



What's New

Infor XA

Release 10 (SH16220)

This update is for Infor XA release 10 and includes enhancements related to Net-Link and Enterprise Financials.

New functions available in Net-Link

These new common editing functions are available in Net-Link:

- Views, subsets, sorts, and temporary subsets
- Cards such as Application card, Attribute card, Compound card, Overview card, List card, Tabbed Card, Related card, and Graph card.
- Card files
- User profiles, User definitions, User preferences, Personalization
- Application preferences, Object preferences, Mass actions, templates, and workspaces
- Presentation schemes, Message builder, Accelerator keys, column statistics
- Net-Link list view and object view export to HTML/TEXT output formats
- Menus, Toolbar, Common editors
- Enhanced licensing to support license by partition in addition to license by machine
- Current option on the Customize menu. This option shows only the user definitions currently being used to display the application data.

List view alternative

The regular list view in Net-Link has been enhanced to additionally allow a split view or a graph view.

- Split view: The split view allows details related to the row selected to be displayed to the right of the list. As the user selects rows from the list, the contents of the details section are refreshed to match the selected row. This behavior is similar to broadcast/receive functionality in Power-Link.
- Graph view: Allows selection from a list of graph definitions that are defined against the business object (as opposed to a related object as is typically the case on a Graph card).

Workspace definitions have been enhanced to allow configuration of the options to control the defaults for the view. The split view comes with three options, they are List, Graph and List/Detail.

Columns of a list view definition can now be frozen

A new feature has been added to Net-Link that allows the columns of a list view definition to be frozen, but still allow the remaining columns of the view to be scrolled. This is similar to the behavior of spreadsheet applications

Export function is enhanced

The export function in Net-Link has been enhanced to export directly to a spreadsheet from a list view

Filter rows

A new option is added to enable the user to create quick ad-hoc filtering of list data by specifying filtering criteria in a filter row above the table.

New user definition tracking functions added

These new user definition tracking functions are now available only in Net-Link:

- Ability to edit custom definitions.
- Enhanced version of the User Definitions and User Preferences objects.
- New User Definitions History and Usage objects.
- Tracking and Usage Services (Where used, Last used).

Enhanced licensing to support license by partition in addition to license by machine

In Release 9.2, the XA application was enhanced to support licensing by partition, in addition to licensing by machine. However, this licensing model was only made available to customers running implementations of XA on hosted machines. At Release 10, licensing by partition has been fully implemented including the ability of our customer care team to generate license keys supporting this scheme.

Licensing by partition allows the customer to separately license the number of users running XA on one partition vs. another, whereas licensing by machine tracks the number of users across all partitions on the same machine. This may be useful for customers that provide for separate test partitions on the same physical IBM i as they run their production environment(s).

Integrator

Integrator is available to users in Net-Link. There is no requirement of Power-Link to use the features of the Integrator function, including these enhancements:

- Enablement in Net-Link
- Enhanced user interface for Integrator functions
- Monitors have been added to give 'at a glance' understanding of edits and relationships in a business object

Enablement in Net-Link

All Integrator functionality is now available in Net-Link, including the integrator object translation functions.

Enhanced user interface: Business objects

Business objects: General and Maintenance tabs merged into a compound card

Attributes: General, Properties, Discrete Domain, Security, Actions, Default and General Notes merged into one Compound Card

Edits: General, Properties, Edit Attributes and General notes all merged into one Compound Card. For different types of Edits only the relevant section will be visible.

Subscriptions: General and Notification card is combined into one Compound card

User Definition: It will appear as a List card instead of Overview card

Actions: General, host program, Local Program and General notes are combined into one compound card.

User Exits: General, Generation status and Source List are combined into one compound card

There is no change in relationships, Content Security and Maintenance History.

Enhanced User Interface: Integrator Projects

General and History cards are combined into one General Compound card

Enhanced User Interface: Enterprise

General, Business Object, User Exits, Maintenance and Events card are combined into One General Compound card

Enhanced User Interface: Data Sources

General, Additional properties and Business Objects card are combined into one Compound card.

Monitors

Monitors are created for Business object, Attributes, Transactions and Host Processes to display the count of Edits, relationships etc. Whenever you will create/delete the edits etc. the count in monitors will get updated accordingly.

