

# Infor XA - Getting Started with Infor XA Release 11.0

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# About this guide

This document provides instructions for using the functions that were added or changed in XA Release 11.0. For detailed instructions about applying XA Release 11.0 see XA SBCS Initial Install Guide v11.

## Intended audience

This guide is for the system administrator or consultant who installs or updates Infor XA Release 11.0 and XA users who use the new functions.

## Release

Release information for enhancements in this document:

Enhancements	Client level	SBCS	DBCS	Date available
XA Release 11.0	SH16293	SH16298		July 2025
(OBPM and MM)				

For prerequisites and release information, you must read the apply instructions in the Initial Install Guide.

# **Contacting Infor**

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# Chapter 1 Architecture settings

# Link-Manager

This section provides an overview of recommended settings in Link-Manager.

# Startup Tasks - Memory settings

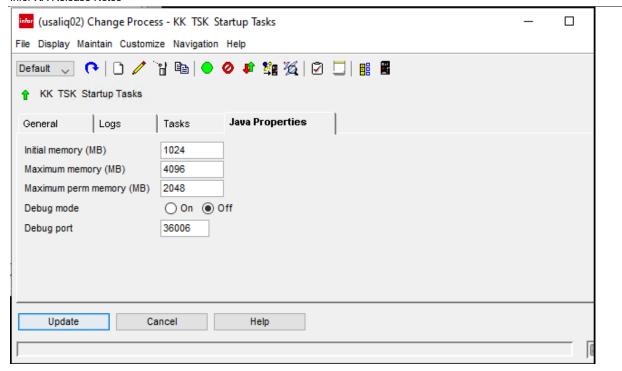
Log into Link-Manager in the partition that contains the XA environment.

On the Configuration tab, double click the Environments icon.

Select the Environment, right click, Display > Processes.

Select the Startup Tasks row, right click, Maintain > Change.

1. These are the recommended settings:



- 2. Select the "Run Integrator" option while applying the build for the first time.
- 3. Monitor the startup logs for any exception messages.

# Net-Link - Memory settings

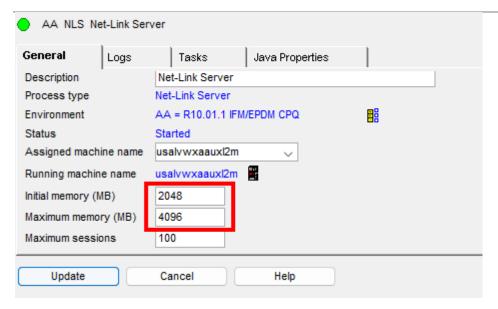
Log into Link-Manager in the partition that contains the XA environment.

On the Configuration tab, double click the Environments icon.

Select the Environment, right click, Display > Processes.

Select the Net-Link Server row, right click, Maintain > Change.

We recommend setting the memory for each Net-Link Server process as follows:



This change will be enabled the next time the Net-Link Server process is started (restarted).

## Restart Net-Link Server

When Shop Floor is activated the NLS (Net-Link Server) must be restarted.

# Chapter 2 Application Updates and Enhancements

# MUI (MAPICS User Interface)

MUI is no longer available at XA R11.

# Menu Changes

IDF replaces many of the green screen menu options, and those menu options are no longer available. In a few cases, the blocked menu options do not have equivalent functions in IDF.

- Before going to release 11.0, please review Appendix B 'XA Release 11.0 Blocked and Removed Menu Options'. Do not go to release 11.0 if your business requires a feature that will be blocked from green screen without a replacement in IDF.

# InterSite Logistics and Multi-Environment InterSite Logistics

It is expected that customers will transition to Material Logistics (ML), the Power-Link and Net-Link equivalent at release 10, preparing them for release 11.0 and beyond. However, customers will retain inquiry capabilities for historical ISL/MISL orders.

# Enterprise General Ledger

Enterprise GL is required if your XA environment is currently using Accounting Management GL or International Financial Management GL. Although Enterprise GL is required, you can continue to use Accounting Management GL and International Financial Management GL. (Enterprise GL is not required if you are not currently using Accounting Management GL or International Financial Management GL.)

Before going to release 11.0, if your environment has any of the following legacy interfaces active, activate the corresponding interfaces to Enterprise GL.

Legacy Interface Condition	Environment > Application Settings > Enterprise General Ledger
Accounting Management AR installed and Accounting Management GL installed	AM Accounts Receivable interface activation date must be on or before today's date.
Accounting Management AP installed and Accounting Management GL installed	AM Accounts Payable interface activation date must be on or before today's date.
Customer Order Management to Accounting Mgmt General Ledger = '2' (Active)	Customer interface activation date must be on or before today's date.
Inventory Management to Accounting Mgmt General Ledger = '2' (Active)	Materials interface activation date must be on or before today's date.
Production Control and Costing to Accounting Mgmt General Ledger = '2' (Active)	Production interface activation date must be on or before today's date.
Repetitive Production Management to Accounting Mgmt General Ledger = '2' (Active)	Production interface activation date must be on or before today's date.
International Financial Management is installed	Finance interface activation date must be on or before today's date.
International Financial Management is installed and [Production Control and Costing is installed or Repetitive Production Management is installed]	Production interface activation date must be on or before today's date.

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Legacy Interface Condition	Environment > Application Settings > Enterprise General Ledger
General ledger transactions to International Financial Management = '2' (Active)	Materials interface activation date must be on or before today's date.
Customer Order Management to International Financial Management = '2' (Active)	Customer interface activation date must be on or before today's date.

# **Enterprise Financials**

IDF maintenance is available for financial transactions generated from cash-in-transit clearing and installment interest accruals. If these transactions fail to post or require approval, you can maintain their data in IDF instead of green screen. The following maintenance actions are available.

- Financial Transaction
  - o Change, Quick Change, Mass Change, Delete and Mass Delete
- Financial Transaction Approval
  - Create, Change, Quick Change, Delete, Approve, Reject and Undo Approval/Rejection
- Financial Transaction GL Amount
  - o Change, Quick Change, Mass Change, Delete and Mass Delete

# Warehouse Management System (WMS)

WMS integration with XA manufacturing orders and Repetitive schedules is not supported at XA R11.0. Customers should not go to R11.0 if they are using WMS and XA.

# Order Based Production Management (OBPM)

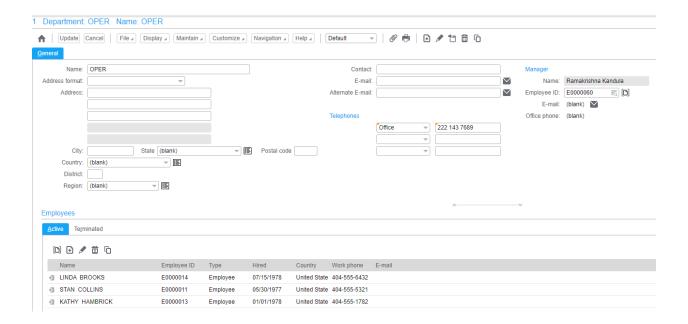
OBPM is enhanced to include new business objects, inventory transactions, manufacturing order exception reports and application settings.

The new OBPM business objects are:
Department
Employee
Employee Absence
Employee Activity
Outside Operations
Shop Floor Activity
Work Schedule
The new OBPM inventory transactions are:
Move Material (MV)
Report Actuals (MC)
Report M.O. Operation Activity (OF)
Manufacturing Order host print options now include;
Exception analysis reports
Under priority exceptions report
OBPM application settings now include:
Production Control and Costing (PCC) install / tailor questions
Production Monitoring and Control (PMC) control file settings
PCC control file settings
Shop Floor Activation option
File synchronization

Each of these enhancements is described below.

## Department

The Department business object is included in XA Release 11.0. No activation is required. Departments are included on the Production Administration application card. Display department details and see a list of employees in that department.



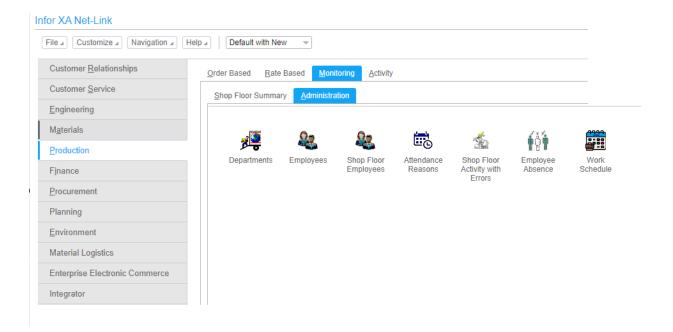
### **Department Security**

Department Security can be found in CAS in the CAS Department Tasks security area. Verify that user(s) are authorized to necessary tasks. The security tasks are shipped unlocked.

## **Employee**

Employee is a new business object in XA Release 11.0. No activation is required. Employees are on the Production Administration application card.

The new employee object does not have payroll details. Payroll information will continue to be updated by the XA Payroll application. If you are using an external application that directly updates the current employee files (EMPMAS or EMPMSX), then do not install XA Release 11.0. See Appendix A for a list of attributes in the new Employee object. Any external application currently using the employee files must be changed to use the new employee object before installing XA Release 11.0.



## Release 11.0 Migration

The release 11.0 installation process migrates existing employee data from employee file(s) (EMPMAS / EMPMSX) to the new employee object. No activation is required.

Data is migrated from the employee master files (EMPMAS and EMPMSX) if XA Payroll is installed. If XA Payroll is not installed, data is migrated from the employee master file (EMPMAS). There is no EMPMSX file if Payroll is not installed. When Payroll is not installed the first, middle and last names in the new Employee object are derived from the full name in the employee master file (EMPMAS). After migration, the first, middle and last names can be reviewed and corrected if needed.

## **Employee Security**

Employee security can be found in CAS.

There are two security areas for Employee. They are CAS Employee Field Level Security and CAS Employee Tasks. The security tasks under CAS Employee Field Level Security are shipped locked. Verify that user has authority to these tasks and security tasks under Employee Tasks security area.

Here is a list of the security tasks found under the 'CAS Employee Field Level Security' security area.

Description	Security designation
Display Employee common data	Common
Maintain Employee common data.	Common
Display Employee sensitive data	Sensitive
Maintain Employee sensitive data.	Sensitive
Display Employee Shop Floor data	Shop Floor
Maintain Employee Shop Floor data.	Shop Floor
Display Employee Pay rate	Payroll
Maintain Employee Pay rate	Payroll
	Display Employee common data Maintain Employee common data. Display Employee sensitive data Maintain Employee sensitive data. Display Employee Shop Floor data Maintain Employee Shop Floor data. Display Employee Pay rate

The above tasks are assigned to the following Employee attributes

Database	Description	Security designation
BJCMNO	Company	Common
BJPRID	Employee ID	Common
BJRLTY	Relationship type	Common
BJSLTN	Salutation	Common
BJFRNM	First name	Common
BJMDNM	Middle name	Common
BJLSNM	Last name	Common
BJNKNM	Nick name	Common
BJFLNM	Full name	Common

Database	Description	Security designation
BJADL1	Address line 1	Sensitive
BJADL2	Address line 2	Sensitive
BJADL3	Address line 3	Sensitive
BJADL4	Address line 4	Sensitive
BJADL5	Address line 5	Sensitive
BJGQNA	Phone Number 1	Common
BJGRNA	Phone Number 2	Sensitive
BJGSNA	Phone Number 3	Sensitive
BJJAST	Phone Number type 1	Sensitive
BJJBST	Phone Number type 2	Sensitive
BJJCST	Phone Number type 3	Sensitive
BJIRNA	Form of address	Sensitive
BJHQCD	Region	Sensitive
BJBKCD	District	Sensitive
BJCOCD	Country	Common
BJAGJR	Web address	Sensitive
BJCTNM	City	Sensitive
BJSTCD	State	Sensitive
BJZPCD	Zip code	Sensitive
BJZPEX	Zip code extension	Sensitive
BJEMAD	E-mail address	Common
BJALEM	Alternate E-mail address	Sensitive
BJDPTN	Department	Common

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Database	Description	Security designation
BJPFID	Facility ID	Common
BJTTNM	Title	Common
BJOCNM	Occupation	Common
BJEMTY	Employment type	Common
BJEMST	Employee status	Common
BJHRDT	Hire date	Sensitive
BJTMDT	Termination date	Sensitive
BJUSID	User ID	Sensitive
BJBGID	Shop Floor role ID	Shop Floor
BJFRMN	Foreman role ID	None
BJPYUS	Payroll used	Sensitive
BJEMID	Payroll employee ID	Sensitive
BJPRBG	Access card ID	Sensitive
BJPRTM	Temporary access ID	Sensitive
BJPREX	Temporary access ID expiration date	Sensitive
BJMCTL	Replication control	Common
BJREPDS	Replication destination	Common
BJSSRF	Replication source system reference	Common
BJSDRF	Replication source document ref	Common
BJSDUR	Replication source document URL	Common

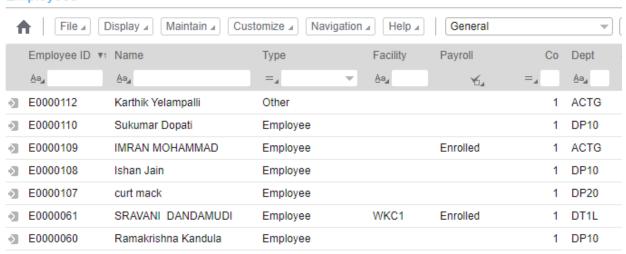
Database	Description	Security designation
BJUUSA	User field switch A	Common
BJUUSB	User field switch B	Common
BJUUSC	User field switch C	Common
BJUUCA	User field code A	Common
BJUUCB	User field code B	Common
BJUUCC	User field code C	Common
BJUUA1	User field amount 1	Common
BJUUQ1	User field quantity 1	Common
BJUU40	User field text 40	Common
BJCRDT	Create date	Common
BJCRTM	Create time	Common
BJCRUS	Create user	Common
BJCHDT	Maintain date	Common
ВЈСНТМ	Maintain time	Common
BJCHUS	Maintain user	Common
BJWKCR	Work crew	Shop Floor
BJMLJB	Multi-job flag	Shop Floor
BJSHFT	Shift	Shop Floor
BJSHWS	Work schedule	Shop Floor
BJTMBG	Temporary badge	Shop Floor
BJTMEX	Temporary badge expiration date	Shop Floor
BJSTID	Site ID	Common
BJEMPR	Pay rate	Payroll

### XA Payroll considerations

As mentioned above XA Payroll employees are migrated to IDF Employees in the R11.0 install process. If XA Payroll is installed, employees can still be created in XA Payroll. When an employee is created in XA Payroll the employee is created in IDF Employees.

