Infor XA – Enterprise Product Data Management

Release 9.1 Supplement

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About this guide

This guide provides an overview of the changes made in Infor ERP XA Release 9 to allow most applications to maintain item information in the Item Revisions object.

Intended audience

This guide is for system administrators and others who implement XA functions and for users who maintain item information in XA applications.

Prerequisite

The changes described in this document require Infor ERP XA Release 9.

Overview

The Infor ERP XA product has enhanced the integration of the Enterprise Product Data Management (EPDM) object Item Revisions across multiple applications. This enhancement replaces the maintenance of item information in the Item Master file with the ability to maintain multiple versions of an item in the Item Revisions object. While the Item Revisions object is not new, the integration of this object into most of the Infor ERP XA functions that use item information is new with Release 9.

This document describes the integration of Item Revisions across Infor ERP XA in the following sections:

- Item Revision control
- Controlled attributes
- Item Revision Foreign Prices
- Enhanced EPDM functions
- Item Revisions enablement for Release 9.

Item Revision control

EPDM allows items to belong to multiple sites with multiple revisions within each site. Each item revision contains an Effective from and Effective to date to define the range of dates when that item revision is effective or "in effect." The Effective from and Effective to dates are not required to be consecutive from one revision of an item to the next. Therefore, on a given date for any specific item and site, the number of revisions that are in effect could be one, none, or multiple revisions. EPDM identifies only one item revision as the current revision for each item and site for a specific date. Unless otherwise specified, the current revision is the source of item-related information in an EPDM-enabled environment at the Release 9 level. The current item revision replaces the Item Master file as the source of item-related information for the Infor ERP XA essential applications.

Current Item Revision function

The Current Item Revision function calculates the current revision for an item and site combination. If only one revision for an item and site has an Effective from and Effective to date range that includes the system or target date, that item revision is the current revision. The Current Item Revision function determines the current item revision for other situations by analyzing the Effective dates based on the following criteria. If more than one revision meets the first criteria, the function selects from among those revisions using the second criteria. If more than one revision meets the second criteria, the function uses a final selection criteria based on revision number.

If multiple item revisions are effective on the same system date, EPDM selects the current item revision based on these criteria.

First criteria	Second criteria	Final criteria
Revision that will expire last (latest Effective to date)	Last revision to become effective (most recent Effective from date)	Highest revision number

If no item revisions are effective on the system date, but previous item revisions exist, EPDM selects the current item revision based on these criteria.

First criteria	Second criteria	Final criteria
Revision that expired most recently (most recent Effective to date)	Last revision to become effective (most recent Effective from date)	Highest revision number

If no item revisions are effective on the system date and no previous item revisions exist, but future revisions do exist, EPDM selects the current item revision based on these criteria.

First criteria	Second criteria	Final criteria
Next revision to become effective (nearest Effective to date)	Next revision to expire (nearest Effective to date)	Lowest revision number

The revision that is current for an item and site can change because of several factors, such as adding or deleting an item revision record, maintaining the Effective from and Effective to dates in any item revision, or by passing of time that changes the system date to a new date.

Item Revision Control function

The Item Revision Control function performs an analysis whenever a user action could potentially cause another item revision to become the current revision for the item site. EPDM then recalculates the current revision for the item and site, which might result in a new current item revision being applicable.

The Item Revision Control function also automatically monitors the system date for changes and compares the new system date and the Last analysis date for the site to the Effective dates of all item revisions to determine if the new system date could affect which item revision is the current revision. This unattached job function normally runs at midnight (system time). If the Effective from or to date for any item revision in a site is earlier than or equal to the system date and also later than the Last analysis date, the current item

revision might have changed. EPDM then recalculates the current revision for the item, according to the rules described previously.

Whenever EPDM identifies a new current item revision, whether due to a new system date or user action, the Item Revision Control function recalculates the new current item revision, generates the appropriate transactions, and updates the associated files as needed, including the Item Release, Item Master, Item Site, Inventory Transaction History, and General Ledger Interface files. Specifically, these transactions and updates occur.

- Updates Item Site file with new current revision number.

- Logs Change transaction for Item Site file to Maintenance History.

- If Unit Cost Default is the cost basis for the item, and if the Unit Cost Default value is different in the new current revision, then EPDM generates Cost Update (CU) transactions and logged to Inventory Transaction History and to the General Ledger Interface file, as required.

- If the item revision has been released, indicated if an Item Release record exists for the previous current revision, and the Auto sync attribute is set to Yes, then EPDM updates the Item Release and Item Master files from the new current item release.

