A)	Specify a value to use as the end of the range of item numbers to print on the report.
From Lot Number (25,A)	Specify a value to use as the start of the range of lot numbers to print on the report.
To Lot Number (25,A)	Specify a value to use as the end of the range of lot numbers to print on the report.
Warehouse (3,A)	If you specify a value, the system will limit the lot numbers on this report to those created for that particular warehouse. Leave this field blank to include all warehouses on the report.

Screen actions - API230D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lots by availability date

The Lots by Availability Date program, API240D, prints a report with the availability dates of all lots within a specified range of dates.

To access this report, choose Lots by Availability Date from the API main menu.

Lots by availability date selection

The Lots By Availability Date selection screen, API240D-01, 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.

The report is sequenced by availability date, item number, lot number, and warehouse.

Field descriptions - API240D-01

Fields	Description
From Available Date (6,0)	Specify a value to use as the start of the range of available dates to print on the report.
To Available Date (6,0)	Specify a value to use as the end of the range of available dates to print on the report.
From Item Number (35,A)	Specify a value to use as the start of the range of item numbers to print on the report.
To Item Number (35,A)	Specify a value to use as the end of the range of item numbers to print on the report.
From Lot Number (25,A)	Specify a value to use as the start of the range of lot numbers to print on the report.
To Lot Number (25,A)	Specify a value to use as the end of the range of lot numbers to print on the report.
Warehouse (3,A)	If you specify a value, the system limits the lot numbers on this report to those created for that particular warehouse. Leave this field blank to include all warehouses on the report.

Screen actions - API240D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Campaign status report

The Campaign Status Report program , AP250D, lists information from the Campaign Master file to assist in the management of existing campaigns.

To access this report, choose Campaign Status Report from the API main menu.

Campaign status report selection

The Campaign Status Report selection screen, API250D-01, 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 - API250D-01

Fields	Description
From Campaign ID (6,A)	Specify a value to use as the start of the range of campaign IDs to print on the report.
To Campaign ID (6,A)	Specify a value to use as the end of the range of campaign IDs to print on the report.
From Start Date (6,0)	Specify a value to use as the start of the range of start dates to print on the report. The report shows transaction dates for the campaign's warehouse.
To Start Date (6,0)	Specify a value to use as the end of the range of start dates to print on the report. The report shows transaction dates for the campaign's warehouse.

Record Status (1,0)	Specify 1 to display only open campaigns, 2 to display only completed campaigns, or 0 to view all campaigns on this report.
Run Time Parameter (1,0)	Specify interactive to process the data in real time or specify batch to process the data in the job queue. If you specify interactive, your workstation is unavailable for other tasks until the job finishes.

Screen actions - API250D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Customer qualified lot report

Use the Customer qualified lot report program, API270D to print usable lots of an item, which is the same type of information available with the Customer/Group Qualified Lot Inquiry. A usable lot is a lot that is suitable for shipment to a particular customer based on any qualifying restrictions setup. With this report, however, you have the additional option to specify a customer group for lot qualification. Similar to the Inquiry program, you can choose to show only usable lots or all lots with an indication of which are usable and which are not, and why. The report shows the report filtering criteria and, for each record, the lot number, warehouse, lot status, available quantity, on-hand quantity, potency, expiration date, and, if it is not usable, whether this is because it failed at least one test or because not all tests are complete.

To access this report, choose Customer Qualified Lot Report, , API270D, from the API main menu.

Customer/group item qualifiers list

Use the Customer/Group Item Qualifiers List screen, API270D-01, to specify data to include in the report.

Field descriptions - API270D-01

Fields	Description
Customer Number (8,0)	Specify the customer associated with the item whose lot information you want to view. If you specify a value in this field, do not specify a value in the Customer Quality Group field.
Customer Quality Group (8,A)	Specify the customer quality group associated with the item whose lot information you want to view. If you specify a value in this field, do not specify a value in the Customer field.
Item Number (35,A)	Specify the number of the item whose lot information you want to view. If you request all lots, the system displays all lots for this item. If you request usable lots, the system includes only lots that meet the qualifying restrictions for this customer or customer quality group. The item you specify must be a valid lot-controlled item in the Item Master file, IIM.
Report Option (1,A)	Use this field to limit the lot records to include in this report. To include only usable lots, specify 0. A usable lot is a lot that is fully tested and meets all qualifying restrictions specified for the customer or customer group you entered for this report. To include all lots, specify 1. The report lists lot information for all lots of this item. Tthe last column in the report indicates whether the lot is usable (blanks) or not usable because tests failed or because not all tests are complete.
Run Time Parameter (1,0)	Specify interactive to process the data in real time or specify batch to process the data in the job queue. If you specify interactive, your workstation is unavailable for other tasks until the job finishes.

Screen actions - API270D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot status change report

The Lot status change report, API280D, produces a listing of all lots that have had a status change through the automated lot status change process since you last purged the audit records.

To access this report, choose Lot Status Change Report from the API main menu.

Automated lot status change report

The Automated Lot Status Change Report screen, API280D-01, 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.

If you use an item range, you can also limit by lot number range. If you type a date, only records from that date or later are included.

The resultant report shows the selection criteria of the report. For each record, it shows the item number, description, class, lot number and description, date and time of the change in lot status, the user ID of the user who ran the program, the old and new status of the lot, and the expiration and retest dates from the lot master.

Field descriptions - API280D-01

Fields	Description
From Item Number (35,A)	Specify the value for the start of the range of item numbers to print on the report. You can restrict by item or item class, but not both. If you restrict by item, you can also restrict the lot number range.
To Item Number (35,A)	Specify the value for the end of the range of item numbers to print on the report. You can restrict by item or item class, but not both. If you restrict by item, you can also restrict the lot number range.
From Item Class (5,A)	Specify the value for the start of the range of item classes to print on the report. You can restrict by item or item class, but not both.
To Item Class (5,A)	Specify the value for the end of the range of item classes to print on the report. You can restrict by item or item class, but not both.
From Lot Number (25,A)	Specify the value for the start of the range of lot numbers to print on the report.
To Lot Number (25,A)	Specify the value for the end of the range of lot numbers to print on the report.
Date (8,0)	To restrict the information in this report to lots with an automatic lot status change on or after a specific date, specify that date here. The default does not restrict selection by date.
Run Time Parameter (1,0)	Specify interactive to process the data in real time or specify batch to process the data in the job queue. If you specify interactive, your workstation is unavailable for other tasks until the job finishes.

Screen actions - API280D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot tracing inquiry

The Lot Tracing Inquiry program, API300, tracks the transaction history to and from the lot. The lot tracing moves between the ITH and YTH records doing backward and forward tracing for single and multiple levels until the trace is complete.

If you use multiple issue or receipt transactions to or from the same order for the same lot, even if some of them are negative issue or receipts transactions, the system displays only one line on the Lot Trace Inquiry showing the total (or net) quantity of all of the related transactions.

This program does not process negative back flush transactions that un-receive the end item and un-issue the components. This also applies to negative WIP transfer transactions.

Lot Inventory Transaction History provides a complete view of all ITH transactions, all transaction effects as established in Inventory Management's Transaction Effect Maintenance program and contained in the ITE file.

Item Number and Lot Number are remembered key fields.

To access the selection screen, choose Lot Tracing Inquiry from the API main menu.

Lot trace inquiry selection

Use the Lot trace inquiry selection screen, API300D-01, to specify data for your inquiry.

Field descriptions - API300D-01

Fields	Description
Item Number (35,A)	Specify a valid item number.
Lot Number (25,A)	You are not required to specify an item number and lot number. If you specify only an item number on the Lot Trace Inquiry selection screen, API300-01, the Lot Trace Inquiry detail screen API300-02, displays in browse/select mode and you can select a lot with a line action code. If you specify only a lot num-

ber, a backward lot trace occurs and displays in backward mode on the Lot Trace Inquiry detail screen API300-03.