Here is a list window of employees.

#### **Employees**

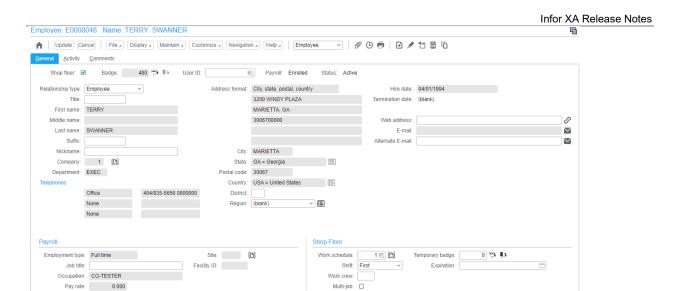


The 'Enrolled' value in Payroll column indicates that this is an XA Payroll employee.

Employee IDs are 25 characters. They can be automatically assigned or manually entered. Migrated employee records are assigned employee IDs beginning with 'E'.

Data that is stored in both the XA Payroll employee record and the IDF Employee object (address, occupation) must be maintained in XA Payroll. Attributes in the IDF Employee object that are not in the XA Payroll employee record must be maintained in the IDF Employee. There is some financial and sensitive data in the XA Payroll employee file (e.g. social security numbers) that are not in the IDF Employee object. This data can only be maintained in XA Payroll.

Here are details for an employee maintained in IDF.

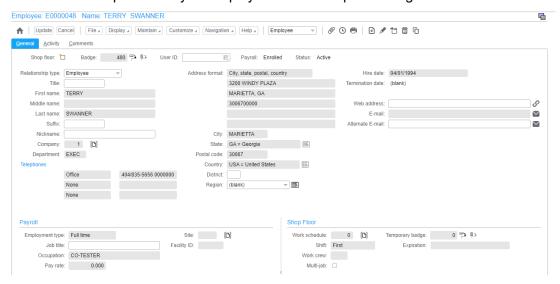


Notice that most of the attributes cannot be maintained. This is because the employee was created in XA Payroll.

#### PMC considerations

In R11.0, the IDF employee has both a Shop Floor flag and badge. If the employee is a Payroll employee and PMC is installed, by default the Shop Floor flag will be checked and badge will be the Payroll 5 digit employee number. The Shop Floor flag can be unchecked. If unchecked, transactions entered in PMC or Shop Floor for that employee will not be processed.

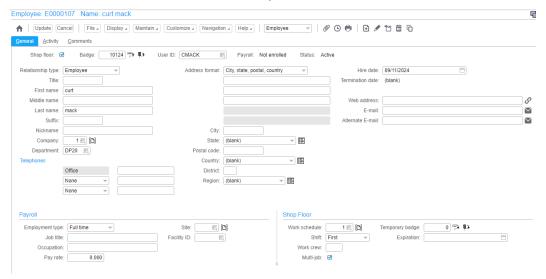
Here is an example of a Payroll employee whose Shop Floor flag is unchecked.



The Badge attribute is greyed out because this is a Payroll employee. The badge is greyed out and non-blank because the badge number is the Payroll employee number.

If employee is not a Payroll employee then all attributes are maintainable.

Here is a non-Payroll employee. The Shop Floor flag is checked and there is a badge so transactions can be entered in PMC / Shop Floor.



## Employee maintenance options

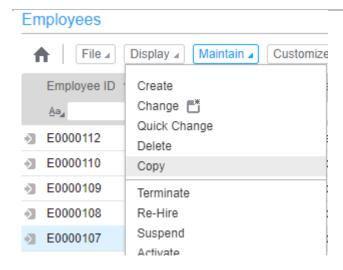
Here is a list of Employee maintenance options

Create, Change, Copy - are available for all employees. Limited maintenance/change for a Payroll employee.

Delete - is only available for non-XA Payroll employees. If Shop Floor is not activated then delete requires that all transactions in PMC be prepared. If Shop Floor is activated then all attendance and labor transactions must be approved. All non-labor transactions must be processed or cancelled. For non-Payroll employees and with employee IDs that are 25 characters long it is recommended not delete an employee for employee activity traceability.

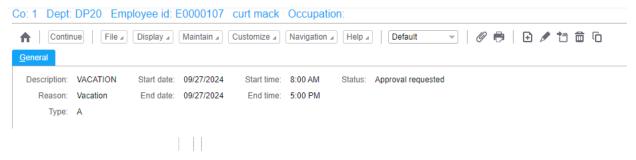
Terminate and Re-hire - are available for non-Payroll employees. Payroll employees must be terminated and re-hired in Payroll.

Suspend and Activate – are applicable for non-employee types. They are like Terminate and Re-hire for employees.



## **Employee Absence**

The Employee Absence business object is included in XA Release 11.0. No activation is required. The Employee Absence icon is on the Production Administration application card. Before R11.0, absence records could be entered in XA, but only for PMC employees. In R11.0, employee absence records can be entered for any employee – even for those who are not Shop Floor employees. Employee absence maintenance in PMC is blocked.

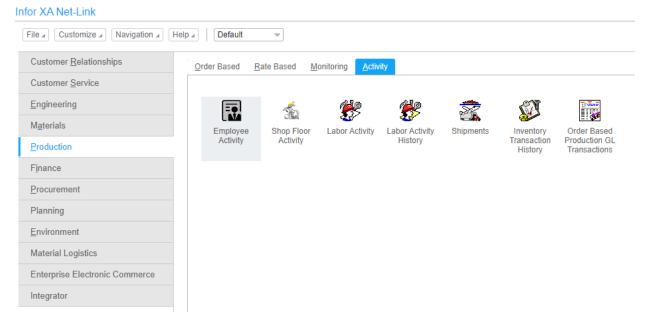


### **Employee Absence Security**

Department Security can be found in OBPM in the OBPM Employee Absence security area. All security tasks are shipped unlocked.

# **Employee Activity**

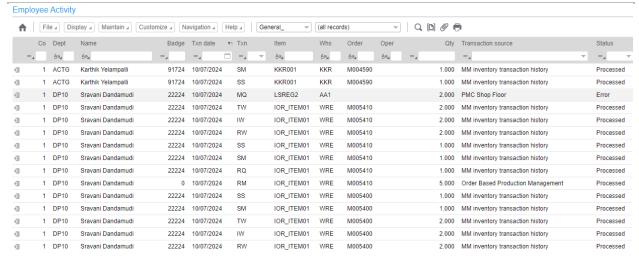
The Employee Activity business object is included in XA Release 11.0. No activation is required. Employee Activity is on the Production Activity application card. There is no migration of data to Employee Activity in the R11.0 install. So immediately after installing R11.0, employee activity will be empty.



After R11.0 installation, XA transaction activity is written to Employee Activity from multiple sources.

The sources include PMC Shop Floor, MM, IM, CSM, COM, OBPM (includes Shop Floor activity), and PCC.

Here is an example of Employee Activity showing XA transaction activity.



In the list, see the person who entered the transaction and where it was entered.

Badge and User ID of the person who entered the transaction is used to create the Employee Activity record. Transactions entered in places where badge cannot be entered like IM or COM will be written to Employee Activity if the user ID of the person entering the transaction is assigned to an employee.

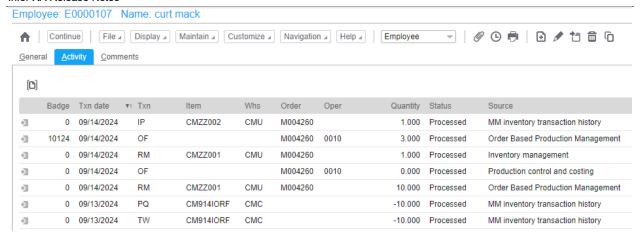
Here in employee details see User ID. It is associated with employee E0000107.



Using the above as an example, any time an XA transaction is entered for badge (10124) or user ID assigned to an employee an Employee Activity record will be created for that employee. The Employee Activity record always contains the employee ID of the person who entered the transaction. Since employee ID is associated with an employee the name of the person who entered the transaction is always known. Who entered a transaction using details from labor activity and inventory transaction history is not so easy to determine.

Employee activity can be displayed by employee either by using a subset in Employee Activity list or in the Employee's card file. Here is Employee Activity for an employee. The 'Source' column shows where the transaction was entered.

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Each Employee Activity record is linked to either a record in Inventory Transaction History or Labor Activity. From the Employee Activity record a user can display details from these history objects.

## **Employee Activity Security**

Employee Activity Security can be found in CAS in the Client Employee Activity Tasks security area. All security tasks are shipped unlocked.

# **Outside Operations**

#### Overview

Here are few things to know about Outside Operations in R11.0.

- Outside Operations is available in IDF at R11.0 when OBPM is installed and Enterprise Production Data Management (EPDM) is active.
- If Outside Operations are available in IDF then the PCC Outside Operations menu options are blocked
- Outside Operation setup is integrated with EPDM Routing Operations
- M.O. Outside Operations is integrated with M.O. Operations.

## **Outside Operations**

The following is a comparison between EPDM Outside Operations and PCC Work with Outside **Operation Details** 

#### **IDF (EPDM) Outside Operations**

Can be created when creating routing operation

Search/Find options

Multiple sort and subset options

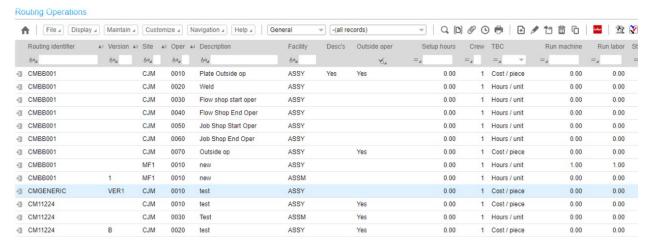
#### **PCC Work with Outside Operation**

Routing operation must exist

No search/find options

No sort or subset options

#### Here is an example list of outside operations

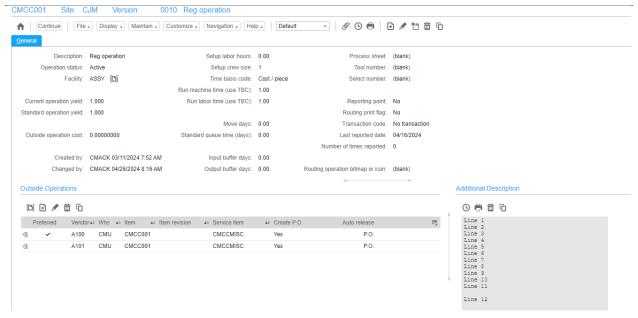


IDF provides multiple sort and subset options that are not available in PCC outside operations

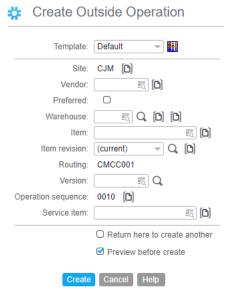
The column 'Outside oper' with 'Yes' identifies those routing operations with at least one outside operation setup record. Typically, a routing operation with TBC (Time Basis Code) of Cost / piece should have an outside operation setup record.

The following shows a routing operation with multiple outside operations.

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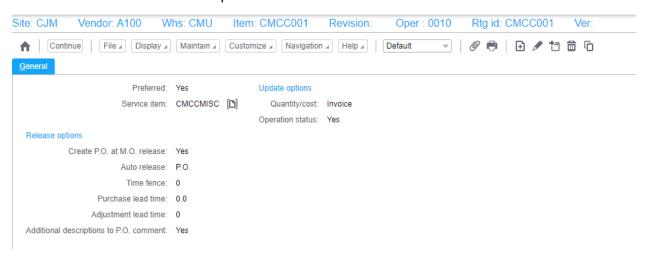


Use a create template to create an outside operation.



The create template includes display and find options that are not available in PCC outside operation details.

Here is a screen shot of outside operation details.



These attributes were previously available in PCC Work with Outside Operation Details so they are not described here

## **Outside Operation Security**

Outside Operation Security can be found in EPDM in the EPDM Outside Operation Setup Tasks security area. All security tasks are shipped unlocked.

## M.O. Outside Operations

The following is a comparison between OBPM M.O. Outside Operations and PCC Work with Outside Operations Cross Reference

M.O. Outside Operations	IDF (EPDM)	PCC
Maintain M.O. Outside Operation while creating M.O. Operation	Yes	No
Adding M.O. Outside Operation requires Outside Operation	No	Yes
Change M.O. Outside Operation options	Yes	No
Releasing M.O. Outside Operation requires Outside Operation	No	Yes
Change M.O. Outside Operation Release options	Yes	No

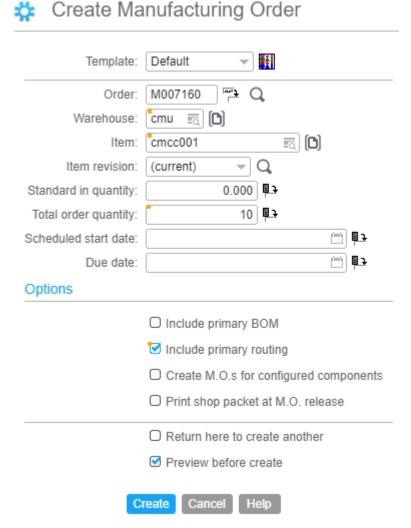
These features are described below.

