Infor XA Release Notes

Release 9.1 and 9.2

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Infor XA Release 9.1 and 9.2 enhancements

Infor XA Release 9.1 and 9.2 adds significant new features and enhancements to the product. This document provides a brief description of the new features and enhancements in this release.

Customer Relationship Management for System i

The Customer Relationship Management (CRMi) application for the Power System i Edition provides marketing and sales organizations with a set of tools to support the sales process, turning sales leads into customer orders.

CRMi Post Sales functions

The CRMi Post Sales functions enable you to record account issues and support or service requests and then respond to those issues and requests according to 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 might involve recording issues in incident comments and referencing the related order, shipment, or invoice. A more complex use of incidents might 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 for resolving the incident and 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 might 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 for 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.

CRMi Account functions

CRMi 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.

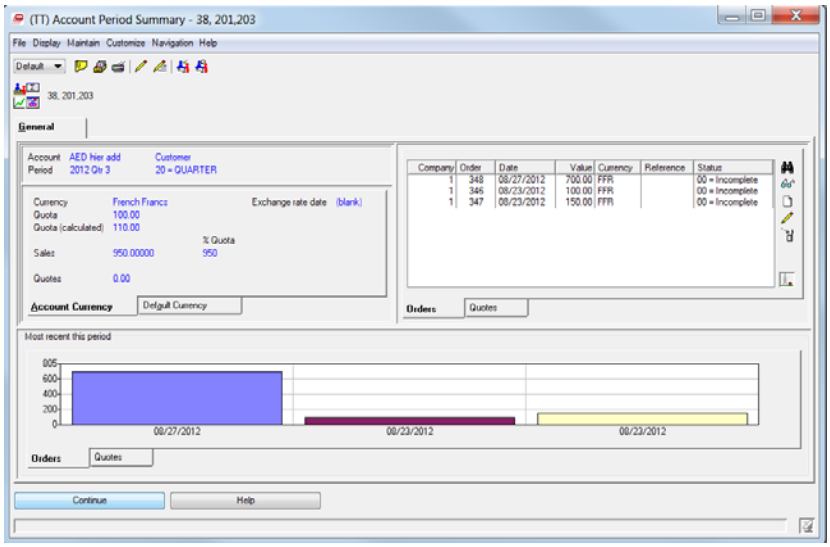
Accounts

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.

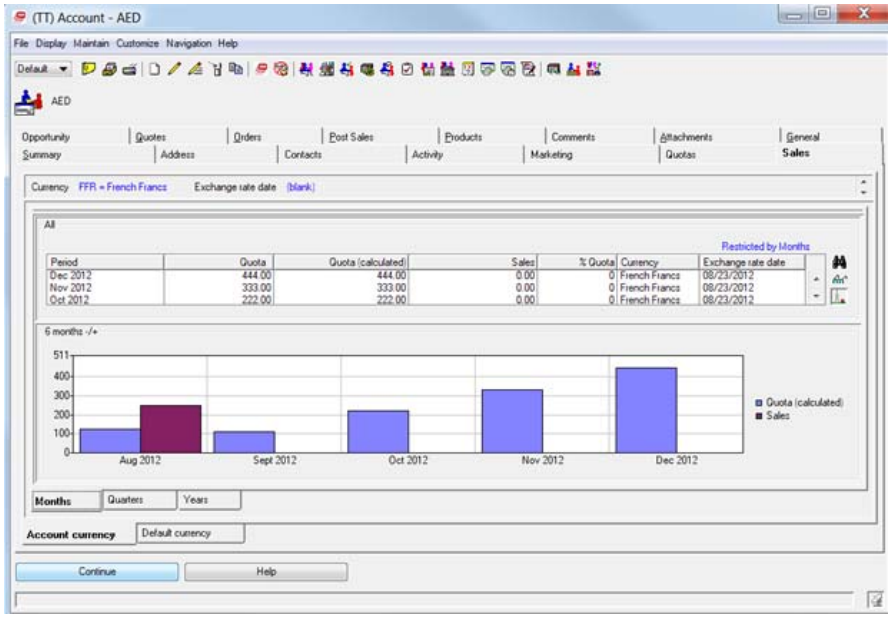
Account Period Summaries

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 for 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 for 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

Upgrade process

These requirements are necessary to upgrade to the Finance 9.2 enhancements.

Verify 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 will not be able to 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. When the financial transactions objects or ledger objects are activated, they 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 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 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 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 financial transactions 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 shows 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 enable these external inventory receipts to be invoiced in XA or 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 attributes 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 for 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. They include quantities on invoices that are not posted to the general ledger and they 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 specifies whether you can post 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 control how the bank is to process payments to a particular payee. Use tasks and host jobs on the Financial Transaction Amounts Due, Invoice Payments, and Payments objects to move amount due records 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 lines that are created are posted to the 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 buttons for the **Allocate** and **Clear Allocations** tasks. Use these buttons to immediately update the Remaining to allocate attribute and the allocations in the Not Posted list.

Schedule installment payments

From Financial Transactions 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 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 and you can recalculate discount totals from the Invoice Payments object before the cash transaction is generated from the 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 (including charges for late payment interest) 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 based on the invoices for the goods purchased and invoiced by other vendors. The **Create Distributed Freight Invoice** task creates new freight company invoice based on one or more vendor invoice financial transaction charges you select. The **Distribute Freight** task creates financial transaction charge lines to distribute the specified freight value, to selected vendor invoice financial transaction charges, while you are creating or maintaining a financial transaction.

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. 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 in the AR and AP workspaces.

Financial Transactions has **Calculate Tax** and **Remove Tax** tasks and buttons 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.

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

Approve financial transactions

All financial transaction approvals for a financial transaction must carry an Approval status of Approved before the transaction can be posted to the general 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 should 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 tasks in the Financial Transactions and Financial Transaction Batches objects provide the ability to validate and post financial transactions.

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 general ledger for transactions in all ledgers in the environment. You can also place a hold on individual financial transactions in Financial Transactions.

Override EGLi GL account segment values

You can override GL account segment values to be used in Enterprise General Ledger for System i (EGLi). The **Set GL Account** task is available for cash lines, charge lines, allocations, GL amounts, and taxes.