For example, an analysis is run on August 21, with a Last analysis date of August 20:

Item revision	Effective from	Effective to	Result
ABC revision 1	January 1 2009	September 1, 2009	Replaced by revision 2 as the current revision
ABC revision 2	August 21, 2009	December 31, 2009	Becomes the new current revision

An analysis is run on October 31, with a Last analysis date of October 30:

Item revision	Effective from	Effective to	Result
ABC revision 1	January 1 2009	September 1, 2009	Expired revision, no change
ABC revision 2	August 21, 2009	December 31, 2009	Current revision, no change
ABC revision 3	January 1, 2010	July 31, 2010	New revision not effective at this time, no change

An analysis is run on January 1, with a Last analysis date of December 31:

Item revision	Effective from	Effective to	Result
ABC revision 1	January 1 2009	September 1, 2009	Expired revision, no change
ABC revision 2	August 21, 2009	December 31, 2009	Current revision, effective dates expired
ABC revision 3	January 1, 2010	July 31, 2010	Becomes the new current revision

Note that a revision is effective from and including the Effective from date up to but not including the Effective to date. In the third example, no revision had dates in effect on December 31. In this case, ABC revision 2 would have remained the current revision, in the absence of an item revision with effective dates, because that revision has the most current Effective to date on December 31.

Check current revision

By default, EPDM checks the current revisions in each site in an XA environment every time the system date and time reaches midnight. However, to check the current revisions at another time, you can run the Item Revision Control host job for a selected site. This host job allows you to start the Item Revision Control function manually. The function performs the same check of current item revisions when run from the host job as performed automatically at midnight. When you run the Item Revision Control function from the host job from the Sites object, you can specify a subset of item revisions to be checked. When the function runs automatically at midnight, it checks all item revisions.

While the automatic performance of the Item Revision Control function determines the current item revision, the Item Revision Control host job provides a quick way to check and potentially update the current revisions for all items in a site or for a subset of selected items in the site. When an item revision is created or deleted or when Effective from or to dates are changed, the current revision should be recalculated. However, in abnormal circumstances, such as a hold on the u-job that prevents the Item Revision Control monitoring function to run, the Item Revision Control job gives users a way to correct any discrepancies or out-of-sync conditions. The same rules apply to determine the current item revision apply whether the function runs automatically at midnight or from the host job.

Release Item Revisions options

While item information in Release 9 is maintained in the Item Revisions object, the legacy Item Master file records in PDM are also retained. For user-written, third-party, and other non-XA-essentials functions, the Item Master data is still available and still can be updated with changes from the Item Revisions object. This type of action is known as releasing Item Revisions data from EPDM to the Item Master file in PDM.

The Initial release option from the Item Revisions object has three choices:

- **No:** do not release the item revision and do not update Item Master. With this option, the creation of a new item revision does not update any Item Master information.

- **Yes:** release the item revision and update the Item Master but do not activate the Auto sync function. This option updates the corresponding Item Master record with information from the newly created item revision. This option will also update the Item Master record with changes to the specific item revision, but will not keep the released item revision in sync with the current revision.

- **Yes, auto sync:** release the item revision, update the Item Master, and activate the Auto sync function. This option updates the corresponding Item Master record with the new item revision information and with any later changes to the item revision. The Auto sync function also will monitor the current item revision associated with the released item and site. When a new revision becomes current, the Auto sync function automatically releases the new current revision and updates the associated Item Master records.

The Auto sync function keeps the Item Master data automatically synchronized with the current item revision for the released item and site and updates item data when current item revisions change. If the Initial release option is set to No, the item revision can later be released to the Item Master file by selecting either the Release or Mass Release option on the Maintain menu of the Item Revisions object. Both of these Release options can also be used to select or deselect the Auto sync setting for an item.

A recommended task after installation of Release 9 is to use the Mass Release option to release your current item revisions to PDM. It is important to select the **Current revisions** subset when you use this option. If you want to initiate automatic synchronization for current item revisions, select the Auto sync option on the Mass Release Item Revisions dialog. The mass release of the current item revisions updates the item information in the Item Master file to be equivalent to the current item information in the Item Revisions object for the released item and site, which ensures that any user-written functions or other outside functions interfacing with XA can access Item

Master information that is equivalent to the current tem revision for the released item and site.

Controlled attributes

In addition to the enhanced control of the current item revision, EPDM adds a new level of maintenance for item revision data across all item revisions for certain attributes. Users can control the values for these selected attributes in all revisions of an item within a site or all revisions of an item across the enterprise, depending on the level of control allowed.

With EPDM enablement, the Item Revisions object becomes the source of information that was previously provided in the Item Master file. However, because an item revision that is current can change due to user action or the passage of time, the values in some critical attributes could change unexpectedly. The controlled attributes feature protects the data integrity of on-hand inventory, open orders, and inter-warehouse activity against potential problems that might occur if new revisions become current with different values for these critical attributes.

For some of the attributes, the control exists at the Enterprise level. All revisions of an item within an enterprise, across all sites, will have the same value for an attribute controlled at that level. The Stocking unit of measure and Inventory code attributes are controlled at the Enterprise level. Other attributes are controlled at the Site level. To enable control at the Site level, XA Release 9 adds an Item Site file. This file contains information used to control and identify the current item revision, provide control for specific item revision attributes within a site, and provide an audit trail for current item revision changes. The Item Site file is maintained automatically by EPDM when item revisions are created and maintained within a site. This file cannot be accessed directly by users.

This table identifies the controlled item revision attributes and the level of control implemented for each attribute.