#### Maintain M.O. Outside Operation while creating M.O. Operation

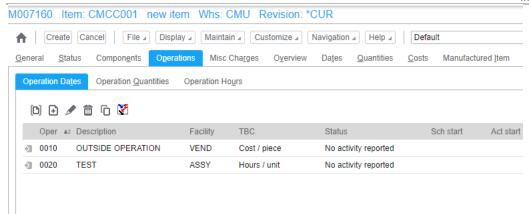
In PCC, a user could not maintain an M.O. Outside Operation when creating an M.O. Operation. Instead, the application would automatically populate the M.O. Outside Operation from an outside operation detail (setup) record or would leave the M.O. Outside Operation blank.

In OBPM a user can manually create an M.O. Outside Operation when creating an M.O. Operation. The user can either create the M.O. Outside Operation using details from any outside operation detail record or manually create an M.O. Outside Operation for any vendor.

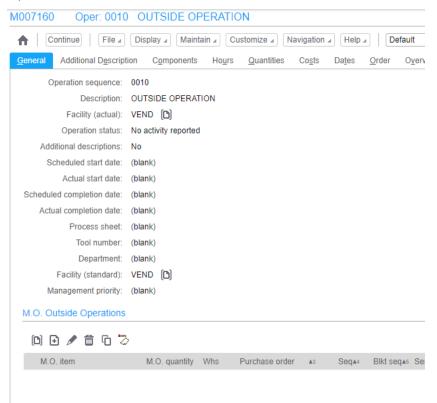
When creating a Manufacturing Order, select "Include primary routing" to automatically include the Outside Operations.



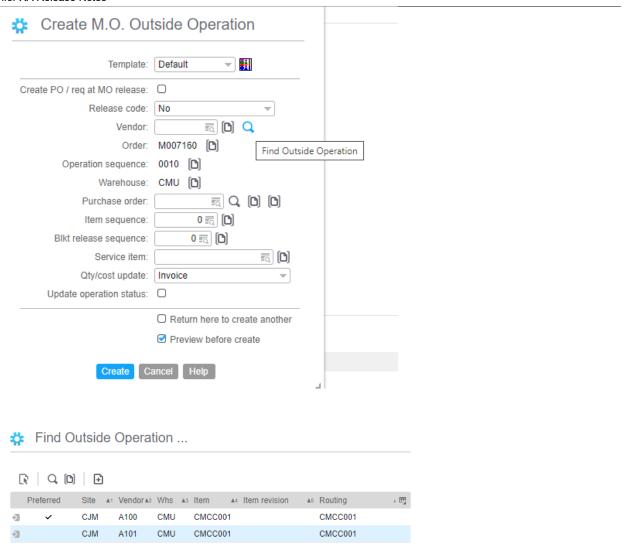
In the Manufacturing Order card file, on the Operations tab, select and display an Outside Operation.



In the Outside Operation card file, there are options to create, change or delete M.O. Outside Operations.



When creating an M.O. Outside Operation, click the Find Outside Operation button to select one of the outside operation details.



Data from the selected outside operation detail record populates the attributes on the Create M.O. Outside Operation template



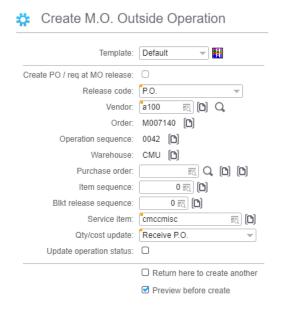
Note: If a user includes the primary routing when creating a manufacturing order, but does not manually create an M.O. Outside Operation, the application will automatically create the M.O. Outside Operation using the preferred outside operation detail record. If there is no preferred outside operation detail record, the application will create the M.O. Outside Operation with attributes (including Vendor) set to blank.

Adding M.O. Outside Operation without outside operation setup record

In PCC, an outside operation detail record was required before an application user could add an M.O. Outside Operation.

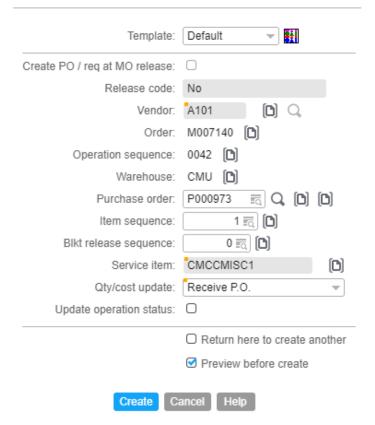
In OBPM a user can manually add an M.O. Outside Operation record, even if there is not an outside operation detail record.

When creating an M.O. Outside Operation, instead of selecting from a list of outside operation details, manually enter or select values for Reason code, Vendor, Service item, Quantity/cost update and Update operation status.



Optionally, enter or select a Purchase Order.

# Create M.O. Outside Operation

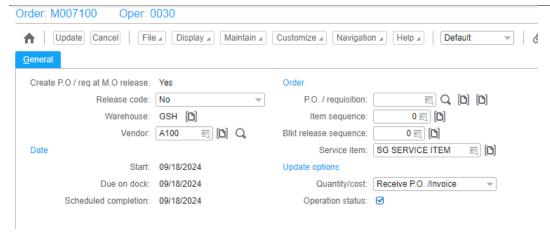


# Changing M.O. Outside Operation options

In PCC, a user cannot change the M.O. Outside Operation options (e.g. Quantity/cost, Update operation status, Vendor) after the M.O. Outside Operation is created.

In OBPM the user can change any of these options.

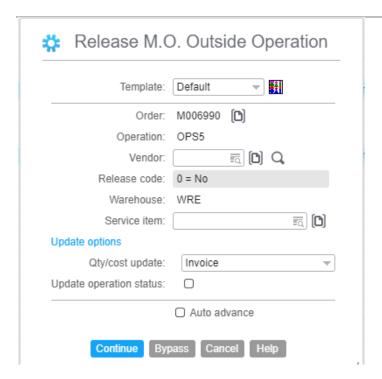
#### Infor XA Release Notes



# Releasing M.O. Outside Operation requires Outside Operation

In PCC, manually releasing an M.O. Outside Operation requires an outside operation detail record.

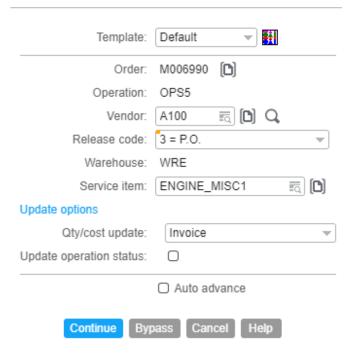
In OBPM, the user can manually release an M.O. Outside Operation without an outside operation detail record. The M.O. Outside Operation only requires a valid vendor and service item.



To release the M.O. Outside Operation, using an existing outside operation, click the Find Outside Operation button next to the Vendor attribute.

Or manually enter or select the Vendor, Release code, Service item, Qty/cost update and Update operation status

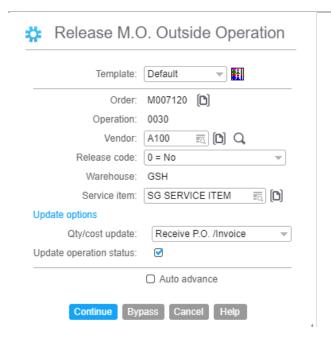
# Release M.O. Outside Operation



# Change M.O. Outside Operation Release options

In PCC an application user cannot display or change any of the release options when releasing an M.O. Outside Operation. The options come from the outside operation detail record which is not displayed. To see the options, the user must navigate to the outside operation detail record.

In OBPM the user can display and change the release options.



# M.O. Outside Operation Security

M.O. Outside Operation Security can be found in OBPM in the OBPM M.O. Outside Operations Tasks security area. All security tasks are shipped unlocked.

# **Shop Floor Activity**

### Overview

Shop Floor Activity is new in OBPM in R11.0. When Shop Floor is activated, most PMC transactions can be processed in the Shop Floor Activity object.

At R11.0 when Shop Floor is activated the following transactions will continue to be processed in PMC. They will not be processed in Shop Floor. They will not appear in Shop Floor activity.

- Repetitive transactions
- Physical inventory transactions
- User defined transactions
- PC Pick Complete by Order (IDF Pick Production Order)
  - o At R11.1 PC transaction will be processed in Shop Floor activity
- IW Interwarehouse issue / (IDF Receive Transferred Item)
  - At R11.1 IW transaction will be processed in Shop Floor activity
- RW Interwarehouse receipt / (IDF Receive Transferred Item)
  - o At R11.1 RW transaction will be processed in Shop Floor activity

At R11.0 when Shop Floor is activated the following transactions will be processed in Shop Floor, but will be flagged in error. The transactions will not be processed in Shop Floor for the reasons given below.

- QC APPROVE/REJECT ENTIRE LOCATION
  - Users will not be able to approve or reject the entire location of an item in Shop Floor activity. The user will be instructed to enter MQ, PQ, CQ or RQ transactions depending on the status and type of item in the location. The CQ, MQ and PQ transactions provide additional options (transfer, reject and scrap) that approve entire location does not. The RQ transaction provide the ability for users to transfer and scrap the rejected quantity that rejecting the entire location does not.
- SM Manufacturing Order Scrap
  - O A manually entered SM transaction cannot be processed in Shop Floor activity. Users will be instructed to report scrap at an M.O. Operation. At previous releases a manually entered SM transaction could be entered and processed in PMC when the IM to PCC interface was not active. This is no longer possible when Shop Floor is activated. If Shop Floor is activated and the IM to PCC interface is not active the user will be instructed to enter scrap at an M.O. Operation. The user can still enter a manually entered SM in IM.

This provides the following benefits:

- Real-time attendance and labor summary information
- Error identification and correction in one place
- Easier review and approve process for attendance and labor
- Persisted data

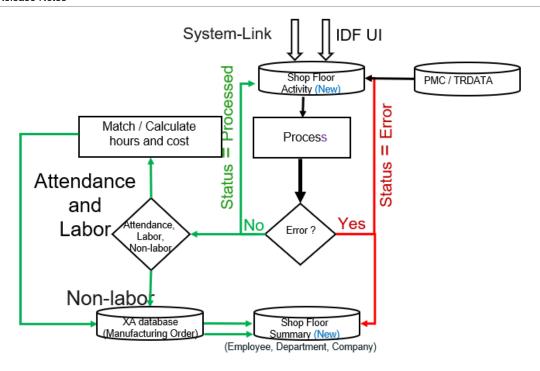
Note: When Shop Floor is activated NLS (Net-Link Server) must be restarted.

### Process Flow

The Shop Floor process is as follows:

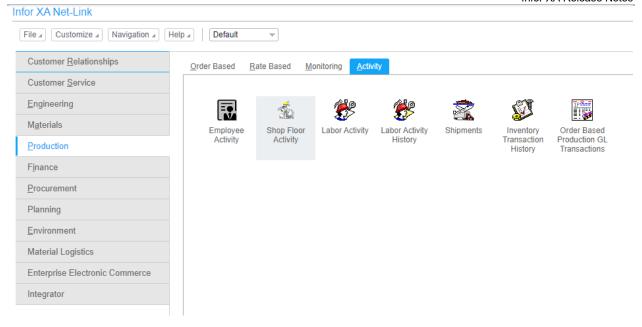
- Transactions come into Shop Floor Activity from multiple sources PMC, Shop Floor System-Link and OBPM (IDF User Interface – attendance and labor only).
- Shop Floor activity transactions are processed.
- Shop Floor Processing status is set to either Error or Processed (no errors).
- If Processing status is Error the application updates Shop Floor summary files (Labor status, Other status, Error counts).
- If non-labor transaction and no error, then the application updates the XA database and Shop Floor summary files.
- If attendance (SW, EW) or labor (ON, OF) transaction then match transactions.
- If matched, then calculate unapproved hours and costs.
- If attendance or labor transactions the application updates XA database and Shop Floor summary files

Here is a diagram of the processing flow:

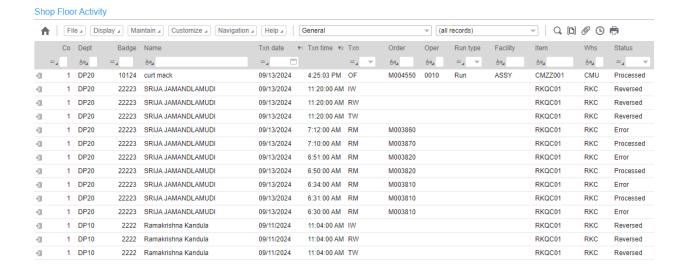


# Shop Floor Activity object

Shop Floor Activity is on the Production > Activity application card



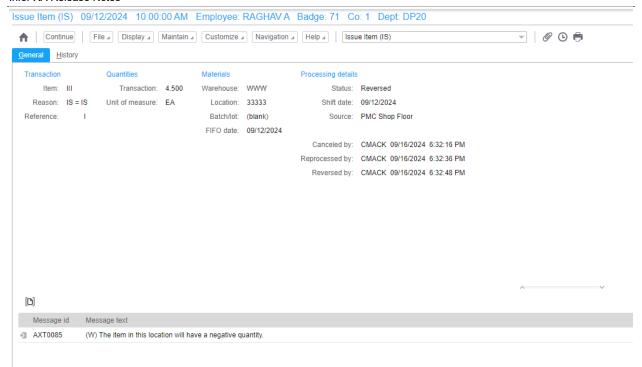
Here is a list of transactions that were processed in Shop Floor Activity.



# Shop Floor Activity Transaction details

Display details of a Shop Floor activity transaction.

#### Infor XA Release Notes



Each transaction type (ON, OF, RM etc.) uses a workspace and card file to display details relevant for that transaction type.