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 will return that value. If an override value does not exist in XA, the macro will return the value of the alternate macro specified by the user. See the *EGLi Configurable Macro User Guide*.

Generate financial transactions from the Legacy System Bridge

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

LSB interface 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 equivalent financial transactions and transaction lines in the Financial Transactions object and its associated transaction line objects.

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 numerators for several transaction types in the same ledger.

Update 1099-MISC tax accumulations

1099-MISC tax accumulations are automatically carried out during transaction processing, and are therefore always complete for the year to date, even if you reverse or copy transactions. 1099 tax 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 tax accumulation information to an electronic file in the transmission format approved by the Internal Revenue Service.

Generate BACS records

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

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

Accounting Management and Accounting Management Plus to Enterprise Financials migration tool

You can use the AM to Enterprise Financials migration tool to migrate these Accounting Management (AM) and Accounting Management Plus (AM Plus) applications to Enterprise Financials and Enterprise General Ledger (EGL) from within XA:

- Accounts Receivable interfacing with General Ledger
- Accounts Payable interfacing with General Ledger
- General Ledger

To use this migration tool, you should be using AM AR interfacing with AM GL or AM AP interfacing with AM GL

The AM to Enterprise Financials migration tool is used replace AM/AM Plus with the Enterprise Finance applications for AP, AR, and Cash. The migration preserves legacy XA chart of accounts and GL account assignment rules. It also adopts the new EGL chart of accounts and EGL account assignment rules. See the *Infor XA Accounting Management to Enterprise Financials Migration Guide*.

This functionality is available with the AM to Enterprise Financial migration tool enhancement.

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 could 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* or see the *Infor XA Implementation Guide for Enterprise General Ledger for System i* for more information about how to configure XA for 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 could 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 segments and 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 events in the Financial Journal Entries list window. Previously, financial journal entries could only be 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

A default event class is assigned when a financial journal entry is created from the Financial Journal Entries list window. If the event class is associated with an EGLi ledger, then it is displayed in the Manual journal entry event attribute in the Ledgers object.

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 consolidate financial structures as the basis for consolidations.

Translate

Use the Translate process types to define the 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 pick a financial event to distribute actual or budgeted balances.

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 to the financial process list.

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.

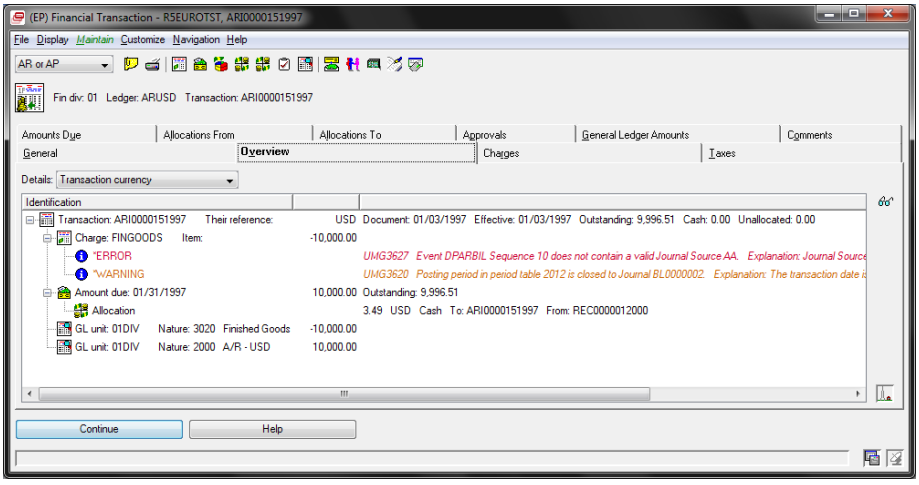
Financial Transactions

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 will use 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 could 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. After manual payments are entered they are equivalent to system-generated payments.

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 for 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 could 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.

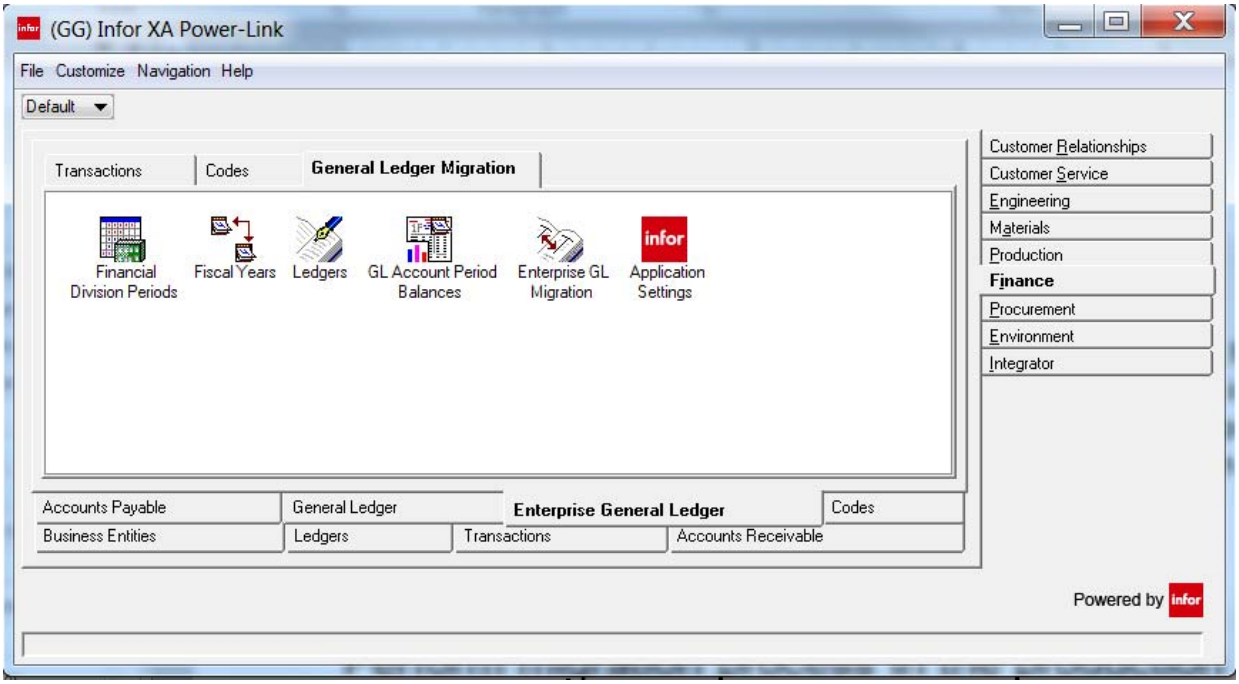
Receivable GL Transactions and Receivable GL Transaction Activities