Attribute name	Attribute description	Level of control	Comments
UNMSR	Stocking U/M	Enterprise Item	All revisions of an item within an enterprise will use the same unit of measure for stocking the item.

Attribute name	Attribute description	Level of control	Comments
INVFG	Inventory code	Enterprise Item	All revisions of an item within an enterprise will be the same classification in inventory.
UCDEF	Unit Cost Default	Site (default value)	The unit cost can vary by revision between and within sites for this item. For convenience, the Unit Cost Default value of the current revision is stored at the Site Item level.
BLCF	Batch/lot control	Site	All revisions of an item within a site will have the same batch/lot control setting.
ALLOC	Discrete allocations	Site	All revisions of an item within a site will have the same discrete allocations setting.
INTYP	Inspect-on-receipt	Site	All revisions of an item within a site will have the same inspect-on-receipt setting.
ITTYP	Item type	Site (in some cases)	For these item types, the value can vary by revision. The default value is stored at the Item Site level: 1=Assembly, 2=Fabricated item, 3=Raw material, 4=Purchased item, or 9=User option. For items that are type 0=Phantom, F=Feature, or K=Kit, all revisions within a site will have the same value.

Attribute name	Attribute description	Level of control	Comments
QCTYP	QC (shelf life)	Site	All revisions of an item within a site will have the same QC value.
QCDAY	Shelf life days	Site	The default value is stored at the Item Site level, but the value can be overridden within revisions.

Default values for controlled attributes

For attributes controlled at the Enterprise level, EPDM maintains an Enterprise Item file with default values for those attributes. EPDM automatically updates default values for the Stocking unit of measure and the Inventory code in the Enterprise Item file.

Similarly, for attributes controlled at the Site level, EPDM maintains an Item Site file with default values for the item revisions within the site. This file is created and updated automatically when item revisions in the site are maintained. When you create an initial item revision within a site, EPDM creates an Item Site record automatically for the item revision. The values entered for the controlled attributes in the new item revision are set as default values in the Item Site record. For some controlled attributes, as specified in the preceding table, the Item Site record contains the default value for the attribute, which must be the same in all revisions for an item. For other attributes controlled at the Site level, the default value for the controlled attribute can be overridden in the revisions for an item.

Maintenance for controlled attributes

After the initial item revision is created, the controlled attributes within an individual item revision record are not maintainable using the Change option. Instead, these attributes have a Change Item Revision button next to them that must be clicked to start maintenance. Clicking the Change Item Revision button next to any of the controlled attributes invokes the Change Item Revisions dialog. This dialog contains all of the attributes for the item revision that are controlled at either the enterprise or site level. Any change to the values on this dialog changes the value for all revisions of the item, either within the enterprise or within the site.

Item Type (ITTYP)

With the Item type attribute, EPDM enforces two levels of control, depending on the Item type value.

For these Item type values, the default value for the item revision is stored in the Item Site file: 1=Assembly, 2=Fabricated, 3=Raw material, 4=Purchased, or 9=User option. The value can be overridden for any revision of the item, as long as the original and overridden values are either 1, 2, 3, 4, or 9. A warning message does appear if the overridden value is not equal to the default Item type value for the item. This flexibility in the default value allows specific revisions to be either manufactured or purchased.

For item revisions with Item type values of 0=Phantom, F=Feature, or K=Kit, the attribute is controlled at the Site level. All revisions of an item within a site must have the same Item type value when the default value equals 0, F, or K. In this situation, the Item type value cannot be overridden for an individual revision of an item. The Item type value can be changed from 0, F, or K to 0, F, or K, and any change applies to all revisions of the item within the site. The Item type value cannot be changed to 1, 2, 3, 4, or 9.

When a user adds an item revision, and no revision already exists in the site specified for the item, then any of the values for Item type can be selected. If a revision already exists for the item, then the initial value for the Item type attribute comes from the default value in the Item Site file.

- If the default value for Item type is 1, 2, 3, 4, or 9, the Item type value for the new item revision can be set to any of those values.

- If the default value for the item type is 0, F, or K, then the Item type value cannot be changed while creating the item revision.

After the item revision has been created, the Item type value can be changed, but how it can be changed depends on the original value in the Item type attribute. If the original Item type value is 1, 2, 3, 4, or 9, the following rules apply.

- If the original Item type value is 1, 2, 3, 4, or 9, and the user wants to change the value only for the individual revision and not all revisions for the item and site, the value can be overridden on the Item Characteristics card. The available values for selection are 1, 2, 3, 4, or 9. If the overridden value is different than the default Item type value, a warning message appears. This change affects only the Item type value in the revision being changed.

- If the original item type value is 1, 2, 3, 4, or 9, and the user wants to change the value for all revisions for the item and site, the value can be changed by clicking the Change Item Revisions button next to the Item type attribute. On the Change Item Revisions dialog, any value can be selected, but the change affects the Item type value for all revisions of

the item and site. If the overridden value is different than the default Item type value, a warning message appears.

- If the original Item type value is 1=Assembly or 2=Manufactured, the value can be changed to 3=Raw material or 4=Purchased item unless the item has bill of material components.

If the original item type value is 0, F, or K, the following rules apply.

