



Infor XA Release Notes

Release 9

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Infor XA 9 – 9.2 enhancements

XA 9 – 9.2 adds significant new features and enhancements to the product.

Cross Application Support

Security

Security for the Client Customization task area now includes the authorization MNTTEMP that allows users who are not authorized to create Private or Public user definitions for creating temporary user definitions as part of their own use. For example, a user authorized to the CARDS MNTTEMP task can create a card in an application object, but the card exists only during the current session and is available only to that user. This authorization gives users a way to reorganize information in an application object for their own temporary convenience.

Customer Relationship Management for the System i (CRMi)

Integration to Microsoft Office Outlook

Customer Relationship Management for the System i (CRMi) adds integration to Microsoft Office Outlook for contacts, tasks, and e-mail messages. CRMi adds options to the Contacts and Tasks folders in Outlook that allow users import or refresh contact and task information from contacts and tasks in CRMi. The contact and task information can then be maintained in either Outlook or CRMi, then refreshed to update the contacts and tasks in the other system. If a contact or task has been changed in both systems, the Outlook integration function allows users for choosing whether to update Outlook, update CRMi, or make no changes.

The Outlook integration function adds a similar option to the Inbox and Sent folders in Outlook that allows users for sending e-mail messages from Outlook through CRMi. When copied, the e-mail message becomes a media file attachment associated with a selected task.

CRMi available without XA financial applications

The CRMi application no longer requires installation with the XA financial applications International Financial Management (IFM) or Accounting Management (AM). This type of installation provides flexibility for users who have other solutions for their financial applications. CRMi still requires installation with the Customer Service Management (CSM) application.

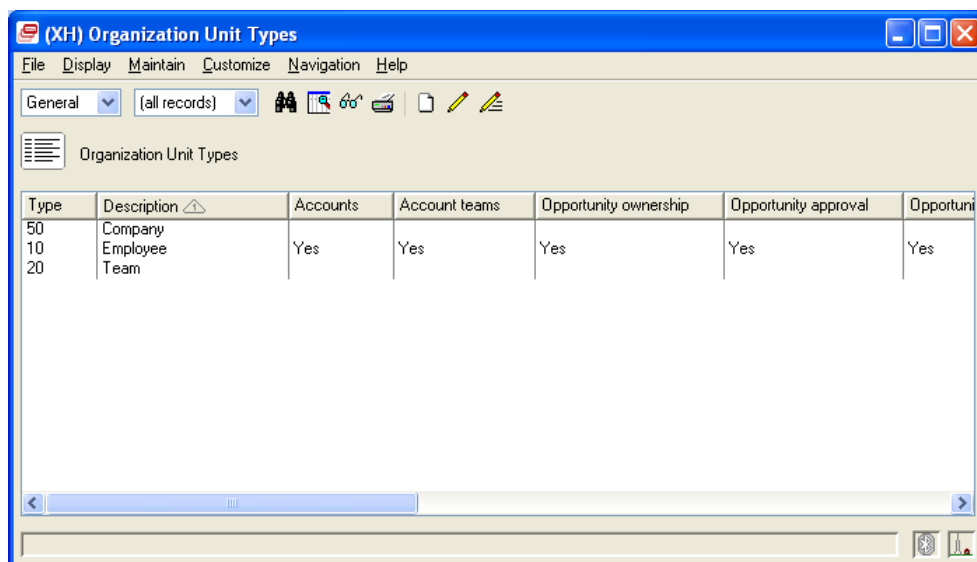
CRMi forecasting functions

CRMi now provides forecasting capabilities that compare sales quotas, forecasts, and actual sales for individual employees and employee groups. The forecast amounts appear on the Forecast card for employees, employee groups, and other organization units.

These enhancements include both new and changed business objects.

Organization Unit

The Organization Units object now allows you to define more than one type of organization unit: Company, Team, and Employee. Previously, the only type of organization unit available was the Employee.

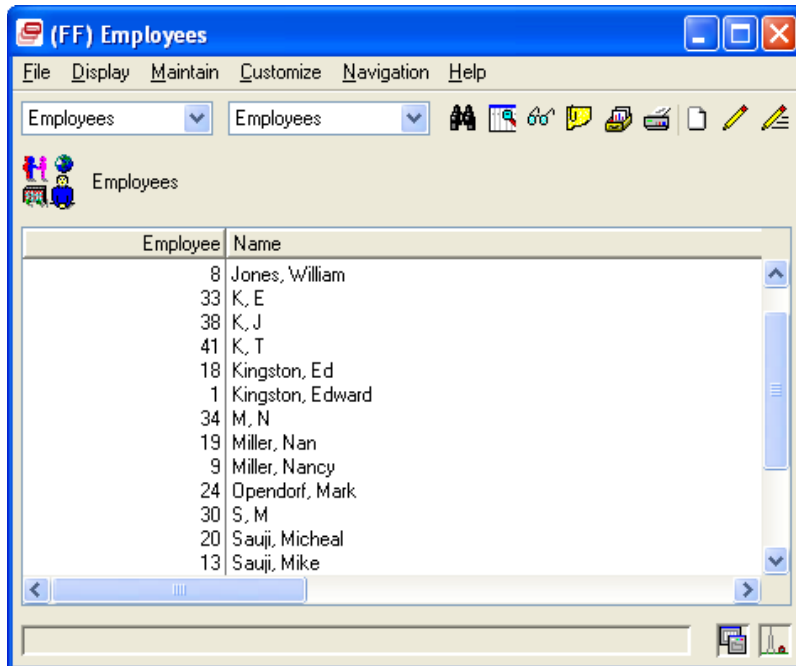


The screenshot shows a software window titled "(XH) Organization Unit Types". It has a menu bar with "File", "Display", "Maintain", "Customize", "Navigation", and "Help". Below the menu bar is a toolbar with icons for various functions. The main area contains a table with the following data:

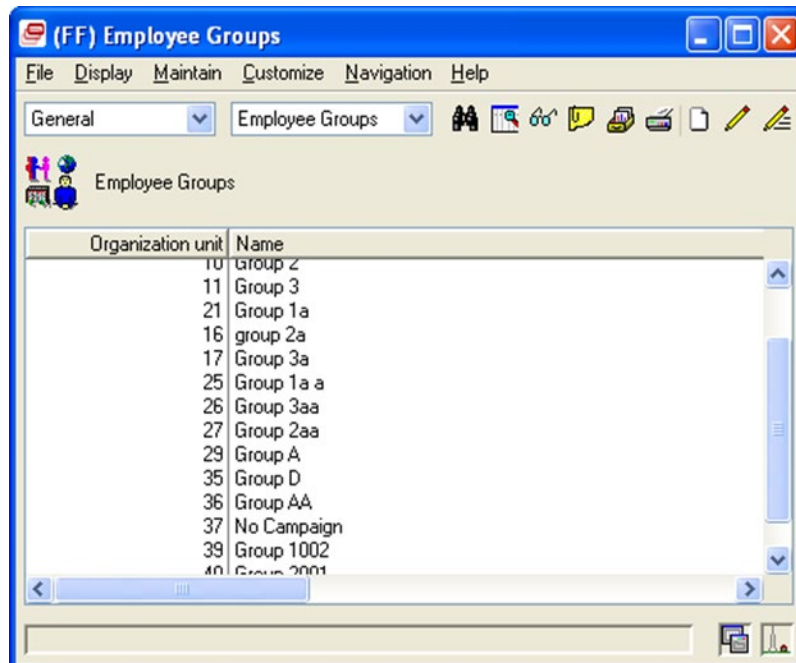
Type	Description	Accounts	Account teams	Opportunity ownership	Opportunity approval	Opportunity
50	Company					
10	Employee	Yes	Yes	Yes	Yes	Yes
20	Team					

For any of the organization unit types, additional attributes allow you to specify how that type of organization unit can be used in CRMi. For example, you can specify whether a team can own or approve opportunities.

Within CRMi, the Employees object contains organization units with a type of Employee.

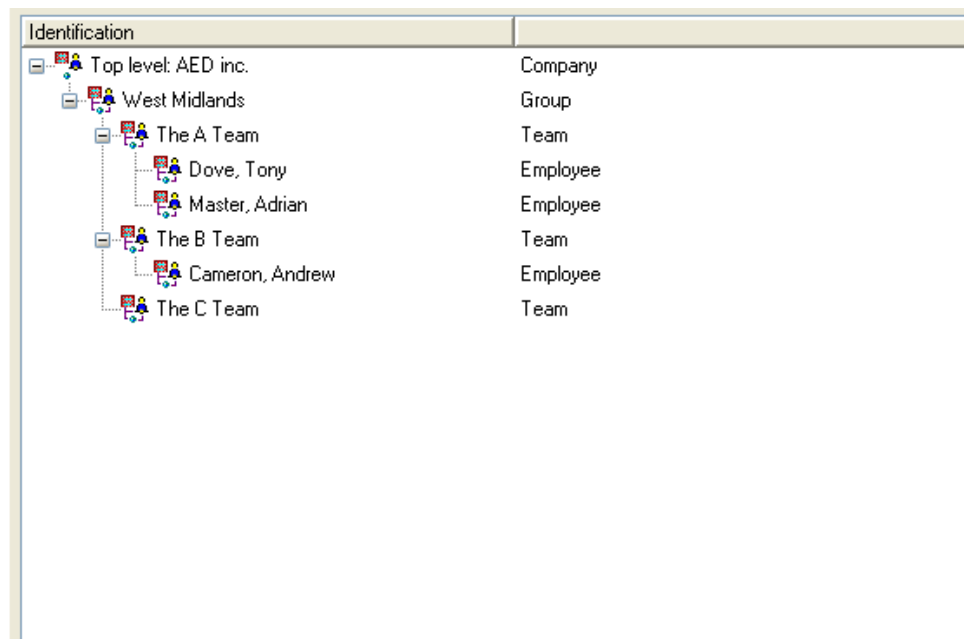


The Employee Groups object contains all organization units with a type other than Employee.



Organizations

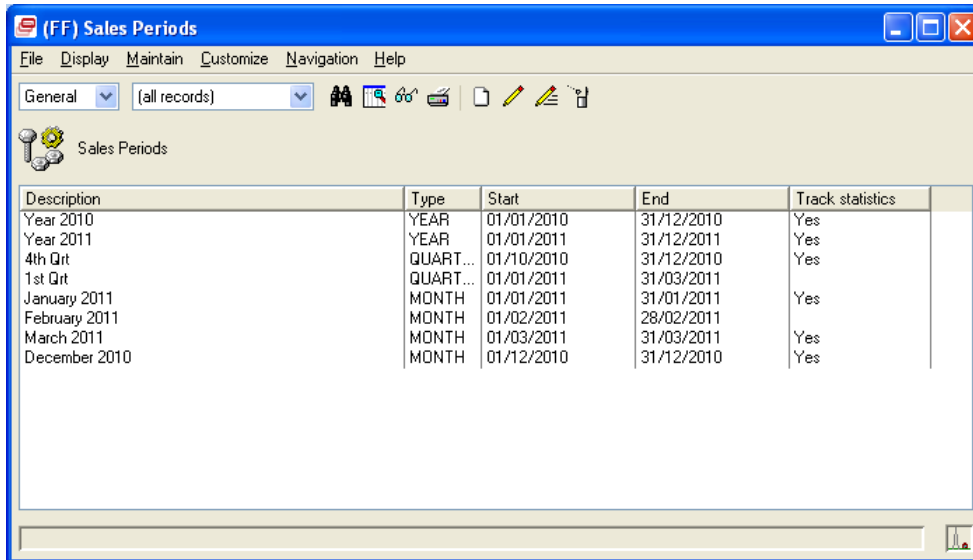
With the addition of different organization unit types, you can now create organization hierarchies by defining relationships among organization units of different types. An organization consists of the top-level organization unit and one or more lower-level organization units. The organization hierarchy can have multiple levels based on the relationships among the organization units. For example, a Company organization unit can have a hierarchy structure consisting of a geographic group. That group can contain three sales teams, and each team can contain varying numbers of employees.



CRMi uses organizations to roll up quota, forecast, and sales amounts for analysis. When an organization unit is part of an organization, CRMi automatically updates the quota, forecast, and sales amounts for the organization whenever those amounts change for the organization unit.

Sales Periods

The Sales Periods object contains the periods of time by which you track sales information such as quotas or forecasts. Each period is associated with a period type, which can be a standard type such as Month or Quarter or a user-defined type. The period must have a start and end date that does not include dates assigned to any other period of the same type. You can define periods of time with an associated key, label and type; for example, 01/01/11 to 01/31/11 is the time period of January 2011 and can be defined as a type Period with a label of Jan 2011. Similarly, the time period 01/01/11 to 03/31/11 can be considered a period type of Quarter and have a label of Quarter 1 2011.

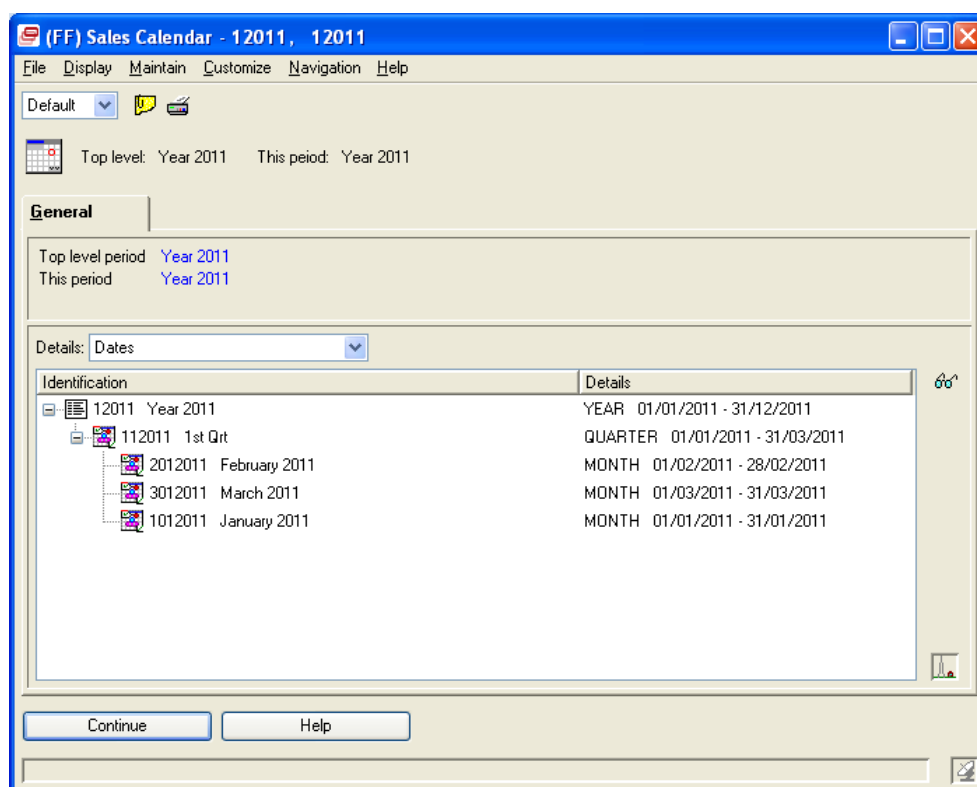


Description	Type	Start	End	Track statistics
Year 2010	YEAR	01/01/2010	31/12/2010	Yes
Year 2011	YEAR	01/01/2011	31/12/2011	Yes
4th Qtr	QUART...	01/10/2010	31/12/2010	Yes
1st Qtr	QUART...	01/01/2011	31/03/2011	Yes
January 2011	MONTH	01/01/2011	31/01/2011	Yes
February 2011	MONTH	01/02/2011	28/02/2011	Yes
March 2011	MONTH	01/03/2011	31/03/2011	Yes
December 2010	MONTH	01/12/2010	31/12/2010	Yes

The Track statistics attribute allows you to track periods of time for updating sales information. If a period is set to track statistics, any sales update amounts for an organization unit that also tracks statistics. For example, an employee, causes CRMi to update the amounts displayed for the organization unit in the specified period in the organization unit period summary.

Sales Calendar

The Sales Calendar object contains the set of sales periods used to track sales information such as quotas or forecasts. A sales calendar includes a top-level sales period and one or more lower-level or child periods. CRMi automatically creates a sales calendar when you create sales periods and then create a sales period relationship to associate the parent-level period with the child period. For example, using the three sales period types of Year, Quarter and Period, you can define a simple company calendar.



Opportunity forecasts

The Opportunities object now contains the following information used for determining forecast values.

Estimated value	The estimate of the total sales amount from a particular sales opportunity.
Estimated probability	The estimate of the probability that the opportunity leads to a successful sale for the estimated value.
Owner forecast value	<p>The sales forecast amount for a particular opportunity, based on the estimated value and the estimated probability.</p> <p>Owner forecast value = Estimated value x Estimated probability</p>
Process probability	The probability that the opportunity leads to a successful sale for the estimated value, based on the current stage of the opportunity.
Process forecast value	<p>The sales forecast amount for a particular opportunity, based on the estimated value and the process probability.</p> <p>Process forecast value = Estimated value x Process probability.</p>
Actual value	The sum of the associated order values.

Organization unit: 3 Davis, Treva

Employee currency: FFR = French Francs Exchange rate date: 21/01/2011 12:33

Period	Quota	% Quota
January 2011	80,000.00	
Employee forecast	64,000.00	80
Process forecast	60,000.00	75
Opportunity sales	74,993.77	93

Period	Quota	Oppy sales	Employee forecast	Process forecast
December 2010	0.00	47,170.00	640,000.00	0.00
January 2011	80,000.00	74,993.77	64,000.00	60,000.00
March 2011	0.00	0.00	0.00	0.00

Months Quarters Years

Continue Help

The actual and forecast values are summarized using the Employees' Organization hierarchy (Organization) and the Sales Period hierarchy (Sales Calendar).

When values change for an opportunity, CRMi applies the changes to the corresponding Organization Unit Period Summary object. CRMi applies the changes to all higher-level Organization Unit Period Summary objects in the Organization hierarchy and all higher-level Organization Unit Period Summary objects in the Sales Period hierarchy.

You can view the summarized Organization Unit Period Summary values from the Employee and Employee Group card files. For example, from the Employee card file, the Forecasts card displays:

- The default currency for the Employee and associated exchange rate date update from XA. In an XA environment with IFM installed and interfacing, the Summary Exchange Rates object is updated by IFM.
- The summarized values for the current month display the Quota, the sum of Employee and Process forecasts, and the total sales value of associated Opportunity orders.
- The lower section of this card displays summarized Period type amounts for Month, Quarter, and Year.

Quotas

Only authorized users can set quotas for Employees and Employee Groups. To restrict the users who can enter or view quotas for employees and employee groups, CRMi has attribute-level security for the Organization Unit ID and for the Quota attributes.

Opt	Task ID	Type	App
—	FIELDS DISPQUOTA	SEC	CAS
	Display Quota Entered		
—	FIELDS MAINTQUOTA	SEC	CAS
	Maintain Quota Entered		

Authorized users can set different Quotas at each level in the Organization and at each level in the Sales Calendar. For example, if the sales manager's quota is one million for the entire team for a particular month, the sales manager may want to set quotas for each of the subordinate organization units so that their total exceeds one million in that month.

The screenshot shows the 'Quotas' tab in the '(XH) Change Organization Unit - 1' window. The window has a menu bar (File, Display, Maintain, Customize, Navigation, Help) and a toolbar. Below the toolbar, there's a section for 'Organization unit: 1 Dove, Tony'. The main area is divided into several tabs: Forecasts, Sales, Quotas, Orders, Teams, Organizations, Attachments, and General. The 'Quotas' tab is active, showing a table with columns for months (Jan 2011 to Jan 2012), quarters (Q1 2011 to Q1 2012), and fiscal years (Fiscal year 2011, Fiscal year 2012). Each cell contains a text input field with a numerical value. At the bottom, there are 'Update', 'Cancel', and 'Help' buttons.

Month	Q1 2011	Q2 2011	Q3 2011	Q4 2011	Q1 2012	Fiscal year 2011	Fiscal year 2012
Jan 2011	29.00	404.00				5678.00	
Feb 2011	30.00	505.00					0.00
Mar 2011	31.00	606.00					
Apr 2011	32.00	707.00					
May 2011	33.00	0.00					
Jun 2011	34.00						
Jul 2011	35.00						
Aug 2011	36.00						
Sep 2011	55.00						
Oct 2011	0.00						
Nov 2011	0.00						
Dec 2011	0.00						
Jan 2012	0.00						

Currency

CRMi displays summary values in the Organization Unit's currency, the default application currency, and the alternate application currency. New options in the Application Settings object for the Customer Relationship Management application allows you to define the default currency and alternate currency.

Opportunity amounts are also available in multiple currencies: opportunity currency, owner currency, default application currency, and alternate application currency.

Exchange Rates

To enable valid comparisons between values in the summary files, the values are converted from the opportunity currencies to the other currencies using the exchange rates in effect as of a common date. The same date is used across all periods. Note that the rates are not those in effect at the end of each individual period. The Summary Exchange Rates object contains the exchange rates used in for currencies in CRMi. When IFM is installed and interfacing in an XA environment, IFM updates the Summary Exchange Rates object with exchange rates used in XA.

CRMi Post Sales functions

The CRMi Post Sales functions enable you to record account issues and support or service requests. You can then respond to those issues and requests as per defined steps or previously determined solutions.

These enhancements include both new and changed business objects.

Incidents

Incidents give you the flexibility to record post-sales issues or requests for support or service in your most efficient and effective manner. A simple use of incidents can involve recording issues in incident comments and referencing the related order, shipment, or invoice. A more complex use of incidents can involve defining process templates and activities that your help desk and support personnel must follow when dealing with post-sales issues.

The Incidents object gives you a quick way to see:

- The accounts which are having issues
- The status of each issue – Open, Closed, or On Hold
- The issues that are assigned to you
- The amount of time support personnel took to resolve the incident.