In example above, details for the Issue Item (IS) transaction is shown. Notice the card file 'Issue Item (IS)' is used to display those details.

Comments about attributes that are used in all transaction types:

#### Status:

Unprocessed – Transaction is waiting to be processed

In process – Transaction in being processed

Processed – Transaction processed with no errors

A Processed transaction can be Reversed.

Error - Error was found during processing.

An Error transaction can be Cancelled or Reprocessed

Cancelled - Transaction was in error and canceled by an application user

A Canceled transaction can be Reprocessed.

Reversed - Transaction was processed successfully and reversed by a user

No further action can be done on a reversed transaction

Cancelled by: The person who cancelled the transaction

Reprocessed by: The person who reprocessed the transaction

Reversed by: The person who reversed the transaction

History card: Contains attributes that were changed when the transaction was reprocessed. This card is only used if the transaction was reprocessed.

Here's an example of the History card showing original and current values.

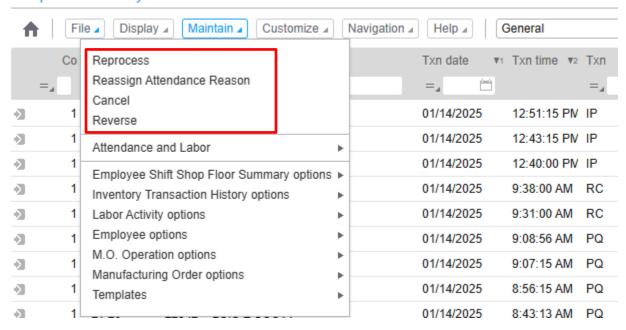


## **Shop Floor Maintenance**

Shop Floor Activity Maintenance has the following actions:

- Reprocess
- Reassign Attendance Reason
- Cancel
- Reverse a selected record in Shop Floor activity.

### Shop Floor Activity



These actions are described here:

Reprocess: The Reprocess action allows a user to correct a Shop Floor activity transaction that was processed in error. When the transaction was processed error(s) existed with the transaction preventing the transaction from being processed successfully. Details for the error(s) can be found by displaying details for the transaction. Reprocess allows the error(s) to be corrected. A transaction with status of 'Error' or 'Canceled' can be reprocessed. When transaction with status of Error or Cancel is highlighted and Reprocess is selected the user will be presented with the IDF transaction window (e.g. Receive Item - RC). User will be allowed to change or correct any maintainable attribute (except for Badge, Transaction date, and Transaction time).

Reassign Attendance Reason: Reason for an attendance transaction (e.g. Start Work, End Work) can be changed. Use this to change attendance reason (e.g. from Start break to Start lunch).

Cancel: A Shop Floor activity transaction with Processing status of Error can be canceled. Select this action to signify that the transaction had error(s), but will not be corrected. All attendance and labor transactions for a given employee shift must have a Processing status of 'Processed' or 'Canceled' before the employee shift Labor status can be set to Approved

Reverse: A Shop Floor activity transaction with Processing status of Processed can be reversed. Reversing a transaction in Shop Floor activity is similar to reversing a transaction in inventory transaction history. Not all processed transactions can be reversed and any attendance and labor transaction that is in employee shift with Labor status of Approved cannot be reversed. Reversing a Shop Floor activity transaction will back out (e.g. Quantity, costs etc.) what was updated when the transaction was processed.

## Shop Floor Summary objects

As Shop Floor activity transactions are processed, a shift date is assigned to each transaction based on the employee and the work schedule assigned to the employee. If an employee shift summary record doesn't exist for the given employee, one is created. The same is true for the other Shop Floor summary objects. There are six Shop Floor summary objects. They are:

**Employee Shift Shop Floor Summary** 

**Employee Shop Floor Summary** 

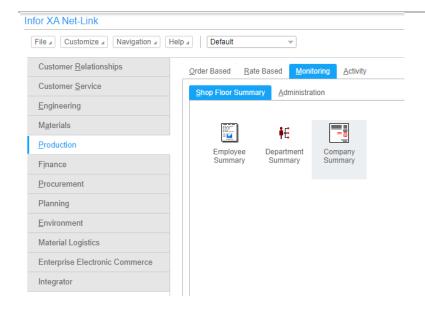
Department Shift Shop Floor Summary

Department Shop Floor Summary

Company Shift Shop Floor Summary

Company Shop Floor Summary

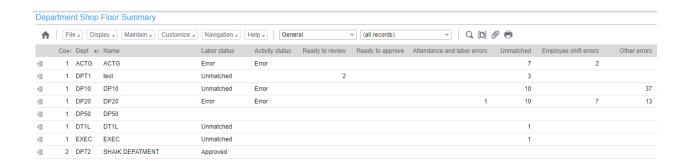
Employee, Department and Company Shop Floor Summary objects are on the Production > Monitoring > Shop Floor Summary application card.



Each of these Shop Floor Summary objects provides a real-time summary by employee, department and company. The Shop Floor Summary objects are created real-time as non-labor and attendance and labor transactions are processed in Shop Floor Activity. Attendance and labor real-time matching and calculations allow authorized application users to correct errors and review and approve attendance and labor time and costs.

If review and approval is done by a department supervisor, the Department Shop Activity Summary shows a list of department summary records.

Here is an example of a list of Shop Floor Summary records.



Note: Shop Floor Summary by employee and company are like the above.

Here is a description of each of the column headings and the values for each:

Labor status: Summary status for attendance and labor transactions. Possible values are: Error, Unmatched, Ready to review, Ready to approve, Approved and blank, Labor status is hierarchical. If there are any attendance and labor errors, then Labor status for the Shop Floor Summary record is set to Error. If there are no errors, then Labor status is Unmatched if there are any unmatched attendance and labor transactions. Labor and attendance transactions require approval. Review is required if OBPM application setting 'Review attendance and labor before approval' is Manual.

Other status: Summary status for non-labor transactions. Possible values are: Error and blank. This should be Error if 'Other errors' is non-zero. Review and approval are not required for non-labor transactions. Those with errors should be reviewed and corrected.

Ready to review: Number of Employee Shift Shop Floor Summary records that are Ready to review.

Ready to approve: Number of Employee Shift Shop Floor Summary records that are Ready to approve

Attendance and labor errors: Number of individual attendance and labor transactions for that Shop Floor Summary record that are in error. If non-zero, then Labor status for Shop Floor Summary will be Error.

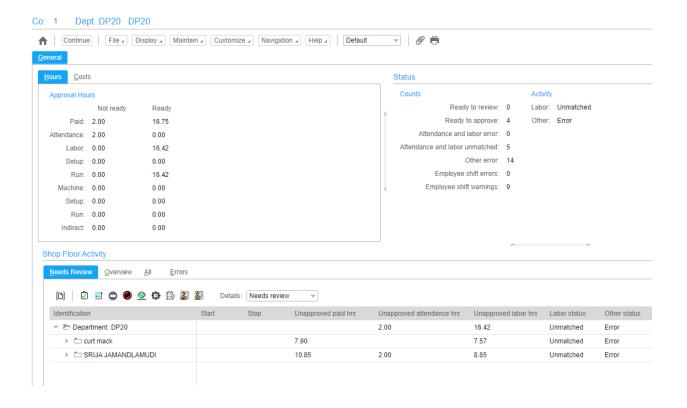
Unmatched errors: Number of individual attendance and labor transactions for that Shop Floor Summary record that are unmatched. If non-zero and both attendance and labor errors and employee shift errors are blank, then Shop Floor Summary Labor status will be Unmatched.

Employee shift errors: Number of Employee Shift Shop Floor Summary records that are in error due to employee shift errors (e.g. No attendance records when the work schedule requires them)

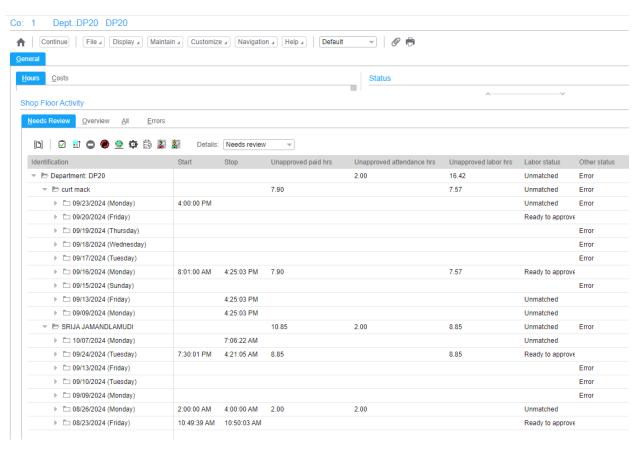
Other errors: Number of non-labor transactions that are in error. If non-zero, then Other status for the Shop Floor Summary should be Error.

Display details of a Department Summary record to see the total hours and costs for that department that are not ready to be approved. The Status section displays the counts and statuses described above. In the bottom see a compound card that contains four tabs.

Needs Review tab: This is an overview that contains Employee Summary records where Labor status is not Approved or Other status is Error.

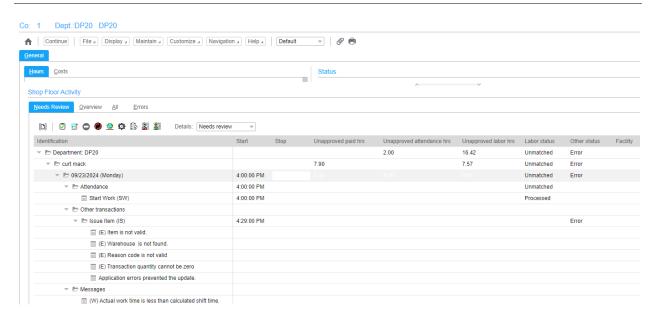


Each Employee Summary record for that department can be expanded to see a list of Employee Shift Summary records

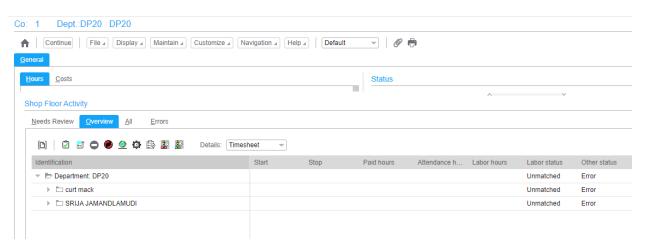


Each Employee Shift Summary record can be expanded to see details for that Employee Shift Summary record

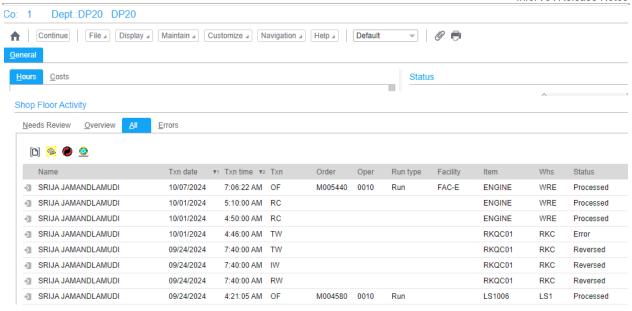
#### Infor XA Release Notes



Overview tab: Overview containing all Employee Summary records in the department. This includes records that are approved.

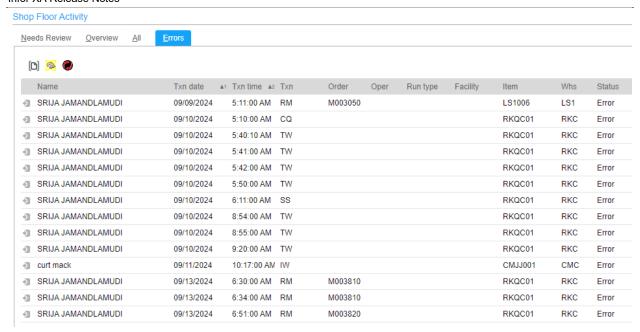


All tab: Contains a list of all Shop Floor transactions in that department.

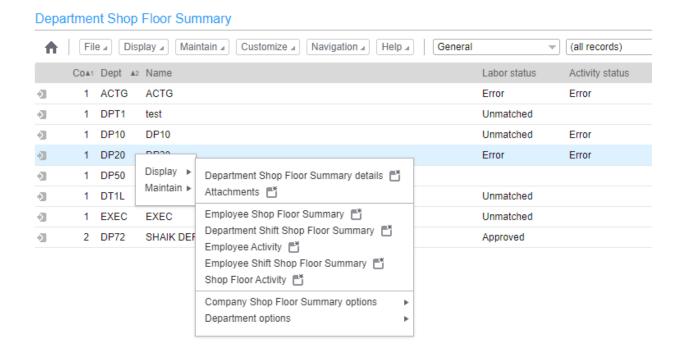


Errors tab: Contains a list of all Shop Floor transactions in error.

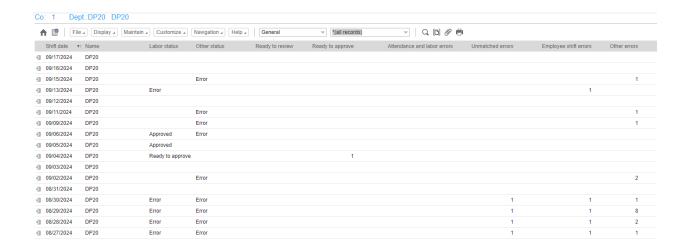
#### Infor XA Release Notes



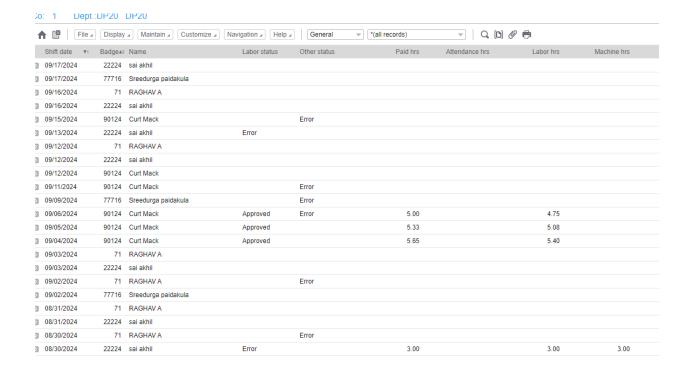
From the Department Shop Floor Summary list you can display the 'Department Shift Shop Floor Summary' and the 'Employee Shift Shop Floor Summary'



Department Shift Shop Floor Summary provides a list of shift dates in the department.