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

In R9.2, 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.*

AM Plus to EGLi migration tool

In R9.2, you can migrate Accounting Management Plus (AM Plus) general ledger account balances to EGLi from within XA. The AM Plus migration tool is used to configure EGLi to process transactions from XA applications. General ledger account balances are transferred during migration from AM Plus to EGLi. In the AM Plus application, the General Ledger Migration card on the Enterprise General Ledger card file contains the objects to migrate AM Plus data to EGLi. See the "Setting up AM Plus to EGLi migration" in *Infor XA Setup Guide for Infor EGLi*.

This functionality is available with the AM Plus to EGLi migration enhancement.

Localization for Germany GDPdU Taxes enhancement

In R9.2, the localization for Germany GDPdU enhancement provides financial tax data from Enterprise Finance and Enterprise General Ledger (EGL). With this enhancement, you have the option to extract financial tax data from EGL using the **Export** host job in the Ledger Book Balance Summary object. The Ledger Book Balance Summary object is located on the Transactions card in Enterprise General Ledger. All other functions including the Reporting functions remain the same.

See the attached cover letter for PCM92Fix-02.09.02.01.31.02.zip in Infor Xtreme.

This functionality is available with the Germany GDPdU localization enhancement.

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 shows 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.

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** button to add a public or private workbench to your favorites. The workbench then shows on the **Favorites** tab.
- Use the task buttons 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.

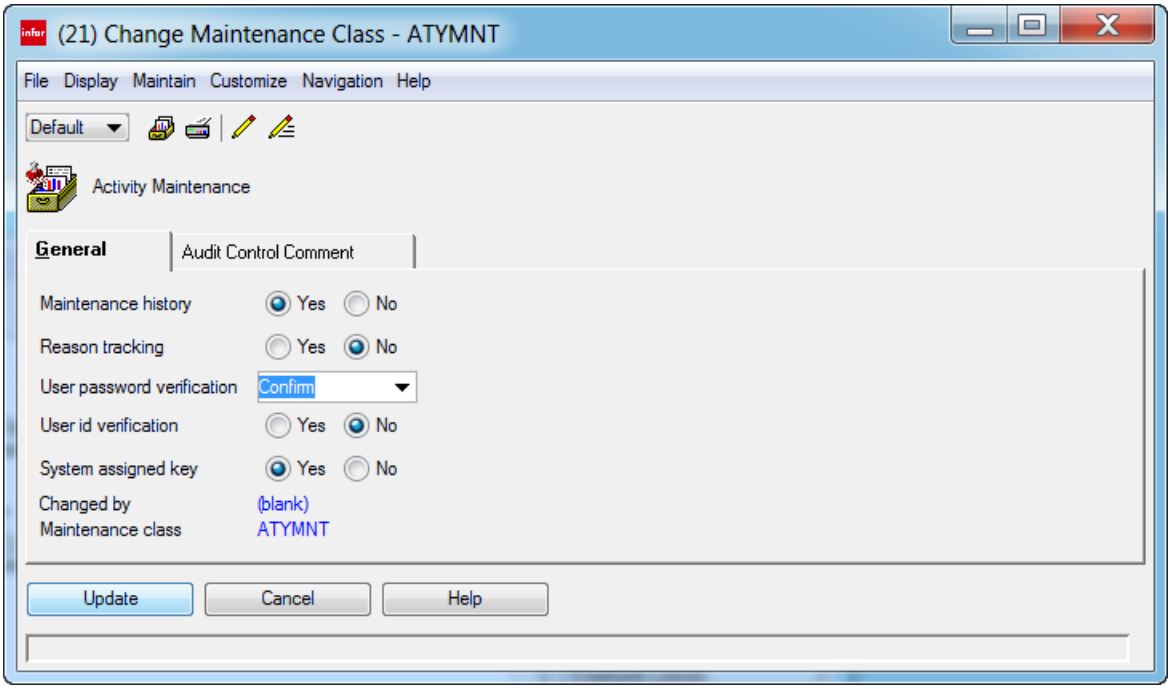
Related cards and Related card sections

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, you would display the related vendor’s purchase amounts 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.

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 shown in this example:

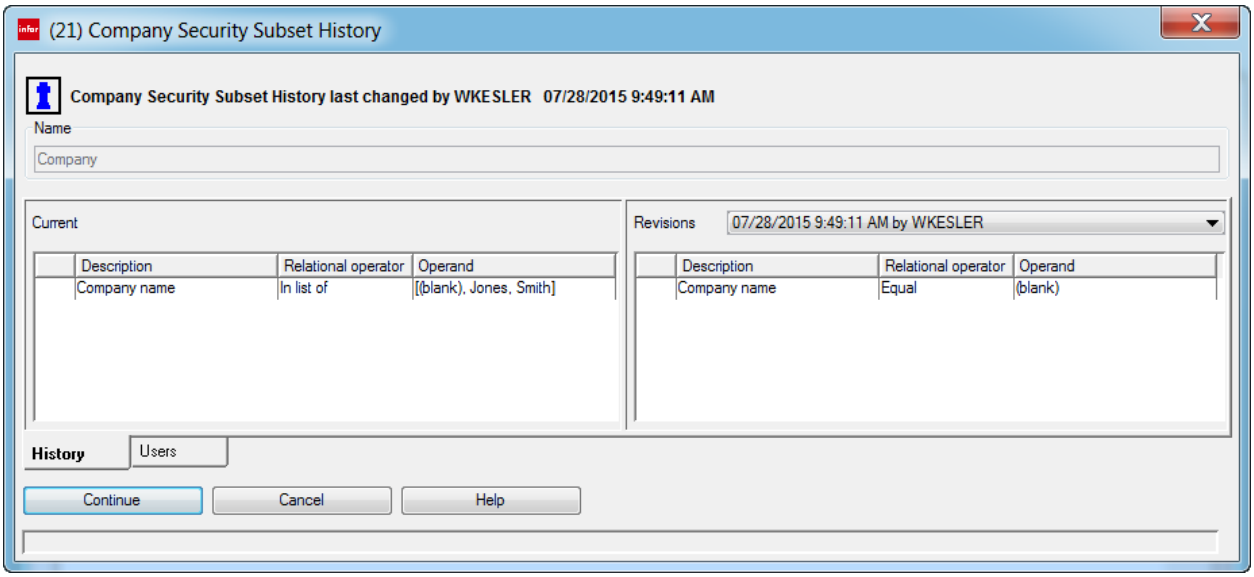
```
<?xml version='1.0' encoding='UTF-8'?>
<!DOCTYPE System-Link SYSTEM 'SystemLinkRequest.dtd'>
<System-Link>
     <Login userId='*LPIUSER' maxIdle='900000'
          properties='com.pjx.cas.domain.EnvironmentId=9P,
               com.pjx.cas.domain.SystemName=USATLS05.INFOR.COM,
               com.pjx.cas.user.LanguageId=en'/>
</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** ( ) button on the Security Subsets tab on the Content Security card in the Business Object window.



Other enhancements

These enhancements

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

Development Profile IDF Level 1 support

In R9.1, the Deployment Profile card file was enhanced in Power-Link to include an IDF Level 1 card. The IDF Level 1 card shows a list of all installed IDF Level 1 tasks. You can use the IDF Level 1 card to define the tasks that are displayed in Power-Link. The IDF Level 1 card contains two tabs: Deployed and All. The **Deployed** tab is initially blank because the IDF Level 1 tasks are hidden. The **All** tab shows only the IDF Level 1 tasks that are installed in the environment.

The Deployment Profile security service was enhanced to load the deployed IDF level 1 tasks and to display the IDF level 1 tasks on the Application cards in Power-Link. The object was also enhanced to include the modified IDF Level 1 tasks in export.

This enhancement is not available in Net-Link or SiW.

IDF Report Writer

(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

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The IDF report writer function allows you to customize the content and appearance of application object data you export to a file, send to a recipient, or print locally as a report. You can specify subtotals 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 for 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 for columns in the report. For example, you might have a view for your Purchase Order Items object that shows the vendor for the purchase order, the purchase order number, the purchase order item number, and the purchased amount for the item with statistics set to Total for the purchased amount. You might sort your list of purchase order items by vendor, then by order number and specify subtotals for both of those attributes. You might then apply a subset to your list of vendors that shows 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 shows a subtotal for the purchase order item amounts on each order, then a subtotal amount for purchase order item amounts for each vendor, then the final total amount of all purchase order item amounts for the vendors and purchase orders included in the list.

Power-Link Functions

This function has been enhanced for XA R9.1.

Attribute tip text for maintenance history

In R9.1 and higher, you can view maintenance history specific to an attribute by holding down the Ctrl key and using the mouse to hover over the attribute.

Integrator

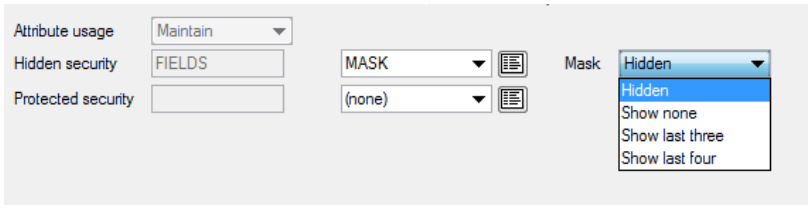
These Integrator functions have been enhanced for XA R9.1.

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.

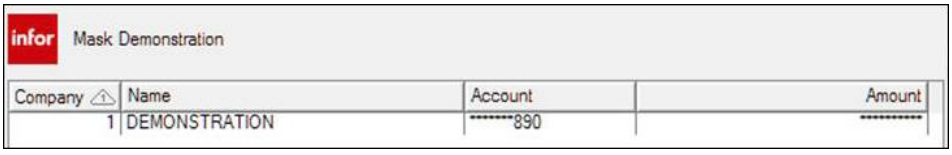
Attributes are shown for all the Business Objects so that users can identify where specific functions have been applied such as identifying field level security or attribute classes.

Attribute security masks