Activities

Activities and activity tasks can now be used with incidents. Creating activities for an incident provides your support staff with clear direction to resolve the incident. This also records the expected and actual time for performing the activity. In addition, you can assign activity tasks to individual employees and set up automatic notifications for these tasks which all employees on the account team can view.

Process templates

You can specify a process template while creating an opportunity to associate process activities with the opportunity. You can also specify a process template while creating an incident to associate process activities with the incident.

Solutions

Solutions provide specific details and step-by-step instructions for resolving incidents. A solution can apply to a single incident or can be used as the resolution for a type of incident that occurs frequently. Solutions can have keywords which identify the type of resolution that the solution contains. When support personnel are working with incidents, the keywords allow them to search for solutions that can apply to an incident.

Support plans

Support plans define levels of service or support your company offers to accounts. A plan specifies the type of service or support, response time, maximum number of incidents or hours covered, and

the standard support hours. Support plans typically are set up for a number of hours of support or a certain number of incidents logged. You also set up the available support hours for each day of the week as per each plan you define.

Support agreements

A support agreement records the specific terms for providing support to an account. You base the support agreement on a support plan, but you can change the frequency, start times, end times, or number of incidents or hours that apply to the agreement. These changes in the agreement override the standard support hours defined in the associated support plan. This flexibility allows you to customize your support for an account without having to create a new support plan.

CRM Account functions

CRM provides you with detailed information about the hierarchical structure of accounts and helps you compare quota and sale amounts for account quotes and account orders in a sales period or over several sales periods.

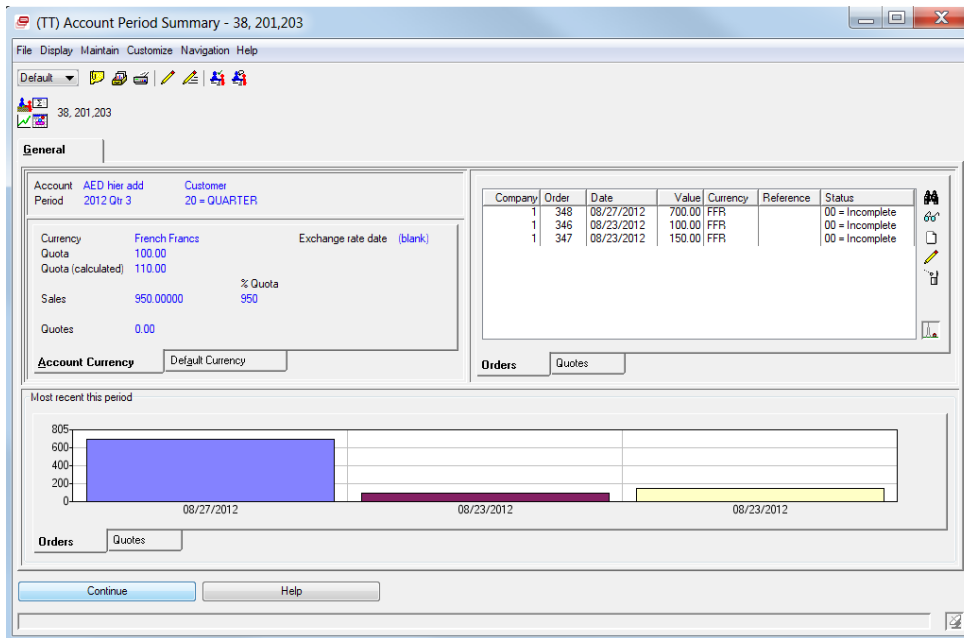
Accounts

You can now define account hierarchies to represent the structure of organizations that have multiple accounts. An account hierarchy consists of the top-level account and one or more lower-level accounts. The relationships you define among the accounts determine the position of the accounts in the hierarchy. Based on these relationships, an account hierarchy can have multiple sets of top-level and lower-level accounts.

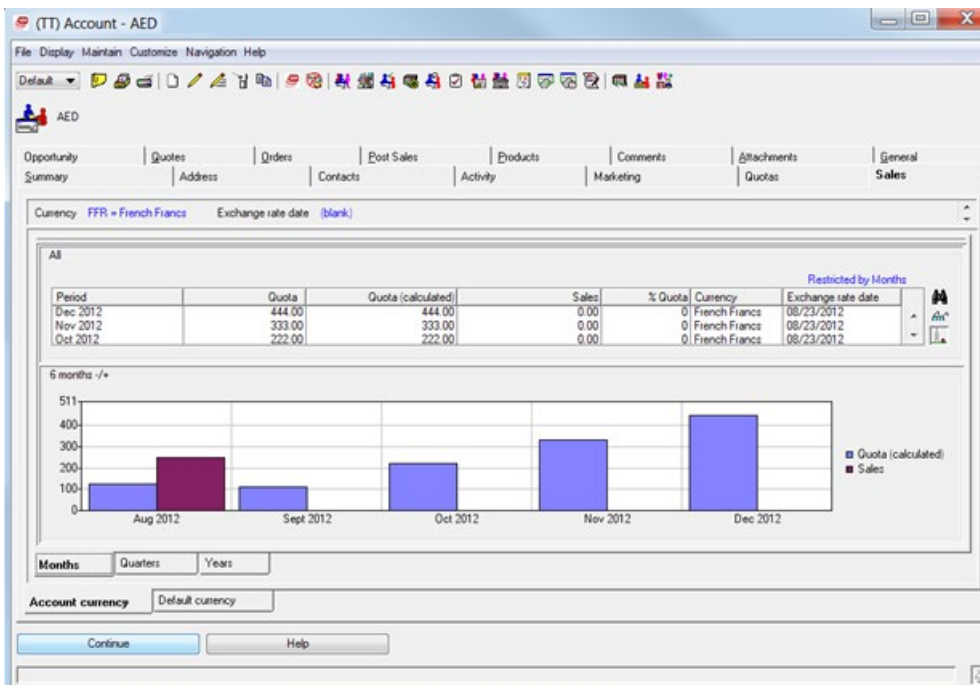
Account Period Summaries

The new Account Period Summaries object presents a summary of sales information to date for an account in a specific month, quarter, or year when the account and sales period are set to track statistics.

You can view sales amounts for the last 20 account orders and account quotes in the selected sales period of the account. For an account, the Month Summary, Quarter/Period Summary, and Year Summary options on the Display menu allow you to select the Account Period Summary details option for each of these sales periods. For a sales period, you select the Sales Period Account Period Summaries option on the Display menu to see account period summaries for that sales period.



From the Sales card in the Accounts card file, you can view quota and sales amounts for the account over months, quarters, and years. This information helps you analyze over months, quarters, or years how sales to the account compare to the quotas set for the account.



Customer Service Management

Create credit memos

You can create a credit memo, optionally create a credit return, and invoice the credit memo using the Immediate shipment template on the Create Credit Memo dialog box.

Maintain variable trade discounts

You can view, create, change, and delete variable trade discounts.

Specify preferences

You can select the default value for the Sales attribute when you create a customer order, standing order, credit memo, or customer quote.

You can select the default value for the Promise date option attribute when you create a C.O. line item or configured C.O. line item. After selecting the default value in C.O. Line Items Preferences, you must also customize the Promise date option on the C.O. Line Item Create Template to prompt the Promise date option and provide the default value. See XA Help “Changing a Template” and follow the instructions to customize prompt options.

Enterprise Financials

Transaction Templates

Financial Transactions consist of a header and a variable number of transaction lines. The number and type of transaction lines depend on the type of transaction. You can create different templates for different types of business transactions. For example, you can create a cash transaction template that has cash lines but not amount due lines; or, you can create an invoice transaction template that has charge lines but not cash lines.

When you create financial transaction template lines, you can specify whether a given line type is optional, mandatory, or prohibited, and also, if one or many lines of this type may be entered. For example, if a certain transaction type always requires approval, you can create a transaction template to specify that approval lines are mandatory.

You can create, maintain, copy and delete financial transaction templates.

You can create, maintain and delete financial transaction template lines.

Document Types

You use the Document Types object to print or export data for invoices, customer statements, remittance advice, checks, notes, direct debits and electronic funds transfer. A document type record specifies the program to be used for each kind of printed item or export file. You can use document types for tailoring the printed output from Finance to suit your own pre-printed stationary. You can also provide exported data in a standard format for banks and government agencies.

Finance includes a set of default programs that you can use for the first document types that you create. You can create additional document types using your own programs.

Each settlement method references a document type to identify the program that prints the document or creates the export file.

Transaction Types

Financial transaction types can be common types such as payable invoice, receivable credit note and cash receipt, or types such as payable credit for goods returned, receivable invoice for services, cash receipt for goods sold, and so on.

Use the Transaction type object for specifying the ledger type to which a transaction belongs such as receivable, payable or cash book.

Withholding Methods

The withholding methods tell Finance how to withhold and remit taxes on payable invoices. You must enter the withholding method on the personal accounts for the vendor entities subject to withholding. You can also indicate which charges are subject to withholding. This allows Finance to automatically generate the correct withholding information for a transaction.

You can use these actions on the Withholding Methods records and revisions:-

- Display
- Create
- Change
- Activate
- Suspend
- Delete

Personal Account Mass Creation

You can use the Create Personal Accounts host job on the Entity object to automatically create Personal Accounts in that ledger, for multiple selected entities, after you create a new accounts payable ledger or a new accounts receivable ledger. For AR ledgers, this option also allows you to automatically create corresponding Customers in the Customer Service Management application.

Bank Messages

When you send transactions to a bank, the bank may reply with messages about each transaction. You can use the Bank Messages object to copy these messages into comments on the corresponding Financial Transaction Cash lines.

Bank Transfers

You can use the Bank Transfers object to transfer cash between two cash ledgers.

Using the Bank Transfers object, you can specify the from ledger, the to ledger and the amount to be transferred. When you generate financial transactions from a bank transfer, Enterprise Financials is generated, but does not post the two cash transactions. These transactions appear as if entered manually and can be posted at any time. A single cash line is created in each of the generated transactions; though the transactions may include a second cash line designated as bank charges.

Personal Account Collection Status History

A personal account assumes a collection status when it has an overdue balance of a certain age and size. The collection status is assigned according to the aging period in which the account's oldest debt falls. Each aging period has threshold values for the statuses to be assigned. For example, you can assign a less severe status to a debt of 10 euro than a debt of 10,000 euro.

The Personal Account Collection Status History object contains a complete record of when the collection status was changed on each personal account. Personal Account Collection Status History includes the date and time when a collection status was assigned, whether confirmation is required before sending out collection letters, and whether confirmation has been received.

In the Finance application, you can run a host job to update the collection status on one or more personal accounts.

Entity Diary Entries

The Entity Diary Entries object records significant events in the trading relationship between your company and an entity or reminders of actions to be taken in the future. The information in the Entity Diaries object provides news about an entity that individuals in your company need to know. For example, an entity diary entry can indicate that a customer entity has promised a special order or that a supplier failed to deliver an important order on time.

Entity Diary Entries can also be used to alert other users that certain events must take place by a certain date. For example, if a customer has promised an overdue payment on a particular day, an entity diary record for the day after the payment is due can remind you to see if it arrived. You can request an acknowledgement of this type of diary entry when you address it to another user.

Repeating Transactions

A repeating transaction is a template from which you can generate other similar transactions. The repeating transaction itself can never be posted.

Repeating transactions are useful for entering transactions which are repeated in a similar form on a regular or occasional basis like standing orders and rent.

If you have a monthly standing order, you can create a repeating transaction instead of entering the same financial transaction each month. On request, EFIN automatically creates the financial transactions that are required for each month. These generated financial transactions are then available to be processed in the normal way using the Financial Transactions object.

Settlement Methods

A settlement method is a means of paying a debt. Settlement methods include those handled by Finance payment lists and collection lists (checks, notes, electronic funds transfer or UK BACS) as well as others such as cash, hand-written check, credit card, and so on. In payment lists, the settlement method indicates whether a check audit is required.

Settlement methods are used:

- Whenever a financial transaction amount due is entered or generated automatically. If no settlement method is specified, the default is taken from the associated personal account. If no settlement method is specified on the personal account, the default is taken from the ledger.
- Whenever financial transaction cash is entered or generated automatically. If no settlement method is specified, the default is taken from the associated cash ledger.

Installment percent method

You can use the Installment Percent Method object to specify creating an installment payment schedule for an invoice, customer order or purchase order.

An installment percent method specifies the number of payments. For each payment, it specifies how the application calculates the due date, based on the number of days from the invoice date. It specifies how the application calculates each payment amount, as a percentage of the total amount due.

For example, there may be 3 payments, with 10% due after 10 days, 40% due after 30 days and the remaining 50% due after 60 days.

Aging Structure

Aging is the process of categorizing financial transaction amounts due according to their age. Aging structures define how posted, unsettled financial transaction amounts due of different ages are to be categorized. For example, for receivables you can use an aging structure to categorize debts as

more than 1, 2, or 3 months old. You can also categorize financial transaction amounts due which are not yet due. For example, payments that are due within the next month.

In an aging structure you can use aging periods to calculate the total financial transaction amounts due falling between two dates.

Banks

A bank is a financial institution that you, your customers, vendors, or other entities use for transferring funds.

In the Finance application you can maintain banks, bank transaction types, bank transmittal codes and bank instructions.

Currency Contracts

A currency contract is an agreement to buy or sell currencies at a particular exchange rate. If a financial transaction's amount due (settlement line) line refers to a currency contract, that contract is used for determining the exchange rate to calculate gains and losses on currency exchange.

Master Calendars (Finance Calendars)

A master calendar is used to specify the days of the week that are non-working days and the dates that are public holidays. Master calendars are used in production, procurement, shipping and finance. In the Finance application, the Finance Calendar is a Master Calendar. It is used by date methods to derive one date from another. For example, to derive a payment due date from an invoice document date.

You can use a master calendar for designating each day of the week (Monday to Sunday) as either a working day or a non-working day. Also, for each calendar you can specify particular dates which are declared as public holidays.

Collection List

A collection list is a list of proposed cash receipts based on the AR invoices that are due. You can also use collection list for sending instructions to a bank. These instructions can be used to direct-debit customers' bank accounts. You can select a set of AR amounts due to generate collection list. The cash receipt values in the collection list can be adjusted to generate the cash receipt transactions. Print the collection list for sending the details to the bank.

Upgrade Process

These steps are required to upgrade to the Finance 9.2 enhancements.

Verify currency activation

The Currencies and Exchange Rates objects (Exchange Rates, Exchange Rate Sets, and Exchange Rate Limits) are activated during the install process. Before you install or upgrade to this XA 9.2 release, you must verify your environment meets the requirements to activate the Currencies and Exchange Rates objects. You cannot successfully install this release until you have fixed any errors that prevent the Currencies and Exchange Rates objects from being activated. See the download instructions for Infor XA release 9.2.

Implement enhancements

After installing or upgrading to this XA 9.2 release, you can select the functionality you want to implement for Finance. See XA help for Enterprise Financials attributes in Application Settings and the *Infor XA Installation and Integration Guide for Enterprise Financials*.

You can select to activate financial transaction objects, ledgers objects, or both financial transaction and ledger objects. Once activated, you maintain the objects in Power-Link, Net-Link, and System-Link.

Caution: When the financial transaction objects or ledger objects are activated, some options and functions in the green screen application and IDF1 are disabled. The financial transactions objects or ledger objects, once activated, cannot be deactivated. For a list of disabled options, see the *Infor XA Installation and Integration Guide for Enterprise Financials*.

Only financial transactions that are not posted and those with a posting date within the past 12 months are upgraded immediately when you activate financial transaction objects. You can schedule the upgrade of all your historical financial transactions at the times most convenient for you.

In addition to choosing when to activate objects, you can choose to update all user preferences, including the public user preferences, to use the new user interface, including the new workspaces, lists, and card files provided with this release.

Maintain financial transactions

Financial transactions and their associated transaction lines can be created and maintained in Finance. New objects, such as Financial Transaction Charge Taxes, Financial Transaction Charge Inventory Matches, and Financial Transaction Amount Due Finance Charges enrich the information already available from the financial transaction line objects.

You can create financial transactions and the transaction lines from the Financial Transactions object. When you copy a financial transaction, references to related objects, such as purchase orders and purchase order debit memos are also copied. Status information from the original transaction is not copied. For example, if bank exchange rate advice is received on the original transaction, the bank exchange rate advice is still pending on the new transaction.

Financial transactions can also be deleted, held, or reversed.

Use the Financial Transaction Batches object to define and manage financial transactions as a group, or batch, rather than individually. Batching financial transactions makes it easier to find the generated transactions, and to view them together in a list or overview. When transactions are in a batch, if any of the transactions has a posting error, you cannot post the other transactions in that

batch. Use the Change Batch ID host job and task for Financial Transactions to move financial transactions from a batch, so that the batch and the remaining financial transactions in the batch can be posted.

Enter invoices

Use the Invoice or Short Invoice create templates to create in Financial Transactions. When you generate AP invoices from inventory transactions, you can group the generated transactions into a batch.

You can generate invoices for purchase orders from the Purchase Order Items and Purchase Order Item Releases, and Pending Financial Transactions objects. The Pending Financial Transactions object displays on the application cards as the Purchases and Receipts not Invoiced icon. If the purchase order item or release has inventory receipts and invoices that are not in the XA database, you can specify the external quantity received or invoiced on the purchase order item or release to prevent XA from generating invoices that duplicate these external invoices.

You can generate invoices for purchase receipts from the Pending Financial Transactions object. You can combine multiple purchase receipts onto a single invoice using the GRN invoice number and Combine purchase orders option to determine the relationship between an invoice and its associated Materials Management (MM) receipts. For example, if both attributes are **Yes**, one invoice is created as part of all receipts having the same GRN number and referencing purchase orders that have the same pay-to entity.

You can generate AP credit memos from Purchase Order Debit Memos and Pending Financial Transactions.

New PO Item/Release Invoice Totals objects store running total values such as quantity received and quantity invoiced. These totals are used by Finance to calculate quantities remaining to be invoiced. The quantities on invoices are included that are not posted to the general ledger and distinguish between positive inventory receipt quantities that require invoices and negative inventory receipt quantities that are corrections to previous receipt quantities.

In Application settings, the Allow invoicing for POs completely invoiced check box on the **Finance** tab for Enterprise Financials. This specifies whether you can generate invoices for POs that are completely invoiced.

Generate payment lists

The Payment Lists object contains a list of proposed payments for user-selected financial transaction amounts due. Payment lists are created when you run the Generate Payment List host job from the Financial Transaction Amounts Due object. Use the Invoice Payments object to work with individual invoices included in payment lists or the Payments object to work with proposed payments. If you are using electronic funds transfer, the payment bank instructions specify how the bank is to process payments to a particular payee. Use actions and host jobs on the Financial Transaction Amounts Due, Invoice Payments, and Payments objects to move invoice amounts due into and out of payment lists.

In Application settings, the Payment list invoice count (error) attribute on the **Finance** tab for Enterprise Financials defines the maximum number of invoices you can select in the Generate Payment List host job on the Financial Transaction Amounts Due object.

Audit and print checks

The Check Numbers object contains a list of issued check numbers for a cash book ledger. Each record in this object is a single check number in a ledger.

You can use tasks in Check Numbers to update the audit status. You use the Ledgers object to control whether duplicate check numbers are allowed for payments from that ledger. Duplicate check numbers are allowed on cash book ledgers that have a Cash book type of Bank account (allow duplicate check numbers), Petty cash, or Other.

You can print and reprint checks and remittances for payments in a payment lists.

Allocate cash

You can reduce outstanding invoice balances by allocating either cash transactions or credits to financial transaction amounts due. Multiple allocations can be used and are considered together, for example, both a credit note and a cash transaction can be used together to settle an outstanding invoice.

Financial Transactions has an **Allocate** task to automatically allocate existing cash or credits to outstanding AP or AR invoice balances. You can use the **Post Allocations and Adjustments** task to post any unposted cash or allocation lines for a selected transaction and the period you specify. The general ledger journal entries that are created are posted to the specified period.

When you create a financial transaction, you can automatically create allocations to invoices. The Financial Transaction Create templates enable you to automatically allocate by entity ID, transaction number, customer invoice, or packing list number. For example, use the Allocate Cash Receipt (Customer Invoice) template to create a financial transaction and allocate funds to the customer invoice you specify.

Cards in Financial Transactions have options for the **Allocate** and **Clear Allocations** tasks. Use these actions to immediately update the Remaining to allocate attribute and the allocations in the Not Posted list.

Schedule installment payments

From Financial Transactions, Customer Orders and Purchase Orders, you can create installment schedule lines when you assign an installment method for an invoice or order that is to be paid in installments. System created installment schedule lines are automatically recalculated when you maintain financial transactions, customer orders and purchase orders that have an installment method. You can use the Recalculate Installment Schedules host jobs and **Recalculate Installment Schedule** task on these objects to recalculate installment schedule lines and to optionally replace manually-created installment schedule lines.

Calculate settlement discounts

You can calculate available settlement discounts when you have changed settlement terms from the Financial Transaction Amounts Due object or before you include Financial Transaction Amounts Due in a payment list.

Generate charges

A finance charge is a charge applied to an overdue account as a penalty for failing to pay within the agreed time. Finance charges are applied in accordance with the 'Settlement terms' specified on each financial transaction amount due. Finance charges and Late Payment Interest penalties can be generated from the Financial Transaction Amounts Due object.

Match charges to inventory

In the Pending Financial Transactions object, you can match inventory receipts to unmatched invoice charge quantities in the Financial Transaction Charges object. This action creates a financial transaction charge inventory match record that links a financial transaction charge to an inventory transaction history record. It is used to provide drill-back from a financial transaction to the source ERP transactions and to identify the inventory receipt quantities that have already been invoiced.

Distribute freight costs

From the **Distribute Freight** card in Financial Transactions or from the Financial Transaction Charges object, you can distribute costs from third party freight invoices to the invoices for the goods purchased from other vendors. Either select the distribute-to invoices and then use the **Create Distributed Freight Invoice** task to create a new distribute-from third-party freight invoice, or select an existing third-party freight invoice and then use the Distribute Freight action to distribute the freight to selected distribute-to invoices.