Manufacturer Number (8,A)

Specify the manufacturer's number. This is a required field for quality controlled items. If you use the Quality Management System (QMS), the manufacturer number you specify must be a valid number in the QMI file. If you do not use the Quality Management System, you can specify a manufacturer number, but you cannot edit it.

If you specify a manufacturer number, you must also specify a manufacturer lot number.

Manufacturer Lot Number (25,A)

Specify the manufacturer's lot number. This is an optional field. You can specify information on this field, but the system validates it only for QA transactions. If you specify a manufacturer lot number, then you must also specify a manufacturer number.

If you specify a manufacturer number on the Lot Trace Inquiry screen API300-01, the Lot Trace Inquiry detail screen API300-02 displays in browse/select mode and you can use a line action to choose a lot to view. If you specify a manufacturer lot number, a backward lot trace occurs and displays in backward mode on the Lot Trace Inquiry detail screen API300-03.

Vendor Number (8,0)

Specify the number of the vendor that supplys the items in this lot.

Vendor Lot Number (25,A)

You are not required to specify a vendor number and vendor lot number. Specify the vendor's lot number for each lot that you receive into inventory. If you specify a vendor number on the Lot Trace Inquiry screen, API300-01, the system displays the Lot Trace Inquiry detail screen API300-02 in browse/select mode and you can use a line action to choose a lot to view. If you specify a vendor lot number, a backward lot trace occurs and displays in backward mode on the Lot Trace Inquiry detail screen API300-03.

Screen actions - API300-01

Commands	Description
F14=Forward Multiple Level Trace	View a forward multiple level trace, for example to view all levels of the bill of material.
F15=Backward Multiple Level Trace	View a backward multiple level trace, for example to view all levels of the bill of material.
F16=Forward Single Level Trace	View a forward single level trace, for example to view one level of the bill of material.

F17=Backward Single Level Trace	View a backward single level trace, for example to view one level of the bill of material.
F18=Lot Master Maint.	Access Lot Master Maintenance, INV130.
F19=Browse Lots	Review all lots assigned to the item.
F20=Material Status	Access the Material Status Inquiry program.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot trace inquiry detail screen

The system displays the Lot Trace Inquiry detail screen API300D-02 if you type just an item number on the Lot Trace Inquiry selection screen, API300-01 and use Enter. You can select a lot to view with a line action in the Act field.

If you use F11 on screen API300-02, the system toggles between the normal and folded (detailed) display.

If you use Dynamic Weights and Measures in your Infor LX environment, Order Entry System Parameters, and this is a DWM item, you can see additional fields in the Lot Trace Inquiry program to accommodate dual measures. In this screen, you can use F18 to toggle between the display of quantity values (on hand, allocated, available, and so on) and their DWM dual measure equivalent values for the item on which you are inquiring.

Field descriptions - API300-02

Fields	Description
Item (35,A)	The system displays the item from the selection screen, API300D-01, but you can specify another valid item.
Item Description	The system displays the description of the item.
Manufacturer	The system displays the manufacturer's number.
Manufacturer Lot	The system displays the manufacturer's lot number.
Vendor	The system displays the number of the vendor supplying the items in this lot.
Vendor Lot	The system displays the vendor lot number.

Line actions

The following line actions are available on this screen:

10= Lot Inquiry

Display the Lot History screen.

14=Forward Multiple Level Trace

Perform a forward, multiple level trace.

15=Backward Multiple Level Trace

Perform a backward, multiple level trace.

16=Forward Single Level Trace

Perform a forward, single level trace.

17=Backward Single Level Trace

Perform a backward, single level trace.

22=Transaction History

View transaction history.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 15)* 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.

Lot

The system displays the lot number based on the item you specified on the previous screen.

Status

The system displays one of the following codes to designate the status of the lot:

A

Lot is active and can be processed in any manner

C

Conditional pass

E

Lot has expired

H

Lot is on hold

Q

Lot is on quality hold. The system displays warnings if the you process the lot in the Inventory system.

Item	The system displays the number for the item.
Receipt Date	The system displays the date the lot was received.
Available Date	The system displays the date the lot became available.
Expiration Date	The system displays the date the inventory expires.
Lot On Hand	The system displays the quantity in this lot that is on hand, or physically within the inventory lot. If the item is a DWM item, you can use F18 to toggle between lot on-hand quantity and the equivalent DWM dual measure value.

Screen actions - API300-02

Commands	Description
F11=Fold/Unfold	Expand or collapse detail information.
F18=DWM Switch	Toggle between the display of quantities and the display of equivalent DWM dual measure values for DWM items.
F22=Transaction History	Display the Lot Inventory Transaction History screen, API300D-04. The Lot Inventory Transaction History screen provides a complete view of all ITH transactions, which are all transaction effects as established in Inventory Management's Transaction Effect Maintenance program and contained in the ITE file. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot trace inquiry detail - backward multiple level

The system displays the Lot Trace Inquiry detail screen API300D-03 in backward multiple level mode when you type an item number and a lot number, or just a lot number on the Lot Trace Inquiry selection

screen, API300-01. If you do not know a lot number, press Enter to display screen API300-02, from which you can choose a lot number and return to screen API300-03.

When you press Enter from the first screen, the system displays the API300-03 screen in backward mode. The backward trace travels a chain of receipts from receipts of the selected lot backward through the issue of components to the lot, the receipt of those components and the issue of sub-components, and so on until no lot number exists or the system reaches the point when the component was a purchased item.

When you use F14 from the first screen, the system displays the API300-03 screen in forward mode. The forward trace performs a similar function from the specified lot forward through issues from the lot and receipts of subsequent items until no lot exists or the issue is to a customer order. Screen actions on screen API300-03 allow you to toggle among the forward and backward single- and multiple-level modes.

If you use F11 on screen API300-03, the system toggles between the normal and folded (detailed) display.

If you use Dynamic Weights and Measures in your Infor LX environment, Order Entry System Parameters, and this is a DWM item, you can see additional fields in the Lot Trace Inquiry program to accommodate dual measures. In this screen, you can use F18 to toggle between the display of quantity values (on hand, allocated, available, and so on) and their DWM dual measure equivalent values for the item on which you are inquiring.

Field descriptions - API300-03

Fields	Description
Lot	The system displays the lot number based on your selection on the previous screen. You can change the lot number.
Received	The system displays the date the lot was received.
On Hand	The system displays the quantity in this lot that is on hand, or physically within the inventory lot.
	If the item is a DWM item, you can use F18 to toggle between lot on hand quantity and the equivalent DWM dual measure value.
Expiration Date	The system displays the date the inventory expires.
Item	The system displays the lot number based on the item you specified on the previous screen.
Class	The system displays the code that indicates how it groups items. You must define item class codes in the Item Class Maintenance program, INV160.

Allocated

The system displays the quantity of the item in this lot that is allocated to customer orders, if a finished good, or to shop orders, if a component.

If the item is a DWM Item, you can use F18 to toggle between the quantity and the equivalent DWM dual measure value.

Retest Date

The system uses the transaction date plus the number of retest days specified for the item in the Item Master file to calculate this date.

Item Description

The system displays a brief description of the item.

Available

The system displays the quantity available.

If the item is a DWM item, you can use F18 to toggle between the quantity and the equivalent DWM dual measure value.

QA Date

The system displays the date of quality control release for this lot. The system updates the QA approved date if you use QMS. The system uses the Manu-facturer/Item Master Maintenance/Inquiry program in the Quality Management System to determine the approved date from the QMI file.