Previously if hidden security was applied to an attribute, the attribute was not visible to the user unless they had 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:

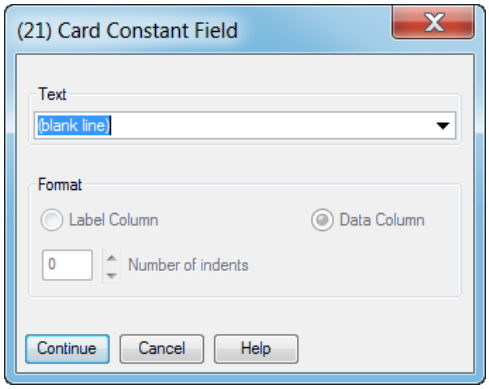
- Hidden: The attribute is hidden from the user.
- Show none: The attribute shows as all asterisks.
- Show last three: All but the last three characters of the attribute show as asterisks.
- Show last four: All but the last four characters of the attribute show as asterisks.



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** () buttons. You can use the **Add Column** button 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** button to append an attribute to the same line as another attribute.

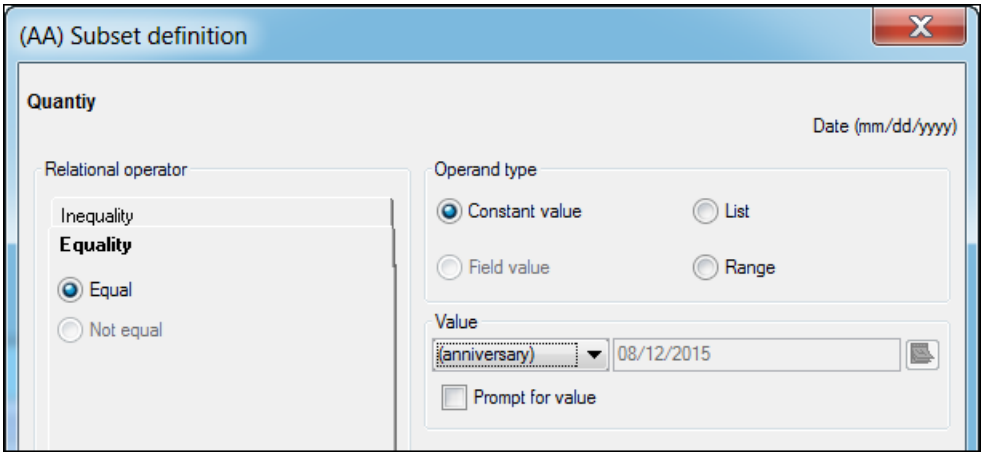


You can select from two types of constants when you click the **Add Constant** button:

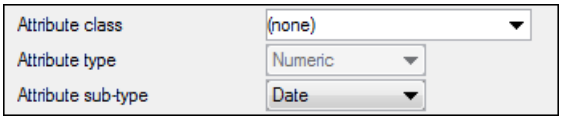
- Blank Line: Use the blank line constant to add a blank line after the attribute.
- Format: Use the format constant to show text in label or data columns.

New date attribute criteria

A new criterion 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.



vIf you select an attribute sub-type of Date on the General tab on the Change Attribute card file for 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.



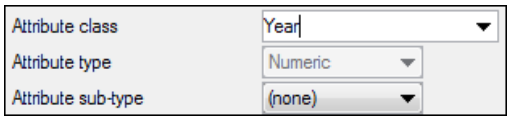
Business objects

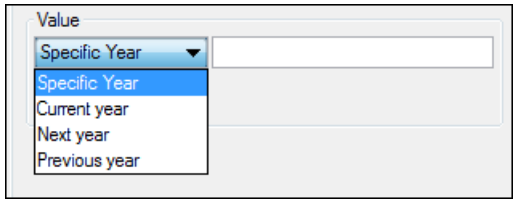
Attachments

Attachments can now be added to Business objects.

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.





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

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 might 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 should be moved manually from the export environment. In this situation, the user exit status will not be 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 should be retained.

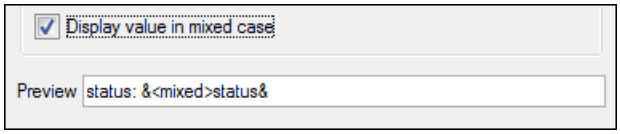
The Export Business Objects dialog now contains these new options:

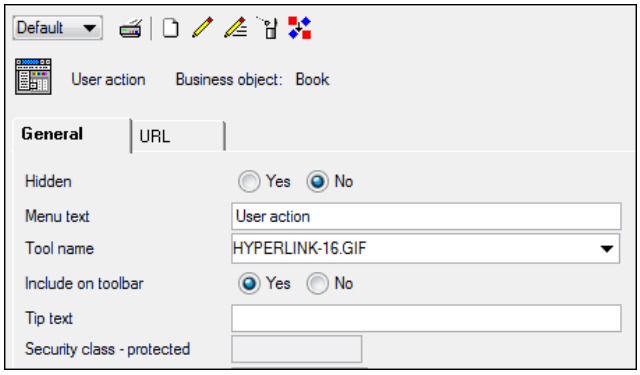
- The Include definitions for Infor Owned objects attribute indicates whether modified Infor owned definitions should be included in the export file.

Mixed case logic for messages

You can now apply the mixed case logic to attributes that would normally only display as upper case when they are being 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** button on the General tab on the Business Object card. Then, select **Display value in mixed case** in the Add attribute window.





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

User Actions

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

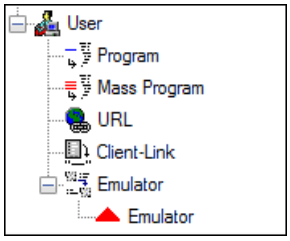
- Attribute user actions

  Previously, User Actions created in Integrator could be 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.



Third party business objects

You can use the Enterprise object to create additional restricted enterprise owners. You can use the Target enterprise owner attribute to select the target enterprise owner. The target enterprise owner can be the default User or any of the restricted enterprise owners you have created. All imported modifications will be owned by the target enterprise owner. When attributes are imported from a third party, you can only change a limited number of the attributes.

The Export Business Object option has been enhanced to handle objects owned by a restricted enterprise owner. Use the Include private definitions attribute to include restricted enterprise owned modifications. Note that only the maintainable attributes will be exported.