- If the original Item type value is 0, F, or K, the value can be changed only by clicking the Change Item Revisions button next to the Item type attribute. On the Change Item Revisions dialog, any value can be selected, but the change affects the Item type value for all revisions of the item and site.

- If changing the value to F=Feature, the Standard batch quantity for the item must be set to 1.

- The value cannot be changed to F=Feature if the item is used in a bill of material, routing, orders, etc.

- If changing the value to K=Kit, the item cannot have a product structure.

- The Inventory code value for the item must be 4=Unstocked in order to change the Item type value to Kit.

- If changing the value to K=Kit, the item cannot have an Item Balance record.

Inventory Code (INVFG)

All revisions of an item in all sites within an enterprise must have the same inventory code. This requirement ensures that the item revisions across all sites are stocked or not stocked consistently and that existing orders and transfers of the item across sites can be handled appropriately. For example, an item revision cannot be specified as inventory and stocked in the Item Warehouse object in one site and transferred to another site where it is handled as a service or miscellaneous item.

The Inventory code attribute can be changed from Inventory to Miscellaneous, Service, or Unstocked if these conditions are met.

- If the Item type value is 3=Raw material, 4=Purchased item, or 9=User option, the Inventory code can be changed to a non-inventory value of Miscellaneous, Service, or Unstocked. If the Item type value for the item revision is type 1=Assembly or subassembly or 2=Fabricated item, the item cannot be changed from an Inventory code of inventory to Miscellaneous, Service, or Unstocked.

- The Batch lot control value must be No for Miscellaneous or Service items.

- Only item revisions with an Inventory control value of Inventory can have Quality control = Yes, Inspect on receipt = Yes, or Discrete allocations = Yes.

- If Product Structure records exist for any revisions of the item, the Inventory code value cannot be changed to Miscellaneous, Service, or Unstocked.

The Inventory code attribute can be changed from Miscellaneous or Service to Inventory under these conditions:

- If no open purchase orders or manufacturing orders exist for any revisions of the item across all sites, the Inventory code can be changed to Inventory.

- If any open purchase orders or manufacturing orders exist for any revisions of the item across all sites, the Inventory code cannot be changed.

Stocking Unit of Measure (UNMSR)

All revisions of an item in all sites within an enterprise must have the same stocking unit of measure. This requirement ensures that the item is stocked, costed, and sold in a consistent unit of measure and that transfers of the item across sites are done using the same type of quantity; for example, a quantity of an item stocked in a warehouse for one site in feet is transferred into a warehouse in another site in feet and not in meters.

The Stocking unit of measure attribute can be changed in either of the following situations.

- The units of measure are equivalent. The global unit of measure conversion factor is 1.0 for the previous and new units of measure.

- The Quantity and Quantity per values are zero for this item. Quantities and Product Structure records do not exist for any revisions of the item.

If open orders exist for any revisions of the item, the Stocking unit of measure can be changed, according to the conditions listed above, but the change will cause a warning message.

Quality Control (QCTYP)

All revisions of an item with a site must have the same Quality control value. If this value is not consistent across all revisions of an item, problems can occur in existing Location Quantity records for the item revisions.

The Quality control attribute can be changed from No to Yes under these conditions.

- If the item revision has Location Quantity records with a Quality control code of 20=Not shelf life, this change is allowed.

- If the Shelf life days value is 0, the Quality control attribute cannot be Yes.

The Quality control attribute can be changed from Yes to No under these conditions.

- If the item revision has Location Quantity records with a Quality control code of 10=Shelf life item, not expired, this change is allowed.

- If the item revision has Location Quantity records with a Quality control code of 19=Expired shelf life, this change is allowed.

- If the Shelf life days value is not 0, the Quality control attribute cannot be No.

Shelf Life Days (QCDAY)

The Shelf life days value can vary among revisions for an item and site. EPDM maintains a default value at the item and site level, but users can override this value in the item revision.

The Shelf life attribute can be changed, but the changed value is restricted by the Quality control value for the item revision. If the Quality control value is Yes, then the Shelf life in days must be greater than zero. If the Quality control value is No, the Shelf life in days value must be zero. The Shelf life in days value cannot be a negative number.

Batch/Lot Control (BLCF)

All revisions of an item within a site must have the same Batch/lot control value. The Batch/lot control attribute is a key for the Location Quantity file. If this value is not consistent across all revisions of an item, problems can occur in existing Location Quantity records for the item revisions.

The Batch/lot control attribute can be changed from No to Yes. However, if a Location Quantity record for a revision of the item has a blank Batch/lot control attribute, a warning message appears.

The Batch/lot control attribute can be changed from Yes to No if the Quality control value is No. If the Quality control value for the item revision is Yes, the Batch/lot control value must be Yes. Also, if changing this value from Yes to No creates duplicate Location Quantity records, a warning message appears.

Inspect on Receipt (INTYP)

All revisions of an item with a site must have the same Inspect on receipt value. If this value is not consistent across all revisions of an item, problems can occur in existing Location Quantity and Receipts to Inspection records for the item revisions.