Clear cash in transit

When a cash receipt or payment is posted and the settlement method on the financial transaction cash line uses in-transit accounting, Finance records the cash amount in the “cash in transit” GL account in IFM. You can use host jobs on the Financial Transaction Cash object to move the cash amount from the “cash in transit” GL account to the “cash” GL account or back to the “cash in transit” GL account.

Create and calculate taxes

Finance calculates both charge tax lines and tax lines. A financial transaction may have only taxes, or it may have both taxes and charge taxes. If a financial transaction has only taxes, you can create and maintain those tax lines. If a financial transaction has both taxes and charge taxes, you can

create and maintain the charge tax lines but not the tax lines. In that case, the tax lines are a summary of the charge tax lines.

If you create financial transaction charge taxes, Finance creates an associated financial transaction tax, if none exists. When a financial transaction tax for the same tax does exist, Finance adds the tax values for the financial transaction charge line to the financial transaction tax. When you create financial transaction charge taxes, you cannot create more tax lines or maintain the system generated tax lines.

You can create tax lines from the **Create Tax** task on Financial Transactions or you can create charge tax lines and tax lines from the Financial Transactions Overview card.

Financial Transactions has **Calculate Tax** and **Remove Tax** actions and options on financial transaction cards. Use these tasks to immediately update the calculated totals, charge tax lines, and tax lines.

Use the new Financial Transaction Tax Estimates object to compare, for an accounts payable financial transaction, the difference between the invoiced tax or estimated tax and the tax calculated by Finance. The financial division has a setting to control the maximum discrepancy allowed between the estimated tax and the entered or calculated tax. The financial transaction is not posted if the discrepancy exceeds the limit.

In Application settings, the Tax date attribute on the **Finance** tab specifies whether tax calculations are based on the financial transaction's document date or supply date.

Approve financial transactions

All financial transaction approvals for a financial transaction must have an Approval status of Approved before the transaction can be posted to the ledger. Use the Approve host job or task to approve financial transaction approval lines and provide a reason for the approval. You can reject financial transaction approval requests to ensure the financial transaction is not posted and to document the reason why the transaction must not be posted. You use the Undo Approval/Rejection host job or task to reverse a previous approval or rejection of a financial transaction approval.

There is a security task to control which users are authorized to approve financial transactions. There is a separate security task to control which users are authorized to approve financial transactions on behalf of other users.

Validate and post financial transactions

Host jobs and actions in the Financial Transactions and Financial Transaction Batches objects provide the ability to validate and post financial transactions to ledgers.

Use security tasks to control who can validate or post financial transactions. You can authorize users to post financial transactions in a particular financial division using the Financial Division Users object.

Use control totals to check actual values entered on the financial transaction lines match the control values you expect to be entered.

The **Suspend Transaction Posting** task in Ledgers prevents transaction posting to the ledger for transactions in all ledgers in the environment. You can also place a hold on individual financial transactions in Financial Transactions to prevent posting of that individual transaction.

Override EGLi GL account segment values

On financial transaction lines you can enter EGL account segment values. These values can be used by the models that build GL journal entries in the Enterprise General Ledger (EGL). **Set GL Account** task is available for cash lines, charge lines, allocations, GL amounts, and tax lines.

In Enterprise General Ledger for System i (EGLi), you must define a custom conditional macro to check for an override account segment value on the XA GL Account Overrides object. If an override value exists in XA, the macro returns that value. If an override value does not exist in XA, the macro returns the value of the alternate macro specified by the user. See the *EGLi Configurable Macro User Guide*.

Generate financial transactions from External Financial Transactions

System-Link has superseded the Legacy System Bridge (LSB). System-Link, not LSB, must be used for any new integrations that pass financial transactions into Finance. However, in this release previous integrations that use LSB are still supported via the External Financial Transactions object.

LSB is a set of offline load files and a program that loads finance transaction information into IFM. LSB finance transaction information is now available in the External Financial Transaction objects in Finance. You can review and maintain the external financial transactions and transaction lines. When you are satisfied that the financial transactions are correct, use the Generate Financial Transactions host job or **Generate Financial Transaction** task in External Financial Transactions to generate financial transactions and transaction lines in the Financial Transactions object.

Maintain ledgers

AP, AR, cash, and general ledgers can be created, copied, changed, deleted, suspended, and activated in Finance. Create templates provide the information you require to create AP, AR, cash, and general ledgers. For example, use the Bank Account template to create a cash ledger that represents a bank account.

In Ledgers, you can create and maintain ledger transaction types and ledger transaction numerators.

In Ledger Transaction Types, you can use the Create Numerators host job to create new numerators at the start of each fiscal year or fiscal period.

Update 1099-MISC tax accumulations

The Internal Revenue Service requires you to report certain payments on the 1099 MISC form. Finance automatically accumulates 1099 MISC totals during transaction processing, maintaining completion for the year to date, even if you reverse or copy transactions. 1099 accumulations

information is now available to view in the 1099 MISC, 1099 MISC Box Totals, and 1099 Transaction Charges objects. You can calculate 1099-MISC totals (Entities, Financial Divisions, and Personal Accounts objects) and print the 1099-MISC form (Entities and Financial Divisions objects). From Financial Divisions, you can export 1099-MISC accumulation information to an electronic file in the transmission format approved by the Internal Revenue Service.

Generate BACS records

In the United Kingdom, the Banks Automated Clearing Service (BACS) is a system that enables funds to be transferred electronically between banks and other organizations. You can generate BACS records from payment lists and then maintain and export BACS files from the BACS Files object.

Generate electronic funds transfer (EFT) records.

From payment lists you can automatically populate files for electronic funds transfer. Or, you can use System-Link to retrieve the required data directly from the payment list objects.

Maintain units

Business units can be created, copied, changed, deleted, suspended, and activated in Finance.

Enterprise General Ledger

The XA 9.2 release adds a new conditional macro type to EGLi. When you create a conditional macro, you select two other macros. If the first macro returns a value, then that value is returned by the conditional macro. If the first macro does not return a value, then the value of the second macro is returned by the conditional macro.

XA customers using Enterprise Financials (Finance) can automatically configure Enterprise General Ledger for System i (EGLi) with existing XA data and transfer GL account balances from IFM to EGLi using XA migration objects. After you have completed the migration, you can perform all maintenance of EGLi objects, such as financial calendars, charts of accounts, GL accounts, ledgers, and books in EGLi.

EGLi is designed to integrate with Finance or Accounts Management (AMPlus). However, you are not required to have Finance or AMPlus installed to send XA transactions to EGLi from Customer Service Management (CSM), Materials Management (MM), or Production (OBPM and RBPM).

EGLi is an advanced general ledger application that provides a central repository for all general ledger information in the global enterprise. EGLi includes tools that enable in-depth analysis of financial and statistical information. EGLi provides these benefits:

- Ability to post financial events to multiple ledgers and books simultaneously
 - Parallel ledgers and books

- Books in any currency
- Corporate and business unit ledgers
- Multiple ledgers such as tax and reporting ledgers, sales ledgers
- Multiple chart of accounts
- Multiple account segments, dimensions, and analysis data fields
- Multiple financial calendars
 - Period table flexibility; fiscal year/calendar, year/weekly/daily
- Drill-back from GL journal entries to the source ERP transactions

After you have completed initial set up tasks in XA and defined rules in EGLi, you can take full advantage of the benefits of EGLi using your XA financial data from these XA applications:

- Accounting Management
- Customer Service Management
- Materials Management
- Production Management
- Procurement Management (PM)
- Enterprise Financials

On the start date you specify for an application, these types of GL transactions are automatically sent or are available to be sent to EGLi.

- AP and AR financial transactions posted in AMPlus
- Customer invoice, credit memo, and cost of sales transactions generated by CSM
- Inventory transactions generated by the MM, CSM, OBPM, and RBPM applications
- Manufacturing order cost and cost variance transactions generated by OBPM
- Labor, machine, and overhead costs to manufacturing schedule transactions generated by RBPM
- Purchase order invoices and credit/debit memos posted in Finance
- Financial transactions and transaction lines posted in Finance

You must ensure your financial data is posted correctly in EGLi. You can run your XA general ledger (Finance or AMPlus) and EGLi, in parallel until you are satisfied that your data is posted correctly to EGLi. For each application except Finance, GL transaction objects identify the transactions that XA sends to EGLi. In the Finance application, the Financial Transactions object identifies the transactions that XA sends to EGLi. In these objects, you can view the ERP transactions for which EGLi can not create a GL journal entry. XA only creates a GL journal entry in EGLi if the configuration of EGLi models, event classes, macros, account segment values, and calendars is correct for the transaction. You have the opportunity to correct issues in EGLi before you resend the transaction to EGLi.

See XA help *Setting up XA for Enterprise General Ledger*.

See the *Infor XA Implementation Guide for Enterprise General Ledger for System i* for more information about how to configure XA to use with EGLi.

XA objects

These XA objects are used in an XA integration to EGLi:

Customer Invoices and Sales GL Transactions

The Sales GL Transactions object contains the revenue and cost amounts that are associated with a customer invoice, including item sales, item costs, and item tax for shipped items.

When IFM/Finance is installed, the sales GL transactions are sent to EGLi when the customer invoice is generated. If the sales GL transactions cannot be processed in EGLi (for example, if the posting period is not open and the event class does not allow journals in error), then the sales GL transactions can be resent to EGLi later using the Generate Sales GL Journal Entries host job. When IFM/Finance is not installed, the sales GL transactions are not sent to EGLi when the customer invoice is generated. The sales GL transactions are sent only from the Generate Sales GL Journal Entries host job.

Customer Invoices and Sales GL Transactions have a subset to identify the customer invoices for which EGLi can not create GL journal entries. To display error messages for a transaction, use the Error Messages menu option or view from the details card. Correct the EGLi errors in the EGLi configuration of account segments, charts of accounts, financial calendars, ledgers, macros, models, event classes, and subsystems. Then, resend the sales GL transactions that have EGLi error messages using the Generate Sales GL Journal Entries host job.

Financial Consolidations

Use the Financial Consolidations object to create and maintain consolidations map sets used during the consolidation process. A map set is a group of account segments and account segment values in a source ledger that are mapped to segments and segment values in a target ledger. You can create multiple map sets to accommodate different consolidation needs.

You can maintain consolidation segment mappings. After you have selected a financial consolidation, you can add ranges of consolidation account segments or change the target source value.

Financial Journal Entries

You can create, post, and void individual journal entries in the Financial Journal Entries list window. Previously, financial journal entries were only created through the Financial Events list window. A financial event can have one or multiple financial journal entries based on the event definition.

As long as the financial event class has a single and active financial event class rule, you can create, post, or void individual financial journal entries from the Financial Journal Entries list window.

Manual journal entry event

When you create a financial journal entry from the Financial Journal Entries list window, the application uses the Manual journal entry event that is specified in the Ledger.

Financial Processes

Use the Financial Processes object to define and maintain processes. A process is a unique set of instructions that defines a process's execution parameters, process type, and output event. These process types are included:

- Consolidate
- Translate
- Allocation event

Consolidate

Use the Consolidate process types to combine source or account balances into a target ledger/book. This process creates journal lines in the target ledger or book. You can also use financial structures as the basis for consolidations.

Translate

Use the Translate process types to define a translation financial process. A translate process converts the currency of a source ledger and book into the currency of a target ledger and book. The translate process includes these attributes:

- Chart of accounts
- Ledgers and books
- Segments and segment values
- Models
- Events with event origin of translation
- Period end and average rate types
- Gain loss and rounding accounts in target ledger

Allocation event

Use the Allocation event process types to distribute actual or budgeted balances from one set of GL accounts to another.

Financial Process Lists

Use the Financial Processes List object to create and maintain process sequences. Multiple processes can be executed in a specific order. After you have selected a financial process, you can add more processes and specify the order of the process.

You can maintain financial process list lines. A financial process list line represents a step in the process sequence. You can add or maintain a financial process list line.

Financial Structures

Use the Financial Structures object to maintain linked and component financial structures. You can use this new feature to combine structures to create different structure hierarchies. A linked structure connects different types of structures to a chart of accounts. Linked structures can have parent structures with multiple child structures. A component structure contains accounts, account segments, or other components.

Use the Financial Structure Sequences object to maintain linked structures. Use the Financial Structure Sequence Components object to maintain component structures.

Financial transactions

When IFM/Enterprise Financials is interfacing with EGLi, XA sends financial transactions to EGLi when:

- A financial transaction is posted. This action sends a financial transaction to EGLi unless the transaction originated from one of these applications that send GL transactions directly to EGLi: CSM, MM, OBPM, or RBPM.
- New financial transaction allocations are posted for a financial transaction that was previously posted. For example, when a posted cash receipt is allocated later to clear an outstanding balance on an invoice, EGLi processes only the new financial transaction allocations and the new financial transaction GL amounts.
- New financial transaction cash is posted for a financial transaction that was previously posted. For example, when the cash amount is corrected on a previously posted cash receipt, EGLi processes only the new financial transaction cash and the new financial transaction GL amounts.
- New financial transaction GL amounts are posted for a transaction that was previously posted. For example, when a prepayment GL line is posted, EGLi processes only the new financial transaction GL amounts.

To find the XA financial transactions that have EGLi errors, use a subset to select records where EGL error count is greater than zero. To display the error messages for a financial transaction, view the financial transaction overview. Correct the EGLi errors in the EGLi configuration of account segments, charts of accounts, financial calendars, ledgers, macros, models, event classes, and subsystems. Then, resend the finance GL transactions that have EGLi error messages using the Generate Finance GL Journal Entries host job.

Inventory GL Transactions

When the General Ledger Interface for MM is active, XA creates a record in the Inventory GL Transactions object for any transaction set up for the GL interface that affects inventory balances or inventory values created in these applications:

- Inventory Management (IM)
- Maintenance Management System (MMS)
- Repetitive Production Management (REP)
- Production Monitoring and Control (PM&C)
- Manufacturing Performance Analysis (MPA)
- Production Control and Costing (PC&C)
- CSM/ Customer Order Management (COM)
- Finance /International Financial Management (IFM)

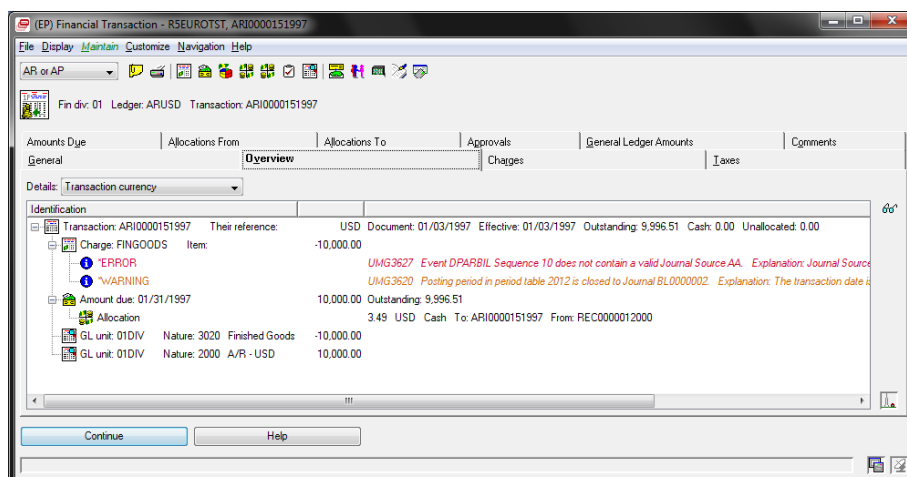
When these applications create inventory transactions, the data flows to the Inventory Management History (IMHIST) file. Inventory GL Transactions is installed only when MM is installed.

When inventory transactions are created in XA and XA is configured for use with EGLi, inventory GL transactions can be used to create inventory GL journal entries in EGLi. To create inventory GL journal entries in EGLi, you must run the Generate Inventory GL Journal Entries host job from the File menu in the Inventory GL Transactions object. EGLi accounts are assigned by EGLi using rules based on the warehouse, transaction type, item, and order information. When you migrate the XA configuration to EGLi, the application automatically creates EGLi rules that uses the account numbers assigned by the XA GL interface. You can create your own rules based on any characteristics of the inventory GL transaction.

Inventory GL Transactions has a subset to identify inventory GL transactions for which EGLi can not create a GL journal entry. To display error messages for a transaction, use the Error Messages menu option or view from the details card. Correct the EGLi errors in the EGLi configuration of account segments, charts of account, financial calendars, ledgers, macros, models, event classes, and subsystems. Then, resend the inventory GL transactions that have EGLi error messages using the Generate Inventory GL Journal Entries host job.

Manual Invoice Payments

The Manual Invoice Payments object in AMPlus contains information about manual payments and the invoices that have been applied against those payments. You cannot maintain manual payments in this object. You enter manual payments in IDF level 1 and then match the payments to invoices that are already open in the Open Payables file in IDF Level 1. Manual payments become equivalent to system-generated payments after entering.



Payable GL Transactions and Payable GL Transaction Activities

After you configure AMPlus for use with EGLi, XA automatically sends payable GL transactions to EGLi. If a payable journal entry is posted to the XA General Ledger, the transaction header is saved in the Payable GL Transactions object and the transaction details are saved in the Payable GL Transaction Activities object.

When GL journal entries for payable GL transaction activities are not created in EGLi, use the Error transactions subset in the Payable GL Transactions object to identify the errors. To display the error messages for a transaction, view the General card in the Payable GL Transaction Activities object.

Correct the EGLi errors in the EGLi configuration of account segments, charts of account, financial calendars, ledgers, macros, models, event classes, and subsystems. Then, resend the payable GL transactions that have EGLi error messages using the Generate Payable GL Journal Entries host job.

Production GL Transactions

When the General Ledger interface for OBPM and RBPM is active, XA creates records in the Production GL Transactions object. For manufacturing order cost and cost variance, records are included associated with order-based production in the Order Based Production GL Transactions workspace. For labor, machine, and overhead costs to manufacturing schedules, records are included for rate-based production in the Rate-Based Production GL Transactions workspace. Production GL Transactions is installed only when OBPM or RBPM is installed.

When production GL transactions are created in XA and XA is configured for use with EGLi, production transactions can be sent to EGLi. To create production GL journal entries in EGLi, you must run the Generate Production GL Journal Entries host job from the File menu in the Order Based/Rate Based Production GL Transactions object.

Production GL Transactions has a subset that identifies production GL transactions for which EGLi can not create a GL journal entry. You can display error messages for a transaction using the Error Messages menu option or view from the details card. Correct the EGLi errors in the EGLi configuration of account segments, charts of account, financial calendars, ledgers, macros, models, event classes, and subsystems. Then, resend the production GL transactions that have EGLi error messages using the Generate Production GL Journal Entries host job.

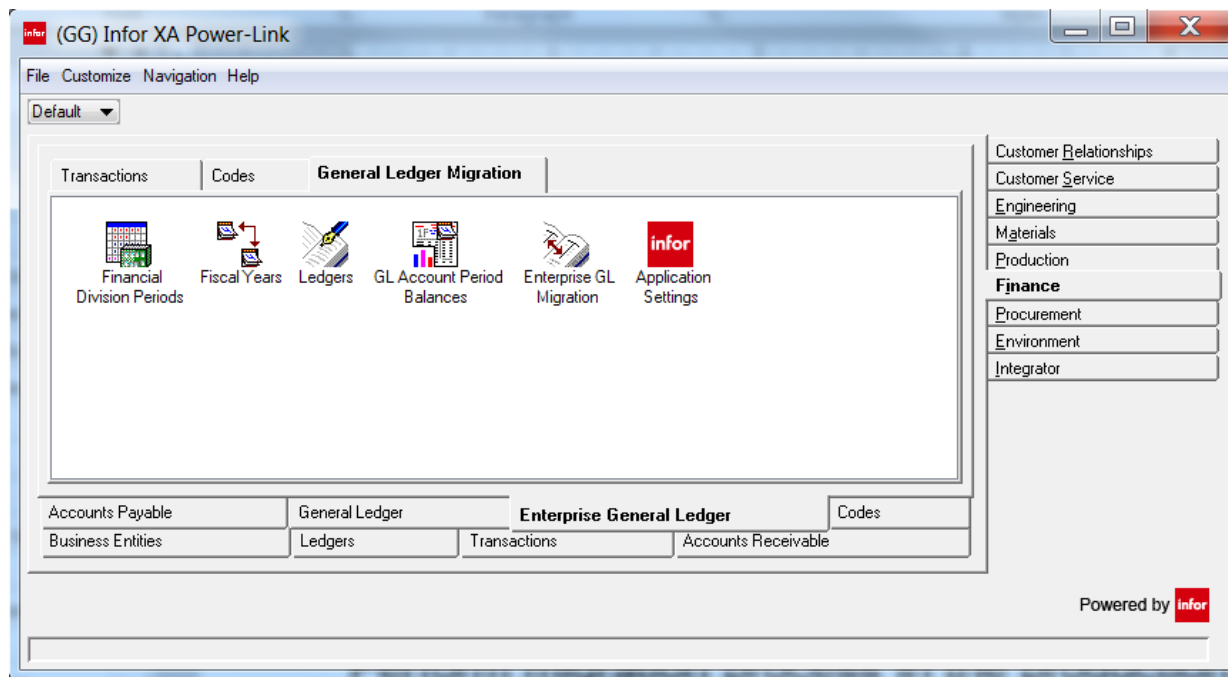
Receivable GL Transactions and Receivable GL Transaction Activities

After you configure AMPlus for use with EGLi, XA automatically sends receivable GL transactions to EGLi. If a receivable journal entry is posted to the XA General Ledger, the transaction header is saved in the Receivable GL Transactions object and the transaction details are saved in the Receivable GL Transaction Activities object.