The new Enterprise ID user definition is used to show the owner description from the Enterprise object in the Business Object, Attributes, Edits, Relationships, and Subscriptions cards.

Client column statistics

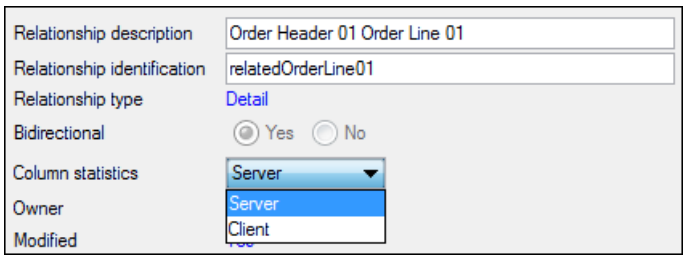
Column statistics can be defined for columns on View or List Card definitions. Column statistics use SQL functions SUM(), COUNT(), MAX(), MIN(), and AVG() to calculate values that are displayed. A list card may contain pending data changes that are not committed to the database. These changes are not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

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 would be 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.

SQL Host Job and Report Limit

The limit for Host Job and Report objects where the SQL describing the selection criteria could 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 the limit for 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.

Application user preferences

In R9.2, the User preferences application has been enhanced to support public preferences for application card files and cards. With this public preference, you can override the system defined settings for all users. The logic for object preferences is now user defined, public defined, and then system defined.

Integrator Translation

In R9.2, you can translate business object text for objects not owned by Infor and for Infor objects where the Infor supplied text have been modified. You can translate text using applications added to the new **Translation** tab on Integrator. The Enterprise Translation object has been added to maintain the translation settings.

This table shows the text that supports translation.

Text type	Text
Business object	Banner message, object name, objects name, title message, and user menu name
Attribute	Description, Boolean true or false aliases, heading, and label
Attribute action	Action description
Attribute discrete domain	Alias
Action	Menu and menu tip text
Relationship	Description
Transaction	Description
Purchase order scrap	Scrap Purchased Item (SP)

Integrator code file extensions

In R9.1 and higher, you can define extension objects on Infor or User owned Code File objects.

Customization

These enhancements have been added to XA.

Infor owned user definition security

In R9.1, the Cross Application Support application was enhanced to add security to verify that the user can maintain user owned public definitions. The new security element, MNTUSER, was added to authorize users to create, maintain, or delete user-owned public definitions if the user does not have authority to MNTPUBLIC. User definitions can be Infor owned, shipped in the client, or User owned, created on-site.

These definitions were added:

- Maintain User Owned Public Cardfiles
- Maintain User Owned Public Cards
- Maintain User Owned Public Presentation Schemes
- Maintain User Owned Public Sorts
- Maintain User Owned Public Templates
- Maintain User Owned Public Views
- Maintain User Owned Public Workbenches

- Maintain User Owned Public Workspaces

Transaction preferences

In R9.1 and higher, the Inventory History Transactions object was enhanced to support Transaction object preferences. Note that not all objects support this enhancement. You can set find preferences for an attribute on the Create or Copy transaction dialog box by clicking the **Customize preferences** button.