The Inspect on receipt attribute can be changed from No to Yes. The Inspect on receipt attribute also can be changed from Yes to No, but if any of the revisions have quantities waiting for inspection in the Location Quantity file with Quality control codes of 17, 80, or 90 (awaiting inspection or rejected), a warning message appears indicating that the unprocessed Inspect on receipt quantities exist. The same message appears if any revisions of the item have records in the Receipts to Inspection file.

Discrete Allocations (ALLOC)

All revisions of an item with a site must have the same Discrete allocation value. If this value is not consistent across all revisions of an item, problems can occur in existing Allocation Quantity records for the item revisions.

The Discrete allocations attribute can be changed from No to Yes. The Discrete allocations attribute also can be changed from Yes to No, but if this change creates duplicate Allocation Quantity records, a warning message appears.

Unit Cost Default (UCDEF)

The Unit cost default value is maintained but not controlled at the item revision level. Each individual item revision can have a unique value for this attribute. EPDM stores the Unit cost default value for the current item revision at the item and site level. This value is for audit purposes and is not used to enforce a consistent Unit cost default value across all revisions of the item in the site. No error or warming messages occur when this value is changed for an individual item revision.

XA generates CU transactions (Standard unit cost default replacement) as needed when the Unit cost default value changes. For example, if a new item revision becomes the current item revision, and the new current item revision has a different Unit cost default value than the previous current item revision, a CU transaction is generated for each item warehouse for the item where the Unit cost default value is used for inventory accounting.

Migration to XA Release 9

Prior to migrating to XA Release 9, a Pre-Upgrade Audit routine is available to screen the attributes in the Item Revisions object. This audit will identify attribute values that are not valid or consistent in the existing Item Revisions data and suggest corrective actions.

During migration to XA Release 9, an ATM program will generate a new Item Site record for every item and site with at least one item revision. The program will use values in the corresponding current item revision for default attribute values in the Item Site record.

See the Infor ERP XA R9 EPDM Pre-Upgrade Audit Instructions document (Informational PTF SH85696) for more information.

Item Revision Foreign Prices

The Item Revision Foreign Prices object contains prices for item revisions in currencies other than the local currency. With this object, an item revision can have multiple prices in multiple currencies.

To add a foreign currency price for an item revision, the user must enter this required information:

- Company to which the foreign currency price applies.

- ID of the foreign currency.

- Date on which the foreign currency price becomes effective.

- Price amount in the foreign currency, or leave this amount blank and use the nominal price calculated by XA.

- Unit of measure to be used for calculating the price.

The user can specify a unit of measure to be used when calculating the price of a quantity of the item revision in the specified foreign currency. After the foreign currency price has been entered, only the price amount and the pricing unit of measure can be changed.

When a user adds a foreign currency price for an item revision without entering a price, XA calculates the nominal price in the specified currency using the current exchange rate for that currency. The calculated price is based on the base price, pricing unit of measure, the current exchange rate for the currency, and any currency adjustment factor that applies to that currency. The result is the nominal price, which is the foreign currency price for the item revision in the unit of measure specified.

An item revision can have multiple prices in the same foreign currency. Each price has a date on which it becomes effective. As with revisions of the item, only one price per currency applies at any time, based on the effective date for each foreign currency price. Additionally, only foreign currency prices entered for the current item revision can be in effect. Foreign currency prices defined for another item revision are only effective when that item revision is the current item revision.

By default, the foreign currency prices for an item revision appear on the Sales card in the detailed information for that item revision along with the local currency prices defined for the revision. The Current tab shows the current base price and the foreign currency prices that are currently effective. The Local tab shows all base prices defined for the item revision. The Foreign tab shows all foreign currency prices defined for the item revision.

Recalculating foreign currency prices

Because fluctuations in exchange rates, changes to the pricing unit of measure, and other factors can require changes to prices in foreign currency, the Item Revision Foreign Prices object provides several options for updating foreign currency prices for an item revision.

Individual foreign currency price

For a single foreign currency price, you can change the price amount directly if you know the amount required for the new price.

If you prefer to have XA calculate the foreign price, you can use the Assign nominal price to foreign price button next to the Price attribute. This button action recalculates the foreign currency price and replaces the previous price with the nominal, or recalculated, price.

If you want to recalculate the foreign currency price but not replace the existing price, you can select the Calculate nominal price button next to the Nominal attribute. This action recalculates the foreign currency price and displays it as the nominal price. You can then review the recalculated nominal price and decide whether the variance between the nominal price and the price entered for the foreign currency requires a change. If you decide to change the foreign currency price, you can either enter a new amount in the Price field or use the Assign nominal price to foreign price button. If you choose to use the button, the recalculated nominal price replaces the existing price.

Multiple foreign currency prices

For situations in which you need to change multiple foreign currency prices, EPDM provides the Mass Replace Foreign Price with Nominal Price option. This option is available from the Maintain menu in the Item Revision Foreign Currency Prices object. This option recalculates the nominal price for all selected foreign currency prices and replaces the existing foreign currency price with the nominal price. For example, if the exchange rate between a local currency and another currency has increased by 10 percent since the last time the prices were recalculated, the Mass Replace Foreign Price with Nominal Price can be used to recalculate and replace the prices in that currency across all item revisions automatically.