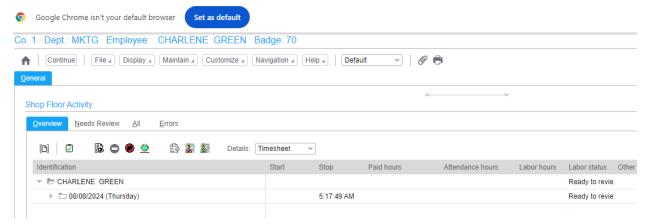
Employee Shift Shop Floor Summary is the 'lowest' level Shop Floor summary object. It contains for a given employee on a given shift date, Labor and Other status along with Paid, Attendance, Labor and Machine hours.



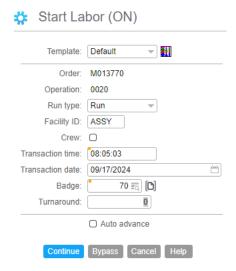
### Real-time Updates

As mentioned, above, Shop Floor activity transactions are processed Shop Floor summary objects that are created or updated immediately.

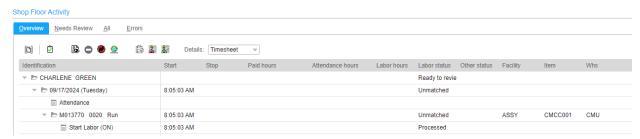
Here the Employee Shop Floor Summary record for this Shop Floor employee has one Employee Shift Shop Floor Summary record



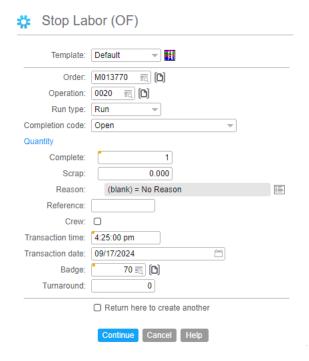
Start Labor (ON) transaction is entered for this employee on 09/17/2024



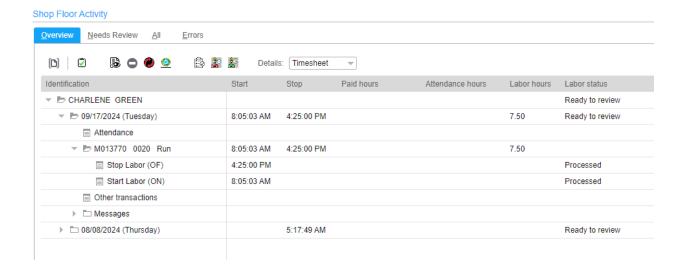
The Employee Shift Shop Floor record is created with Labor status Unmatched. There is a missing Stop Labor (OF) transaction.



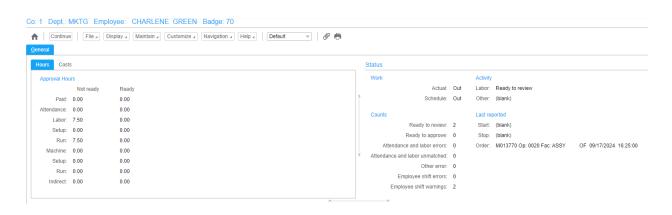
#### Enter a Stop Labor (OF) transaction



The transaction is processed with real-time matching and hour and cost calculations. ON and OF are matched, Labor hours is calculated and Labor status is set to Ready to review.



Employee Shop Floor Summary shows hours and costs that are not ready for approval.



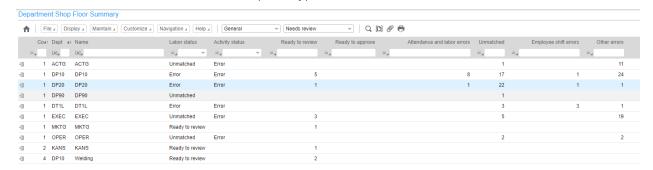
### **Error Identification and Correction**

Errors can be easily identified and corrected from any of the Shop Floor Summary objects. Labor status and Other status immediately identify issues that should be reviewed and corrected.

It should be noted that there are four types of errors

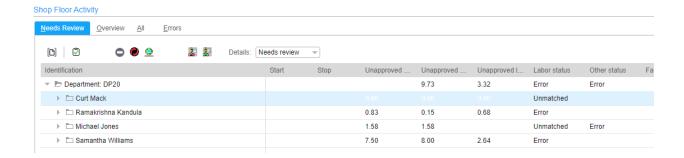
- Transaction errors (e.g. Item not found)
- Unmatched errors (e.g. missing Stop Labor (OF) transaction)
- Related errors (e.g. Location doesn't allow negative on-hand)
- Employee shift errors (e.g. Missing attendance records)

Below are two examples of how to identify and correct errors from Department Shop Floor Summary Here Department Shop Floor Summary records are listed. The 'Needs review' subset shows the records where Labor status and Other (Activity) status is not blank.

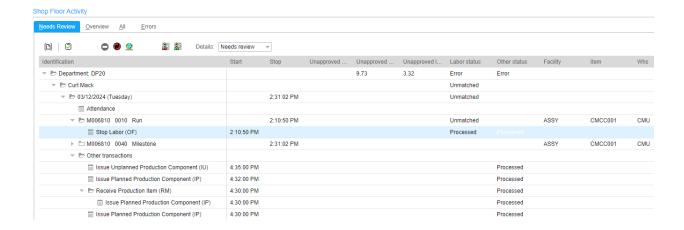


Display details for a Department Shop Floor Summary record to see a list of Employee Shop Floor Summary records in that department. In the screenshot below, the Needs Review tab shows

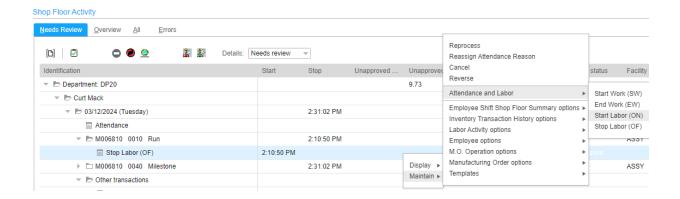
Employee Shop Floor Summary records that need attention. The highlighted record has Labor status Unmatched.



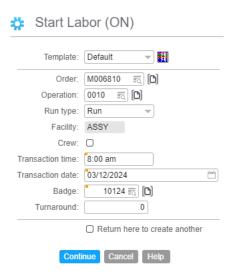
Expand the highlighted Employee Shop Floor Summary record to see the Unmatched Stop Labor (OF) transaction that is missing the Start Labor (ON) transaction.



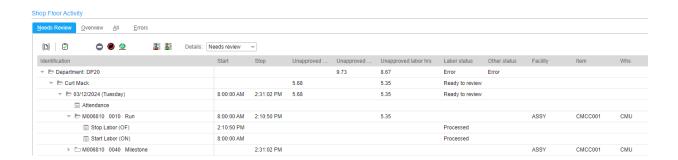
Highlight the Stop Labor (OF) transaction and select the menu option to add the Start Labor (ON) transaction



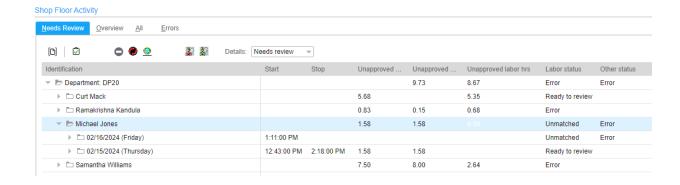
#### Enter details



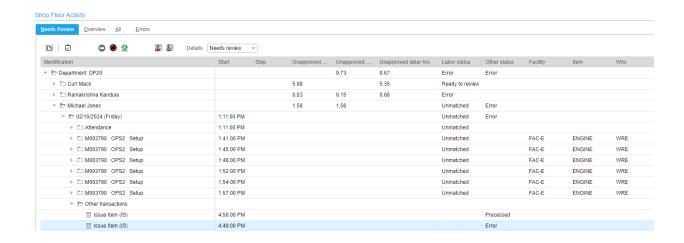
Hit Continue and the transaction is processed. The Labor status is now Ready to review. Unapproved labor time is calculated.



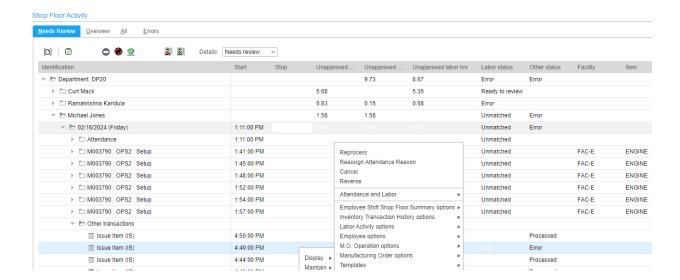
In this example, Other status is Error for the highlighted employee. The Employee Shift Shop Floor Summary record below it also has an Other status of Error



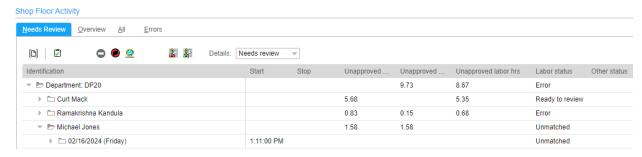
Expand the Employee Shift Shop Floor Summary record and see the Issue Item (IS) transaction that is in Error.



To cancel the transaction, select Maintain > Cancel.



Other status is now blank for both Employee Shop Floor Summary and Employee Shift Shop Floor Summary.

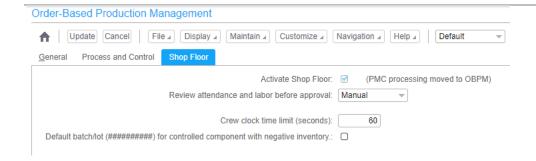


## Review Shop Floor Summary

Here are a few points to know about Review Shop Floor Summary.

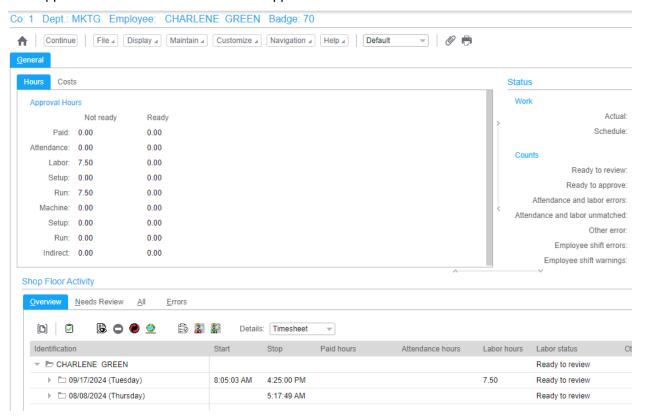
- The Review action is available from maintain menu and host jobs for each Shop Floor summary object
- It updates Employee Shift Shop Floor Summary Labor status from 'Ready to review' to 'Ready to approve'
- When labor transactions are reviewed the associated 'Not ready' hours and costs for Shop Floor summary are moved to 'Ready'
- All Employee Shift Shop Floor Summary records in higher level Shop Floor summary object (e.g. Department Shop Floor Summary) with Labor status of 'Ready to review' are set to 'Ready to approve' when Review is selected from the higher-level Shop Floor summary record.
- If Labor status is 'Ready to approve' for all Employee Shift Shop Floor Summary records in a higher-level Shop Floor summary record (e.g. Employee Shop Floor Summary) then Labor status is set to 'Ready to approve' in the higher-level Shop Floor summary record
- Review is optional. It is only required if the OBPM application setting 'Review attendance and labor before approval' is Manual.

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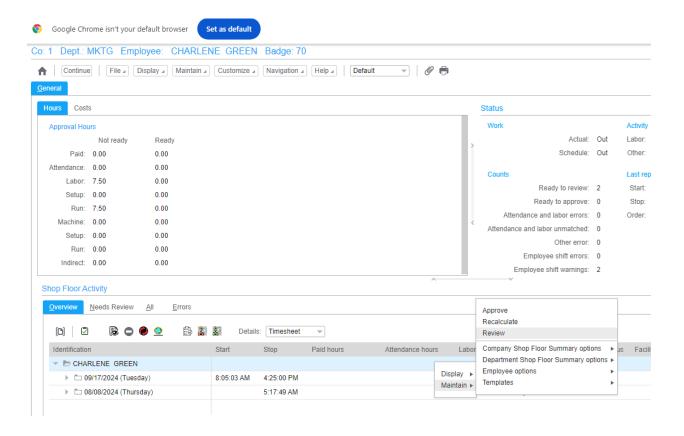


If this setting is set to 'Automatic' then Review is not required.

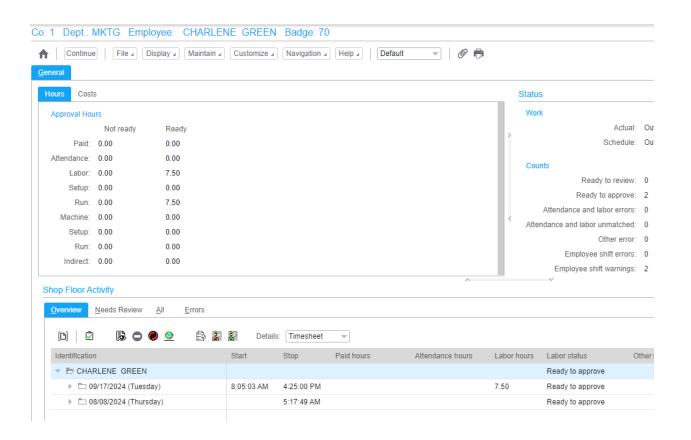
Here is an Employee Shop Floor Summary record with 'Labor status' of 'Ready to review' There are two Employee Shift Shop Floor Summary records with Labor status also set to 'Ready to review'. The Approval hours that are listed in the 'Approval hours' section.