When GL journal entries for receivable GL transaction activities are not created in EGLi, use the Error transactions subset in the Receivable GL Transactions object to identify the errors. To display the error messages for a transaction, view the General card in the Receivable GL Transaction Activities object. Correct the EGLi errors in the EGLi configuration of account segments, charts of account, financial calendars, ledgers, macros, models, event classes, and subsystems. Then, resend the receivable GL transactions that have EGLi error messages using the Generate Receivable GL Journal Entries host job.

IFM migration process

IFM users can configure EGLi with existing XA data and transfer GL account balances from IFM to EGLi using XA migration objects.



To take full advantage of the IFM migration tools, we recommend that you install EGLi and complete the migration tasks in a test environment with data from your production environment. After you test transaction processing, you can transfer the EGLi configuration to your production environment.

The IFM migration automatically configures EGLi to process transactions from XA applications. The migration updates EGLi objects with XA data so that you are not required to manually set up EGLi objects. The migration transfers general ledger account balances from IFM and provides a process that enables you to confirm that no discrepancies occurred when the balances were transferred.

For more information about using the IFM migration process, see the *Infor XA Implementation Guide for Enterprise General Ledger for System i*.

Enterprise Product Data Management

Pricing enterprise items

You can use the **Pricing** task on the Enterprise Items object to calculate a selling price for an item without entering the item on an order or quote. The price is calculated using the values you specify and displays on Price Inquiry cards with details of how the price was calculated.

Printing price lists

You can use the Item Revision Price List report on the Item Revision Base Prices object to print all possible base prices, or a subset of base prices, for an item revision based on the effective date, currency ID, and price book ID.

Item revision enablement

The Item Revisions object is now the source for item information in XA applications. Applications interfacing with EPDM use the revision identified as the current item revision for item information. XA retains the legacy item master records, but those records are no longer used by XA applications enabled for EPDM.

Current item revision

An item can belong to multiple sites and have multiple revisions within each site. EPDM uses the Effective from and Effective to dates for each revision of an item to determine which revision is current within a site on a particular date. If one or more item revisions exist for a site, then EPDM uses an algorithm to identify the one item revision that is current.

The Current Item Revision analysis function runs automatically whenever the passage of time reaches an Effective from or Effective to date for an item revision. The same analysis is also performed if a user adds or deletes a revision for an item or changes the effective dates associated with a revision.

When a new current item revision is identified, transactions update the appropriate files, including Maintenance History, Inventory Transaction History, and General Ledger Interface.

While the Item Revision Control function normally runs automatically at midnight (system time), the Item Revision Control host job in the Sites object provides a quick way to check and potentially update the current revisions for all items in a site or a selected subset of items. The host job performs the same evaluations and updates as the Item Revision Control function does when it runs automatically.

Release item revisions

While item information in XA 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 released from the Item Revisions object.

EPDM provides a new option, Auto sync that enhances the Release function by automatically updating the Item Master file when a new revision of the item becomes the current revision.

Controlled attributes

EPDM adds a new level of control for item revision data across all item revisions with certain critical attributes. The current revision for an item can change due to passage of time or user action, but the values in some critical attributes, such as item type or stocking unit of measure, can change unexpectedly. Users can control the values for these critical 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 provided.

Implementation statuses

The implementation status attribute is now required in every item revision. Status code values contained in that implementation status, determine how XA processes information for that item revision. Two new statuses, Release to purchasing and Release to customer, expand the level of control for an implementation status. The Release to legacy item master status now controls whether an item revision is eligible to update Item Master. The Maintain BOM and Maintain routing status codes have been expanded to include regular items as well as configured items.

A default implementation status is assigned to all existing and new item revisions without an implementation status.

Item revision descriptions

The Translations card displays both the local language description and all foreign language descriptions for the item revision. This card gives a convenient way to view and maintain all the item revision descriptions in one place.

Item revision foreign prices

The Item Revision Foreign Prices object contains prices for item revisions in currencies other than the local currency. An item revision can have multiple prices in multiple foreign currencies.

Also, as with item revision base prices, if a user adds a foreign currency price for an item revision without entering a price amount, XA calculates the nominal price in the specified currency using the current exchange rate for that currency.

The effective date for the foreign price determines which one of multiple prices in the specified currency applies to the item revision on a given date. Only one price per currency applies at a time. Additionally, only foreign currency prices entered for the current item revision can be in effect.

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 associated with an item revision. The Assign nominal price action allows users to replace the current price with a recalculated version of the price. The Mass Replace Foreign Price with Nominal Price option recalculates the nominal price for all selected foreign currency prices and replaces the existing foreign currency price with the nominal price.

User interface upgrades

The Default card files for the primary EPDM objects have been upgraded to provide faster, more streamlined access to detailed object information. Information in these card files appears on fewer cards organized by functional areas, such as engineering, procurement, costs, inventory control, and sales for item revisions and single-card access to single-level, single-level with blow-through, indented, and costed bills of material. Some cards now also present costing information in graphical form.

Migration to Release 9

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

Environment Management

These enhancements apply to the functions and features used to set up, manage, and customize an XA environment.

Navigation Workbenches list window

These enhancements add additional functionality to the Navigation Workbenches list window:

- Use the four tabs on the Navigation Workbench list window to view all workbenches, public workbenches, private workbenches, or your favorite workbenches. Use the **Add to Favorites** option to add a public or private workbench to your favorites. The workbench then displays on the **Favorites** tab.
- Use the task related options beside the list window to perform tasks such as changing workbench settings, adding a workbench to the **Favorites** tab, or removing a workbench from the **Favorites** tab.

Related cards and Related card sections

When customizing an object, you now have the ability to create a card that contains information about an object that is related to the object that you are customizing. You can use this feature to add cards or card sections that provide related object information to an object. You can also add related cards to a compound card as a card section. See XA help for “Creating a new related card.”

For example, you may want to view the purchase amounts for vendors related to purchase orders. Typically, the related vendor's purchase amounts is displayed in a separate window. Now, you can use the Related card attribute to create a related card for the vendor's purchase amounts, and then add the related card to a new or existing card file in the Purchase Orders object.

Media Files

The Media Files object now supports embedded attachments as well as standard attachments. For a file used as a traditional attachment, the media file only stores the name of the file and the path where the file can be found. With embedded attachments, the file to be used as an attachment is stored on the Infor/IFS location on the System i that is the host system. IDF functions control the storage and access of the embedded attachment file. Users upload changed versions of the embedded attachment file but do not change the embedded attachment directly. IDF functions retain and manage the versions of the embedded attachment file.

While traditional attachments provide the flexibility for users to store the attachment files in any accessible location, access to those locations can change outside of IDF control. Embedded attachments offer users the reliability of consistent access to the attachment files.

For users working in Net-Link, embedded attachments are available regardless of the type of machine running the Net-Link processes. Traditional attachments required the Net-Link Server process to be running on a Windows auxiliary machine. Embedded attachments are available in Net-Link whether the Net-Link processes are running on the host machine or on an auxiliary machine.

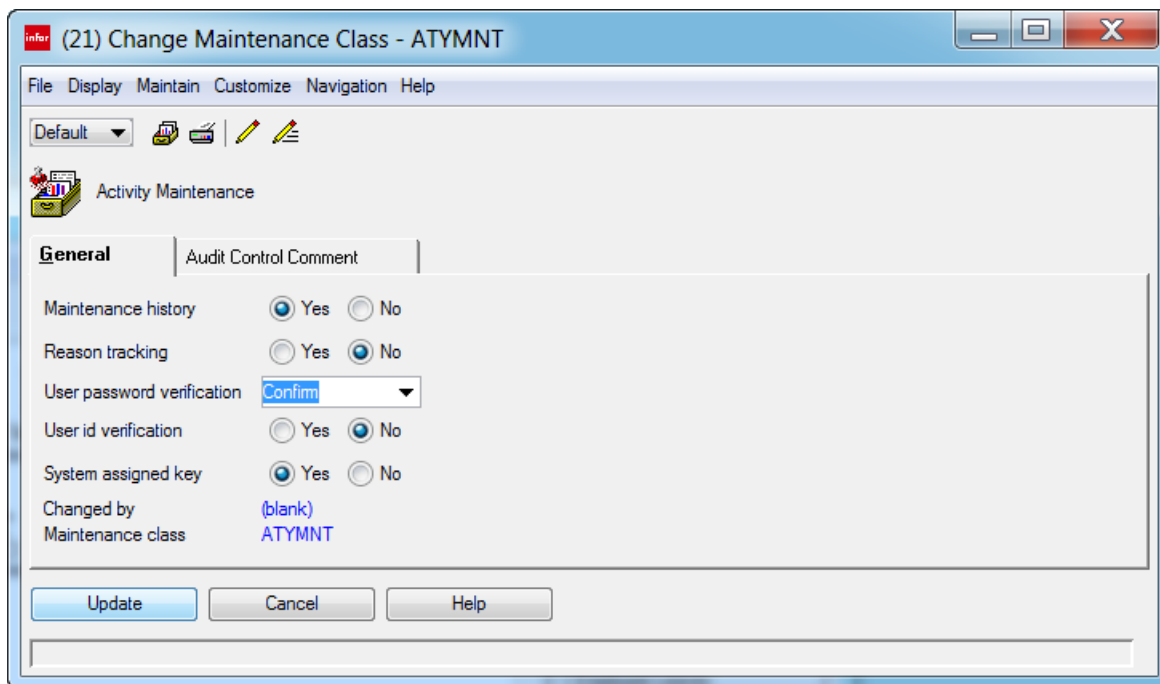
Notification History

The Notification History object contains information to help administrators identify notifications that failed to be transmitted. When the Publish and Subscribe function is set up, each time a notification is published, XA creates a record in the Notification History object. The status of each record indicates whether the notification completed or failed. If a notification failed, the detailed information in the history record displays the administrator the errors that prevented the successful transmission. The Resubmit option allows administrators to send failed notifications again. The notifications that are sent again have a status of resubmitted. A host job in the Notification History object is available to purge the history data.

You can also view the Notification History information from Maintenance History.

Maintenance Class user verification

The Maintenance Classes object now contains the User password verification and User id verification attributes. These attributes can be set to require the user to re-enter their user ID and password or re-enter only their password before starting to maintain application data or when the action is being confirmed.



If User password verification is set to Confirm in the Change Maintenance Class window, a comment can be added for user password verification in the Audit Control Comment card. If a comment is added, the verification text is displayed when the user is requested to re-enter the password.

System-Link Requests

In System-Link Requests, the user ID and password do not have to be hard coded. A new login request uses the user credentials from the job as displayed in this example:

```
<?xml version='1.0' encoding='UTF-8'?>
<!DOCTYPE System-Link SYSTEM 'SystemLinkRequest.dtd'>
<System-Link>
  <Login userId='*LPIUSER' maxIdle='900000'
    properties='com.pjx.cas.domain.EnvironmentId=9P,
      com.pjx.cas.domain.SystemName=USATLS05.INFOR.COM,
      com.pjx.cas.user.LanguageId=en' />
</System-Link>
```

User Definitions

Tracking

User Definition changes can be tracked by selecting **Yes** for the Archive User Definitions setting from the **Setting** menu on the User Definitions list window. By archiving user definitions, a copy of the user definitions is made before the definitions are modified.

Currently, only archived information is accessed for Security Subset definitions when the definition history is displayed. You can access the new history pane by clicking the **Display History** (📄) option on the Security Subsets tab on the Content Security card in the Business Object window.

(21) Company Security Subset History

Company Security Subset History last changed by WKESLER 07/28/2015 9:49:11 AM

Name
Company

Description	Relational operator	Operand
Company name	In list of	[(blank), Jones, Smith]

Revisions: 07/28/2015 9:49:11 AM by WKESLER

Description	Relational operator	Operand
Company name	Equal	(blank)

History Users

Continue Cancel Help

Other enhancements

These enhancements

- You can select multiple objects on the User Definitions window when exporting definitions.
- You can select the **Locate** (🔍) option to locate a specific user definition.

IDF report writer

The IDF report writer function allows you to customize the totals and totals for amounts, enter the text you want to use to identify subtotal and total amounts, and choose a presentation scheme to format the subtotal and total text. You define subtotals for attributes that you select as part of the sort you use with the application object list. You specify the statistics to be calculated in the view you define for the application object list. In the subset you define for the application object list window, you select the Statistics option to calculate the statistics specified in the view associated with columns in the report.

For example, you can have a view for your Purchase Order Items object that displays the vendor related with the purchase order, the purchase order number, the purchase order item number, and the purchased amount associated with the item with statistics set to Total purchased amount. You can sort your list of purchase order items by vendor, then by order number and specify subtotals for both of those attributes. You can then apply a subset to your list of vendors that displays those vendors that have open purchase order items and that has the Statistics option selected. When you apply the sort, view, and subset containing the subtotal and statistics options and then export the list of purchase order items, the resulting report displays a subtotal associated with the purchase order item amounts on each order, then a subtotal amount associated with purchase order item amounts for each vendor, then the final total amount of all purchase order item amounts associated with the vendors and purchase orders included in the list.

(99) Purchase Order Items - Non-invoiced purchased items

Vendor	Order	Item	Amount
AED	P001070	AALS100	3,383.2500
AED	P001070	ALUMTRAY	1,230.0000
Totals for Order: P001070			
		# 2	4,613.2500
AED	P001075	ALUMTRAY	615.0000
AED	P001075	LS1140	182.4000
Totals for Order: P001075			
		# 2	797.4000
Totals for Vendor: AED			
		# 4	5,410.6500
APOMI1	P000564	LSMROITEM2	125.5500
APOMI1	P000564	LS1002	169.5000
APOMI1	P000564	LS1117	175.3000
Totals for Order: P000564			
		# 3	470.3500
Totals for Vendor: APOMI1			
		# 3	470.3500
Final Totals			
		# 7	5,881.0000

Dec 29, 2011 10:15:51 AM

Infor Development Framework Level 1 (IDF Level 1)

IDF Level 1 is the graphical user interface available for Infor ERP XA applications that previously were accessible only through the XA System i-based interface.

Navigation

The IDF Level 1 interface streamlines the access between Power-Link applications and the XA applications enabled for IDF Level 1. Prior to XA 9, working with both Power-Link applications and the legacy XA applications required users to log on to both sets of applications and to switch between the two sets of applications to perform some tasks. The IDF Level 1 functions provide a more integrated flow for users when working with information in both Power-Link and in the functions previously only accessible in the XA legacy applications.

Clicking an IDF Level 1 icon on an application card in Power-Link provides access to the IDF Level 1 tasks related to that application or to the Power-Link functions on the application card. For example, to access the IDF Level 1 Purchasing functions, users double-click the “Other Procurement Tasks” icon on the Procurement application card. This action opens a separate window that contains the IDF Level 1 options available from the Purchasing application.

Clicking an IDF Level 1 task allows a user to enter information or to select the options required to perform the task. Processing of tasks from IDF Level 1 windows proceeds sequentially. Depending on the task, users enter selection information on one window, and then proceed to another window.

to select an action to be performed for a selected record. Users proceed through the IDF Level 1 tasks by clicking options on the IDF Level 1 windows or by selecting options from the Functions menu. When users complete the entries or selections, the task is completed or stopped or Help is referred to see information about the task.

Menus and options

An IDF Level 1 application window contains the icons users click to start specific tasks. XA organizes the icons in groups of related tasks. Each task icon starts a specific task. Depending on the type of task, users see a list of records, a set of attributes to be entered or maintained, or information to be viewed only.

To work with information on an IDF Level 1 window, users have menus in the menu bar area at the top of the window and action related options along the bottom of the window. The menus provide options for standard actions, such as Cut, Copy, or Paste on the Edit menu. The Function menu provides options for actions that are specific to the task. In most cases, the options on the Function menu take users to another window or task. For a task that involves selecting an order to maintain, the Function menu contains an option that takes users to another window to look up an order number.

Differences from Power-Link

While you can access the IDF Level 1 tasks from Power-Link, the IDF Level 1 windows do work somewhat differently than Power-Link windows and options. The IDF Level 1 windows cannot be customized in the same way that Power-Link windows can. Also, some advanced Power-Link functions, such as broadcasting and receiving information among application windows or attaching outside files to application records, are not available for IDF Level 1 functions.

However, IDF Level 1 does provide an Additional Tasks feature that allows users to add frequently used options to the IDF Level 1 application windows through the Menu Maintenance function in Cross Application Support. Users can add a task, or option, to the Additional Tasks tab associated with a selected IDF Level 1 application window. This function allows users to customize the IDF Level 1 application windows and to expand the number of XA tasks that can be performed in IDF Level 1.

Installation and setup

To support IDF Level 1 in an environment, XA has added the Host Presentation Server (HPS) process. This process provides the functions that must be active in order to use the IDF Level 1 tasks, windows, and options in an XA environment. An XA environment must have the Host Presentation Server installed to support IDF Level 1. Also, the Host Presentation Server process must be installed and running on an auxiliary machine.

The IDF Level 1 menus reference existing task definition security records in the Cross Application Support application. All existing security authorizations for XA System i options apply to the corresponding IDF Level 1 options.

To control the number of IDF Level 1 sessions a user may have open at one time, the User Profiles object has a new Number of group jobs allowed attribute. An administrator sets a value between 0 and 16 to indicate the number of additional IDF Level 1 sessions for a user. The default value is 0, which indicates that a user may have only one IDF Level 1 session open at a time with no additional sessions allowed.

Infor Development Framework

In release 9, XA includes these enhancements to the Infor Development Framework (IDF) functions.

Copy to clipboard

Users can now copy values from display-only attributes by right-clicking the attribute value. The Copy to clipboard option appears. Selecting this option pastes the attribute value into a clipboard.

Overview cards

The card type Overview now supports these functions.

Users who are authorized to create cards can add multiple columns of information to the hierarchy of objects as displayed in the overview. For example, a user creates a version of the Overview card associated with manufacturing orders that displays a Days off schedule column, components, and operations in the manufacturing order. The information in this column gives the user a quick way to compare how closely the elements in the order were progressing toward a scheduled date.

Users can now broadcast information from a selected row in an overview. When the Broadcast option on the Overview card is selected, any of the objects in the overview which are set up for broadcasting is broadcasted. From the Overview card for a manufacturing order, the Broadcast function sends information about the manufacturing order, the operations performed, and the components consumed during the processing of the order. Which objects broadcast depends on how the preferences and the Broadcast option for each individual object is set.

Integrator

These Integrator functions have been enhanced for XA 9 – 9.2.

Attributes object

The Attributes object is now a top level object so that it can be added to Application cards. The Attributes object is located on the Integrator application card. The Attributes object supports maintenance actions. Pending maintenance changes need to be saved to Host from the Business Objects object.

Attributes are displayed for all the Business Objects so that users can identify where specific functions have been applied such as identifying field level security or attribute classes.

Attribute security masks




Previously if hidden security was applied to an attribute, the attribute was only visible to the user with required authority. Now with Attribute Mask you can make attributes visible to the user with some or all of the attribute data masked with asterisks. These mask values are available for selection:

- Hidden: The attribute is hidden from the user.
- Show none: The attribute are displayed as all asterisks.
- Show last three: All but the last three characters of the attribute are displayed as asterisks.
- Show last four: All but the last four characters of the attribute are displayed as asterisks.

infor Mask Demonstration			
Company	Name	Account	Amount
1	DEMONSTRATION	*****890	*****

You can use masks to determine how a user who does not have authority to the attribute views the attribute in the application.

Attribute template formatting

The Attribute template now contains the **Add Column** () , the **Append Column** () , and the **Add Constant** () options. You can use the **Add Column** option to split attributes into multiple columns to avoid the attributes going over the limits of the screen from top to bottom. You can use the **Append Column** option to append an attribute to the same line as another attribute.

You can select from two types of constants when you click the **Add Constant** option:

- Blank Line: Use the blank line constant to add a blank line after the attribute.
- Format: Use the format constant to display text in label or data columns.

Default entry field width

You can now limit the entry field width on the Change Attribute card. Use the Default entry field width option to specify a field width and all cards that contain the attribute defaults to the specified field width.

To only change the entry width for an attribute on a single card, use the Entry field width option on the Card attribute definition window.

Content	Value
Visual control	Entry field
Entry field width	10

New date attribute criteria

A new criteria for the date attribute has been included on the Subset definition value list so that records can be selected by their anniversary. The constant value operand has a new value (anniversary) to select all dates with the current month and day regardless of their year.

If you select an attribute sub-type of Date on the General tab on the Change Attribute card file associated with a business object, then you can specify the anniversary criteria for a subset. You can select a constant value of (anniversary) or a range of current anniversary week, current anniversary month, next anniversary week, and next anniversary month.

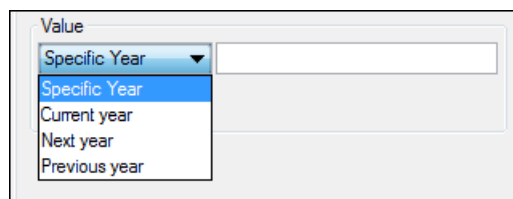
Attribute class	(none)
Attribute type	Numeric
Attribute sub-type	Date

Business objects

New attribute class for year

You can define an attribute class of Year on the General tab on the Change Attribute card file for a business object.

Attribute class	Year
Attribute type	Numeric
Attribute sub-type	(none)

A screenshot of a software interface showing a dropdown menu. The menu is titled 'Value' and is open, displaying four options: 'Specific Year', 'Current year', 'Next year', and 'Previous year'. The 'Specific Year' option is currently selected and highlighted in blue. To the right of the dropdown is an empty text input field.



You can then specify a subset criteria for a specific year, the Current Year, Next Year, or Previous Year. You can also select a range of years for the subset value.

New attributes

These new attributes are available for business object definitions.

- Checked out by displays the ID of the user who has the object reserved for maintenance.
- Has user exits indicates if any user exits are defined for the business object.
- Has active user exits indicates whether the business object has user exits that currently are functional.
- Has content security displays if the business object has any restrictions on content from any user.
- Processing indicates if the transaction must be posted immediately or as part of a transaction group. This attribute is on the General card on the Business Object Transaction card file. The valid values are:
 - Group: The transaction is included with the other changes in the group posting.
 - Immediate: The transaction is completed immediately.