To allow you to narrow the foreign currency prices for recalculation and replacement using this option, the Item Revision Foreign Prices object includes these subsets. You can apply one of these subsets or select specific item revision foreign prices from the Item Revision Foreign Prices list window.

Subset	Use to…
Currency ID …	Recalculate and replace only item revision foreign prices calculated in the specified currency.
Current price	Recalculate and replace only the item revision foreign prices that are currently effective.
Item …	Recalculate and replace only item revision foreign prices for the specified item.
Variance percent …	Recalculate item revision foreign prices and only replace those prices that differ from the nominal prices by a percentage greater than or equal to the specified variance percent.

For any item revision foreign price included in the subset, the Mass Replace Foreign Price with Nominal Price option recalculates the nominal price based on the base price for the item revision, the pricing unit of measure, the current exchange rate for the currency, and any currency adjustment factor that applies to that currency. The nominal price then replaces the existing price. If the list of item revision foreign prices does not have a subset, then all item revision foreign prices are recalculated and replaced.

Enhanced EPDM functions

In addition to the objects and functions described in other sections of this document, this section describes enhancements for existing EPDM objects.

Item Revision Descriptions

The Descriptions card in the Item Revisions object displays both the local language description for the item revision and a list of foreign language descriptions entered for that revision.

To add or change the local language description, you can enter text in the Description attribute. EPDM automatically enters or changes the text in the 10 Characters and 20 Characters attributes based on the 40 characters of text allowed in the Description attribute. If the description requires more than 40 characters, users can enter that text in the Extended attributes.

To add or change foreign language descriptions, you can click the Create or Change buttons in the Foreign Languages section of the Descriptions. Clicking the Create button opens the Create Item Revision Foreign Language Description dialog, where you specify the language to be used for the description and the text of the description. The translated description allows the same set of descriptions as for the local language descriptions: a 40-character primary description, 10- and 20-character truncated descriptions, and two additional 40-character attributes for extended description text. Clicking the Change button opens the Change Item Revision Foreign Language Description dialog, where you can change any of the description text. The language cannot be changed.

Implementation Statuses

With Release 9, every item revision must have an implementation status. The implementation status assigned to an item revision, and status code values contained in that implementation status, determine how Infor ERP XA processes information for that item revision. An implementation status can be assigned to more than one item revision. For example, one implementation status might be created for all items that are manufactured but not purchased, while another implementation status might be created for all purchased items.

Implementation status codes

Each implementation status contains the following status code attributes. Implementation statuses also include three status codes that users can define for their own purposes.

Release to legacy item master

The Release to legacy item master attribute indicates whether the item is available to be released to update the corresponding Item Master record. This status code corresponds to the Release to engineering code in previous releases. Note that with Release 9, this status code only controls whether the item revision information updates the corresponding Item Master record. The Release to purchasing and Release to customer status codes control whether purchase orders and customer orders can be created for the item revision.

Release to manufacturing

The Release to manufacturing attribute is used in the IM, MRP, and MPSP applications to indicate that a manufacturing order for the item can be released.

Release to purchasing

The Release to purchasing attribute controls whether a requisition or purchase order can be created for an item revision. The Procurement Management (PM) application uses this status code to determine whether a requisition or purchase order can be created for an item revision. If the Release to purchasing status is set to Yes, the purchase order creation for the item revision can proceed. If set to No, the purchase order create function cannot process the item revision.

The Release to purchasing attribute provides an additional level of control for which revision of an item is eligible for purchase. For example, if a purchased component will no longer be needed, you can assign the item revision for that component to an implementation status that has the Release to purchasing value set to No. That item is then no longer available for new requisitions or purchase orders from PM, but existing orders for the item can still be processed and inventory transactions are not affected.

Release to customer

The Release to customer attribute is used by the Customer Service Management (CSM) application to control whether a customer order can be created for an item revision. If the Release to customer status is set to Yes,

the customer order creation for the item revision can proceed. If set to No, the customer order create function cannot process the item revision.

The Release to customer attribute provides an additional level of control for which revision of an item is eligible for sale to customers. For example, if an item is being replaced by a newer model, you can assign the item revision for the current version to an implementation status that has the Release to customer value set to No. That item is then no longer available for new customer orders in CSM, but existing orders for the item can still be processed and inventory transactions are not affected.

Maintain BOM

The Maintain BOM function has been expanded to include bills of material for regular items as well as for configured items. EPDM checks this status for an item revision before allowing users to maintain the corresponding bill of material. If the Maintain BOM status is set to Yes, users can maintain and change the BOM. If set to No, users cannot maintain or change the BOM.

The Maintain BOM attribute provides an additional level of control for which bills of material users can maintain. For example, bills of material for item revisions that are obsolete, current, or development versions of the item might be maintainable or might be restricted.