Link Manager

These enhancements have been added to Link Manager for XA 9.1.

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 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 attribute to have Link Manager run the Integrator Synchronize Business Object start-up task after applying the fix build.

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 show first on the template.

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

- Company
- Order type
- Order
  - Line
  - Release

New inventory transaction tasks

This table shows 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:

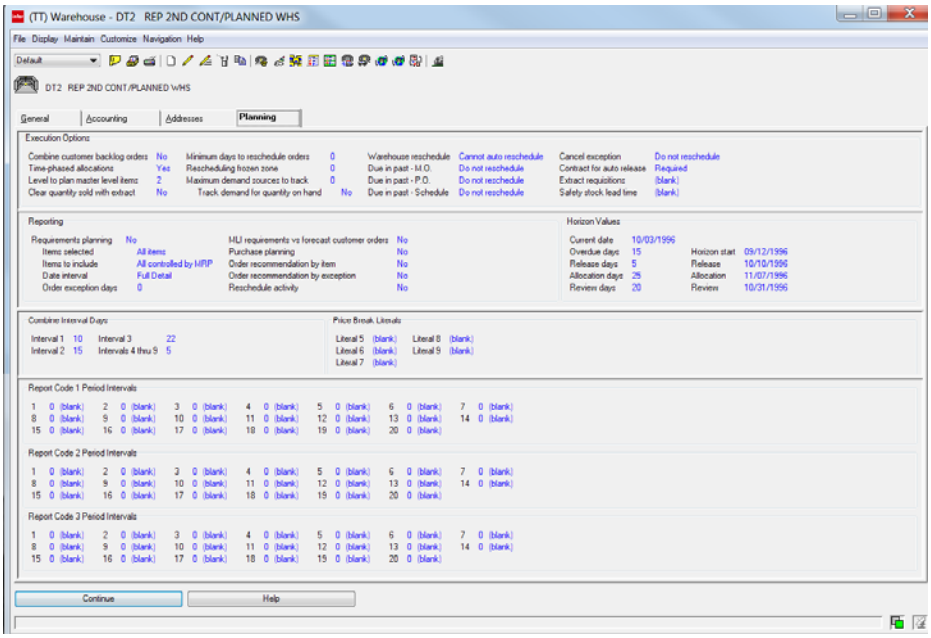
- Issue transactions
- Receipt transactions
- Adjustment transactions
- Procurement transactions
- Production transactions
- Scrap transactions
- Quality Control transactions
- Cost transactions

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 Planning card is maintainable when Materials Planning (MP) is installed and the warehouse is a planning warehouse. This card is blank when MP is not installed.



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

Specify how the planning run will run. For example, should customer backlog orders be combined? Should you allow time phased allocations? At what level will you plan master level items? How do you want rescheduling orders to be handled? Should contracts for auto-release be 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 for 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 should only change planning dates immediately before a planning run, because between runs they are used on reports and displays and should correspond with the data they accompany. Because the data represents the last planning run, the dates should 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 combine interval codes are used during planning to determine time intervals for combining requirements for the item for planning orders.

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

Specify the number of days for period intervals. The Requirements Planning Report shows 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 for the item. Therefore, the plan that is created is basically a collection of the requirements and the resulting planned orders for items that should 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:

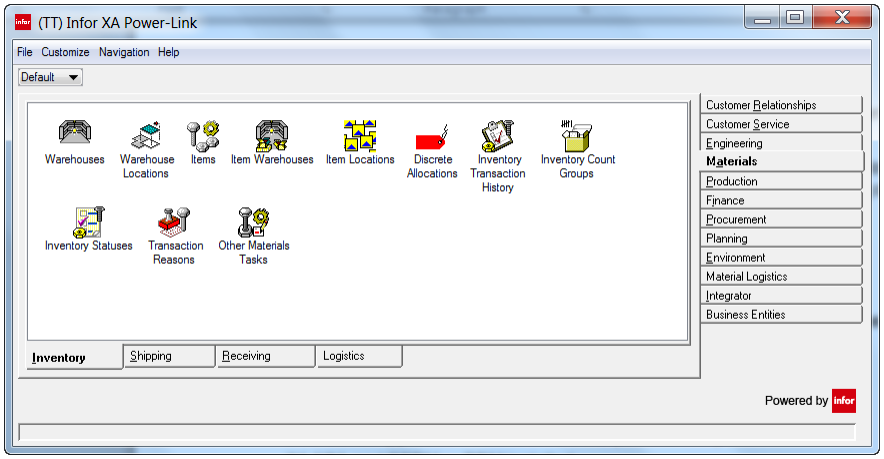
- Extract customer demand including released intersite orders and expected customer orders from the respective databases for informational and planning purposes
- Transfer the new master schedule (planned and firm planned orders) from MPSP to MRP
- Auto-release manufacturing orders, purchase orders, 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

Warehouses General card

The Assign planning defaults button 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 button to set default warehouse values. Specify No for the Planning warehouse attribute and click the Assign planning defaults button to clear planning warehouse values. Values are updated when you click Update.

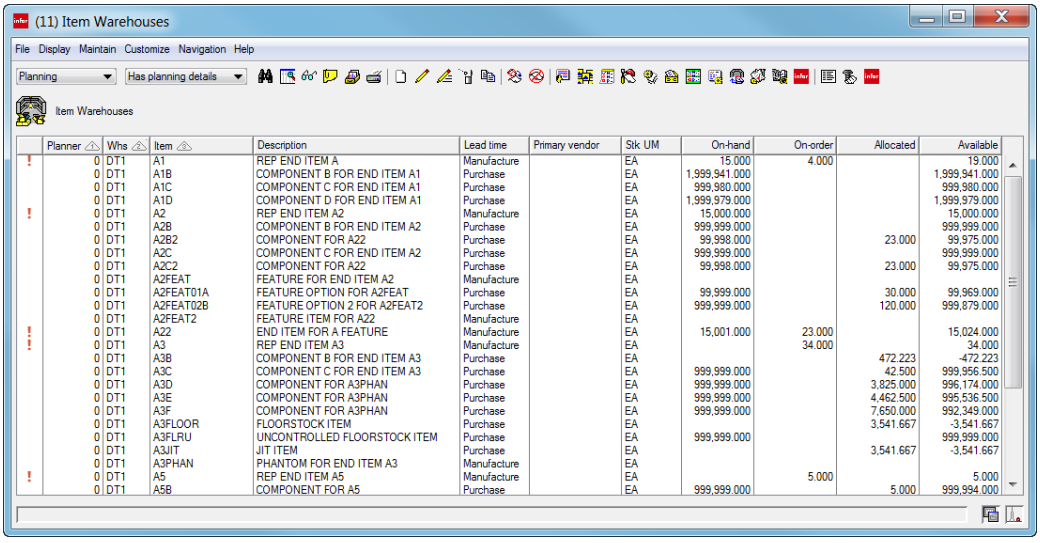
Item Warehouses (Planning)

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 to view item warehouse planning. Another advantage to opening the Item Warehouses (Planning) object from the Planning application is that Item Warehouses displays to the Planning view.



Planning View

The Planning view that has been added to 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.