#### Highlight the Employee Shop Floor Summary record and select 'Maintain > Review'



The Labor status for Employee Shop Floor Summary and Employee Shift Shop Floor Summary records are set to 'Ready to approve'. The Approval hours are moved from Not ready to Ready.

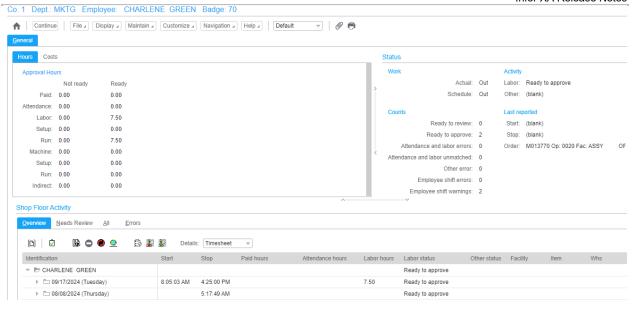


## Approve Shop Floor Summary

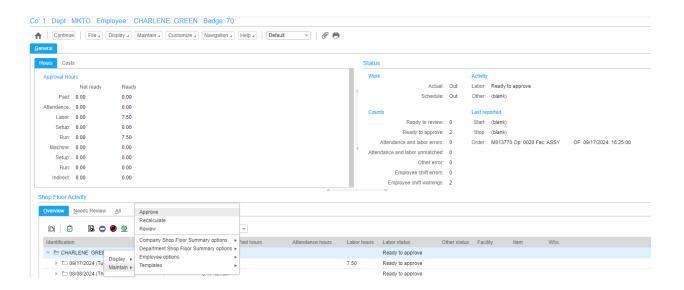
Here are a few points to know about Approve Shop Floor Summary

- Approve action is available from maintain menu and host jobs for each Shop Floor summary object
- Updates Employee Shift Shop Floor Summary Labor status from 'Ready to approve' to 'Approved'
- Attendance and labor transactions in approved Employee Shift Shop Floor Summary are set to approved. No further maintenance (Cancel and Reverse) is allowed on those transactions.
- When labor transactions are approved the associated unapproved hours and costs on manufacturing orders are moved to actual hours and costs.
- All Employee Shift Shop Floor Summary records in higher level Shop Floor summary object (e.g. Department Shop Floor Summary) with Labor status of 'Ready to approve' are set to 'Approved' when Approve is selected from higher level Shop Floor summary record.
- If Labor status is 'Approved for all Employee Shift Shop Floor Summary records in a higher-level Shop Floor summary record (e.g. Employee Shop Floor Summary) then Labor status is set to 'Approved' in the higher-level Shop Floor summary record

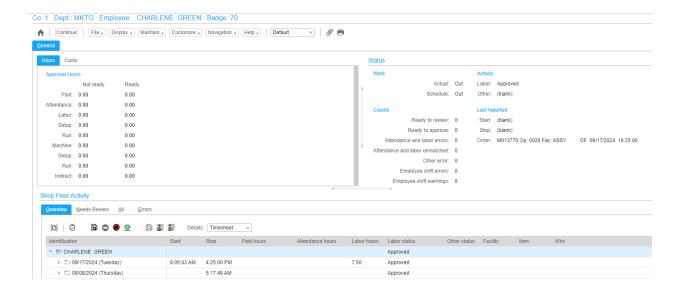
Here is an Employee Shop Floor Summary record. The Labor status for Employee Shop Floor Summary and all Employee Shift Shop Floor Summary records are 'Ready to approve'. Labor approval hours is Ready for approval.



### Highlight and select Maintain > Approve on the Employee Shop Floor Summary



Labor status is now 'Approved' on Employee Shop Floor Summary and Employee Shift Shop Floor Summary records. 'Ready' hours (and costs) are zero. They were removed because they are approved.



## Recalculate Shop Floor Summary

Recalculate is available on the maintain menu and host jobs for each Shop Floor summary object.

Recalculate can be used when there are changes in the work schedule (e.g. pay basis, breaks, attendance required y/n) or related object (e.g. production facility reporting method changes) and the changes affect the calculation of hours and costs.

# Shop Floor Activity Security

Shop Floor is activated in OBPM Application Settings and is found on the 'Shop Floor' card within OBPM application settings.

User activating Shop Floor must be authorized to the 'OBPM Settings 'FIELDS ACTINC' security task. This security task can be found in CAS security in the OBPM application 'OBPM Field Level Security' security area.

When activating Shop Floor the following is required.

All transactions in PMC (trdata) must be prepared (trdata.tstat = 5)

AMJUA, AXHREC, AXHSFP and PSVTUH unattached jobs must be held

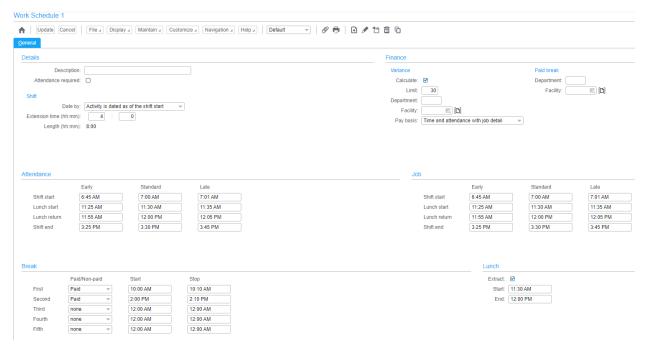
After activating Shop Floor these unattached jobs should be released.

The Net-Link Server (NLS) should be restarted.

## Work Schedule

Work Schedule is a new business object and is available if PMC is installed. The Work Schedule icon is on the Production Administration application card. Work schedules can be displayed and maintained in IDF. The work schedule menu options in PMC green screen are blocked.

Here are details for a work schedule.



# Work Schedule Security

Work Schedule Security can be found in OBPM in the OBPM Work Schedule Tasks security area. All security tasks are shipped unlocked.

# **OBPM Transactions**

Three OBPM transactions are available in IDF. They are:

Report M.O. Operation Activity

Report Actuals (MC)

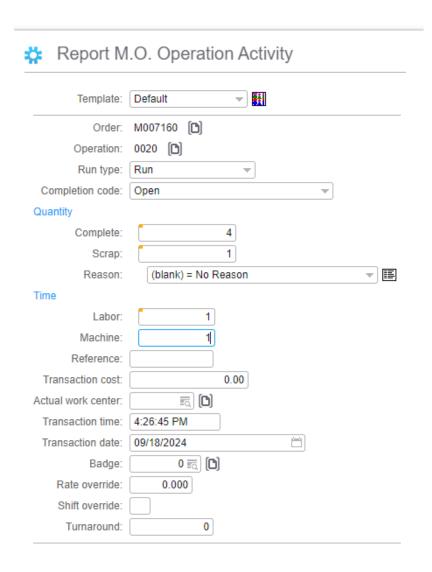
Move Material (MV)

Each of these transactions is described below.

# Report M.O. Operation Activity

Report M.O. Operation Activity allows a user to enter time (labor and machine), complete quantity and scrap quantity in IDF. This requires Shop Floor Activation. This is like PCC Shop Activity Update.

Report M.O. Operation Activity can be entered from Labor Activity, M.O. Operation, Shop Floor Activity and Employee.



# Report M.O. Operation Activity Security

Report M.O. Operation Security can be found in OBPM in the OBPM Manufacturing Order Tasks. The security task is MOR OPRACT with description Report M.O. Operation Activity. The security task is shipped unlocked.

# Report Actuals

Report Actuals allows users to enter actual miscellaneous charges for an M.O. Miscellaneous Charge. This is similar to enter miscellaneous charge in PCC. The user can create an M.O. Miscellaneous Charge at the same time as reporting actual (quantity and cost) for that M.O. Miscellaneous Charge.

In the Manufacturing Order card file, select the Misc Charges card.

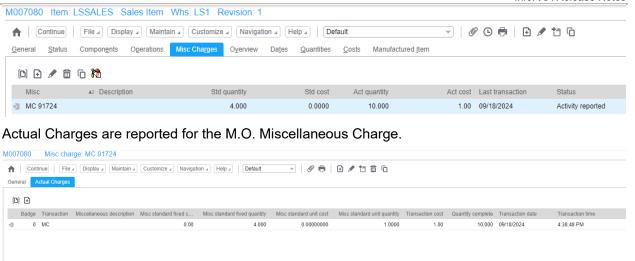
#### M007080 Item: LSSALES Sales Item Whs: LS1 Revision: 1 Customize 4 Default Continue Display 4 Maintain 🗸 Navigation a Help ₄ General Status Components Operations Misc Charges Overview Dates Quantities Costs Manufactured It <u> Դ</u> Misc Std quantity Std cost Act quantity Report Actuals

Select 'Report Actuals'

Enter charge, actual quantity and actual cost

Template:	Default 🔻
Order:	M007080 [b]
Charge:	MC 91724   □□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□
Charge quantity:	10
Charge cost:	1
Transaction time:	4:37:10 PM
Transaction date:	09/18/2024
Badge:	0 📆
	☐ Return here to create another

The M.O. Miscellaneous Charge is created



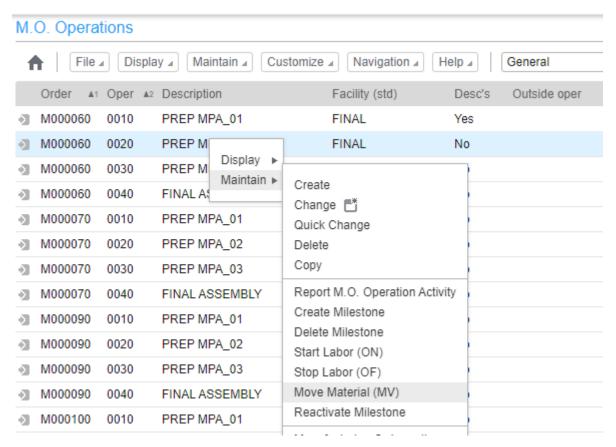
### Report Actuals Security

Report Actuals Security can be found in OBPM in the OBPM Manufacturing Order Tasks. The security task is MOR ACTUALS with description Report Actuals. The security task is shipped unlocked.

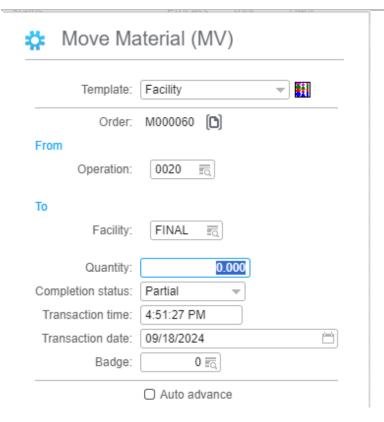
# Move Material (MV)

Move Material allows a user to move material from one operation to another or from one operation to another work area. This is similar to the Move transaction in PCC Shop Activity Update. The Move Material (MV) transaction can be entered from M.O. Operation.

Select an M.O. Operation to run the Maintain > Move Material (MV) action.



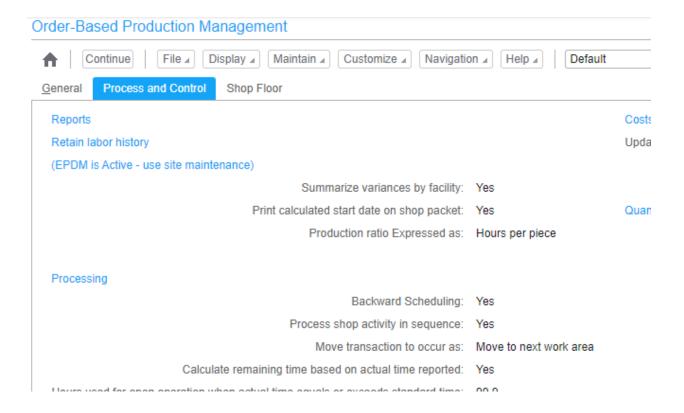
Use the Facility template to move material from the M.O. Operation to a Facility.



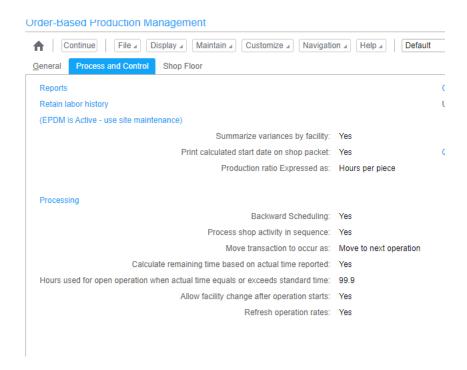
# Move Material (MV) Security

Move Material (MV) Security can be found in OBPM in the OBPM Manufacturing Order Tasks. The security task is MOR MOV with description Move M.O. Operation. The security task is shipped unlocked.

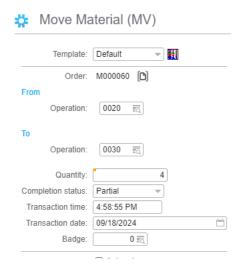
The Facility template opens by default if the OBPM application setting 'Move transaction to occur as' is 'Move to next work area'



The 'Default' template opens by default if 'Move transaction to occur as' is 'Move to next operation'



The Default template moves the material to the next M.O. Operation.