Maintain routing

The Maintain routing function has been expanded to include routings for regular items as well as for configured items. EPDM checks this status for an item revision before allowing users to maintain the corresponding routing. If the Maintain routing status is set to Yes, users can maintain and change the BOM for the item revision. If the Maintain routing status code is set to No:

- The routing header information cannot be changed.

- The routing operations in the routing cannot be changed. Also, no new operations can be added and no operations can be deleted.

- The ID of the routing in an item process cannot be changed. The item process cannot be changed to use a different routing ID.

An individual routing can be used for a specific combination of item/site/revision, for more than one revision of an item, or across multiple items and sites. EPDM handles the Maintain routing status code according to these rules.

- **Routing without an item revision:** If the routing is not associated with an item revision, no association exists to an implementation status, so maintenance of the routing is allowed.

- **Routing associated with a single item revision:** If the implementation status for the item revision has a Maintain routing value of Yes, the routing can be maintained. If the Maintain routing attribute has a value of No, the routing cannot be maintained.

- **Routing associated with multiple item revisions:** If the routing is associated with multiple revisions of one or more items, and the Maintain routing value in the implementation statuses associated with all of the item revisions is Yes, the routing can be maintained. If the Maintain routing value in an implementation status associated with one or more of the item revisions is No, the routing cannot be maintained.

- **Routing ID in an item process:** The Maintain routing value also controls whether the Routing ID in the item process can be maintained. If the implementation status for the item revision associated with the item process has a Maintain routing value of Yes, the Routing ID can be maintained. If the item process is for an item revision with an implementation status that has the Maintain routing status set to No, the Routing ID cannot be changed.

Implementation statuses provided by Infor ERP XA

Because Release 9 requires all item revisions to have an implementation status value, Infor ERP XA provides two implementation statuses to be used as default statuses for existing item revisions that do not have an implementation status value and for new item revisions created without an implementation status value.

(ALL): This implementation status is the default implementation status assigned to non-configured item revisions. Initially, all of the status codes for this implementation status are set to Yes. At Release 9, this implementation status is assigned to any existing, non-configured item revisions that do not have an implementation status and to any new non-configured item revisions created with an implementation status of (blank).

(CFG): This implementation status is the default implementation status assigned to configured item revisions. Initially, all of the status codes for this implementation status are set to Yes except Maintain bill of material and Maintain routing. At Release 9, this implementation status is assigned to any existing, configured item revisions that do not have an implementation status and to any new configured item revisions created with an implementation status of (blank).

The (ALL) and (CFG) implementation statuses are specified as default implementation status values in the Application Settings object for the

Enterprise Product Data Management application. The default implementation status values can be changed from (ALL) or (CFG) to user-defined implementation statuses. However, any implementation status specified as a default cannot be deleted.

Buyers

From the Buyers object in the Procurement Management (PM) application, you can see a list of all item revisions assigned to a selected buyer by selecting the Buyer Items option on the Display menu. The list of item revisions displayed for the buyer shows both the current item revisions and other item revisions, across all sites, which are assigned to the buyer.

Item Revisions enablement for Release 9

The charts in this section indicate the applications that use Item Revisions for item information and the functions in Power-Link options that now replace XA menu option functions.

XA applications that use Item Revisions

This chart identifies the XA applications that use Item Revisions for item information at Release 9. Note that some applications had used Item Revisions data prior to Release 9.

Application	EPDM enabled for Release 9
Accounting Management Plus	Yes
Accounting Management Accounts Payable	Not applicable
APS Integration	Yes
Accounting Management Accounts Receivable	Not applicable
Cross Application Support	Yes
Customer Order Management	Yes
Capacity Requirements Planning	Yes
Customer Service Management	Yes
Enterprise Business Intelligence	No
Electronic Commerce	Yes
Enterprise Product Data Management	Yes
Financial Analysis	Not applicable
Finite Capacity Planning/Scheduling	Yes
Forecasting	No

Application	EPDM enabled for Release 9
Accounting Management General Ledger	Not applicable
Infor ERP XA iCRM	Yes
International Financial Management	Yes
Inventory Management	Yes
Infor ERP XA Browser	Yes
Maintenance & Calibration Management (Maincor)	No
Infor Integrator	Yes
Materials Management	Yes
Manufacturing Performance Analysis	Yes
Master Production Schedule Planning	Yes
Material Requirements Planning	Yes
Net-Link	Yes
Order-Based Production Management	Yes
Production Control and Costing	Yes
Product Data Management	No
Procurement Management	Yes
Production Monitoring and Control	Yes
Payroll	Not applicable
Purchasing	Yes
Repetitive Production Management	Yes
Sales Analysis	No

XA legacy options replaced with Power-Link options

When Infor ERP XA Release 9 is installed, the functions in the XA Power-Link applications replace functions in the XA legacy applications. Replaced functions are no longer accessible. This table lists the XA legacy options that are replaced and the corresponding Power-Link option for performing the task in Release 9.