Check out

Users can use the Check-Out () option to lock the object and prevent other Integrator users from modifying the object. The Cancel Check-Out () option removes the lock if the lock is no longer required. The user can keep or release the lock if the Business Object is maintained and a Save to Host is completed.

Import and Export

The Import and Export functions have been enhanced to provide greater notification of changes. The Import function now warns users if a business object has been changed on a local system after the last time the object was imported. This warning lets users know that local changes can be lost if the object is imported again.

The Import Business Objects dialog now contains several new options:

- The Prevent object class reassignment attribute prevents objects from being reassigned by blocking the import function if any business objects in the environment need to be moved to another slot, or EXTnnnn number.

- The Externally control user exits attribute indicates that user exits programs must be moved manually from the export environment. In this situation, the user exit status is not reset in the import environment. Integrator displays a warning message if a user attempts to generate or compile a user exit in the imported environment. If the business objects in the environment are externally controlled, any attempt to generate or compile a user exit causes an error.
- The Reset user exit status to Inactive attribute resets the user exit status for any imported business object to Inactive. If this attribute is not selected, the imported business object retains the original, imported user exit status.
- The Retain public user definitions attribute indicates that any Public definitions created in the To environment must be retained.

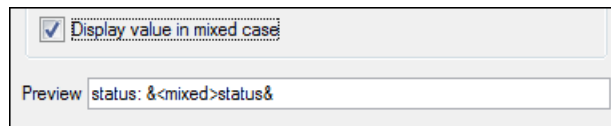
The Export Business Objects dialog now contains these new options:

- The Include definitions for Infor Owned objects attribute indicates whether modified Infor owned definitions must be included in the export file.
- The Include private definition attribute indicates whether privately owned definitions must be included in the export file.

Mixed case logic for messages

You can now apply the mixed case logic to attributes that normally only displays as upper case when used in message substitution. For example, messages that are in the object Banner text, titles, overviews, or subscription notifications.

There are multiple places within Integrator that you can select to display text in mixed cases. For Banner text, select the **Build Banner message** option on the General tab on the Business Object card. Then, select **Display value in mixed case** in the Add attribute window.



The screenshot shows a dialog box with a checked checkbox labeled "Display value in mixed case". Below the checkbox is a preview field with the text "status: &<mixed>status&".

For example, you have message text that displays as “EXAMPLE ITEM ONE” normally. When you select **Mixed case allowed**, only the first letter of each word is capitalized “Example Item One”.

Subsets

These additional subsets are now on the Business Object Subsets list:

- Has active user exits
- Has content security
- Has maintenance control
- Has secondary user extension
- Has text user extension
- Has user exits

With these subsets, users can better identify objects that have features such as user exits, user extensions, or content security defined.

User Actions

These two enhancements are available under Users on the Actions card in the Business Object details card file:

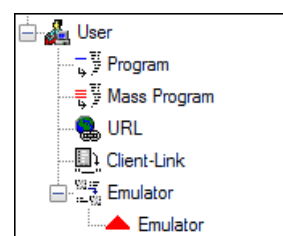
- Attribute user actions

User Actions created in Integrator were displayed on the object toolbar, but not on the property toolbar. You can now include these actions on the object and property toolbars.

You can then select these user actions to use as property actions from the Attribute Actions list. The default for user actions is to not be included on the property toolbar.

- Emulator action

Emulator, a new action type, has been defined for user actions. The Emulator action can only be used in Net-Link when running within System i Workspace. The action is used to launch a System i Workspace task from Net-Link. You launch the emulator from the Drill Back Mapping option in System i Workspace. The Emulator action defines the Drill Back View Action, View ID, and Parameters to be passed to System i Workspace.



Other enhancements

These additional enhancements have been made to Business Objects:

- Attachments can be added to Business Objects
- The Business Object import/export function now imports/exports user code within user exits, so that user exits no longer need to be manually moved between environments.

Client column statistics

Column statistics can be defined for columns on View or List Card definitions. Column statistics use SQL functions SUM(), COUNT(), MAX(), MIN(), and AVG() to calculate values that are displayed. A list card may contain pending data changes that are not committed to the database. These changes are not included in the column statistics calculated using SQL functions.

For example, line 1 for item A1 has a quantity of 10 and line 2 of item A2 has a quantity of 15, then you have a total quantity of 25.

Line	Item	Quantity
1	A1	10
2	A2	15
		25

If line 2's quantity is changed to 35, then the total quantity was not getting recalculated when the pending change was committed.

To allow pending changes to be included in the column statistic value, the new Column statistics attribute has been added to perform the calculation on the client using the pending data set. This attribute is only available for list cards with a header and detail relationship. The Column Statistic attribute is available on the Relationship card on the Business Object card file. Column Statistics provides you with two options for calculating pending changes:

- **Server:** This option specifies that XA continue to perform the calculation using the SQL function. This option is the default option.
- **Client:** This option specifies that XA complete the calculations on the client using the pending data set.

Relationship description	Order Header 01 Order Line 01
Relationship identification	relatedOrderLine01
Relationship type	Detail
Bidirectional	<input checked="" type="radio"/> Yes <input type="radio"/> No
Column statistics	Server
Owner	Server
Modified	Client

If you select **Client** to complete the example for items A1 and A2 after A2's quantity is changed to 35, then the column statistics calculation is 45.

CAS security task

A new CAS security sub-task of Blank has been added to the OBJECT task. The Blank sub-task restricts Integrator access to read-only. Integrator inquiry is available to users authorized assigned the Blank task, but the users are locked out of the maintenance OBJECT tasks.

Integrator environment configurations

Integrator now allows multiple development projects to be imported into an alternate environment prior to being imported into a production environment. This configuration allows users to import a project into an environment for testing or validation purposes prior to importing the changes into an environment that is in production.

An Externally control business objects attribute in the Enterprise object allows users to specify whether imports for business objects in the specified environment are locked. For a production environment, this attribute can be selected to prevent unintended imports. For a test or development environment, this attribute is not checked, which allows imports into these appropriate types of environments.

Deployment Profiles

The Deployment Profiles object now includes system-defined deployment profiles that restrict the set of Power-Link objects users can access. These system-defined deployment profiles can be assigned to user profiles but cannot be maintained.

The No Access deployment profile can be used to restrict users from access through the Power-Link, Net-Link, or System-Link interfaces. This deployment profile can be assigned to an interface in a user profile to block the user from logging on to XA through that interface. For example, the No Access deployment profile can be assigned to Net-Link and System-Link in a user profile. This user then receives access to XA only through Power-Link.

The Customer Relationship Management deployment profile contains the CRMi application objects and those Customer Service Management (CSM) objects that are required for use with CRMi. This deployment profile provides a quick way to restrict Power-Link, Net-Link, or System-Link for CRMi users to only authorized application objects.

SQL Host Job and Report Limit

The limit for Host Job and Report objects where the SQL describing the selection criteria must not exceed 3,000 characters has been removed. The selection criteria for Host Job and Report objects passed to the server can now be up to 32,766 characters limit related to RPG. All user exits for user owned objects need to be regenerated and compiled to apply this enhancement.

User Exit Calls object

The User Exit Calls object is now a top level object so that it can be added to Application cards. The User Exit Calls object is located on the Integrator application card. This object supports maintenance actions. Pending maintenance changes need to be saved to Host from the Business Objects object.

You can use the User Exit Calls object to view user exit calls for all Business Objects. Generation and Compile Status are two new Sort definitions for subsetting User Exit Calls.

Support for special values

Users can now select special values specific to a Notification type in the Subscription Notification message builder.

Link Manager

Link Manager has new and updated System-Link processes and functions which support the Maintenance Control function as well as a new process to support the IDF Level 1 tasks. Link Manager now provides a single place to manage all environment aspects for both the server and client, which includes copying, renaming, and deleting business environments.

System-Link Outbox and Inbox processes

The new System-Link Outbox and System-Link Inbox processes increase the reliability of message delivery between systems and environments. With these new processes, the receipt and processing of messages does not depend on environment availability or immediate processing capability. System-Link uses these processes to retain both outgoing and incoming messages until processed.

The System-Link Outbox process stores messages sent from an environment whenever the destination for the message cannot be contacted. Periodically, System-Link checks destinations that

have entries in the outbox to determine if available. If a destination is available, System-Link then sends all remaining outbox entries for that destination.

Similarly, the System-Link Inbox process stores messages received for an environment if System-Link cannot immediately process the message. The message remains in the System-Link Inbox until System-Link can process the message and forward the processed document or transaction to the environment. The System-Link Inbox process can hold only messages that have a destination type of System-Link and that are set for Deferred or Immediate Preferred processing.

Host Presentation Server (HPS) process

The Host Presentation Server process (HPS) provides the functions that must be active in order to use the IDF Level 1 tasks in an XA environment. An XA environment must have one instance of a Host Presentation Server process to support IDF Level 1. This process must be running on an auxiliary machine that is an Intel-based server running Windows Server 2003 or Windows Server 2008.

Copy, rename, and delete environments

In XA 9.1, Link Manager supports copy, rename, and delete functionality for environments.

Copy environments

Use the Copy functionality to create a new product environment by copying an existing product environment. You need to be authorized to maintain the business environment in CAS and have access to both Maintain JAVA Server controls and Copy Environment tasks.

Rename environments

Use the Rename functionality to rename an existing product environment. You need to be authorized to maintain the business environment in CAS and have access to both Maintain JAVA Server controls and Rename Environment tasks.

Delete environments

Use the Delete functionality you to delete existing product environments. You need to be authorized to maintain the business environment in CAS and have access to both Maintain JAVA Server controls and Delete Environment tasks.

Synchronize Business Objects

On the Apply Update prompt window, users can now select the Run Integrator Synchronization option to have Link Manager run the Integrator Synchronize Business Object start-up task after applying the fix build.

Maintenance Control

The Maintenance Control functions allow you to choose how an XA application object is maintained. With maintenance control, you can specify that an application object is maintained locally by the XA environment, externally by another XA or IDF environment or by another system, or by both an external environment or system and the local environment.

The Object Settings object contains a record associated with each XA application object for which the maintenance control function has been implemented. The options in the Object Settings object control whether you allow maintenance by another XA or IDF environment or another system. Only XA objects that have a record in Object Settings can use maintenance control.

(99) Change Object Setting - Purchase Order

File Maintain Customize Navigation Help

Default [Print] [Edit] [Add]

Purchase Order

General

Description Purchase Order

Maintenance control support Both

Default replication destination 92 99 TO 88

Default external control Both

Created by 12:00 AM

Changed by NDRAGAM 10/11/2011 5:54 PM

[Update] [Cancel] [Help]

For example, a company can have three XA environments. One XA environment is used primarily for financial data. Because this environment is used to maintain vendor purchasing and payment information, it is the environment which has local control for the Vendors object. The other two XA environments are for production use. In these environments, the Vendors object is set to external control. No direct maintenance of the Vendors object occurs in these environments. Instead, the financial environment provides updated information directly and automatically to the Vendors object in the production environments.

For those XA application objects that do have records in Object Settings, the application object also has Replication Settings attributes that allow you to override the maintenance control values in the Object Settings object for an individual object record or a group of application object records. Replication Settings also include attributes that allow you to enter information about the source system for objects that are externally maintained. For example, in the XA production environments, the Replication Settings attributes related to a vendor have source system information that identifies the external system that updates the vendor information.

(99) Change Replication Settings Vendor - AL02 ALI

AL02 ALI Test

Replication destination: ION

Maintenance control: External

Source system reference: SERVER01

Source document reference: SD-MW002

Source document URL: www.ali.com

Update Cancel Help

How XA processes object information when maintenance control has been implemented depends on whether the local XA environment has control of that object. If the local XA controls the object, the object information can be shared with another environment or system through outbound processing. With outbound processing, a System-Link request for transmitting the object information automatically goes to the replication destination specified for the object when the object is updated or published. The outbound processing also generates a record for the Transaction Status object that identifies the application object, the user who updated the object, the transaction identifier and status, the date and time, and the destination to which the object information was sent. If logging is turned on for the System-Link Request object, the transaction status record also includes the System-Link request and response text.

If an external environment or system controls the object, new and updated object information can be shared with the local XA environment through inbound processing. How the inbound information is processed depends on the destination to which the object information is sent. If the destination is the Infor On-Ramp, the updated object information is received in the On-Ramp inbox as an inbound message. System-Link then processes the request document from the On-Ramp or inbox.




If the destination is an XA environment, System-Link processes the message according to the value in the Send type attribute for the System-Link destination.

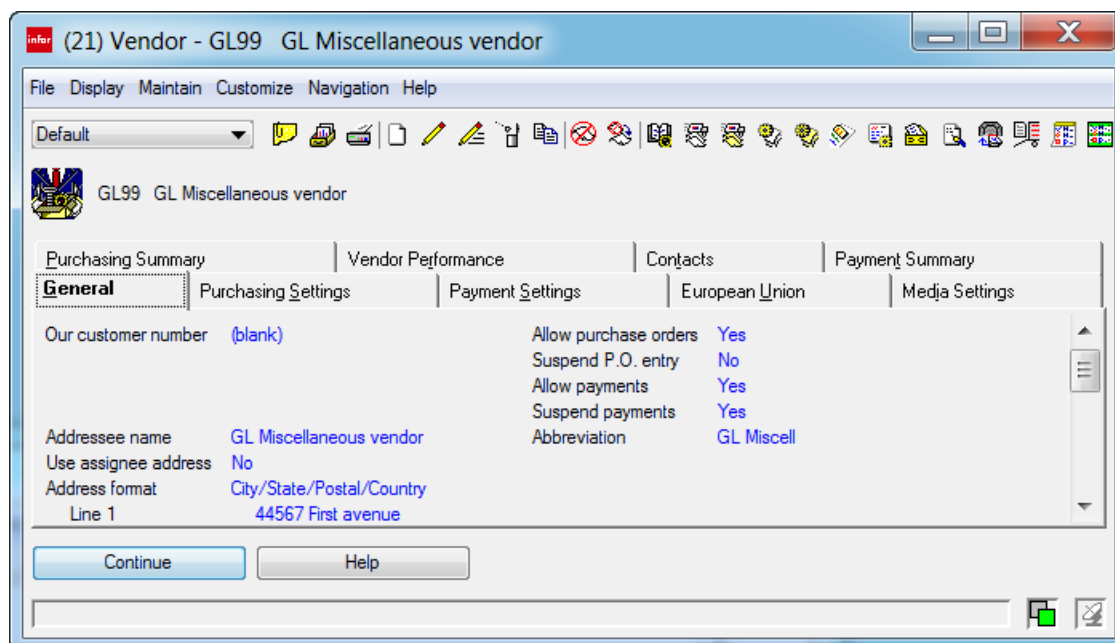
- If Send type = Immediate, the message goes directly to System-Link.
- If Send type = Deferred, the message does to the IDF inbox.
- If Send type = Immediate preferred, the message goes to System-Link. If System-Link is not available, the message goes to the IDF inbox.

In the destination environment, the System-Link Adapter process reads the documents from the IDF inbox.

When the local XA environment receives the updated object information from System-Link, a record is generated in the Transaction Status object that displays the external transaction identifier and the date and time the externally received information was processed. The status record also displays the transaction identifier and date and time information for the transaction that updated the application object in the local XA environment. The processing of these transactions also creates or updates an application object record in the XA application object.

The status line at the bottom of each card file now can display replication settings for an instance of an object. These icons display the replication settings:

-  (controlled locally)
-  (controlled remotely)
-  (controlled both locally and remotely)



Maintenance transactions

IDF supports common maintenance activities for objects such as Create, Change, and Delete. IDF also supports mass transactions such as Mass Change and Mass Delete.

Additional transactions have been defined for business objects that support maintenance control. These transactions are actually logical transactions for the normal maintenance transactions. You can use these logical transactions to specify that executed user exits work the same as the standard maintenance action user exits.

For objects that support maintenance control, you can set these transactions on the Transactions card on the Business Objects card file:

- **Local Change:** You can use this transaction for changing an object where the maintenance control flag is set to **Both**. Use this transaction for the maintenance of attributes that are controlled by the local application.
- **External Create:** You can use this transaction to create objects in the IDF system for remote systems. Use the External Create transaction for transactions coming in through System-Link and not through the IDF UI.
- **External Change:** You can use this transaction to change objects in the IDF system for remote systems. Use the External Change transaction for transactions coming in through System-Link and not through the IDF UI.
- **External Delete:** You can use this transaction to delete objects in the IDF system for remote systems. Use the External Delete transaction for transactions coming in through System-Link

and not through the IDF UI. You can set the Delete transaction for performing a hard delete or change to local.

- Change Replication Settings: Administrators can use this transaction to control the replication settings that are on an individual instance of an object. With the Change Replication Settings, administrators can change an object without regular maintenance being turned for the administrator. This transaction can be set for individual changes or Mass changes.

Material Logistics (ML)

Material Logistics replaces the ISL/MISL applications with enhanced capabilities (ISL/MISL discontinues at XA R10). The advantage is twofold: Ease of set up and the ability to take advantage of all the Power-Link features and functionality.

A very convenient and nonintrusive migration path has been developed for allowing any company movement from the host applications to IDF (Infor Development Framework).

ML features and functions include:

- Multiple items per Transfer Order
- Multiple Releases per line item per Transfer Order
- ML uses COM and/or CSM for shipping
- Change default location capability
- Use all of the Power-Link search, subset, view, sort and card tools
- ML uses MM, Scheduled Receipts for receiving
- Visibility of Transfer Orders (When, Where, Lead Times, Quantity)
- Ease of editing open and released transfer orders
- Attachments
- Combined reporting to gather data
- Deployable over the internet (With Net-Link)
- Ability to use MM transfer non-netable in-transit locations
- Easier to set up new locations and warehouse relations
- Multi-sourcing (Integration of Transfer Order Planning).

Pre-requisite applications for ML are:

- Integrator
- System Link
- Materials Management (MM)
- Cross Applications Support (CAS)
- Customer Order Management (COM) or Customer Service Management (CSM)
- Product Data Management (PDM) or Engineering Product Data Management (EPDM)
- Material Requirements Management (MRP) or Order-Based Product Management (OBPM).

Enterprise Warehouse

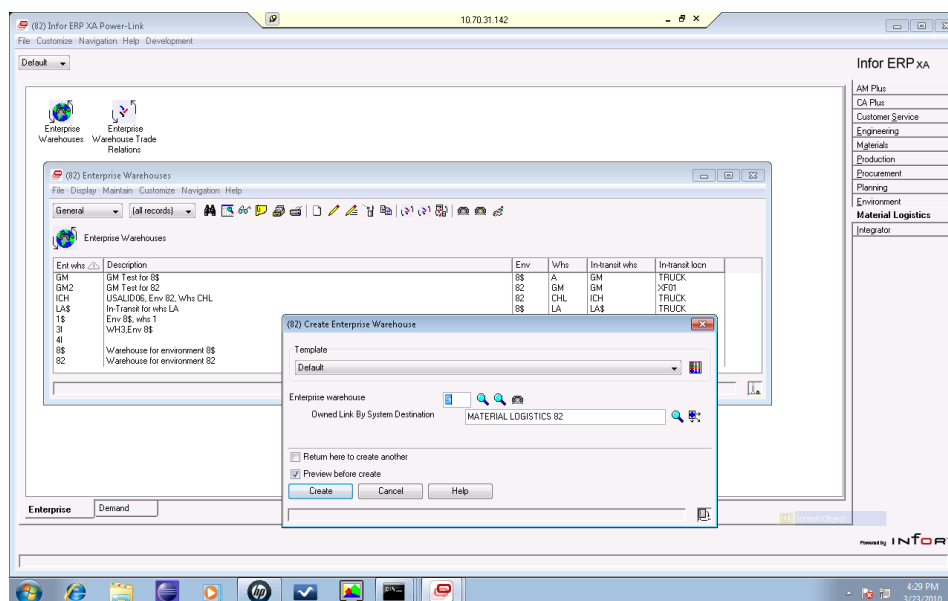
From the Enterprise Warehouse icon, we can drill down to create and maintain an Enterprise Warehouse. This function offers enhanced flexibility over the previous intersite warehouse definition.

From this list window, we can change certain attributes connected to this warehouse: Warehouse Description, System Link Destination, the environment, the planning warehouse, the in-transit warehouse, and the in-transit location. Then we can enable the enterprise for the warehouse that was selected.

The toolbar feature found on all Power-Link screens is also being used throughout Material Logistics objects. From a toolbar icon (Enterprise Warehouse Trade Relations), we can see the relationships between the supply and demand warehouses.

From the Enterprise Warehouse list window, we can see the three cards: General List, Replications and About. We can drill down into these cards to maintain and review how our Enterprise Warehouse was set up during creation.

Creating an enterprise warehouse uses the standard create icons from the Power-Link toolbar.

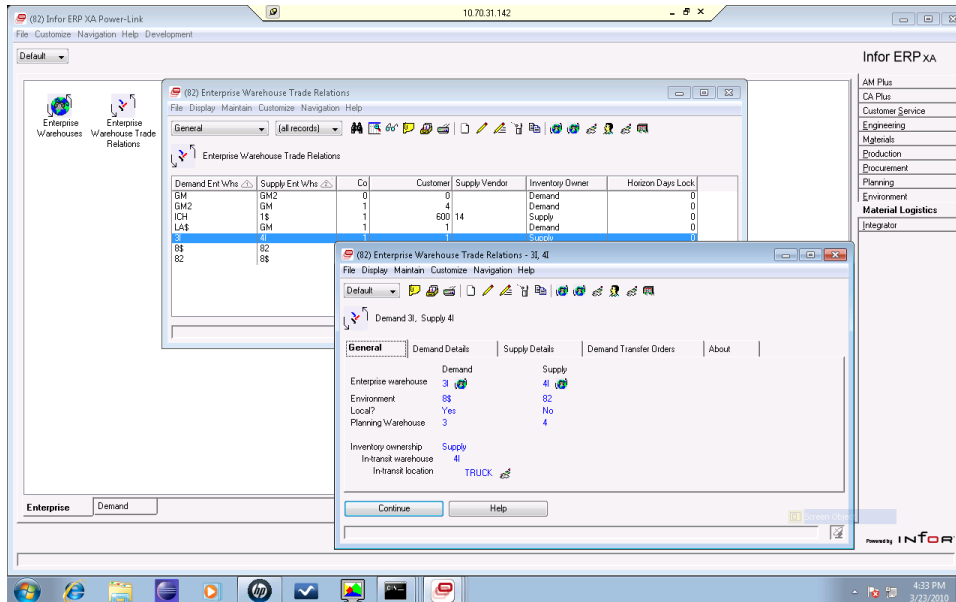


Enterprise Warehouse Trade Relations

From the Enterprise Warehouse Trade Relations Details, we can view the relationship between the "demand" enterprise warehouse and the "supply" enterprise warehouse.