Status

The system displays one of the following codes to designate the status of this lot:

A

Lot is active and can be processed in any manner

C

Conditional pass

E

Lot has expired

H

Lot is on hold

Q

Lot is on quality hold. The system displays warnings if you process the lot in the Inventory system.

Lot Reference

The system displays the reference number associated with this lot.

Batch Size

The system displays the batch size for batched items.

Last Trace

The system display the date of the last trace.

Manufacturer   The system displays the manufacturer's number.

Vendor   The system displays the number of the vendor supplying the items in this lot.

Archive Label   The system displays the name of the archived media tape with archived information on this lot. You can overwrite the information in this field.

Manufacturer Lot   The system displays the manufacturer's lot number.

Vendor Lot   The system displays the vendor lot number.

Level   The system displays a number that represents the level of this lot. This number is reflective of whether you are performing a forward or backward trace.

Lot   The system displays the lot number for the selected item.

Item   The system displays the item number.

+/- (1,A)   The +/- field displays whether the transaction was a receipt or an issue.

Quantity   The system displays the quantity of the lot.

If the item is a DWM item, you can use F18 to toggle between the quantity and the equivalent DWM dual measure value.

T (1,A)   The system displays the type of order the lot was received from or issued to:

C

Customer order

P

Purchase order

S

Shop order

This is not the transaction type.

Order   The system displays the order number for the lot.

Date   The system displays the order date.

Cust/Vendor   The system displays an entry only if the transaction is at the end level and contains a vendor description for backward traces and a customer description for forward traces.

Screen actions - API300-03

Commands	Description
F11=Fold/Unfold	Use to expand or collapse additional item or lot information.
F14=Forward Multiple Level Trace	Use to view a forward multiple level trace, for example to view all levels of the bill of material.
F15=Backward Multiple Level Trace	Use to view a backward multiple level trace, for example to view all levels of the bill of material.
F16=Forward Single Level Trace	Use to view a forward single level trace, for example to view one level of the bill of material.
F17=Backward Single Level Trace	Use to view a backward single level trace, for example to view one level of the bill of material.
F18=DWM Switch	Use to toggle between quantities and equivalent DWM dual measure values for DWM items.
F19=Browse Lots	Use to review all lots assigned to the item.
F20=Material Status	Use to access Material Status Inquiry.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document. |

Lot inventory transaction history screen

The Lot Inventory Transaction History screen, API300-04, displays a complete line view of all inventory transaction history files. This screen is an online equivalent of the Transaction History report, INV270, and provides a different view of inventory transaction history than the Material Status Inquiry - History screen, INV300D-05. This screen searches by lot number and shows all of the items that the lot went into.

Lot Trace Inquiry processes only issues, including shop order single and multiple issues, receipts, and re-designate transactions. The system ignores opening balance, adjustments and other transactions that do not affect lot traceability.

Field descriptions - API300-04

Fields	Description
Lot	The system displays the lot number based on the entry on the previous screen. You can change the lot number.
Vendor	The system displays the number of the vendor supplying the items in this lot.
Vendor Lot	The system displays the vendor lot number.
Item	The system displays the lot number based on the item you specified on the previous screen.
Manufacturer	The system displays the manufacturer's number.
Manufacturer Lot	The system displays the manufacturer's lot number.
Transaction Effect	Specify the transaction effect code. Leave the field blank to display all transactions.
Facility	Specify the code for the facility associated with this lot inventory transaction history.
Warehouse	Specify a code for the warehouse.
Start Date	Specify the date that begins the list of inventory transactions.
Trans (Transaction Effect)	The system displays the transaction effect code for the selected lot.
Lot	The system displays the lot number.
Item	The system displays the item number.
Whs (Warehouse)	The system displays the code that identifies the warehouse in which the inventory is stored.
Locn (Location)	The system displays the code of the location with which this item is to be associated, typically, the location where it is stocked.
T (1,A)	The system displays the type of order that the lot was received from or issued to. C Customer order

P

Purchase order

S

Shop order

This is not the transaction type.

Quantity	The system displays the quantity of the lot.
Order	The system displays the order number for the lot.
Date	The system displays the date the lot was created.
Reason Code	The system displays the reason code for this particular transaction. You maintain transaction reason codes in Inventory Management's Reason Code Maintenance program.

Screen actions - API300-04

Commands	Description
F11=Fold/Unfold	Use to expand or collapse additional item and lot information.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Customer qualified lot inquiry

To access the selection screen, choose Customer Qualified Lot Inquiry, API370D, from the API main menu.

Use Customer Qualified Lot Inquiry, API370D, to display all usable lots of an item. A usable lot is suitable for shipment to a particular customer, based on any qualifying restrictions you set up.

Customer/group item qualification selection

Use the Customer/Group Item Qualification Selection screen, API370D1-01, screen to select a combination of customer, item and group on which to run the inquiry.

You can use line action 12 to display all lots of this item. If you use this option, the inquiry results screen displays a field that indicates whether each lot is usable for the customer of this record. If it is usable, the field is blank. If it is not usable, the system indicates that one or more tests failed or that the tests are not complete.

Field descriptions - API370D-01

Fields	Description
Line actions	The following line actions are specific to this screen:
	11=Display Usable
	Use this action to display only lots that fulfill all test requirements for this customer/group item qualifier record.
	12=Display All
	Use this action to display all lots of this item, whether or not they meet this customer's requirements. A field in the inquiry results screen indicates whether the lot is acceptable for this customer. If it is usable, the field is blank. If it is not usable, the field displays failed or incomplete tests.
	All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 15)* 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.
Customer (8,0)	The system displays all existing customer/group item qualifier records. The value in this field must be a valid record in the Customer Master file, RCM.
	The Order Management product expects this value to be the sold-to customer.
Group (8,A)	The system displays all existing customer/group item qualifier records. The value in this field must exist in the Table Code Master file, ZCC, with Table ID of CUSTQUAL.
Item (35,A)	The system displays all existing customer/group item qualifier records. The value you type must be a valid lot-controlled item in the Item master file, IIM.

Screen actions - API370D-01

Commands	Description
F13 = Filter	Access a filter screen and specify whether to view all records or only active records.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Customer/group qualified lot inquiry results

The second Customer/Group Qualified Lot Inquiry screen, API370D-02, displays lot information for the customer or customer group and item record you selected in the initial screen. A literal in the upper left of the screen reads Usable Lots or All Lots, depending on the choice you made. Use F13 to toggle between usable and all.

The system displays Item/Lot information from the Location Inventory file and the Lot Master, including the following values:

- Lot and Warehouses with Inventory. Sequenced in order of expiration date, with earliest date at the top of the list.
- Amount of inventory of the lot in each warehouse, on-hand. Open balance plus receipts plus Adjustments, minus issues and available on-hand quantity minus quantity hard-allocated to orders.
- Lot Status Code. There is an asterisk * to the right of this field if any location status is different than the lot status.
- Lot Potency. On the top line, to the right of each item, you can see an indication of the lot's availability for this customer/customer group. A blank indicates that the lot is usable for this customer. This means that all tests are complete and meet this customer's criteria. The message Tests Failed appears if the lot failed any tests. The message Tests Incomplete appears if the lot has passed all completed tests, but some tests still need to be performed.

Field descriptions - API370D-02

Fields	Description
Act (2,0)	Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 15)* in the overview information in this document.

Lot Number (25,A)   Use this field with line action 8 to position the list to your entry.

Screen actions - API370D-02

Commands	Description
F13 = Toggle	Use to toggle between all lot information and only lot information that is usable for this customer.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot status change inquiry

Use Status Change Inquiry, API380D, to produce an online listing of all lots that had a status change through the automated lot status change process since you last purged the audit records.