XA legacy option		Replaced by Power-Link option	
Application/ Menu option	**Option description**	**Power-Link Application/ Object**	**Description**
PUR AM6M90, option 2	Work with Purchasing / Buyers, Sub-option 10=items	Procurement Management, Buyers object	Displays list of item revisions for a selected buyer.
PUR AM6M60, option 3	Vendor/Item Master	Procurement Management, Vendor Items object	Edits for Engineering number (ENGNO), Department number (DPTNO), and Alternate item (B2OEMN) no longer apply.
PUR AM6M40, option 3	Reports / Buyer Worksheet	Procurement Management, Buyer object	Customize the Buyer object to display the same information as the worksheet.

XA legacy option		Replaced by Power-Link option	
Application/ Menu option	**Option description**	**Power-Link Application/ Object**	**Description**
COM AMBM20, option 3	Inquiry / Items, Sub-option 65=Foreign currency prices	Enterprise PDM, Item Revision Foreign Prices object	Accessed from Item Revisions, Display menu, Item Revision Foreign Prices option. Also displayed in Item Revisions object: Sales card, Prices section, Current tab.
COM AMBM63, option 7	Pricing Maintenance / Item Foreign Currency Prices	Enterprise PDM, Item Revision Foreign Prices object	Accessed from Item Revisions, Display menu, Item Revision Foreign Prices option. Also displayed in Item Revisions object: Sales card, Prices section, Current tab.
PUR AM6M30, option 2	Inquiry / Display Item Detail	Enterprise PDM, Item Revisions object	Display menu, Item Revision details option shows detailed information for a selected item revision.
PUR AM6M70, option 1	File Listings / Item Master	Enterprise PDM, Item Revisions object	Item Revisions object lists all item revisions. List can be customized with views, subsets, and sorts.

XA legacy option		Replaced by Power-Link option	
Application/ Menu option	**Option description**	**Power-Link Application/ Object**	**Description**
PUR AM6M90, option 1	Work with Purchasing / Items, Sub-options 1=Create, 2=Change, 4=Delete, 5=Display	Enterprise PDM, Item Revisions object	Maintain menu contains Create, Change, and Delete options. Display menu contains option for viewing Item Revision details.
COM AMBM20, option 3	Inquiry / Items, Sub-option 62=Foreign language	Enterprise PDM, Item Revision Foreign Language Descriptions object	Accessed from Item Revisions, Display menu, Foreign Language Descriptions option. Also available on Descriptions card, Foreign Languages section.
COM AMBM20, option 3	Inquiry / Items, Sub-option 66=Local currency prices	Enterprise PDM, Item Revision Foreign Prices object	Accessed from Item Revisions, Display menu, Item Revision Foreign Prices option. Also displayed in Item Revisions object: Sales card, Prices section, Current tab.

XA legacy option		Replaced by Power-Link option	
Application/ Menu option	**Option description**	**Power-Link Application/ Object**	**Description**
COM AMBM40, option 8	Miscellaneous Reports / Item Master	Enterprise PDM, Item Revisions object	Use the Local Print option in Item Revisions to print item revision information.
IM AMIM10, option 1	Inquiry / Display Item Detail	Enterprise PDM, Item Revisions object	Display menu, Item Revision details option shows detailed information for a selected item revision.
IM AMIM23, option 1	File Listings / Item Master List	Enterprise PDM, Item Revisions object	Use the Local Print option in Item Revisions to print item revision information.
IM AMIM90, option 1	Work With / Items, Sub-options 1=Create, 2=Change, 4=Delete, 5=Display	Enterprise PDM, Item Revisions object	Maintain menu contains Create, Change, and Delete options. Display menu contains option for viewing Item Revision details.
COM AMBM63, option 6	Pricing Maintenance / Mass Price Changes	Enterprise PDM, Item Revision Base Prices object	Maintain menu contains Mass Change and Mass Delete options.

XA legacy option		Replaced by Power-Link option	
Application/ Menu option	**Option description**	**Power-Link Application/ Object**	**Description**
IM AMIM23, option 3	File Listings / Item Base Price List	Enterprise PDM, Item Revision Base Prices object	Use the Local Print option in Item Revision Base Prices to print item revision base price information.
COM AMBM6E, option 2	Offline Pricing / Offline Price Book	Customer Service Management, Price Book object and System-Link	Use System-Link XML request and response to extract or update price book information.
COM AMBM6E, option 3	Offline Pricing / Offline Contract Promotion	Customer Service Management, Customer Contracts and Promotion objects and System-Link	Use System-Link XML request and response to extract or update contract and promotion information.
COM AMBM6E, option 4	Offline Pricing / Offline Foreign Price	Enterprise PDM, Item Revision Foreign Prices object and System-Link	Use System-Link XML request and response to extract or update foreign price information for item revisions.

XA legacy option		Replaced by Power-Link option	
Application/ Menu option	**Option description**	**Power-Link Application/ Object**	**Description**
COM AMBM6E, option 1	Offline Pricing / Offline Item Base Price	Enterprise PDM, Item Revision Base Prices object and System-Link	Use System-Link XML request and response to extract or update base price information for item revisions.
COM AMBM63, option 8	Pricing Maintenance / Item Foreign Currency Price Revaluation	Enterprise PDM, Item Revision Foreign Prices	Maintain menu includes Mass Replace Foreign Price with Nominal Price option.