We can view the customer number and associated company number that is set up for the "demand warehouse". This provides a supplier customer relationship for 'inter' and 'intra' warehouse relationships. Inventory ownership is also found on this screen and can be maintained from the cards associated to the relationship.

The default cards are; General, Demand Details, Supply Details, Replication and About.

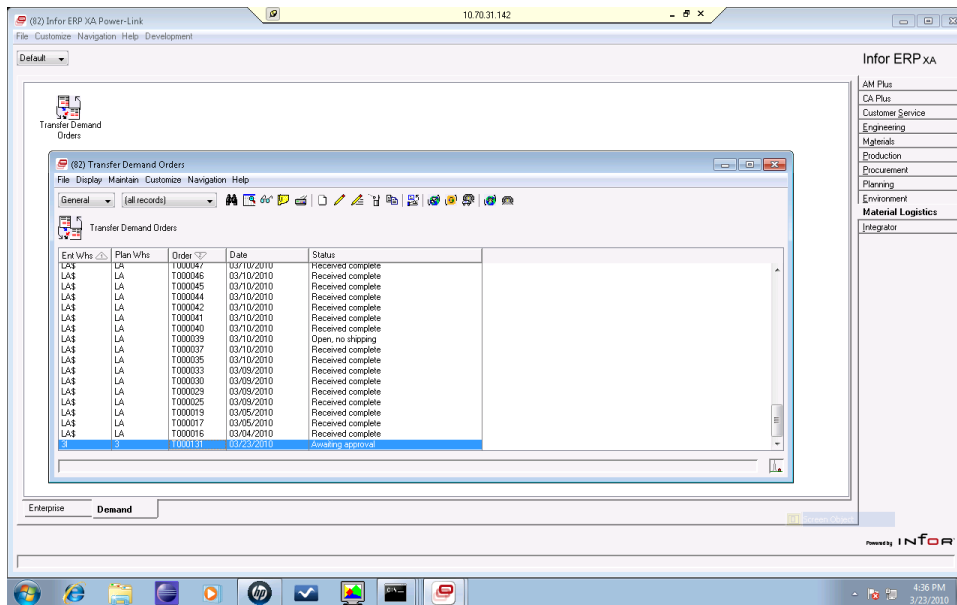


Transfer demand orders

From the Enterprise Demand Order Details, you can see the demand transfer order, the line items on the demand transfer order, and the supply order.

From this screen, you can also click on an Overview tab, a Ship-to tab and the About tab for accessing more attributes that have relevant data to be maintained or displayed.

The Overview tab displays the transfer order and line status. The Ship-to tab displays the ship-to address and allow you for adding to it or overwriting it. The About tab displays data important to the replication process.



Scheduled Receipts

Material Logistics is integrated with the Materials Management application and the user can use the Scheduled Receipts icon to easily receive the Material Logistics Transfer Orders.

System-Link destination

Each enterprise warehouse points to two System-Link destinations. This allows for a “Replication Destination”. One is for the environment that the enterprise warehouse is located in, called: Owned Link by System Destination. The enterprise warehouse also points at the “group destination” and uses it as its SOA replication destination.

For Material Logistics, several objects are published using System-Link destinations that represent other System-Link environments.

Each customer needs setting up a series of System-Link destinations for Material Logistics to work across environments. A System-Link destination needs to be created for each XA environment participating in ML orders. In addition, a group System-Link destination needs to be created that references all of the environment destinations.

Materials Management

Transaction templates

The inventory transaction templates are enhanced to provide consistent appearance and functionality. Transaction descriptions and template headers now include the transaction code with the client description. Attributes are sequenced on the template by the targeted action of the transaction. For example, Issue Item (IS) is an action against an item; therefore, item-related attributes are displayed first on the template.

Attributes are also grouped according to their relationships or function. For example, the grouping associated with the order group includes:

- Company
- Order type
- Order
 - Line
 - Release

New inventory transaction tasks

This table displays the new names of the inventory transactions that are available from Inventory Transaction History.

Green screen transaction name	New transaction name
Cyclic item QC complete	Approve Shelf Life Item (CQ)
Avg cost replacement	Change Item Average Cost (CR)
Cost adjustment	Change Item Cost (CA)
Location addition	Change Item Location (LA)
Batch/lot number change	Change Item Location Batch/lot (LQ)
Std cost replacement	Change Item Standard Cost (CS)
Planned mfg issue	Issue Planned Production Component (IP)
Unplanned component issue	Issue Unplanned Production Component (IU)
Component return to stock	Return Production Component (RS)
Return to vendor	Return Purchased Item to Vendor (VR)
Mfg component scrap	Scrap Production Component (SC)
Purchase order scrap	Scrap Purchased Item (SP)

The **Reverse** task is available for these new transactions:

- Change Item Average Cost (CR)
- Change Item Cost (CA)
- Change Item Standard Cost (CS)
- Issue Planned Production Component (IP)
- Return Production Component (RS)
- Scrap Production Component (SC)
- Scrap Purchased Item (SP)
- Scrap Item (SS)
- Return PO Item to Vendor (VR)

Transaction tasks grouped

Transaction tasks are grouped on the Maintain menu by type of activity such as issue, receive inventory, etc., or by purpose. The Maintain menu includes these groupings:

- Issue transactions
- Receipt transactions
- Adjustment transactions
- Procurement transactions
- Production transactions
- Scrap transactions
- Quality Control transactions
- Cost transactions

Materials Planning

The Materials Planning functions enable you to establish planning horizon dates, set date intervals for consolidating requirements, establish planning run execution and report options, and initiate a planning run from the Warehouses object. You can also review the planned orders and release the planned order (create an order) from the Requirements card on the Planning card file of Item Warehouses (Planning).

Warehouses Planning card

The new Planning card is maintainable when Materials Planning (MP) is installed and the warehouse is a planning warehouse.

(TT) Warehouse - DT2 REP 2ND CONT/PLANNED WHS

File Display Maintain Customize Navigation Help

DT2 REP 2ND CONT/PLANNED WHS

General Accounting Addresses **Planning**

Execution Options

Combine customer backlog orders	No	Minimum days to reschedule orders	0	Warehouse reschedule	Cannot auto reschedule	Cancel exception	Do not reschedule
Time-phased allocations	Yes	Rescheduling frozen zone	0	Due in past - M.O.	Do not reschedule	Contract for auto release	Required
Level to plan master level items	2	Maximum demand sources to track	0	Due in past - P.O.	Do not reschedule	Extract requisitions	(blank)
Clear quantity sold with extract	No	Track demand for quantity on hand	No	Due in past - Schedule	Do not reschedule	Safety stock lead time	(blank)

Reporting

Requirements planning	No	MLI requirements vs forecast customer orders	No	Horizon Values	
Items selected	All items	Purchase planning	No	Current date	10/03/1996
Items to include	All controlled by MRP	Order recommendation by item	No	Overdue days	15
Date interval	Full Detail	Order recommendation by exception	No	Release days	5
Order exception days	0	Reschedule activity	No	Allocation days	25
				Review days	20
				Horizon start	09/12/1996
				Release	10/10/1996
				Allocation	11/07/1996
				Review	10/31/1996

Combine Interval Days

Interval 1	10	Interval 3	22
Interval 2	15	Intervals 4 thru 9	5

Price Break Literals

Literals 5	(blank)	Literals 8	(blank)
Literals 6	(blank)	Literals 9	(blank)
Literals 7	(blank)		

Report Code 1 Period Intervals

1	0 (blank)	2	0 (blank)	3	0 (blank)	4	0 (blank)	5	0 (blank)	6	0 (blank)	7	0 (blank)
8	0 (blank)	9	0 (blank)	10	0 (blank)	11	0 (blank)	12	0 (blank)	13	0 (blank)	14	0 (blank)
15	0 (blank)	16	0 (blank)	17	0 (blank)	18	0 (blank)	19	0 (blank)	20	0 (blank)		

Report Code 2 Period Intervals

1	0 (blank)	2	0 (blank)	3	0 (blank)	4	0 (blank)	5	0 (blank)	6	0 (blank)	7	0 (blank)
8	0 (blank)	9	0 (blank)	10	0 (blank)	11	0 (blank)	12	0 (blank)	13	0 (blank)	14	0 (blank)
15	0 (blank)	16	0 (blank)	17	0 (blank)	18	0 (blank)	19	0 (blank)	20	0 (blank)		

Report Code 3 Period Intervals

1	0 (blank)	2	0 (blank)	3	0 (blank)	4	0 (blank)	5	0 (blank)	6	0 (blank)	7	0 (blank)
8	0 (blank)	9	0 (blank)	10	0 (blank)	11	0 (blank)	12	0 (blank)	13	0 (blank)	14	0 (blank)
15	0 (blank)	16	0 (blank)	17	0 (blank)	18	0 (blank)	19	0 (blank)	20	0 (blank)		

Continue Help

You must review the options on the Planning card before you initiate the planning run using the Planning Run host job.

Specify how the planning run must run. For example, whether customer backlog orders must be combined; or time phased allocations must be allowed? At what level must you plan master level items? How do you want rescheduling orders to be handled? Are contracts for auto-release required?

Specify the reports you want to print automatically when a planning run is executed.

- Requirements planning
- MLI requirements vs forecast customer orders
- Purchase planning
- Order recommendation by item
- Order recommendation by exception

If you specify to print the Requirements planning report, you can also specify the types of items, the level of details for the items, and date intervals associated with the items on the report.

Specify planning horizon values and dates used in the planning run. Use the Horizon Values section to specify a new current date and new displacements (days). For convenience in changing the planning horizons as time passes, displacements, or intervals, occur between four of the dates:

Start, Current, Release, and Review. You must only change planning dates immediately before a planning run, because between runs the dates are used on reports and displays and must correspond with the accompanied data. Because the data represents the last planning run, the dates must also represent the last planning run.

Specify the number of days for the combine codes. The Combine requirements code (1-9) in the Item Planning object identifies which of these combine interval codes is used during planning to determine time intervals for combining requirements associated with the item as part of planning orders.

Specify the unit of measure that must be used as the price break literal value for price breaks from the vendor to combine codes.

Specify the number of days for period intervals. The Requirements Planning Report displays total quantities of requirements and planned orders in these period intervals.

Planning Run host job

The planning run examines the balance of each inventory item, starting with end-items. On any date where requirements exceed the projected available on-hand, a planned order is created for the quantity required to satisfy the net required quantity and other order sizing requirements associated with the item. Therefore, the plan that is created is basically a collection of the requirements and the resulting planned orders for items that must be replenished. The planned orders are a tentative production and purchasing schedule.

You initiate the planning run using the new Planning Run host job. When you submit a Planning run, you can specify to:

- Extract customer demand including released intersite orders and expected customer orders from the respective databases for informational and planning purposes.
- Transfer the new master schedule (planned and firm planned orders) from MPSP to MRP.
- Auto-release manufacturing orders, purchase orders, and intersite orders.
- Auto-reschedule manufacturing orders, purchase orders, and REP production schedules.
- Run all items planned by MRP or only items planned by MRP that have had activity since the last planning run.

- Run only the bill of material levels you requested during planning run execution options or only bill of material levels you requested during planning run execution options that have had activity since the last planning run.

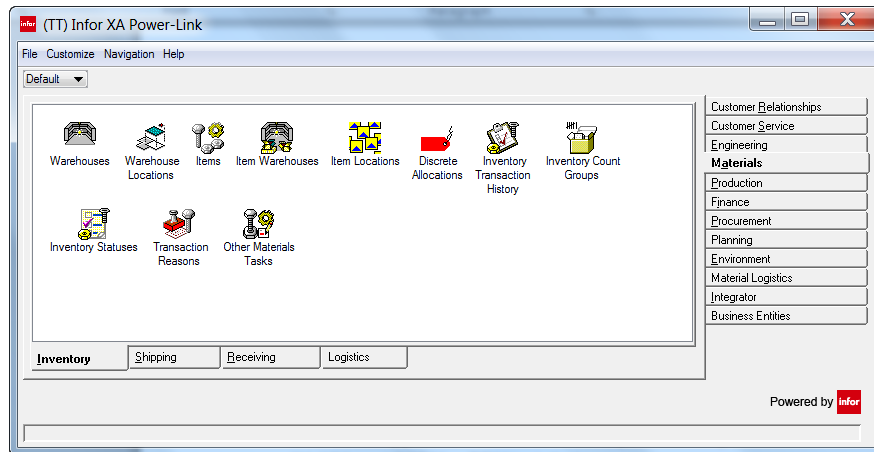
The screenshot shows the '(TT) Warehouse Host Jobs' window. On the left, a list of jobs includes 'Audit Allocation Quantities', 'Audit Location Quantities', 'Audit On-order Quantities', 'Cycle Count', 'Generate Reorder Recommendations', 'Physical Inventory', 'Planning Run' (highlighted with a blue icon), and 'Publish'. The main area is divided into 'Content' and 'Confirmation' tabs. Under 'Content', the 'Execute' checkbox is checked. Below it, there are fields for 'Description', 'Subset' (set to '(selected record)'), and 'Sort' (set to '(default)'). The 'Options' section contains several settings: 'Extract independent demand' (Yes/No), 'Transfer MPSP orders' (Yes/No), 'Auto-release manufacturing orders' (Yes/No), 'Auto-release purchase orders' (Yes/No), 'Auto-release intersite orders' (No), 'Auto-reschedule manufacturing orders' (Yes/No), 'Auto-reschedule purchase orders' (Yes/No), 'Auto-reschedule schedules' (Yes/No), 'Planning run type' (Full planning run - Generation), 'Start date' (//), and 'Start time'. At the bottom are 'Submit', 'Cancel', and 'Help' buttons.

Warehouses General card

A new Assign planning defaults option sets warehouse values back to their default value or clears planning warehouse values. Specify Yes for the Planning warehouse attribute and click the Assign planning defaults option to set default warehouse values. Specify No for the Planning warehouse attribute and click the Assign planning defaults option to clear planning warehouse values. Values are updated when you click Update.

Item Warehouses (Planning)

Item Warehouses (Planning) has been added to the Planning application when Materials Planning is installed. The addition of the Item Warehouses (Planning) object allows planners to stay within the Planning application for viewing item warehouse planning. Another advantage of opening the Item Warehouses (Planning) object from the Planning application is that Item Warehouses displays to the Planning view.



Planning view

The Planning view added onto Item Warehouses allows planners to view planning details, exceptions, release exceptions, and recommendations for the item warehouses. These views are controlled by the subset selected. A red exclamation point in the first column indicates that the item has at least one planning exception.

R-Rvw and S-Rvw columns are also in the Item Warehouse Planning view. R-Rvw means Recommendation Reviewed Show and S-Rvw means Schedule Reviewed Show. When R-Rvw is checked, the order for that item warehouse has been reviewed. When S-Rvw is checked, the schedule for that item warehouse has been reviewed.

Description	Lead time	Primary vendor	Stk UM	On-hand	On-order	Allocated	Available	R-Rvw	S-Rvw
NDOW DEMO	Manufacture		EA	-751.000			-751.000		✓
DD COMP	Manufacture		EA			30.000	-30.000		
DD FAMILY COMPONENT	Manufacture		EA		30.000		30.000		✓
ycle	Manufacture		EA	35.000	160.000	75.000	120.000		
Wheel	Manufacture		EA		855.555	270.000	585.555		
ycle	Manufacture		EA						
RENT FOR FEATURE	Manufacture		EA	-15.000	2.000		-13.000		
A PARENT 201	Manufacture		FT	9.985.000	20.000	11.000	9.994.000		
A PARENT 301	Manufacture		OT	9.967.000	51.000		10.018.000		

Item Warehouse subsets

Item Warehouse subsets have been renamed and additional subsets have been added for planning.

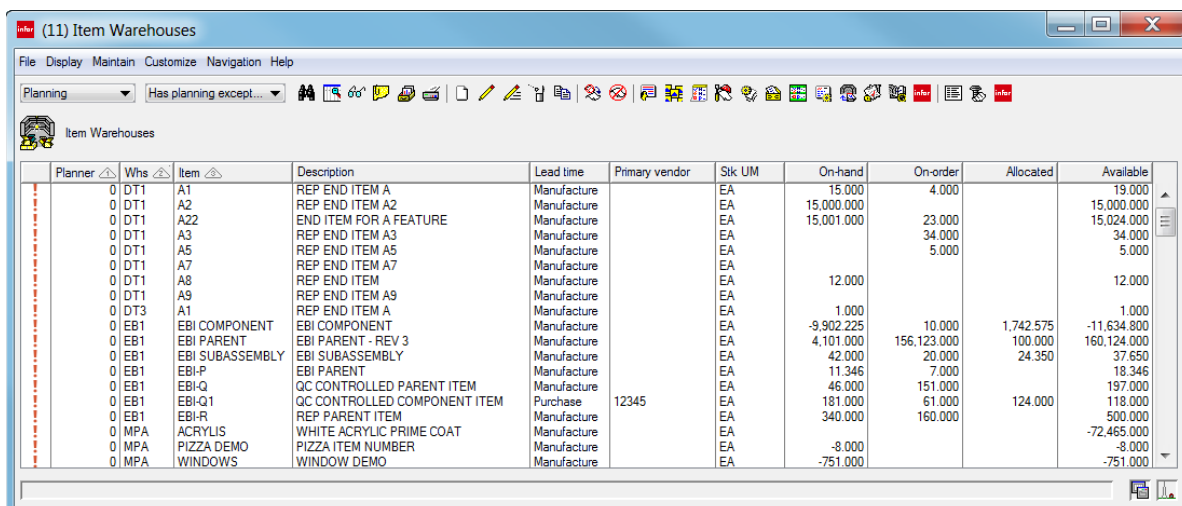
- Renamed existing subsets

Old subset names	New subset name
For cycle count class	Cycle count class
MRP has recommendations	Has planning recommendations

Old subset names	New subset name
MRP has release exception	Has planning release exceptions
MRP net change items	Included in net change planning

- New subsets
 - Has planning details
 - Has planning exceptions
 - In last planning run
 - Master level items
 - Planner...

These subsets provide you with the ability of narrowing the list of item warehouses or planning details for item warehouses to only the details you desire. For example, you can limit your view to only those items that have planning exceptions in the last planning run or only those items that were active in the last planning run. In either case, the appropriate subset is available in Item Warehouses.