Lot Status Change Inquiry shows item number, lot number, date of the change in lot status, the old and new status of the lot, and the user ID of the user who ran the program. Access the Lot Inquiry program, INV130D2-01, for additional information about displayed lot records.

To access the first screen, choose Automated Lot Status Change Inquiry, API380D, from the API main menu and press Enter.

Automated lot status change inquiry

Use the Automated Lot Status Change Inquiry screen, API380D-01, to view lots that had status changes. Fold the screen to see the old and the new status.

Field descriptions - API380D-01

Fields	Description
Line actions	The following line action is specific to this screen:

10=Lot Inquiry

Use to access Lot Master Maintenance, INV130D2-01, in display mode to view additional information about this record's lot.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 15)* 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 the item number to position to or view in Lot Inquiry, INV130D2-01.

Lot Number (25,A)

Specify the lot number to position to or view in Lot Inquiry, INV130D2-01.

Screen actions - API380D-01

Commands	Description
F11=Fold	Toggle between a basic and an expanded view of the records. Fold the screen to view the old and new lot status for the lots.
F13=Sequence	Use this function to toggle between item/lot sequence and lot/item sequence. The initial display is item/lot.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Campaign processing

Batch process manufacturers use campaign planning to improve the utilization of manufacturing capacity by producing the same item in multiple batches, one shop order per batch. The system links multiple batches of production into a single campaign to simplify the maintenance of related planned, firm planned, and shop orders . The overlapping or spacing of batches, (batch interval) within a campaign ensures that batches start when both the first work center is available and the controlling operation is free to accept a batch.

You can include existing planned and firm planned orders in a campaign, and you can create new orders in campaign planning. You can then aggregate them into one campaign firm planned order.

You can split a single campaign firm planned order into multiple time-phased orders before you generate the material requirements plan to minimize inventory investment. Campaign quantity divided by the

manufacturing batch size determines the number of firm planned orders the system creates. This ensures that the system create only one firm planned order for a given due date.

If necessary, the system adjusts the campaign quantity upward to reflect even multiples of the manufacturing batch size. The batch interval determines the release date of each time-phased order. When the system converts firm planned orders to shop orders, it schedules multiple batches per day if the batch interval is less than one day.

The system considers campaign setup times only once per campaign, and it backward schedules them from the release date of the campaign's first time-phased firm-planned order. The system forward schedules teardown times from the completion date of the campaign's last time-phased firm planned order. The system performs this scheduling if the detailed capacity requirements plan is ready and if you release the first and last time phased firm planned orders.

If you use multiple planned orders rather than a previously consolidated order to release an order, you can schedule the cleanup operations on more than one shop order if the released quantity exceeds campaign quantity by more than one batch.

To access the first screen, choose Campaign Processing, API500C, from the API main menu.

Specify a warehouse for campaign planning

Use the Campaign Planning warehouse specification screen, API500-01, to specify the warehouse for which you want to view or maintain campaigns.

Field descriptions - API500-01

Fields	Description
Warehouse (3,A)	Specify a warehouse code for campaign planning. This entry selects existing campaigns planned for this warehouse and provides for the identification of new campaigns with this warehouse.

Screen actions - API500-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Campaign master list

If you continue with Campaign Master Planning, the system displays the Campaign Master List screen, API500-02.

In addition to the input fields, the screen displays the following quantity fields:

Gross Open Quantity. The system displays the total quantities of all firm planned order and shop order campaign items planned for production.

Gross Rel. Quantity. The system displays total quantities released to shop orders for this campaign.

Field descriptions - API500-02

Fields	Description
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 line action is specific to this screen.
	11=Remove
	Use to delete the campaign and the campaign ID from any existing firm planned order or shop order linked to the deleted campaign.
	All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 15)* in the overview information in this document.
Campaign ID (6,A)	Specify the Campaign ID. You use this field with line actions 1 Create and 8 Position to.
Seq (Item Sequence number) (2,0)	The system assigns the next item sequence number when a new item is added to the campaign. The same item cannot appear twice in the same campaign. If you try to add an item a second time, the system displays an error message and does not assign a new sequence number for it.
	When you include multiple items in a campaign, the system assigns multiple campaign headers. The item sequence number makes each one unique.
Item (35,A)	Specify the item produced in this campaign.

Screen actions - API500-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Copy campaign

The system displays the Copy Campaign screen, API500-08, if you use the Copy line action on the Campaign Master List screen, ACP500-02.

The system displays the campaign and item number from the original campaign in the Copy From fields. Specify the new campaign, item, and start and end dates in the Copy To fields. The system checks for uniqueness of the campaign ID and item combination, and if the data passes the edit, the system creates a YCP record for this campaign/item, including the Description, Facility, Ordered Quantity (released and finished quantity will be zero on the new record), Alt Mfg Method-BOM, Alt Mfg Method-Routing, Mfg Batch Size, Batch Interval-days, Set-up Operation, Clean-up Operation, and the two comments lines.

The system also creates a campaign firm-planned order, KFP record, or, if a planned order exists for the dates, it changes the KFP to reflect the Copy To campaign ID. If a planned order exists for the item/facility with a matching start date (from date) but a different due date, the system displays a warning message. If you override that message, the system changes the KFP due date to the campaign end date.

Field descriptions - API500-08

Fields	Description
Campaign (6,A)	The system displays the campaign ID of the copied record in the Copy From Campaign field. Specify the new campaign ID in the Copy To Campaign field. This must be a unique campaign ID/item combination or the copy operation does not take place.
Item (35,A)	The system displays the item number of the copied record in the Copy From Item field. Specify the new item number in the Copy To Item field. This must be a unique campaign ID/item combination or the copy operation does not take place.
Campaign Start Date (8,0)	Specify the start date of the earliest planned or released order to include in this campaign. Express the date as the date of the warehouse region.
Campaign End Date (8,0)	Specify the due date of the latest planned or released order to include in this campaign. Express the date as the date of the warehouse region.

Screen actions - API500-08

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Campaign planning - available orders

The Campaign Planning - Available Orders screen, API500D2, lists all current planned and firm planned orders for an item and warehouse not previously linked to a campaign. The system displays this screen if you create a new campaign from API500-02 or if you request Available Orders within an existing campaign.

Field descriptions - API500D2

Fields	Description
Act (1,0)	Specify 11 next to an available order and press Enter to include it in the campaign.
Type (1,A)	Specify the type of order to include in the campaign. Choose one of the following values: **F** Firm Planned Order **S** Shop Order
Due Date (8,0)	Specify the due date for the planned order. This is the date according to the planned order warehouse region.

Screen actions - API500D2

Commands	Description
F7=Backward	Use to scroll backward to display additional information.
F8=Forward	Use to scroll forward to display additional information. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Campaign master details

If you continue with Campaign Planning, the system displays the Campaign Master Details screen, API500-04.

Field descriptions - API500-04

Fields	Description
Campaign ID (6,A)	The system displays a unique identifier for planning of an individual campaign. This ID is attached to firm planned and shop orders that are processed in the campaign.
Description (50,A) (Optional)	Specify campaign comments or additional descriptions.
Item Number (35,A)	The system displays the item produced in this campaign.
Warehouse (3,A)	The system displays the warehouse linked to this campaign.
Campaign Start Date (6,0)	The system displays the start date of the earliest planned or released order included in this campaign. The date is expressed as the date of the warehouse region.
Campaign End Date (6,0)	The system displays the due date of the latest planned or released order included in this campaign. The date is expressed as the date of the warehouse region.
Customer Order Number (9,0)	Specify a customer order number for this campaign. This is memo information that the system edits for item/order.
Material Method (2,A)	Specify a material method code that the system uses for production of this item. Changes effect only those orders not yet released.
Prior Campaign (6,A)	Specify the campaign ID you want to link to prior to the current campaign. The Prior and Next Campaign fields allow you to chain together a number of campaigns to further reduce outlay for setup and cleanup operations.
Next Campaign (6,A)	Specify the campaign ID you want to link to after the current campaign. The Prior and Next Campaign fields allow you to chain together a number of campaigns to further reduce outlay for setup and cleanup operations.
Routing Method (2,A)	Specify a routing method code that the system uses for production of this item. Changes effect only those orders not yet released.