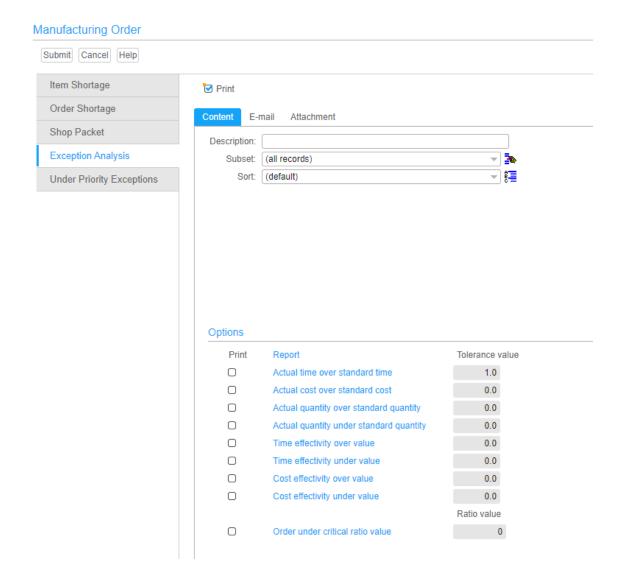
Infor XA Release Notes
If the XA environment is not tailored for Moves, the Move Material (MV) transaction is not allowed.

# Manufacturing Order Exception Reports

Manufacturing Orders exception analysis reports can be printed in IDF.

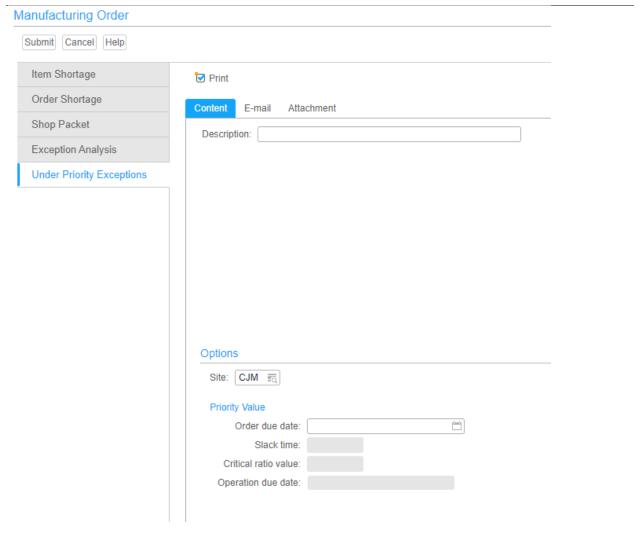
The reports are identical to the ones in PCC.

Nine reports are available on the 'Exception Analysis' host print tab.



On the 'Under Priority Exceptions' host print tab the maintainable fields (e.g. Order due date) are determined by what was selected for the Manufacturing Order host print 'Work List Generation'.

#### Infor XA Release Notes



# **OBPM Application Settings**

OBPM Application Settings have been updated to include questions and responses from:

Ten PCC install / tailor questions

PMC control file settings

### PCC control file settings

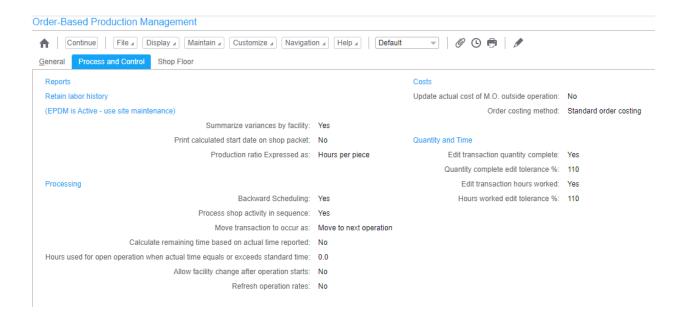
### Shop Floor activation option

Changes made in XA green screen install / tailor, control file settings and OBPM application settings are synchronized. This ensures that no matter where the changes are made, all files and programs contain the same information.

When changing some of these application settings (e.g. Order costing method), unattached jobs should be ended and restarted, and application users should be instructed to logoff and logon.

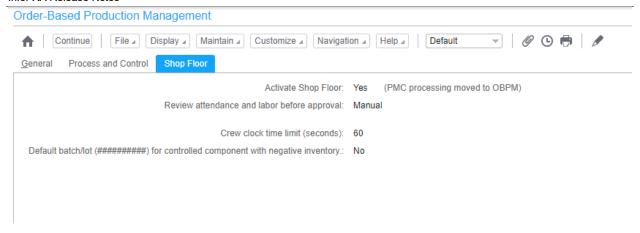
Here are the new OBPM application settings.

#### **Process and Control**



### Shop Floor

#### Infor XA Release Notes



# Materials Management (MM)

Materials Management enhancements are in Scheduled Receipts, quality control transactions and application settings.

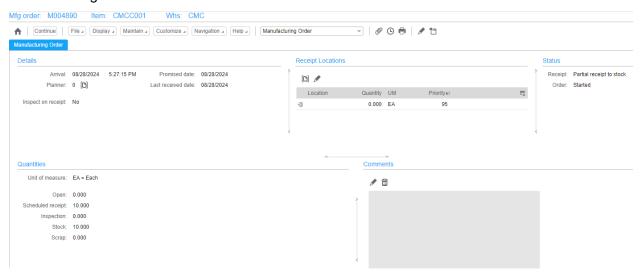
# Scheduled Receipts

Enhancements to Scheduled Receipts:

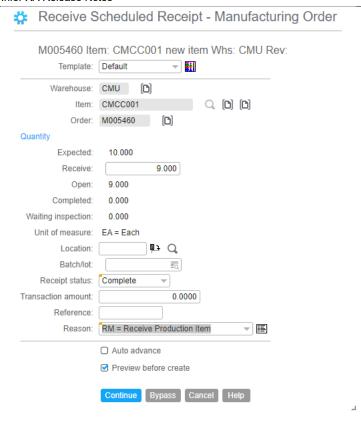
- Scheduled Receipts for Manufacturing orders, M.O. Components (with negative quantity per) and Repetitive Schedules
- Receipts for Repetitive Schedules
- Manufacturing orders and M.O. Components with negative quantity per can be received in Scheduled Receipts
- Controlled floor stock components on a manufacturing order can be backflushed when receiving the manufacturing order.
- Controlled floor stock components scrapped as part of the manufacturing process can be backflushed when receiving the manufacturing order complete.
- Workspaces and cards display details relevant to the selected Scheduled Receipt (Purchase order, Manufacturing order, Transfer order etc.)
- A new 'Receipt type' subset segregates Scheduled Receipts by type.

# Manufacturing Orders

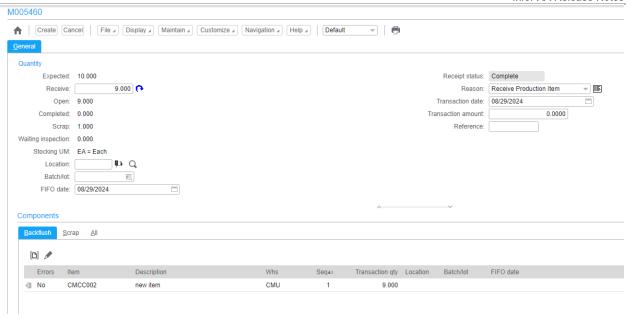
Manufacturing orders (Receipt type 3 = Manufacturing order) are added to Scheduled Receipts. In Scheduled Receipts a Manufacturing Order workspace is display details relevant to the Manufacturing Order.



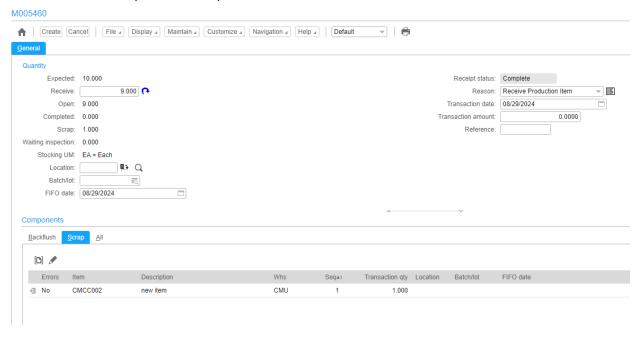
Manufacturing Orders can be received in Scheduled Receipts. Select a Scheduled Receipt and select Maintain > Receive. The 'Receive Scheduled Receipt - Manufacturing Order' action prompt is displayed. Three templates are available (Complete, Default, Uncontrolled)



Any controlled floor stock components on the manufacturing order can be backflushed as shown here.

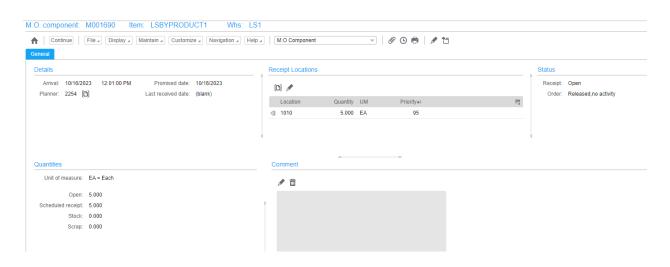


Receive manufacturing order 'Complete' and any scrapped controlled floor stock components would be listed on the Components Scrap card.

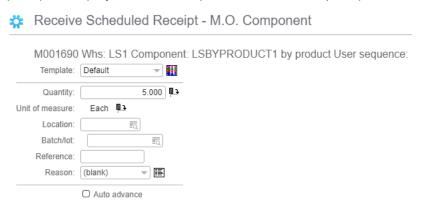


# M.O. Components

M.O. Components (Receipt type 7=M.O. component) for regular and controlled floor stock with negative quantity per are added to Scheduled Receipts. M.O. 'by-product' components have negative quantity per. They are considered a 'by-product' of a manufacturing product. In Scheduled Receipts an M.O. Component workspace displays details relevant for that M.O. component.



The M.O. 'by-product' component can be received in Scheduled Receipts. Select the Scheduled Receipt, then select Maintain > Receive. The 'Receive Scheduled Receipt – M.O Component' action prompt is displayed. Three templates are available (Complete, Default, Uncontrolled).

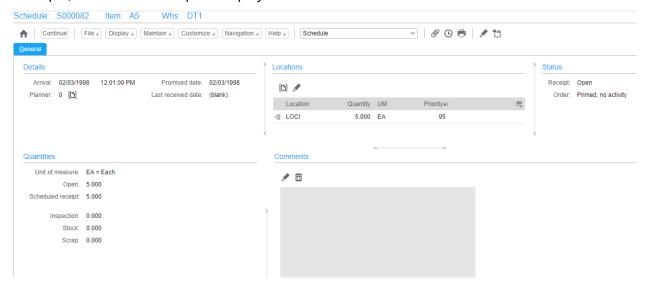


Receiving the M.O. 'by-product' component creates an 'IP' (Issue Planned Production Component) inventory transaction with a negative quantity.



# Repetitive Schedules

Repetitive Schedules (Receipt type 5=Schedule) are added to Scheduled Receipts. In Scheduled Receipts, a Schedule workspace displays details relevant to the schedule.



Receive Scheduled Receipt is not supported for Repetitive Schedules.

# **Quality Control Transactions**

#### **New in IDF**

Approve Production Item (MQ)

Approve Purchased Item (PQ)

Reject Item (RQ)

Change Item Location QC Status (SQ)

#### **Enhanced**

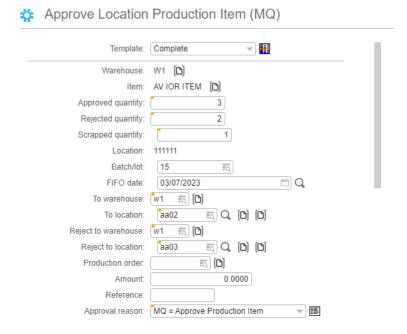
Approve Shelf Life (CQ)

- Includes reject and scrap options

# Approve Production Item (MQ)

The IDF (MM) MQ transaction reports approved, rejected and scrap for production IOR (Inspection On Receipt) items waiting inspection. This MQ transaction is enhanced so that Inspection Receipt records are kept in sync with the rejected item location records.

The IDF (MM) MQ transaction can be entered from Inventory Transaction History, Manufacturing Order, and Item Location.



The IDF (MM) MQ transaction supports direct reversals.

The table below compares the IDF (MM) MQ transaction to the MQ entered in IM and PMC.

Approve Production Item (MQ)	IDF (MM)	IM/PMC
Approved, Rejected and Scrapped quantities	Yes	Yes
Item Locations with Rejected quantity	Yes	Yes
Inspection Receipts for Rejected quantity (new)	Yes	No
Direct reversal	Yes	Compatible

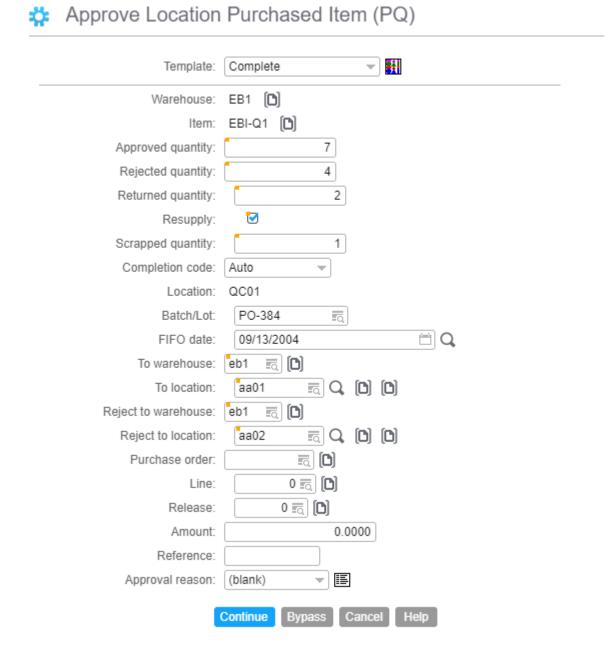
### Approve Production Item (MQ) Security

Approve Production Item (MQ) Security can be found in MM in the MM Approval Tasks. The security task is TXN INVTXN\_MQ with description Approve Production Items. The security task is shipped unlocked.