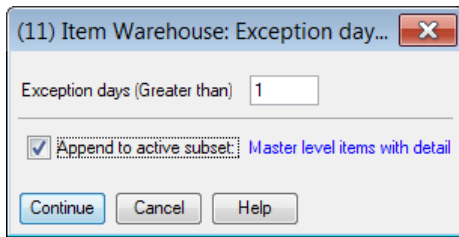


Planner	Whs	Item	Description	Lead time	Primary vendor	Stk U/M	On-hand	On-order	Allocated	Available
0 DT1	A1	REP END ITEM A	REP END ITEM A	Manufacture		EA	15.000	4.000		19.000
0 DT1	A2	REP END ITEM A2	REP END ITEM A2	Manufacture		EA	15.000.000			15.000.000
0 DT1	A22	END ITEM FOR A FEATURE	END ITEM FOR A FEATURE	Manufacture		EA	15.001.000	23.000		15.024.000
0 DT1	A3	REP END ITEM A3	REP END ITEM A3	Manufacture		EA		34.000		34.000
0 DT1	A5	REP END ITEM A5	REP END ITEM A5	Manufacture		EA		5.000		5.000
0 DT1	A7	REP END ITEM A7	REP END ITEM A7	Manufacture		EA				
0 DT1	A8	REP END ITEM	REP END ITEM	Manufacture		EA	12.000			12.000
0 DT1	A9	REP END ITEM A9	REP END ITEM A9	Manufacture		EA				
0 DT3	A1	REP END ITEM A	REP END ITEM A	Manufacture		EA	1.000			1.000
0 EB1	EBI COMPONENT	EBI COMPONENT	EBI COMPONENT	Manufacture		EA	-9,902.225	10.000	1,742.575	-11.634.800
0 EB1	EBI PARENT	EBI PARENT - REV 3	EBI PARENT - REV 3	Manufacture		EA	4,101.000	156,123.000	100.000	160,124.000
0 EB1	EBI SUBASSEMBLY	EBI SUBASSEMBLY	EBI SUBASSEMBLY	Manufacture		EA	42.000	20.000	24.350	37.650
0 EB1	EBI-P	EBI PARENT	EBI PARENT	Manufacture		EA	11.346	7.000		18.346
0 EB1	EBI-Q	QC CONTROLLED PARENT ITEM	QC CONTROLLED PARENT ITEM	Manufacture		EA	46.000	151.000		197.000
0 EB1	EBI-Q1	QC CONTROLLED COMPONENT ITEM	QC CONTROLLED COMPONENT ITEM	Purchase	12345	EA	181.000	61.000	124.000	118.000
0 EB1	EBI-R	REP PARENT ITEM	REP PARENT ITEM	Manufacture		EA	340.000	160.000		500.000
0 MPA	ACRYLIS	WHITE ACRYLIC PRIME COAT	WHITE ACRYLIC PRIME COAT	Manufacture		EA				-72.465.000
0 MPA	PIZZA DEMO	PIZZA ITEM NUMBER	PIZZA ITEM NUMBER	Manufacture		EA	-8.000			-8.000
0 MPA	WINDOWS	WINDOW DEMO	WINDOW DEMO	Manufacture		EA	-751.000			-751.000

Additional Item Warehouse subsets have been added to the view for MLI:

- Exception days greater than...
- Master level items not reviewed
- Master level items with detail
- Planning orders not reviewed

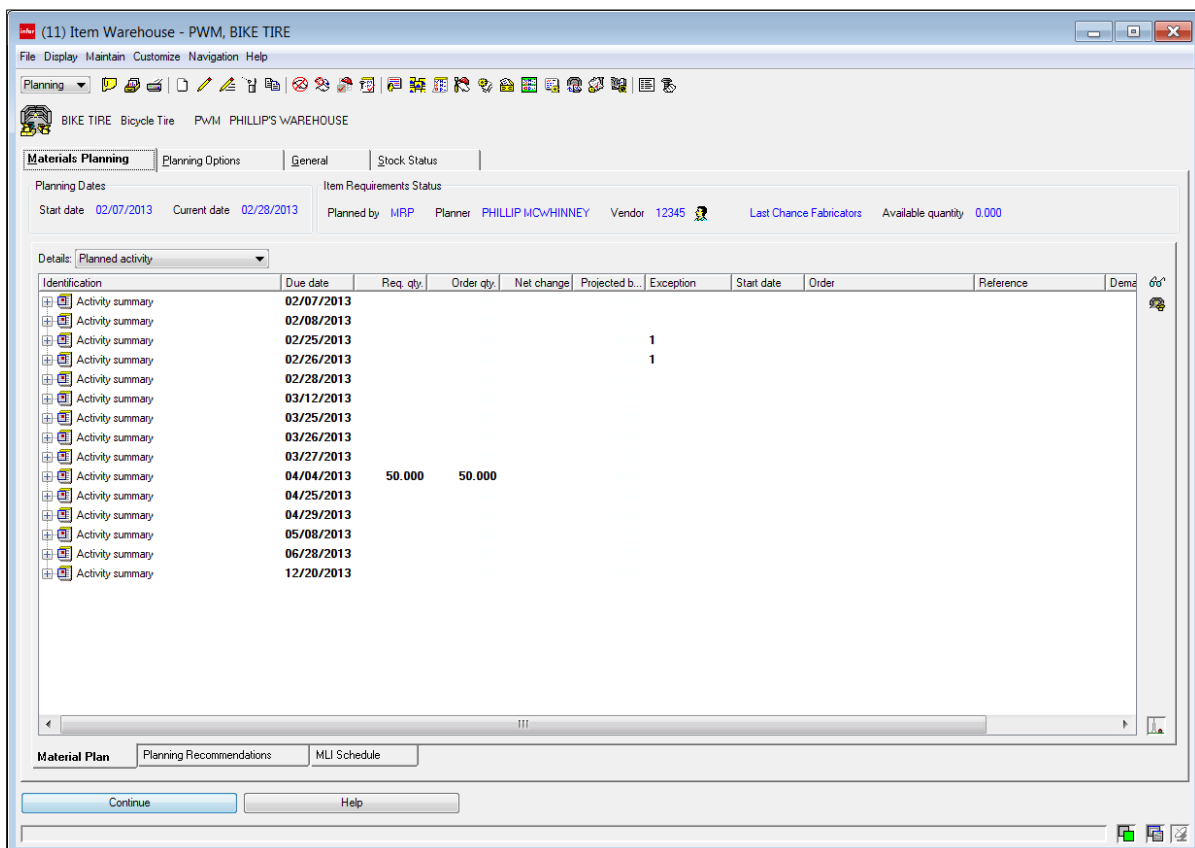
These Master level items (MLI) subsets provide you with the ability of narrowing the list of item warehouses with MLI schedules to display only those you desire. You can use the Exception days greater than... for narrowing the list to those with exception days greater than the date you set. You can also append this subset to the currently selected subset. For example, you may want to only view those items MLI items with detail and that have exception days greater than 1. You must first use subset Master level items with detail. Then select Exception days greater than set to 1 and append it onto the Master level items with detail subset.



Item Warehouses Planning card file

Note: In SH54061, the Requirements card on the Item Warehouse Planning card file has been renamed to Materials Planning card. The Planning card has been renamed to Planning options.

The Planning card file displays when you select **Item Warehouse details** from the Display menu for an item warehouse or double-click the item warehouse line. The Planning card file lets you view material plan needs (requirements) for the item and replenishment orders, both released and planned, to fill those needs. The Planning card file consists of four cards: Materials Planning, Planning Options, General, and Stock Status. The Planning Options, General, and Stock Status cards are also viewable in the Default card file. The new Materials Planning (formally Requirements) card on the Planning card file provides planners with a complete view of material plan requirements for planned activity or recommended activity.



Materials Planning card

These three tabs have been added to the Materials Planning card.

- **Material Plan** (previously the Requirements view on the Requirements card) – planners can review planning recommendations, check the impact of an order, and to review peg-to relationships of master scheduled components.

Materials Planning | Planning Options | General | Stock Status

Planning Dates: Start date 02/07/2013 Current date 02/28/2013

Item Requirements Status: Planned by MRP Planner PHILLIP MCWHINNEY Vendor (blank) (blank) Available quantity 10.000

Details: Planned activity

Identification	Due date	Req. qty.	Order qty.	Net change	Projected b...	Exception	Start date	Order	Reference	Dema
Activity summary	02/20/2013		25.000	25.000	35.000	1				
Activity summary	02/28/2013	150.000	135.000	-15.000	20.000	1				
Activity summary	03/15/2013	20.000		-20.000						
Activity summary	03/29/2013	225.000	225.000							
Activity summary	04/30/2013	180.000	150.000	-30.000	-30.000					

Material Plan | Planning Recommendations | MLI Schedule

- **Planning Recommendations** (displayed below) – planners can review lead times, order release settings, and all MRP recommendations for the item.

Materials Planning | Planning Options | General | Stock Status

Planning Dates: Start date 02/07/2013 Current date 02/28/2013

Item Requirements Status: Planned by MRP Planner PHILLIP MCWHINNEY Vendor (blank) (blank) Available quantity 0.000

Lead Times:

	Standard	Variable	Adjustment	Average	Cumulative	Review	Vendor	Safety
Manufacture	2.0	0.0	0.0	0.0	0.0			
Purchase	0.0		0	0.0		0.0	0.0	0.0
Material					0.0			

Order Release Settings:

Manufacture auto release No Item reschedule Default to warehouse P.O. time fences: Reviewed No

Purchase auto release No Rescheduling frozen days 0 02/28/2013 Firm Authorized 0 Changed by (blank)

Contract required Default to warehouse Minimum days to reschedule 0

MRP Recommendations:

Action	Exception	Make/buy	Order	Sub-type	Vendor	Start date	Due date	Quantity
	12 = Past due	M	M000540	M.O.		02/08/2013	02/11/2013	340.000
		M	M000650	M.O.		02/25/2013	02/27/2013	33.000
		M	M000770	M.O.		02/25/2013	02/27/2013	315.000
	33 = Expedite	M	M000710	M.O.		02/25/2013	02/27/2013	44.000
	33 = Expedite	M	M000720	M.O.		02/25/2013	02/27/2013	333.000
		M	M000850	M.O.		02/25/2013	02/28/2013	15.000
		M	M000780	M.O.		02/28/2013	03/04/2013	167.000
		M	M000730	M.O.		07/15/2014	08/02/2014	60.000
		M	M000620	M.O.		08/08/2014	08/15/2014	69.000
		M	M000790	M.O.		08/08/2014	08/15/2014	169.000
		M	M000810	M.O.		08/06/2014	08/15/2014	166.000
		M	M000820	M.O.		08/05/2014	08/15/2014	334.000
		M	M000800	M.O.		08/08/2014	08/20/2014	37.000

Material Plan | **Planning Recommendations** | MLI Schedule

- **MLI Schedule** – planners can determine the greater demand, see if the planner requirements meet the forecasted demand or fall below the greater demand, and determine when items are needed. The MLI Schedule displays both summary totals by forecast period and by the day (daily summary) within a forecast period for planner requirements, forecast demand, and expected receipt.

Materials Planning | Planning Options | General | Stock Status

Planning Dates: Start date 02/07/2013 Current date 02/28/2013

Item Requirements Status: Planned by MRP Planner PHILLIP MCWHINNEY Vendor (blank) (blank) Available quantity 10.000

Master level Multiple source Forecast Yes Periods 3 Days / period 22 Reviewed No Changed by MOSHER 01/24/2014 1:56 PM

Details: MLI Schedule activity

Identification	Date	Planner requirem...	Greater demand	Plan vs demand	Forecast demand	Order demand	Expected receipts	Expected inventory	Start date
Forecast Period	02/20/2013	0.000	0.000	0.000	0.000	0.000	25.000	35.000	
Daily Summary	02/20/2013						25.000	35.000	
Forecast Period	02/28/2013	170.000	150.000	20.000	71.590	150.000	135.000	20.000	
Daily Summary	02/28/2013	150.000	150.000		71.590	150.000	135.000	20.000	
Daily Summary	03/15/2013	20.000	150.000	20.000				20.000	
Forecast Period	03/29/2013	225.000	100.000	145.000	75.000	100.000	225.000	145.000	
Daily Summary	03/29/2013	225.000	100.000	145.000	75.000	100.000	225.000	145.000	
Forecast Period	04/30/2013	180.000	100.000	225.000	75.000	100.000	150.000	195.000	
Daily Summary	04/30/2013	180.000	100.000	225.000	75.000	100.000	150.000	195.000	

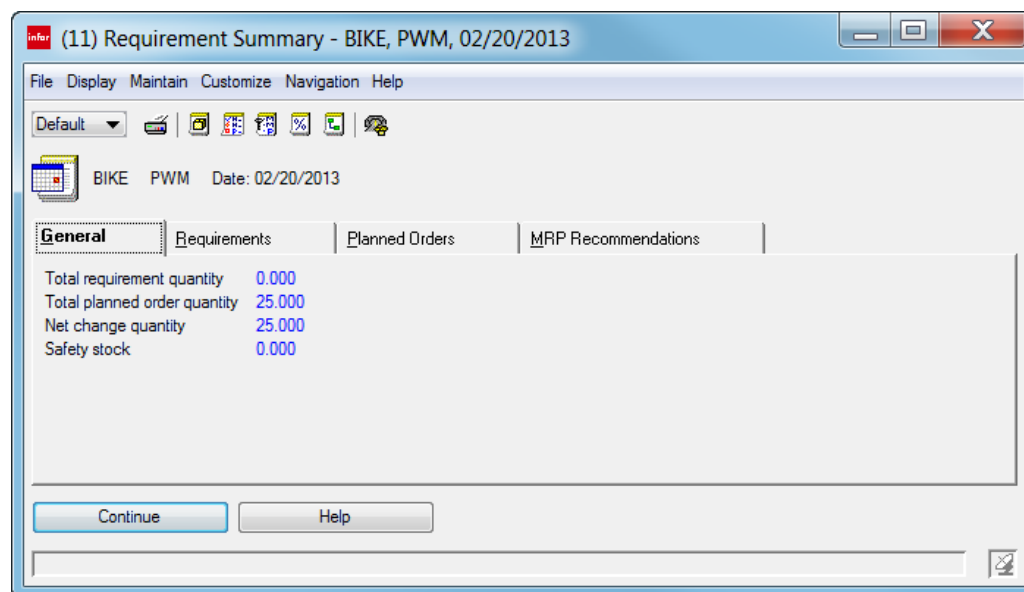
Material Plan | Planning Recommendations | **MLI Schedule**

- MLI Period Summary card – This card displays general information for the selected (MLI) forecast period. You can access this card from the **MLI Schedule** tab by right-clicking on a **Forecast Period** and selecting **Display** and then **MLI Period Summary details**.
- MLI Schedule Daily Summary list – This list displays dates and general information for all the daily summaries associated with the selected (MLI) forecast period. You can access this list from the **MLI Schedule** tab by right-clicking on a **Forecast Period** and selecting **Display** and then **MLI Schedule Daily Summary**.
- MLI Daily Summary card – This card displays general information for the selected (MLI) daily summary under a forecast period. You can access this card from the **MLI Schedule** tab by right-clicking on a **Daily Summary** and selecting **Display** and then **MLI Daily Summary details**.
- Requirements (Consolidated) list – This list displays two records for related pairs of requirements and any unpaired requirement, respectively. You can access this list from the **MLI Schedule** tab by right-clicking on a **Daily Summary** and selecting **Display** and then **Requirements (Consolidated)**.

You can view the Requirements (Consolidated) detail card by selecting a requirement source. Then select **Display** and **Requirements (Consolidated) details**.

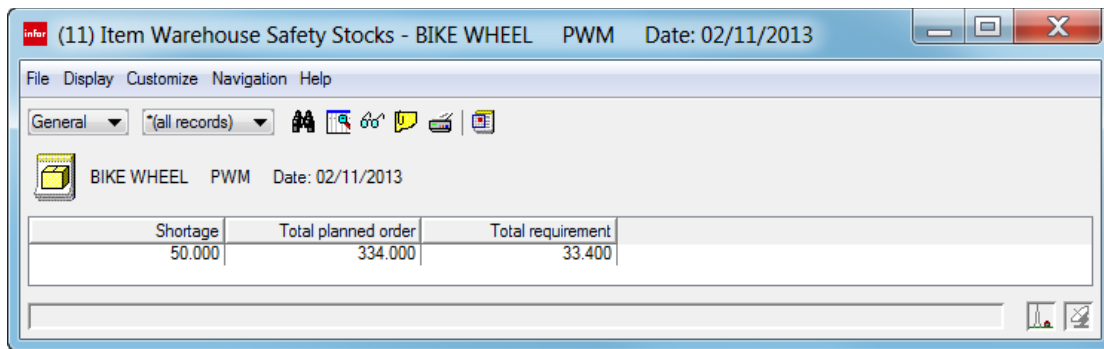
Requirement Summary details

The Requirement Summaries object contains four cards. The Requirements Summary details displayed are only for the selected activity summary.



Item Warehouse Safety Stocks

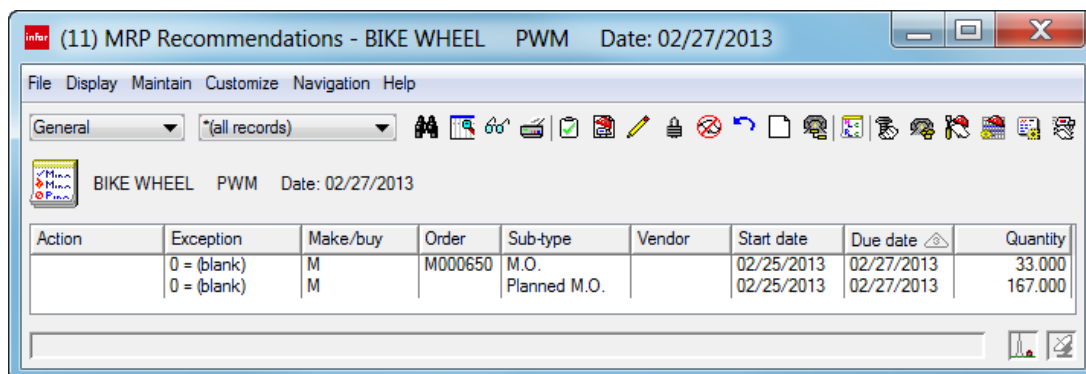
The Item Warehouse Safety Stocks object displays the quantity of an item to be carried in stock for meeting unexpected demand or late delivery.



Shortage	Total planned order	Total requirement
50.000	334.000	33.400

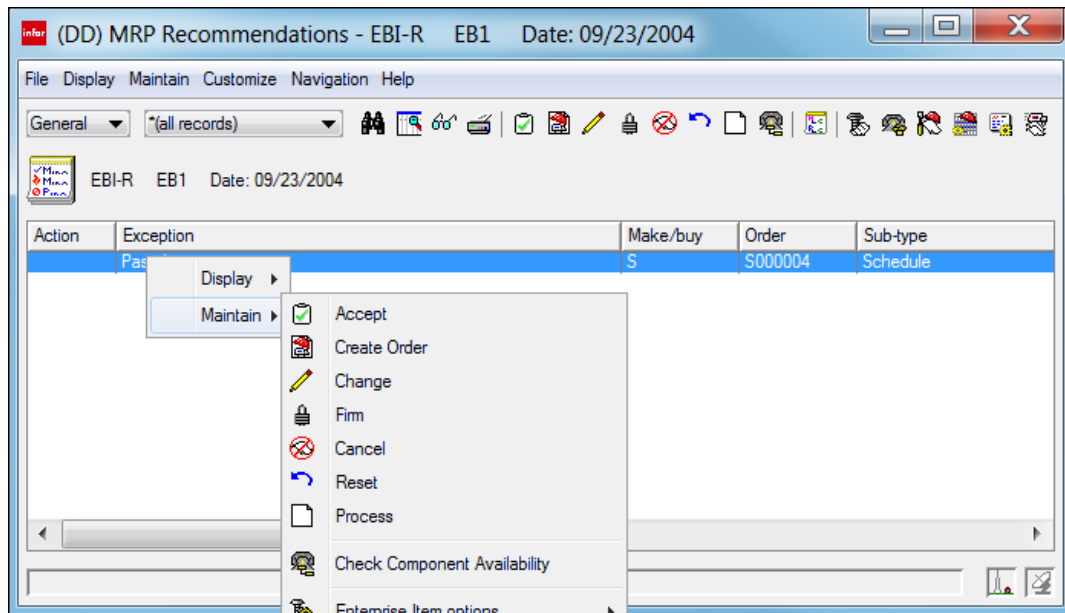
MRP Recommendations

The MRP Recommendations object displays the recommended orders details as planned by MRP for the selected activity summary. The details displayed include recommended action, exceptions, make/buy code, order, sub-type, vendor, start and due dates, and quantity. The MRP Recommendations object has multiple subsets.



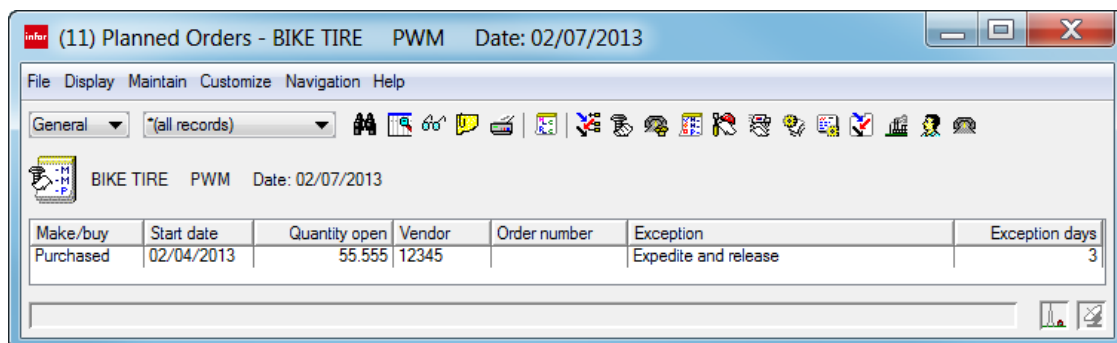
Action	Exception	Make/buy	Order	Sub-type	Vendor	Start date	Due date	Quantity
	0 = (blank)	M	M000650	M.O.		02/25/2013	02/27/2013	33.000
	0 = (blank)	M		Planned M.O.		02/25/2013	02/27/2013	167.000

You can perform maintenance tasks by right-clicking a MRP recommendation and selecting from the Maintain menu.



Planned Orders

The Planned Orders object displays the planned order(s) details for the selected activity summary, which include the make/buy code, start date, open quantity, vendor, order number, exceptions, and exception days. The Planned Order object has three subsets: all records, Orders with shrinkage, and Outside review horizon.



Planned Orders Shrinkage

The Planned Orders Shrinkage object displays the requirements for the quantity of planned scrap and other losses expected before an order is received into stock. Planning automatically suggests planned orders taking shrinkage into account. The Planned Orders Shrinkage object has two subsets: all records and Orders with shrinkage.