Set-up Operation (3,0)   Specify the alternate operation number in this item's routing for setup.

Clean-up Operation (3,0)   Specify the alternate operation number in this item's routing for cleanup.

Standard Yield Factor (5,2)   Specify the standard yield factor for this item. The system uses this to adjust quantities on shop orders, planned orders, and purchase orders in MRP and MPS by an anticipated yield, expressed as a percentage. The yield factor does not affect shop orders released through Shop Order Release, SFC500. Refer to the MPS/MRP Run Instructions for more detail.

Campaign Batch Size (11,3)   Specify the gross batch size. Batch size refers to the campaign. The defaults, in order of selection, are incremental order quantity, lot size, or batch size.

Comp Batch Size (Net) 11,3)   Specify the net batch size. Batch size refers to the campaign.

Batch Interval (Days) (7,3)   This field determines the release date of each time-phased order. When you convert firm planned orders to shop orders, the system schedules multiple batches per day if the batch interval is less than one day.

Batch Interval defaults to the campaign batch size divided by variable lead time rate.

Example: 150 Units divided by 100 Units/Day = 1.5 Days

The information first defaults from the CIC and then from the IIM. The variable lead time rate is from the facility/item planning data.

You can change this interval to affect orders not released. The system uses the following hierarchy to populate the campaign batch size field:

1. Incremental order quantity

2. Lot size

3. Batch size

Ordered Quantity (Gross) (11,3)   The system displays the gross ordered quantity for the campaign.

Ordered Quantity (Net) (11,3)   The system displays the quantity based on yield for the campaign.

Released Quantity (Gross) (11,3)   The system displays the quantity of shop orders released.

Completed Quantity (11,3)	The system displays the quantity reported and posted in SFC600.
Comments (50,A)	Specify any comments or additional descriptions for this campaign.

Screen actions - API500-04

Commands	Description
F14=Create Campaign FPO	Use to create campaign firm planned orders. This screen action aggregates previously included firm planned orders to a summary campaign firm planned order.
F15=Available Orders List	Use to view the available orders list.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Campaign master additional details

This screen displays if you use line action 5 on Campaign Master List, API500-02, or press Enter on Campaign Master Details, API500-04.

Field descriptions - API500-05

Fields	Description
Act (2,0)	Specify the number for the line action to perform and press Enter. Refer to the overview section of this documents for information on line actions.
	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 15)* in the overview information in this document.
Type (1,A)	Specify one of the following order types:
	F Firm Planned Order
	S Shop Order
From Date (8,0)	Specify the earliest date of records to process.
Shop Order (9,0)	Specify the number of the shop order you want to process.

Screen actions - API500-05

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Campaign planning - order details

The system displays the Campaign Planning - Order Details screen, API500D2-06, if you press Enter on Campaign Master Details, API500-04.

This screen contains fields that you use to limit the data the system selects.

Field descriptions - API500D2-06

Fields	Description
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.
	7=Release
	Use to perform an online release and print for campaign firm planned orders.
	9=Auto Pre-Assign Lot Number
	Use to automatically assign a lot number to a campaign order, firm-planned order or shop order. The system creates a lot if necessary.
	11=Remove
	Use to remove the campaign ID from an existing firm planned order.
	12=Split
	This screen action is valid only for firm planned orders. Use to create multiple, time phased, firm planned orders that represent the life of the campaign or a part of it.
	13=Release with Pre-Assign Lot Numbers
	Use to pre-assign multiple lot numbers based on the setting for the Campaign Release Lot Numbering Logic field in Advanced Process Industries Parameters, API820D.

22=Serial Number

Display SFC599D-01 and select the serial numbers assigned to this item.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 15)* in the overview information in this document.

F/B (1,A)	Specify whether this is forward or backward scheduled.
Type (1,A)	Specify one of the following order types:
	F Firm Planned Order
	S Shop Order
From Date (8,0)	Specify the earliest date in the range of dates for records to process. Express the date as the date of the warehouse region.
To Date (8,0)	Specify the latest date in the range of dates for records to process. Express the date as the date of the warehouse region.
Gross Order Quantity (11,3)	Specify the gross quantity of the order.
Shop Order (9,0)	Specify the number of the shop order you want to process.
Pre-assign Lot No. (25,A)	Pre-assign a lot number to a campaign firm planned order or shop order.
Reason Code (3,A)	Specify the reason code for this order. If you have turned on the Reason Code Required field at the system or facility file level when Maintaining Planned or Firm Planned Orders, you must specify a value in this field. Your entry must be a valid reason code in the ZCC table, PLOREASN.
Reason Code Comment (30,A)	Optional. Specify a comment related to your reason for making revisions to the order.

Screen actions - API500-06

Commands	Description
F15=Available Orders List	Use to view the available orders list.
F17=Item/Facility Quality	Use to access the Item/Facility Quality Selection program, SFC121D1. You must have group authority to use this screen action.
F19=Release All	Use to release and forward schedule all campaign planned and firm planned orders for facility, planner code, item and any other Position to entry previously specified.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Starting lot number

Use the Starting Lot Number screen, API500-09, to pre-assign lot numbers.

For lot-controlled items, if you use the Release with Pre-Assign Lot Numbers option, you can pre-assign multiple lots based upon the Campaign Release Lot Numbering Logic field in API Parameters, API820D.

If that field is set to 8 (new lot numbering algorithm), the system displays this screen and requires input. You must specify a 10-character prefix for lot numbers and a 15 digit start number for pre-assigned lots. The system then numbers the lots for the order sequentially, starting with the entered number. The system must check for the lot's existence before it assigns numbers. If multiple items per lot is not allowed and a lot already exists with that number for another item, the system bumps the sequence number up by one.

If you set the Campaign Release Lot Numbering Logic to one of the other options (1 - 7), no input is required on this screen. You must accept this screen with the fields empty to continue.

Field descriptions - API500-09

Fields	Description
Lot Prefix (10,A)	Specify the ten-character string you want to use as the lot-numbering prefix.
Starting Lot Number (15,0)	Specify the 15-character string you want to use as the starting point for numbering lots using the lot prefix entered above.

Screen actions - API500-09

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Shop packet print prompt

Use this program to print shop packets for all planned orders released from the work station by the Campaign Processing Program, API500. This program is available if the CIMPath program is not installed and/or enabled on your system.

Print shop packets

Use the options on this screen to print the shop order packets and/or to allocate inventory components to the shop order.

If you specify 1 in the Print Shop Packet field and 0 in the Allocate Shop Orders field, the program prints the shop order packet without allocating stock to the shop order.

If you specify 1 in the Print Shop Packet and Allocate Shop Orders fields, the program prints the shop order packet and allocates stock to the shop order in non-managed warehouses and creates reservations and/or allocations in managed warehouses based on the Shop Order Reservations field in the Warehouse file, IWE.

If you specify 0 in the Print Shop Packet field and 1 in the Allocate Shop Orders field, the program allocates stock for the shop order but does not print the shop order packet.

If you specify 0 in the Print Shop Packet and Allocate Shop Orders fields, the program updates shop order files with released order information but neither prints the shop order packet nor allocates stock to the shop order.