### Approve Purchased Item (PQ)

The IDF (MM) PQ transaction reports approved, rejected, scrap and vendor returns for purchased IOR items that have a QC status of Pur, waiting inspection. This PQ transaction is enhanced so that an Item Location and Inspection Receipt will exist for the rejected quantity.

The IDF (MM) PQ transaction can be entered from the Inventory Transaction History, Item Location and Scheduled Receipt objects.



The IDF (MM) PQ transaction supports direct reversals.

The table below compares the IDF (MM) PQ transaction to the PQ in IM and PMC.

Approve Purchased Item (PQ)	IDF (MM)	IM/PMC
Approved, Rejected, Returned and Scrapped quantities	Yes	Yes
Item Locations with Rejected quantity (new)	Yes	No
Inspection Receipts for Rejected quantity (new)	Yes	No
Direct reversals	Yes	No

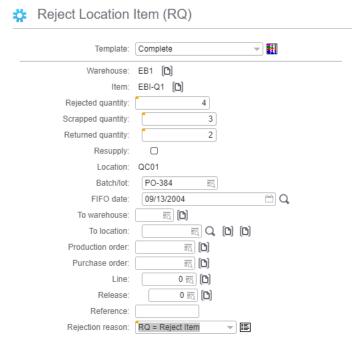
### **Approve Purchased Item (PQ) Security**

Approve Purchased Item (PQ) Security can be found in MM in the MM Approval Tasks. The security task is TXN INVTXN\_PQ with description Approve Purchased Items. The security task is shipped unlocked.

### Reject Item (RQ)

The IDF (MM) RQ transaction reports rejected quantity for both expired QC items and IOR items waiting inspection. Scrap quantity can be entered for QC and IOR items and this reduces the rejected quantity. Return quantity can be entered for purchased IOR items and this also reduces the rejected quantity. For IOR items, Item Location and Inspection Receipt records will exist for the rejected quantity not scrapped or returned. For QC items, Item Location records will exist for the rejected quantity not scrapped.

The IDF (MM) RQ transaction can be entered from the Inventory Transaction History, Item Location, Manufacturing Order, and Scheduled Receipt objects.



The IDF (MM) RQ transaction supports direct reversals.

The IDF (MM) RQ transaction does not exist in IM or PMC. In IM, rejected quantity is entered from quality control transactions. In PMC, rejected quantity is entered for PQ, MQ, and CQ transactions.

The table below compares the IDF (MM) RQ transaction to the RQ entered in IM and PMC.

Reject Item (RQ)	IDF (MM)	IM/PMC (Compatible with MQ/PQ/CQ)
Rejected, Scrap and Return quantities	Yes	Yes
Item Locations with Rejected quantity	Yes	MQ (compatible), PQ (no), CQ (yes)
Inspection Receipts for Rejected quantity	Yes	No
Direct reversal	Yes	No

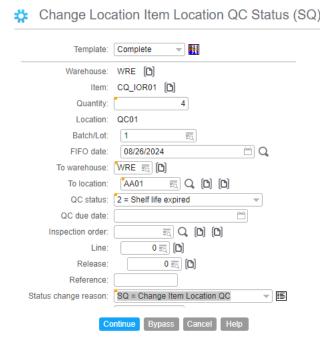
### Reject Item (RQ) Security

Reject Item (RQ) Security can be found in MM in the MM Approval Tasks. The security task is TXN INVTXN RQ with description Reject Item. The security task is shipped unlocked.

### Change Item Location QC Status (SQ)

The IDF (MM) SQ transaction changes the Item Location QC status for both IOR and QC items. This SQ transaction allows a user to transfer all or part of the item location quantity to another location. The IDF (MM) SQ transaction for an IOR item can change QC status from rejected to Pur/Mfg, waiting inspection. The IDF (MM) SQ transaction for a QC item can change status from Approved, within shelf life to Expired, waiting inspection and from Rejected to Expired, waiting inspection.

The IDF (MM) SQ transaction can be entered from the Inventory Transaction History and Item Location objects.



The IDF (MM) SQ transaction does not allow a direct reversal.

The following table compares IDF (MM) transaction to the IM SQ transaction.

Item (IOR/QC)	Current QC status	New QC status	IM
QC	Rejected	Approved	Yes
QC	Approved, but expired	Expired, waiting inspection	Yes (Report)
QC	Approved, within shelf life	Expired, waiting inspection	No

QC	Rejected	Expired, waiting inspection	No
IOR	Rejected	Pur/Mfg, waiting inspection	No

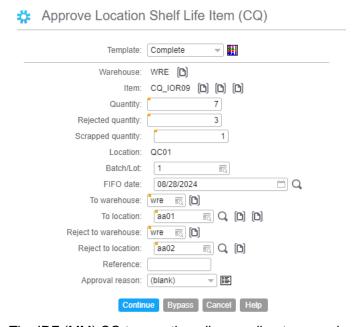
### Change Item Location QC Status (SQ) Security

Change Item Location QC Status (SQ) Security can be found in MM in the MM Item Location Tasks. The security task is TXN INVTXN\_SQ with description Change Item Location QC Status. The security task is shipped unlocked.

### Approve Shelf Life (CQ)

The IDF (MM) Approve Shelf Life (CQ) transaction is enhanced to allow approve, reject and scrap quantities to be entered for an expired QC item. This CQ transaction allows transfer of the approved and/or rejected quantity to another location. The IDF (MM) CQ transaction previously only allowed approval quantity and transfers.

The IDF (MM) CQ transaction can be entered from the Inventory Transaction History and Item Location objects.



The IDF (MM) CQ transaction allows a direct reversal.

The IDF (MM) CQ transaction is now compatible with the CQ transaction in IM and PMC.

Approve Shelf Life (CQ)	IDF (MM)	IM/PMC
Approved quantity	Yes	Yes
Transfer Approved quantity	Yes	Yes

Rejected and Scrapped quantities (new in IDF)	Yes	Yes
Transfer Rejected quantities (new in IDF)	Yes	Yes
Direct reversals	Yes	No

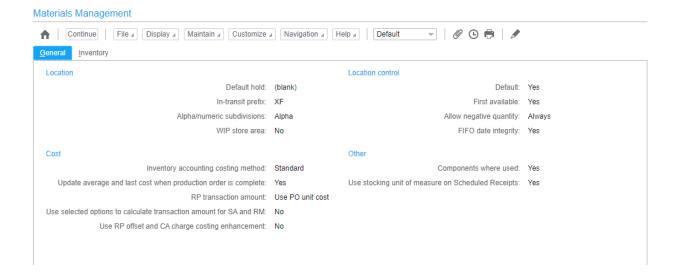
### Approve Shelf Life Item (CQ) Security

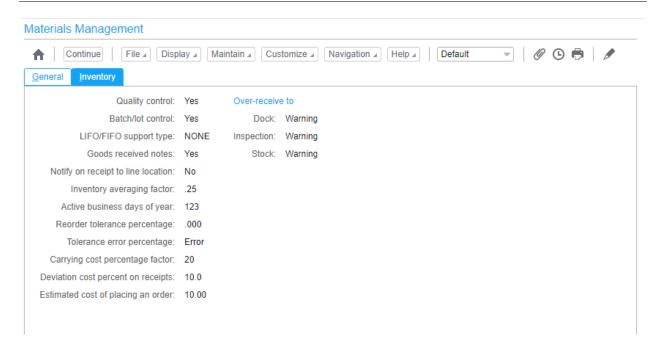
Approve Shelf Life Item (CQ) Security can be found in MM in the MM Approval Tasks. The security task is TXN INVTXN CQ with description Approve Shelf Life Items. The security task is shipped unlocked.

# Materials Management Application Settings

Materials Management application settings is updated to include nineteen IM install/tailor questions and responses. The IM install / tailor responses and MM application settings are synchronized.

When changing some of these application settings (e.g. Inventory accounting method), unattached jobs should be ended and restarted, and users should be instructed to logoff and logon.





# Appendix A Employee Attributes

Attribute description	Comments
Company	Maps to employee company
Employee ID	Auto key definition  Constant – 'E'  Numeric loop of seven  E0000001
Relationship type	E = Employee, P = Partner, S= Sub-contractor, O = Other
Salutation	
First name	Maps to employee first
Middle name	Maps to employee middle
Last name	Maps to employee last
Nick name	
Full name	Maps to employee name
Name suffix	
Address line 1	Maps to employee line 1
Address line 2	Maps to employee line 2
Address line 3	

Attribute description	Comments
Address line 4	
Address line 5	
Phone Number 1	Maps to Payroll Work phone (empmsxl0.ph03jf). If Payroll not installed then Employee telephone (empmasl0.ph01bp)
Phone Number 2	Maps to Payroll employee cell phone. If blank then Other phone
Phone Number 3	Maps to Payroll Home phone. If blank then Work fax. If blank then Home fax.
Phone Number type 1	Will always be 1=Office phone
Phone Number type 2	
Phone Number type 3	
Form of address	
Region	
District	
Country	
Web address	
City	Maps to Payroll employee city
State	Maps to Payroll employee state
Zip code	Maps to Payroll employee zip code
Zip code extension	Maps to Payroll employee extension
E-mail address	Maps to Payroll employee e-mail
Alternate E-mail address	

Attribute description	Comments
Department	Maps to Payroll employee department
Facility ID	Maps to Payroll employee facility ID
Title	
Occupation	Maps to Payroll employee occupation
Employment type	F = Full time, P = Part time, T = Temporary,  Maps to Payroll employee
Employment status	A = Active, I = Inactive, T = Terminated  Employee active record code maps to active or terminated
Hire date	Maps to Payroll employee hire date
Termination date	Maps to Payroll employee term date
User ID	
Shop Floor role ID	
Foreman role ID	Future use
Payroll used	Boolean 1 = Yes, 0 = No
Payroll ID	
Access card ID	
Temporary access card ID	
Temporary access card expiration date	
Replication maintenance control	

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Attribute description	Comments
Replication destination	
Replication source system reference	
Replication source document ref	
Replication source document URL	
User field switch A	
User field switch B	
User field switch C	
User field code A	
User field code B	
User field code C	
User field amount 1	
User field quantity 1	
User field text 40	
Create date	
Create time	
Create user	

Attribute description	Comments
Maintain date	
Maintain time	
Maintain user	
Work crew	Shop Floor specific data
	Maps to Payroll employee work crew
Multi-job flag	Maps to Payroll employee multi
Shift	Maps to Payroll employee shift
Work schedule	Maps to Payroll employee schedule
Temporary badge	Maps to Payroll employee temp
Temporary badge expiration date	Maps to Payroll employee exp
Site ID	
Pay rate	Maps to Payroll employee
Employee display name	Employee display name will be formatted using the on selected format in Human Resources application settings and will be displayed in the Employee user interface.

# Employee Attributes

Attribute description	Comments
Company	Maps to employee company
Employee ID	Auto key definition  Constant – 'E'  Numeric loop of seven  E0000001

Attribute description	Comments
Relationship type	E = Employee, P = Partner, S= Sub-contractor, O = Other
Salutation	
First name	Maps to employee first
Middle name	Maps to employee middle
Last name	Maps to employee last
Nick name	
Full name	Maps to employee name
Name suffix	
Address line 1	Maps to employee line 1
Address line 2	Maps to employee line 2
Address line 3	
Address line 4	
Address line 5	
Phone Number 1	Maps to Payroll Work phone (empmsxl0.ph03jf). If Payroll not installed then Employee telephone (empmasl0.ph01bp)
Phone Number 2	Maps to Payroll employee cell phone. If blank then Other phone
Phone Number 3	Maps to Payroll Home phone. If blank then Work fax. If blank then Home fax.
Phone Number type 1	Will always be 1=Office phone
Phone Number type 2	

Attribute description	Comments
Phone Number type 3	
Form of address	
Region	
District	
Country	
Web address	
City	Maps to Payroll employee city
State	Maps to Payroll employee state
Zip code	Maps to Payroll employee zip code
Zip code extension	Maps to Payroll employee extension
E-mail address	Maps to Payroll employee e-mail
Alternate E-mail address	
Department	Maps to Payroll employee department
Facility ID	Maps to Payroll employee facility ID
Title	
Occupation	Maps to Payroll employee occupation
Employment type	F = Full time, P = Part time, T = Temporary,  Maps to Payroll employee
Employment status	A = Active, I = Inactive, T = Terminated  Employee active record code maps to active or terminated
Hire date	Maps to Payroll employee hire date

Attribute description	Comments
Termination date	Maps to Payroll employee term date
User ID	
Shop Floor role ID	
Foreman role ID	Future use
Payroll used	Boolean 1 = Yes, 0 = No
Payroll ID	
Access card ID	
Temporary access card ID	
Temporary access card expiration date	
Replication maintenance control	
Replication destination	
Replication source system reference	
Replication source document ref	
Replication source document URL	
User field switch A	

Attribute description	Comments
User field switch B	
User field switch C	
User field code A	
User field code B	
User field code C	
User field amount 1	
User field quantity 1	
User field text 40	
Create date	
Create time	
Create user	
Maintain date	
Maintain time	
Maintain user	
Work crew	Shop Floor specific data  Maps to Payroll employee work crew
Multi-job flag	Maps to Payroll employee multi
Shift	Maps to Payroll employee shift
Work schedule	Maps to Payroll employee schedule
Temporary badge	Maps to Payroll employee temp

### Infor XA Release Notes

Attribute description	Comments
Temporary badge expiration date	Maps to Payroll employee exp
Site ID	
Pay rate	Maps to Payroll employee
Employee display name	Employee display name will be formatted using the on selected format in Human Resources application settings and will be displayed in the Employee user interface.