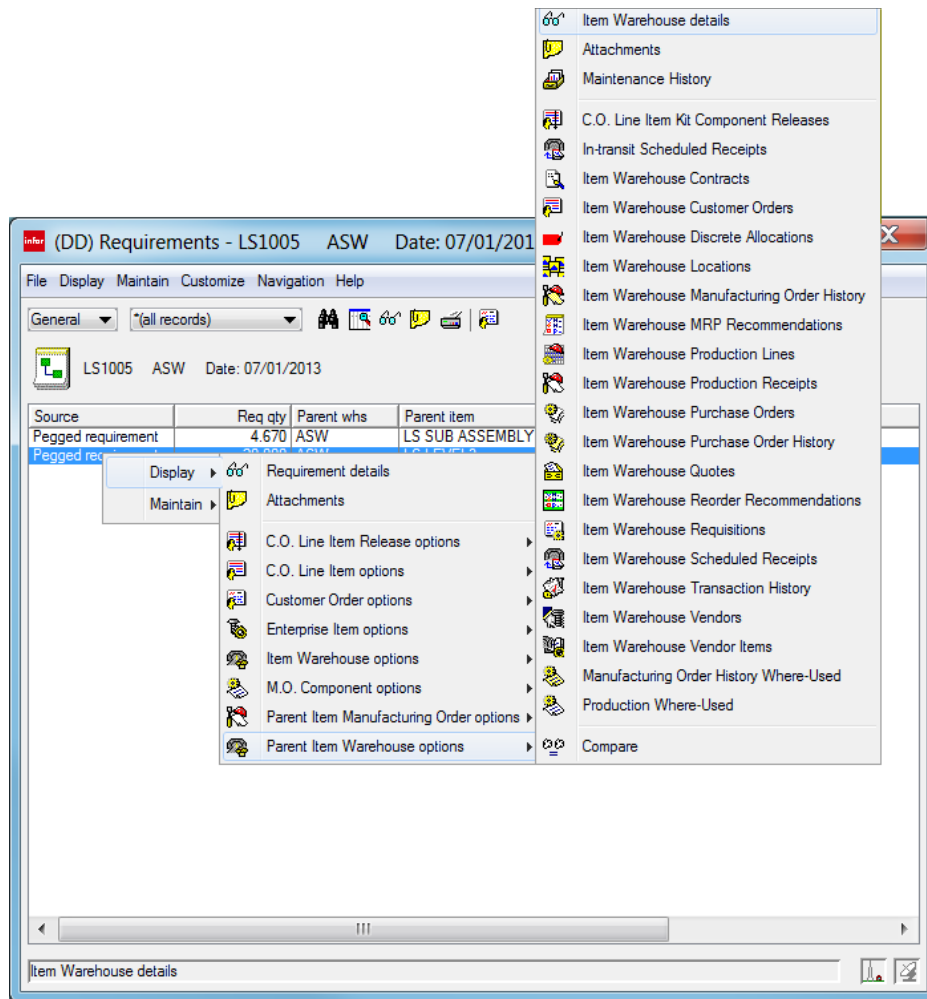


Requirements

The Requirements object displays the details for each item requirement of the selected activity summary. The requirement details displayed are source, quantity, parent warehouse, parent item, description, order, parent low level, and APC conf ID. The Requirements object has two subsets: all records and Demand requirements.

Source	Req qty	Parent whs	Parent item	Description	Order	Parent low level	APC conf ID
Requirement	50.000				1.CO. 355.400	1	
Customer order blanket	50.000				1.CO. 355.400	1	
Pegged requirement	230.000	PWM	BIKE	Bike - BuyDesign		1	
Pegged requirement	150.000	PWM	TRIKE	Tricycle		1	

You can view the parent item details for the pegged requirements by right-clicking and selecting **Display > Parent Item Warehouse options >Item Warehouse details**.



Multi-database

In release 9, XA provides support for SQL Server 2005. Microsoft has released a new driver for SQL Server 2005 that includes a different connection syntax than the SQL Server 2000 driver.

The SQL Server 2005 driver must be used for transitional SQL Server 2008 support.

Net-Link

Net-Link now supports a list of restricted user IDs. XA blocks any attempt for logging on to Net-Link by any of the user IDs on the list. The restriction occurs before the user can log on to the System i. A message appears telling the user that the user ID cannot be used for logging on to the specified environment. This restriction provides additional protection for critical system IDs.

Net-Link supports embedded attachments (see “Media files”). Additionally, with embedded attachments, the Net-Link processes can be running on the host machine or on an auxiliary machine. The requirement for the Net-Link Server process associated with running on a Windows auxiliary machine applies only to traditional attachments.

Procurement Management

In release 9, the Procurement Management application has been updated with the following enhancements.

Redesign of objects

Procurement Management (PM) has redesigned objects to consolidate object information for faster and more efficient use. The object lists and card files are now optimized for 1280 by 1024 screen resolution in Power-Link and Net-Link. Views on list cards have reduced presentation widths, improved column headings, and an improved arrangement of columns for increased visibility of object information. Some views now use icons to represent status text. For example, the General view in the Purchase Orders object uses icons to represent the Approval status, Print code, Vendor acceptance, Receiving status, Invoicing status, and Order status. Also, some object lists have new subsets for narrowing the focus of these lists to specific types of objects or object conditions. For example, the new Approval requested subset in the Purchase Orders object displays only purchase orders for which approval is pending.

For most PM objects, the reorganization of object information included combining card files and consolidating multiple cards into one or two compound cards. Card files have been combined so that a single card file handles object information whether or not multiple currency support is active and International Financial Management (IFM) is installed. The consolidation of multiple cards into one or two compound cards allows viewing of comprehensive information for an object without navigating among card files, cards, and related objects. Additionally, some attributes have been renamed and reordered on cards and templates and on host print and host job dialogs. Other attributes have been added and deleted. For example, these samples display changes made to the Buyers object.

The first example displays the previous version of the General card.

(99) Change Buyer - 2254 Lori Scott

File Display Maintain Customize User Navigation Help

Default [Icons]

2254 Lori Scott

General | Buyer Performance

Name: Lori Scott

User ID: 2254

Department: 222

Telephone: 5555885335 ext. 496

Fax: 5555885333 ext. 201

E-mail address: lori.scott@infor.com

Average orders: 3

IFM approver: SCOTLOR

Last maintained date: 02/23/2010

[Update] [Cancel] [Help]

The next example displays the previous version of the Buyer Performance card.

(99) Change Buyer - 2254 Lori Scott

File Display Maintain Customize User Navigation Help

Default [Icons]

2254 Lori Scott

General | **Buyer Performance**

Rating: 0.59

Number of orders late: 50

Number of orders early: 130

Number of over shipments: 6

Number of under shipments: 8

[Update] [Cancel] [Help]

The redesigned Buyers information combines the general information and the performance information on a new General card that also includes a list of activities for the buyer. In addition, new cards display lists of related objects that are automatically subset for the selected object. For example, the new Requisitions card displays the list of requisitions that belong to buyer 2254.

(99) Change Buyer - 2254 Lori Scott

File Display Maintain Customize User Navigation Help

Default

2254 Lori Scott

General | Items | Requisitions | Orders | Quotes/Contracts

Name: Lori Scott
 User ID: 2254
 Department: 222
 Average orders: 3
 IFM approver: SCOTLOR
 Last maintained date: 02/23/2010

Office: 5555885335 ext. 496
 Fax: 5555885333 ext. 201
 Mobile: 5555885332
 E-mail address: lori.scott@infor.com

Performance
 Rating: 0.59
 Number of orders late: 50
 Number of orders early: 130
 Number of over shipments: 6
 Number of under shipments: 8

Activity

Status	Date	Type	Summary
Not reviewed	03/06/2012	P.O. created	P001285 Vendor: APOMI5
Not reviewed	03/06/2012	P.O. item created	P001285 Line: 1 A2 Vendor: APOMI5
Not reviewed	03/06/2012	P.O. created	P001284 Vendor: APOMI5
Not reviewed	03/06/2012	P.O. item created	P001284 Line: 1 A2 Vendor: APOMI5
Not reviewed	03/06/2012	P.O. created	P001283 Vendor: APOMI5
Not reviewed	03/06/2012	P.O. item created	P001283 Line: 1 A2 Vendor: APOMI5
Not reviewed	03/06/2012	P.O. item created	P001282 Line: 1 A2 Vendor: APOMI5
Not reviewed	03/06/2012	P.O. created	P001282 Vendor: APOMI5
Not reviewed	03/06/2012	P.O. price changed	P0M0001 Line: 2 A2 Diff: 9990.0000 Old: 10.0000 New: 10...
Not reviewed	02/28/2012	P.O. inventory transaction	P000685 Vendor: APOMI1 Receipt to stock
Not reviewed	02/28/2012	P.O. inventory transaction	P000685 Vendor: APOMI1 Receipt to stock

Update Cancel Help

See SH15832, Procurement Management for release 9.1, for instructions to make the redesigned views and card files the default choices for the PM objects.

Application Settings

The Purchase Orders card for Procurement Management in the Application Settings object has been improved. The attributes on the Purchase Orders card have been reorganized to group the attributes more logically by purpose. The Recalculate dock and stock date attributes have been removed from the Application Settings object. The options for recalculating dock and stock dates are now handled as preferences in the Purchase Order Items and Purchase Order Item Releases objects. Also, new attributes for Requisition approval and Purchase order approval have been added to the Purchase Orders card in Application Settings.

The Purchase Orders card also contains the Include item receiving operations option. This option allows you to control whether the Include item receiving operations attribute is visible in the Purchase Order Items and Purchase Order Item Releases objects. If you do not specify receiving operations at the item level, you can set this option to No in Application Settings instead of specifying No in the Include item receiving operations attribute for each purchase order item or item release.

The Errors section of the Purchase Orders card now contains new Contract expired (create) and Contract expired (change) attributes. These attributes allow you to specify whether a warning message or an error message appears when you are creating a purchase order item or item release associated with a contract that has expired.

Warehouse Vendor Items

Vendor item processing has been enhanced with the addition of a new Warehouse Vendor Items object, which provides procurement control by warehouse for each vendor and item. Warehouse Vendor Items includes new vendor price, vendor unit of measure and unit of measure conversion information. Now purchase orders can utilize specific item prices for each vendor and warehouse. Also, vendor statistics are now captured at both the warehouse vendor item and vendor item levels. Users who have custom modifications based on Vendor Items may want to upgrade their changes for using the new Warehouse Vendor Items object.

Quotes and Contracts

The Quotes object contains a new Quote UM (unit of measure) attribute that can be set to the stocking unit of measure, purchasing unit of measure, or vendor unit of measure for the item in the quote. The Quote UM provides a quick and flexible way to see the unit of measure values for the item and choose the one you want related to the quote. In addition, the item information for the quote displays the conversion factors for converting the quote unit of measure, purchase unit of measure, and vendor unit of measure values to the stocking unit of measure.

The detailed information for a quote also includes a Quantity/Prices section that provides a comparison of prices in the Quote UM, Stocking UM, Purchase UM, and Vendor UM values. This section gives you a quick way to compare the item price by unit of measure and, if quantity price breaks are specified, by price break quantities. The item price is displayed in the currency specified for the quote.

The Quotes and Contracts objects now support creation of a purchase order item.

Buyers

The Buyers object has been enhanced for providing easy access to the item revisions and purchase orders entered by each buyer and requisitions, quotes and contracts assigned to the buyer.

The item revisions information now accessible from the Buyers object includes the current revision and other revisions for each item.

Currencies and Exchange Rate Sets

Procurement Management now uses the standard IDF Currencies and Exchange Rate Sets objects. These objects have been enabled for use in any release 9-level XA environment.

Revalue host job and Revaluation host print options

A new Revalue host job option and Revaluation host print option are now available in the Quotes, Purchase Orders, and Vendors objects. The Revalue host job allows you to recalculate the local currency amounts in quotes or contracts if the exchange rate for an associated trading currency has changed as of a specified date. You can optionally print a report for the recalculated amounts. The

Revaluation host print option performs the same recalculation and automatically generates a report for the amounts that were recalculated.

Maintenance Control in Procurement Management

For those Procurement Management objects that were enabled to send or receive application object information from other systems, the new IDF Maintenance Control feature replaces the Replication cards and attributes previously used for transmitting object information. The IDF Maintenance Control function allows you to specify whether an application object allows an external system or environment to maintain object information, only the local environment to maintain object information, or both external and local maintenance. The new Object Settings object identifies the application objects which are enabled for the IDF Maintenance Control function. This also identifies the default Replication Settings values which apply for the object. Each application object with a record in the Object Settings object has Replication Settings attributes that can override the Object Settings values to allow different maintenance control for an individual object record. To override the Replication Settings values for multiple records in an application object, the Object Settings object has the Update Replication Settings values.

Product Data Management

This XA 9.2 release adds new features and enhancements to Product Data Management (PDM). This document provides a brief description of these new features and enhancements.

Pricing items

You can use the **Pricing** task on the Items object to calculate a selling price for an item without entering the item on an order or quote. The price is calculated using the values you specify and is displayed on Price Inquiry cards with details of how the price was calculated.

Printing price lists

You can use the Item Price List report on the Item Base Prices object to print all possible base prices, or a subset of base prices, for an item based on the effective date, currency ID, and price book ID.

System-Link

System-Link has been enhanced for release 9 in several areas.

System-Link database changes

The System-Link Inbox process requires that an environment have a new library to hold journaling files created for data received from an external environment or system. The name of the new library must be AMELIBx, where x is second character of the environment ID unless the second environment ID character is M. In that case, the library name is AMELIB.

System-Link must write journaling files to this library at all times, even during a backup. Similarly, the existing ESB* tables for the System-Link Inbox and System-Link Outbox process must be written to at all times. For that reason, these ESB* tables must be moved to the AMELIBx/AMELIB library. Release 9 automatically moves these tables during installation. Before the tables are moved, the installation process stops journaling for those tables to prevent new messages from being written. The installation process then moves the physical and logical ESB* tables onto the new AMELIBx/AMELIB library and restarts journaling of the tables to a journal in the new library. Moving these tables requires that the existing OnRamp configuration be changed to use the new location for the ESB* tables.

Link Manager uses the presence of the AMELIBx/AMELIB library in an environment to initiate the creation of a System-Link Inbox process for the environment.

Restricted user IDs

As with Net-Link, System-Link now supports a list of restricted user IDs. XA blocks any attempt for logging on to System-Link by any of the user IDs on the list. The restriction occurs before the user can log on to the System i. A message appears telling the user that the user ID cannot be used to log onto the specified environment. This restriction provides additional protection for critical system IDs.

System-Link objects

System-Link adds new application objects, accessible in Power-Link, that allow users for specifying how requests are transformed, logged, and delivered to other systems.

System-Link Requests

For environments on which System-Link is installed, the Settings tab on the Environment card also contains a System-Link Requests object. A System-Link request provides information required to form requests for sending information onto another system. Each System-Link request contains descriptive information about the request, control information for processing the request, audit controls to log the request, and the original and overridden versions of the request XML.

XA provides a default request for each transaction supported by a BOD. Users can use or modify the XA requests or create additional requests. The Request ID for XA-provided requests begins with "XA_" and contains a verb and noun indicating the type of request.

System-Link Destinations

The System-Link Destinations object now contains two new attributes. The Local logical ID attribute indicates the ESB process logical ID that applies when the destination is a remote environment or system. This attribute is optional. If this attribute is blank, the default value in the Send type attribute is Immediate.

The Send type attribute indicates when System-Link must process a message.

- If Send type = Immediate, the message goes directly to System-Link.
- If Send type = Deferred, the message goes to the IDF inbox.
- If Send type = Immediate preferred, the message goes to System-Link. If System-Link is not available, the message goes to the IDF inbox.

The remote System-Link Inbox process handles the messages it receives according to the value in the Send type attribute defined in the corresponding destination in the sending environment.

System-Link Destination Transformations

For each combination of System-Link destination and request, a System-Link Destination Transformation object must exist. A System-Link destination transformation establishes the link between the System-Link request and the System-Link destination. This also specifies the stylesheet to be applied for transforming the request associated with the particular destination.

The information for a specific System-Link destination transformation displays the request ID, destination associated with the request, and the stylesheet associated with transforming the request. The list also indicates if the transformation includes an override stylesheet and if the override is active.

System-Link Transformations

For each XA-provided System-Link request, a System-Link Transformation object must exist. The System-Link transformation contains default options for processing, or transforming, the request into a BOD. These processing options apply to any BODs created from an XA-provided request for the destinations associated with that request.

XA supplies the System-Link transformations for use only with XA-provided System-Link requests. System-Link transformations do not apply to user-defined System-Link requests.

Transformations cannot be maintained, but can be displayed from the Transformations card in the detailed information for a System-Link destination or from the System-Link Transformations option on the Display menu in the System-Link Destinations object

Substitution variables for transforming documents

System-Link provides substitution variables that allow a transformed document to be customized for more than one destination with destination specific information. The transformed document can vary for each destination through substitution variables entered in the stylesheet. The available variables are different for each type of System-Link destination that supports substitution variables.

The substitution variables are indicated in the stylesheet by the % character. The values used with the substitution variables primarily come from values entered for the System-Link destination. However, some substitution variables can require values from the generated document. For these variables, System-Link uses reference values specified in the stylesheet in comment text with the convention TX_REF (Reference) = (Value).

Processing options

System-Link now has additional attributes and options to support conditional processing of complete requests within a single document, based on the success or failure of previous requests or actions.

- For requests, the validation attribute now has a simulate option which allows processing of the request but cancels any data updates that result from the request. This option can be used to test requests with production data without risk of unintended data changes.
- Additionally, a processing attribute has been added to provide commitment control for the request. This attribute has two options. The immediate option allows processing of the elements in the request to proceed as specified in the code. The group option causes all of the elements in the request to be processed as one transaction group. This option is equivalent to using the StartTransactionGroup element at the beginning of a request.
- To allow processing of a simulation request with an action that depends on data made available by a preceding action within the request, the processing attribute must be set to group. Otherwise, the action in the simulation request fails. If an error occurs in a simulation request that uses group processing, all subsequent actions in the request must be ignored.
- To allow group processing of one request based on successful completion of another request, System-Link adds a name attribute to the request element. The name must have a different value than the value for the workHandle attribute.
- System-Link adds a requestSucceeded attribute to send responses indicating if the request processing is successful. The response tracks errors or warnings in actions contained in the request to determine whether the value of the attribute is true or false.
- To determine whether preceding actions succeeded or failed, System-Link adds attributes to the condition element. The actionName and requestName attributes contain the identifiers for actions and requests. The actionStatus and requestStatus attributes indicate whether the action succeeded, failed, or ended in some other condition.

Task Logging

To allow administrators to track and compare usage of host tasks and client tasks, release 9 includes a Task Logging function in Power-Link. At the highest level, the Task Logging function tracks usage by application. Administrators can drill down into application information to see usage and comparison of Power-Link tasks, Host Presentation Server tasks, and host menus and options. For host menu options, administrators can drill down to usage by individual users. Additionally, administrators can see usage by user through the User Profiles object. Usage for any category is presented over time: yesterday's usage; usage in the last week; usage in the last 30, 60, and 90 days; and usage for the year.

Integrations

This table displays the new products that you can integrate with XA at release 9.2:

Product	Version
Infor CRM	8.3
Infor d/EPM	11.0
Infor d/EPM	12.0.5
Infor CRM	8.4
Infor Local.ly Tax Reporting (Spain)	12.0
Infor Local.ly Services Platform(Making Tax Digital)	12.0
Infor SiW AnyWhere on Infor OS On-prem	Anywhere
Infor SiW 2015	2015
Infor SCE	10.4
Infor EAM	11.2
Infor System i Manager	3.0.4
Infor CPQ	8.1

See Infor XA integration documents on the Infor Support Portal at <https://support.infor.com/>.

To navigate to the XA integration documentation on Infor Support Portal, select **Search > Browse Documentation > XA > XA Product Manuals > Integrations > 9.2**.

Product Configurator

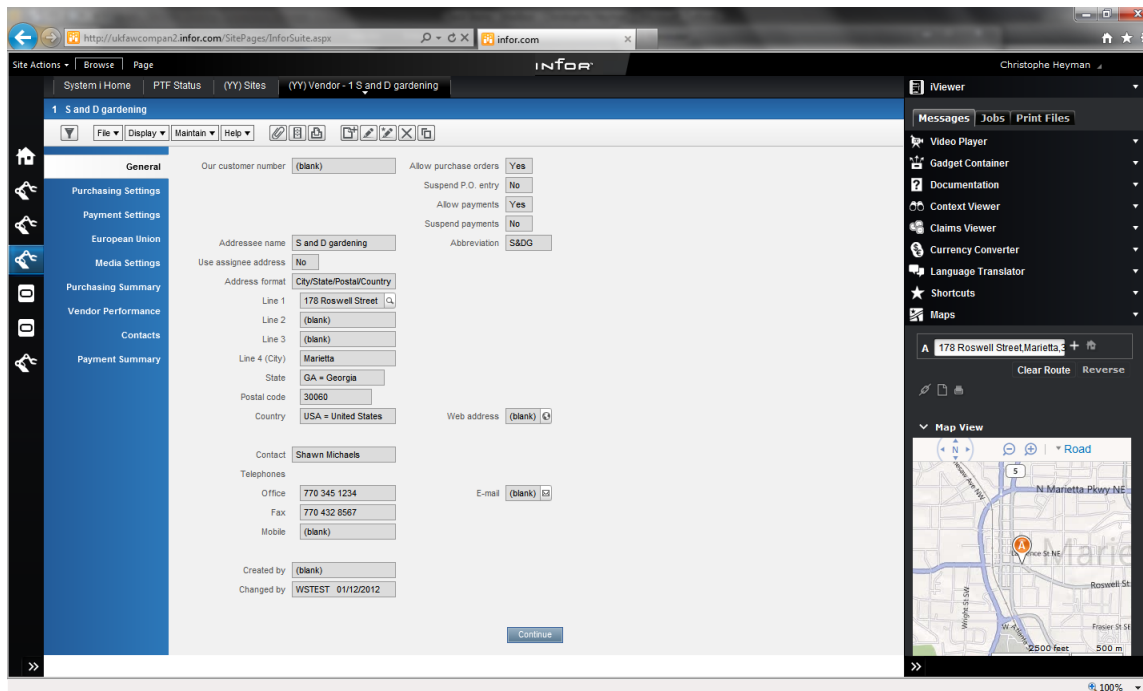
The Product Configurator integration with XA has been enhanced to support multi-site configurations. Each configured item may now have multiple configurations defined across multiple sites. The Configuration ID identifies the alternate item process for each specific configuration of an item revision in a site.

Integration with Infor Workspace

XA R9.1 is integrated to Infor Workspace. Infor Workspace unifies information from multiple applications and sources into a single page.

The integration with Infor Workspace also supports a single network log on that automatically handles all subsequent logons to Infor Workspace and any Infor product installed and integrated with Infor Workspace. For example, once an XA user logs on with a network ID and password, that user is logged on automatically to Infor Workspace, System i Workspace, IDF Level 2 objects, and IDF Level 1 tasks.

As part of the integration with Infor Workspace, Net-Link has been upgraded to the Infor corporate standards for application look and feel.



Enablement for future System i applications

Release 9 includes file-level changes to enable future applications that can be installed with any of the Info10 ERP System i products. Thru-Put enhancements for supporting vendor daily call offs and improvements to multisource planning.

The file changes allows these new applications and functions to be installed easily with XA when available.