Field descriptions - Shop Packet Print Prompt

Fields	Description
Print Shop Packet (1,0)	Specify 1 to print the shop order packet and specify 0 to not print shop packets. This field defaults to the MRP system parameter you set. You can override that value with your entry here.
Allocate Shop Orders (1,0)	Specify 1 to allocate stock for shop orders and specify 0 to not allocate stock. If you specify 1, the system allocates inventory in non-managed warehouses

and creates reservations and/or allocations in managed warehouses based on the Shop Order Reservations field set in Item/Warehouse maintenance file, IWE. This field defaults to the MRP system parameter you set. You can override that value with your entry here.

Screen actions - API503D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot release processing

Use this program to run lot release processing on the specified item with the specified lot. After you input an item and lot number and press Enter, the system works backward from the lot you input, checking the current lot status of all of the materials used to manufacture that item to insure that these materials are in an approved status.

Note: For Infor LX 8.3.3 and higher versions, you can alternatively choose to run the process against only first-level components. The program checks both issues and allocations.

After identifying the current lot statuses, the system uses the field Lot Release O.K. in the Lot Status Table to identify the particular statuses that are okay to release the lot for shipment. The system writes results records to a file called the Lot Process Error Work file. If this check finds lot numbers in the production chain for this item that have statuses with the Lot Release O.K. field set to no, the system populates the Result Type field in the Lot Process Error Work file with a value of DNMT, Does Not Meet Test. If the system finds no lots in a status where the Lot Release O.K. field is no, the system writes the result value of MT, Meets Test, to the records in the QAL file.

This Lot Release Processing automated lot status check applies to all users, regardless of whether QMS is installed. As a QMS user, you can create a result type 4 test, which initiates Lot Release Processing when you disposition the lot. When the Lot Release Process finishes, based upon your next action, the system can write the result to the QMS Results file, QRE, and the Dispositions file, QDP. After the lot release checking process is complete, you can continue through normal Infor LX processing, run the process again, or return to the previous screens.

However, even if you use QMS, you can run this Lot Release Process as a standalone process without updating the QRE or QDP files by using the Lot Release Process Line action 30 from the Disposition screen, QMS550D1-01. This initiates the API program Lot Release Processing, the same program non-QMS users access from the API menu.

When the lot release check completes, you may receive informational result messages. If you receive the message Lot Release Processing has passed for all component items, this indicates that all lots in

the production chain for this item have passed the check. The No Receipt or Issue Transactions Found for all component items message indicates that the system found no transactions in the ITH or YTH history files to run the check against. Or, the system presents you with the actual item/lot combination exceptions on Lot Release Process Exception Results, API510D-02.

To access the first screen, choose Lot Release Processing, API510D, from the API main menu. Or, use line action 30 on the Disposition screen, QMS550D1-01.

Lot release processing by item/lot

Use the Lot Release Processing by item/lot screen, API510D-01, to specify the item and lot on which to run lot release processing.

Field descriptions - API510D-01

Fields	Description
Item Number (35,A)	Specify the item number for the item/lot combination that the system uses to run Lot Release Processing. This item must have a valid record in the Item Master file, IIM.
Item Description (50,A)	The system displays the description of the item in the Item Number field.
Lot Number (25,A)	Specify the lot number for the item/lot combination that the system uses to run Lot Release Processing. This lot must have a valid record in the Lot Master file, ILN.
Single or Multi-level (1,A)	Specify 1=single to run the release processing for top-level BOM components only or 2=multi to run it for components of all levels of the BOM.

Screen actions - API510D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot release process exception results

The system displays the Lot Release Process Exception Results screen, API510D-02, if one or more of the item/lot combinations in the production chain of the item/lot for which you are running Lot Release Processing fails the Lot Release OK check. This screen displays the original item and its description

and the original lot number in the upper portion of the screen. The lower portion of the screen displays each of the item/lot records that failed the check and generated an exception.

This screen is informational only, but it provides the opportunity to identify lots with potential problems and to go back and examine the individual records, for example lot status records, associated with these item/lots. You can also disregard the warning this screen represents and proceed with release of the original item/lot to the customer without taking any corrective action.

This screen displays the sequence number, item number, lot number, and lot status for each failed record. If you fold the screen, you can also see a description of the item.

Field descriptions - API510D-02

Fields	Description
Line Actions (2,0)	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 15)* 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 field value.
Seq (5,0) or +/-/#	For ERP LX 8.3.02 or earlier, use this field with line action 8. Specify the sequence number of the item/lot record to which you want to position the list.
	For ERP LX 8.3.03 or higher, this field displays the type of data that generated the exception result:+ = receipt, - = issue, and # = allocation.
Item Number (exception) (35,A)	The system displays the item number of this exception record from the Lot Process Work file, QAL.
Lot Number (exception) (25,0)	The system displays the lot number of this exception record from the Lot Process Work file, QAL.
Lot Status (2,A)	The system displays the lot status of this exception record as shown in the Lot Master, ILN. A ** status occurs when there is no active record in the Inventory Status Code Table, IST, for the lot status on the Lot Master File for this lot number.

Screen actions - API510D-02

Commands	Description
F14=Accept and Continue	This screen action is available if you access it via a QMS test only. Use to accept the results on this screen (updating the QRE and QDP records) and continue with standard QMS processing.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Bounded disposition

Traditional production planning, MPS and MRP, explodes planned orders through product structures creating lower level material requirements. Lower level ingredients often must be fully consumed during the production run due to short shelf life or unique storage requirements. In the past, you could perform manual adjustments to shop order quantities to use up the critical raw material. This approach often created material shortages for other items whose requirements increased at the time of shop order creation. Bounded disposition automates this process by creating a unique relationship, established by facility, between an item and one of its ingredients.

Bounded disposition transfers control to the child item, which can override the planned requirements for the parent. The inventory of the component will be consumed during the period as soon as possible after it becomes available-to-promise. At the end of the period, there will be a zero planned available-to-promise balance on hand. Concurrently, the system replans other components that are at the same level on the bill of materials as the bounded component.

Within the user-defined production interval, the system creates or increases firm planned order quantities for manufactured parents to fully consume bounded ingredients. These new firm planned orders create additional requirements for other ingredients used in the production process. The end result is an achievable production plan, which fully consumes all available bounded ingredients.

API550 cannot run concurrently with MPS (MRP500), DRP (DRP500), and MRP (MRP600) within a given facility.To access the first screen, choose Bounded Disposition, API550D, from the API main menu.

Bounded disposition selection

The Bounded Disposition selection screen, API550D-01, contains fields that you use to limit the data the system selects to print in the report.

Field descriptions - API550-01

Fields	Description
Start Date/End Date (6,0)	Specify a date range for bounded ingredient replanning. The dates generated are for the planned order warehouse region.
Ingredient Number (35,0)	Specify a range of ingredients. Ingredients previously identified as bound in Manufacturing Data Maintenance, BOM500D1, and other ingredients on the same level as the bounded ingredients, are processed.
Facility Code (2,A)	Specify a valid facility code for bounded ingredients.
Planner Code (3,A)	Specify the planner code for the selected bounded ingredients. Leave the field blank to include all planner codes.
Run Time Parameter (1,0)	Specify Interactive to process the data in real time or specify Batch to process the data in the job queue. If you specify Interactive, your workstation is unavailable for other tasks until the job finishes.

Screen actions - API550-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot usage inquiry and release

Lot Usage Inquiry/Release, API560D, helps you keep on top of the usage of components that need to be used promptly, because of short shelf life, high cost, and so on. On the initial prompt screen you specify an item and warehouse for which you want to view available quantities. The system displays all lots of this item in the specified warehouse. From there, you can select a lot for release to a shop order.

This program applies primarily to items that require a restriction of the number of lots that you can allocate to a single shop order.

Lot usage inquiry/release by item/warehouse

Use the Lot Usage Inquiry/Release by item/warehouse screen, API560D-01, to specify an item and warehouse for which you want to view available quantities.