- Business Object Level: Count of Edits, Relationships, Transactions, Subscriptions, Host Jobs, Host Processes, User Actions, Content Security Users, User Exits, Active User Exits, user Secondary extensions and User Text Extensions for the selected Business Object.
- Attribute Level: Count of Action, Discrete Domain, Groups, Edits, Transactions and User definitions for the selected attribute.
- Transaction Level: Count of Edits, Relationships, Subscriptions, User Exits and Active User Exits for the selected Transaction.
- Host Process Level: Count of Edits, Relationships, User Exits and Active User Exits for the selected Host Process.

Attachment Viewer

Attachment viewer is a new user definition Card type. The card shows an attachment in Net-Link when displaying the object details. The card can be included on a card file, a compound card section or referenced as a related card.

New functions available in Enterprise Financials

The following new features are available in IDF Net-Link, Power-Link and System-Link. The corresponding green screen menu options are deactivated.

Enhanced user interface for purchase order invoices

A new user interface on the Financial Transactions object enables seamless and swift creation of purchase order invoices without navigating to the Purchases and Receipts not Invoiced object. Within the Financial Transaction card file, you can view and select purchase orders or inventory receipts to invoice, specifying override quantities and prices if necessary. XA automatically generates and displays invoice charge lines from the selected records.

Tax rule maintenance & tax calculation simulation

Create and maintain tax rules that XA uses to calculate taxes for invoices, customer orders and purchase orders.

Maintain Taxes. These define the different types of taxes that can apply to invoices. XA uses these definitions to categorize and record invoice taxes to meet state, federal and international tax reporting requirements.

Maintain Tax Groups, to consolidate related taxes into a single line on a printed invoice.

Maintain Tax Criteria. These configurable tax rules define how to calculate invoice taxes based on a variety of criteria such as customer/vendor address, warehouse address, customer/vendor exemption status, item category, transaction type, etc.

Simulate Tax Calculations. After setting up tax rules in XA, you can test the rules by entering sample invoice details to see if the application calculates the correct invoice taxes.

Administrative division maintenance

Maintain administrative divisions to set application-wide financial controls and defaults such as whether to enable country-specific tax calculations and tax withholding for Europe and Latin America.

Installment method maintenance

Maintain installment methods to define how XA automatically calculates installment payment schedules for invoices, customer orders and purchase orders. Use installment methods to specify the number of installments, the interest rate (if applicable), and how to calculate the amount due in each installment.

Accounts receivable collection letters

Generate, preview, and edit collection letters for customer entities with overdue balances. Select entities and invoices to include or exclude. Print and/or automatically e-mail the letters to customers.

Accounts receivable and accounts payable audit confirmation letters

Generate, preview, and edit audit confirmation letters for accounts receivable customer entities, and accounts payable vendor entities. These letters include a summary of the outstanding invoices, for the customer or vendor to check against their records and then report back to your company's auditors. Print and/or automatically e-mail the letters to customers.

New functions available in Enterprise General Ledger

Multiple Language Support (MLS) for Account Segment Value Descriptions

Set a language code on each user profile and enable each user to maintain and display Account Segment Value Descriptions in the user's chosen language. This feature is available across various views and cards in Enterprise General Ledger.

Maintain foreign language codes on the new Enterprise GL Foreign Language object. Account segment descriptions can be defined for any of the language codes.

Journal Upload for Multiple Books

EGLi Journal Upload is a Microsoft Excel Add-in application which allows users to send journal entry information to the EGLi server to create journal entries without using Power Link or Net Link. Journal entries entered in Excel and sent to the EGLi Journal Upload generates journal entries in multiple books that are setup in the related manual journal event class.

The EGL Journal Upload constructs each Excel row's data into XML format and send them via System Link to server function Create Journal Entry Line Transaction simulating what a user do to add manual journal entry lines in a Ledger Book in Power Link.

Journal Upload - Reason code

There is a new reason code field in the journal upload spreadsheet. This field is optional. If a reason code value is entered in the spreadsheet it is used as the reason code on the generated financial journal entry. This reason code is for information only, it is not used to determine the financial event class or model.

Journal approval and last maintenance attributes

New attributes on the Financial Journal Entry and Financial Journal Entry Lines record the date and time the journal entry was approved and last maintained, and the user who did the approval and maintenance.

Documentation information

For details about this release, see Infor XA Release Notes Release 10 (SH16219).

For documentation for your CloudSuite, go to docs.infor.com and the Infor Support Portal. If you have comments about Infor documentation, contact documentation@infor.com.

Support information

Go to Infor Concierge at conciierge.infor.com to create a support incident if you have questions about this communication, entitlements, or software features.