Field descriptions - API560D-01

Fields	Description
Item (35,A)	Specify the number of the item for which you want to view quantities available for release. The item you specify must by a valid item in the Item Master file, IIM, and it must be a lot-controlled item.
Warehouse (3,A)	Specify the number of the warehouse in which to view quantities of the specified item that are available for release. The warehouse must be a valid Infor LX warehouse in the Warehouse Master, IWM.

Screen actions - API560D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot usage inquiry/release selection, API560D-02

Use the Lot Usage Inquiry/Release selection screen, API560D-02 to view selected lots to make release decisions. It displays all available lots for the specified item in the specified warehouse, sequenced by lot expiration dates. You can view critical information to help you make release decisions, such as the expiration date of each lot and the quantity currently available in each lot.

Field descriptions - API560D-02

Fields	Description
Line Actions	The following line actions are available on this screen: **11=Select for Release** Use to select lots in preparation for releasing them to shop orders. You can use this action only if your group is authorized to release shop orders in the Group Maintenance program, SYS603D. This action initiates Lot Usage Inquiry/ Release Parent Specification, API560D-03, in which you can input a parent

and see what quantity of that parent you can produce with the available inventory of the lot or lots selected. You can then proceed to the Inquiry/Release Accept SO Release screen, API560D-04, and release that lot quantity to a shop order.

12=De-Select

Use to de-select a previously selected lot.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 15)* 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 (35,A)

The system displays the item you specified on the prompt screen Lot Usage Inquiry/Release, API560D-01, along with its description. To view a different item, specify the number of that item to view quantities available for release in the specified warehouse. You can specify a new item, a new warehouse, or both.

The item you specify must by a valid item in the Item Master file, IIM, and it must be a lot-controlled item.

Warehouse (3,A)

The system displays the warehouse you specified on the prompt screen Lot Usage Inquiry/Release, API560D-01, along with its description. To view quantities of the specified item that are available for release in a different warehouse, specify the number of that warehouse. You can specify a new item, a new warehouse, or both.

The warehouse must be a valid Infor LX warehouse in the Warehouse Master, IWM.

Lot (35,A)

Select a lot to release in whole or partially. To display a specific lot record at the top of the list, use action 8 in the top Act field, type the lot number here, and press Enter. The system positions the list to the lot closest to your entry.

Override Qty (11,3)

Type the portion of the displayed available quantity, which is the on-hand quantity minus any allocated quantity, that you want to use in the calculation. When you press Enter, the system displays a screen in which you can specify the parent you want to make. It calculates how much of the parent you can make with the quantity you specified from this lot. You can specify any quantity up to the available quantity, but you cannot exceed it.

Screen actions - API560D-02

Commands	Description
F6=Process	Accept the changes to this screen and process the lot.
F17=Item/Facility Quality	Access the Item/Facility Quality Selection program, SFC121D1. You must have group authority to use this screen action.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Required to release order

If you use the F15=Display screen action in the Lot Usage Inquiry/Release screen, API560D-02, the system displays the Required to Release Order screen, API560D-03, with the total quantity specified for all lots selected on the selection screen. You can specify the parent for which you want to run a calculation. The system calculates the quantity of the parent item you can create to completely use up the sum of the available quantities or portions of them for the lots you selected.

Field descriptions - API560D-03

Fields	Description
Parent Item (35,A)	Specify the parent item for which you want the quantity calculation performed. If you press Enter, the system locates the appropriate bill of materials and calculates the quantity of the parent item you can make to completely use up the quantity from the lot or lots selected.
Release Date (8,0)	Specify a release date for the possible shop order. This field defaults to today's date. This is expressed in the current date of the warehouse region if you are using the regional clock time zone conversion.
Method (2,A)	To use an alternate material method to create the order, specify the method code.

Screen actions - API560D-03

Commands	Description
Standard screen ac-tions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot usage inquiry/release - accept SO release

If you press Enter on the Parent Specification screen, the system displays the Accept Release Order screen, API560D-04. The screen shows the selected parent, release date, facility, and alternate manufacturing method. The system also displays the shop order quantity that would use up the entire available inventory for the lot or lots that you selected. If the parent item is lot controlled, this screen also displays a PreAssign Lot Number field.

Field descriptions - API560D-04

Fields	Description
Create Lot (1,0)	Optional. This field applies only if your end item is lot controlled. Specify 1 to automatically assign the next available lot number when you release the shop order. Specify 0 to not automatically assign this number. If you specify 1 in this field, you must leave the PreAssign Lot Number field blank.
	If the end item is lot controlled and you leave both the Create Lot field and the PreAssign Lot Number field blank in this screen, the system automatically assigns a lot number when it receives this shop order.
PreAssign Lot Number (25,A)	Optional. This field applies only if your end item is lot controlled. To pre-assign a custom lot number for the end item produced in this shop order, specify the desired lot number.
	If the end item is lot controlled and you leave both the Create Lot field and the PreAssign Lot Number field blank in this screen, the system automatically assigns a lot number when it receives this shop order.

Screen actions - API560D-04

Commands	Description
F6=Accept Release	Release a shop order in the quantity calculated to use up the specified inventory. The system first accesses API504 so you can set bar code, print and allocate options, and release the shop order. The system then returns you to the Lot Usage Inquiry/Release Selection screen, API560D-02.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Batch allocation planning report

To access the first screen, choose Batch Allocation Planning Report, API260D, from the API main menu.

This report allows you to select a lot-controlled component item and view lot information for it globally or limited to a specific facility, and restricted to lots in up to ten specified lot statuses. The report displays lot numbers, quantities, and release and due dates, allowing you to make better decisions about the allocation of inventory of costly or time-sensitive component items.

Batch allocation planning report selection

Use the Batch Allocation Planning Report selection screen, API260D-01, to specify information to include in the report.

Field descriptions - API260D-01

Fields	Description
Component Item (35,A)	Specify the component item for which you want to view lot and other inventory information. You can include global information or you can restrict it to a single facility by entering a value in the Facility field.
	The item you specify must be a valid, lot-controlled item in the Item Master file, IIM.
Facility (3,A)	Specify a facility to restrict the report to this component in a single facility. A blank field restricts the selection to global bills (no facility specified).

The item you specify must exist as a component on at least one bill of materials in the specified facility (if you type one) or on a global bill of materials if you were not specific.

Status Code (2,A) Specify up to ten lot/location status codes to include in the report on this component item. If you leave all fields blank, the system includes all statuses. The statuses must exist in the Inventory Lot Status file, IST.

Run Time Parameter (1,0) Specify interactive to process the data in real time or specify batch to process the data in the job queue. If you specify interactive, your workstation is unavailable for other tasks until the job finishes.

Screen actions - API260D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot test results entry

Use the Lot Test Results Entry program, API570D, to enter test results for a particular item/lot combination. These tests must exist in Lot Test Master Maintenance, API170. The system uses the results to determine whether you can use a specific lot of an item in a specific customer's order.

Lot test results entry by item/lot

Use the Lot Test Results Entry by item/lot screen, API570D-01, to specify the item and lot for which you want to enter test results. You also specify a specification value to retrieve all tests that share that specification value, a lot test results entry selection, or a specific test ID to go directly to that test record to input data.

Field descriptions - API570D-01

Fields	Description
Item Number (35,A)	Specify the item number of the item for which you are entering test results. It must be a valid lot-controlled item in the Item Master file, IIM.
Lot Number (25,A)	Specify the lot number of the lot for which you are entering test results. The value must be a valid lot for this item in the Lot Master file, ILN.
Specification (15,A)	Specify the specification value of the tests for which you want to type results. If you specify a value in this field, do not specify a value in the Test ID field. If you specify a value here, the system displays the second selection screen, Lot Test Results Entry Selection, API570D-03, where you can choose the test in this specification group for which you want to type results.
Test ID (10,A)	Specify the test ID of the test for which you want to type results. If you specify a value in this field, do not specify a value in the Specification field. If you type a value, the system displays the third screen, Lot Test Results Entry detail, API570D-02, where you can specify results under this test ID for the specified item and lot.
User Attribute 1 (10,A)	If the field for this attribute is set to on in API System Parameters, API820D, you can type any available results for this attribute in this lot here. The data updates the corresponding field in the Lot Master record for the specified lot.
	The literal that the system displays on your screen for this attribute comes from the message file. This is user definable in Message File Maintenance, SYS708. The literal numbers are L087753 through L087756.
User Attribute 2 (10,A)	If the field for this attribute is set to on in API System Parameters, API820D, you can type any available results for this attribute in this lot here. Refer to the User Attribute 1 field help for detailed information.
User Attribute 3 (10,A)	If the field for this attribute is set to on in API System Parameters, API820D, you can type any available results for this attribute in this lot here. Refer to the User Attribute 1 field help for detailed information.
User Attribute 4 (10,A)	If the field for this attribute is set to on in API System Parameters, API820D, you can type any available results for this attribute in this lot here. Refer to the User Attribute 1 field help for detailed information.

Screen actions - API570D-01

Commands	Description
F14=Lot Master	Access the Lot Master program, INV130D.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot test results entry selection

The system displays Lot Test Results Entry selection, API570D-03 if you entered a specification on the initial Lot Test Results Entry screen, API570D-01. The system displays a list of all the test IDs that share the specification value you entered. You can select one or more of them to type test data.

Field descriptions - API570D-03

Fields	Description
Item Number (35,A)	The system displays the item number you specified on the initial selection screen. You can change this value. It must be a valid lot-controlled item in the Item Master file, IIM. If you change the value, the system reloads the list with the appropriate records.
Lot Number (25,A)	The system displays the lot number you specified on the initial selection screen. You can change this value.. The value must be a valid lot for this item in the Lot Master file, ILN. If you change the value, the system reloads the list with the appropriate records.
Specification (15,A)	The system displays the specification value you specified on the initial selection screen. You can change this value. If you change it, the system reloads the list with the appropriate records.
Line actions	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 15)* 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.
Test ID (10,A)	Specify the test ID of the test for which you want to type results. Or, choose one or more test IDs to type test results.

Screen actions - API570D-03

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot test results entry detail

Use the Lot Test Results Entry detail screen, API570D-02, to enter test results for tests run on this lot of the specified item.

If you choose more than one test ID for update on the second selection screen, the system displays this screen for one record after another, allowing you to process each one. After you process all test IDs, the system returns you to the initial selection screen, Lot Test Results Entry, API570D-01.

Field descriptions - API570D-02

Fields	Description
Item Number (35,A)	The system displays the item number you specified on the initial selection screen and its description from the Item Master record.
Lot Number (25,A)	The system displays the lot number you specified on the initial selection screen.
Specification (15,A)	The system displays the specification value you specified on the initial selection screen.
Test ID (10,A)	The system displays the test ID specified on the first or second selection screen.
Last Results Sequence (3,0)	The system displays the last result sequence number. This number increments every time you specify a new result for this lot/item/test ID in the Lot Test Results Master. If this is the first test, the sequence number is zero.
	After you accept a results entry, you cannot return to it and revise it. You must create another record with a new sequence number.
Test Date (8,0)	This field defaults to today's date. If you are using the regional clock time zone conversion, this is expressed in the current date of the user region. You can change this date to any date prior to today, but not to a future date.

Test Time (6,0) This field defaults to the current time. If you are using the regional clock time zone conversion, this is expressed in the current time of the user region. You can change it to any time before the current time, but not to a time in the future.

Tester ID (10,A) This field defaults to your user ID, but you can change it to any valid Infor LX user ID.

Alpha Results (2,A) If the result type for this test ID is 2 or 3, you can specify the alpha results for this test.

Numeric Results (13,6) If the result type for this test ID is 1 3, you can specify the numeric results for this test.

Remarks 1 (40,A) Specify any additional information you want to associate with this run of this test.

Remarks 2 (40,A) Specify any additional information you want to associate with this run of this test.

User Attribute 1 (10,A) If the field for this attribute is set to on in API System Parameters, API820D, you can specify any available results for this attribute in this lot. The data updates the corresponding field in the Lot Master record for the specified lot.

The literal that the system displays on your screen for this attribute comes from the message file. This is user definable in Message File Maintenance, SYS708. The literal numbers are L087753 through L087756.

User Attribute 2 (10,A) If the field for this attribute is set to on in API System Parameters, API820D, you can specify any available results for this attribute in this lot. Refer to the User Attribute 1 help for detailed information.

User Attribute 3 (10,A) If the field for this attribute is set to on in API System Parameters, API820D, you can specify any available results for this attribute in this lot. Refer to the User Attribute 1 help for detailed information.

User Attribute 4 (10,A) If the field for this attribute is set to on in API System Parameters, API820D, you can specify any available results for this attribute in this lot. Refer to the User Attribute 1 help for detailed information.

Screen actions - API570D-03

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Automated lot status change

This program reads lot expiration dates and retest dates that are set set on the lot records and the additional number of days set for expiration in the Item Master records. If an expiration date and/or retest date falls within the period that is defined by these two values, the system changes the lot's status to a system default value you entered to indicate that it is close to expiration or close to requiring retesting.

To access the first screen, choose Automated Lot Status Change, API580D, from the API main menu.

Automated lot status change date specification

Use the Automated Lot Status Change date specification screen, API580D-01, to automatically update lot statuses of existing lots. To use this screen, you must turn on automatic lot status change in the Advanced Process Industries System Parameters. There, you, indicate whether you want this program to run against expiration dates or retest dates. You must also set a value in the Item Master for expiration or retest horizon days. This is the number of days before the dates specified in the Lot Master records for those items for which you want to monitor lots.

Dates and times in this program default to the current date and time, but you can change these values to any prior date and time. You can also set it to up to three days in the future. The system uses the date you specify as the base date/time against which to check lot records.

Field descriptions - API580D-01

Fields	Description
Automated Lot Status Change Date (8,0)	Specify the date you want the system to use as the base against which it checks whether lots are expired or require retesting. The system considers any lots that fall within the defined period from this date for automatic lot status change. This date defaults to the current date, but you can set it for any date in the past or up to three days into the future.
Run Time Parameter (1,0)	Specify interactive to process the data in real time or specify batch to process the data in the job queue. If you specify interactive, your workstation is unavailable for other tasks until the job finishes.

Screen actions - API580D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Lot status change purge

Use Lot Status Change Purge, API980D, to purge records from the Automatic Lot Status Change audit file, YLS.

To access this screen, choose Automated Lot Status Change Purge from the API main menu.

Automated lot status change purge

Use Automated Lot Status Change Purge, API980D-01, to specify an end date for the purge. If you specify a date and press Enter, the system permanently deletes all YLS records whose creation date falls on or before the date you specify. The default date in the date field is three months prior to the current date.

Field descriptions - API980D-01

Fields	Description
Date (8,0)	Specify the date to use for the purge. The system permanently deletes all records from the Automated Lot Status Change Audit file, YSL, whose creation date falls on or before the date you specify. This field defaults to three months prior to today's date.
Run Time Parameter (1,0)	Specify interactive to process the data in real time or specify batch to process the data in the job queue. If you specify interactive, your workstation is unavailable for other tasks until the job finishes.

Screen actions - API980D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 16)* in the overview information in this document.

Appendix A
Glossary

A

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 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 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.

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