	Planner	Whs	Item	Description	Lead time	Primary vendor	Stk UM	On-hand	On-order	Allocated	Available
!	0	DT1	A1	REP END ITEM A	Manufacture		EA	15.000	4.000		19.000
	0	DT1	A1B	COMPONENT B FOR END ITEM A1	Purchase		EA	1,999,941.000			1,999,941.000
	0	DT1	A1C	COMPONENT C FOR END ITEM A1	Purchase		EA	999,980.000			999,980.000
	0	DT1	A1D	COMPONENT D FOR END ITEM A1	Purchase		EA	1,999,979.000			1,999,979.000
!	0	DT1	A2	REP END ITEM A2	Manufacture		EA	15,000.000			15,000.000
	0	DT1	A2B	COMPONENT B FOR END ITEM A2	Purchase		EA	999,999.000			999,999.000
	0	DT1	A2B2	COMPONENT FOR A22	Purchase		EA	99,998.000		23.000	99,975.000
	0	DT1	A2C	COMPONENT C FOR END ITEM A2	Purchase		EA	999,999.000			999,999.000
	0	DT1	A2C2	COMPONENT FOR A22	Purchase		EA	99,998.000		23.000	99,975.000
	0	DT1	A2FEAT	FEATURE FOR END ITEM A2	Manufacture		EA				
	0	DT1	A2FEAT01A	FEATURE OPTION FOR A2FEAT	Purchase		EA	99,999.000		30.000	99,969.000
	0	DT1	A2FEAT02B	FEATURE OPTION 2 FOR A2FEAT2	Purchase		EA	999,999.000		120.000	999,879.000
	0	DT1	A2FEAT2	FEATURE ITEM FOR A22	Manufacture		EA				
!	0	DT1	A22	END ITEM FOR A FEATURE	Manufacture		EA	15,001.000	23.000		15,024.000
!	0	DT1	A3	REP END ITEM A3	Manufacture		EA		34.000		34.000
	0	DT1	A3B	COMPONENT B FOR END ITEM A3	Purchase		EA			472.223	-472.223
	0	DT1	A3C	COMPONENT C FOR END ITEM A3	Purchase		EA	999,999.000		42.500	999,956.500
	0	DT1	A3D	COMPONENT FOR A3PHAN	Purchase		EA	999,999.000		3,825.000	996,174.000
	0	DT1	A3E	COMPONENT FOR A3PHAN	Purchase		EA	999,999.000		4,462.500	995,536.500
	0	DT1	A3F	COMPONENT FOR A3PHAN	Purchase		EA	999,999.000		7,650.000	992,349.000
	0	DT1	A3FLOOR	FLOORSTOCK ITEM	Purchase		EA			3,541.667	-3,541.667
	0	DT1	A3FLRU	UNCONTROLLED FLOORSTOCK ITEM	Purchase		EA	999,999.000			999,999.000
	0	DT1	A3JIT	JIT ITEM	Purchase		EA			3,541.667	-3,541.667
	0	DT1	A3PHAN	PHANTOM FOR END ITEM A3	Manufacture		EA				
!	0	DT1	A5	REP END ITEM A5	Manufacture		EA		5.000		5.000
	0	DT1	A5B	COMPONENT FOR A5	Purchase		EA	999,999.000		5.000	999,994.000

Item Warehouse subsets

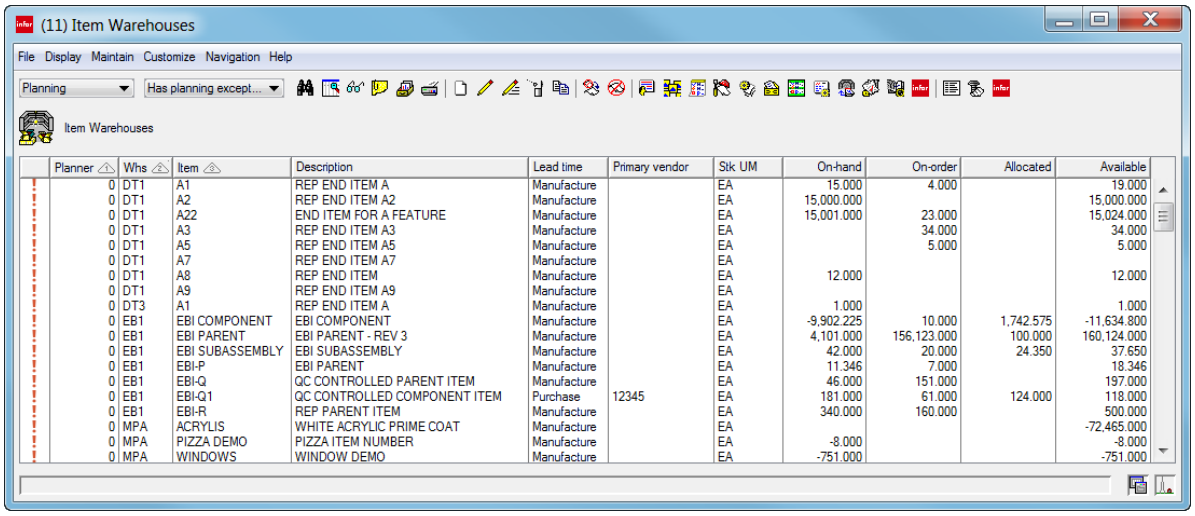
Item Warehouse subsets have been renamed and additional subsets have been added for planning.

- Renamed Existing Subsets

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

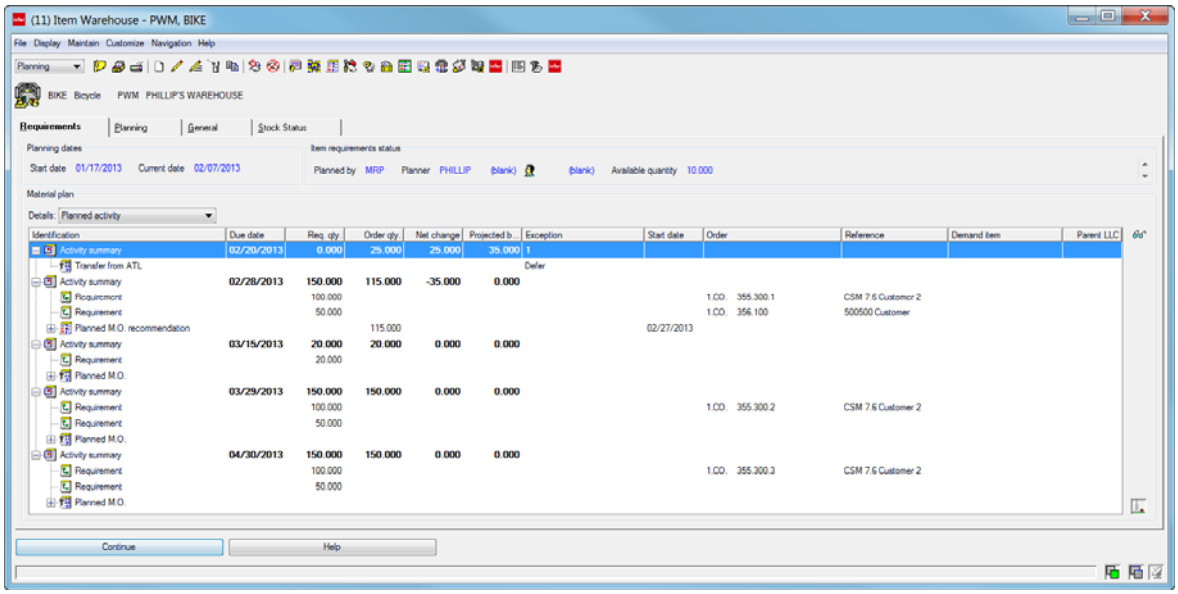
These subsets provide you with the ability to narrow the list of item warehouses or planning details for item warehouses to only the details you desire. For example, you may want to limit your view to only those items that have planning exceptions in the last planning run or to only those items that 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 UM	On-hand	On-order	Allocated	Available
0	DT1	A1	REP END ITEM A	Manufacture		EA	15.000	4.000		19.000
0	DT1	A2	REP END ITEM A2	Manufacture		EA	15,000.000			15,000.000
0	DT1	A22	END ITEM FOR A FEATURE	Manufacture		EA	15,001.000	23.000		15,024.000
0	DT1	A3	REP END ITEM A3	Manufacture		EA		34.000		34.000
0	DT1	A5	REP END ITEM A5	Manufacture		EA		5.000		5.000
0	DT1	A7	REP END ITEM A7	Manufacture		EA				
0	DT1	A8	REP END ITEM	Manufacture		EA	12.000			12.000
0	DT1	A9	REP END ITEM A9	Manufacture		EA				
0	DT3	A1	REP END ITEM A	Manufacture		EA	1.000			1.000
0	EB1	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	Manufacture		EA	4,101.000	156,123.000	100.000	160,124.000
0	EB1	EBI SUBASSEMBLY	EBI SUBASSEMBLY	Manufacture		EA	42.000	20.000	24.350	37.650
0	EB1	EBI-P	EBI PARENT	Manufacture		EA	11.346	7.000		18.346
0	EB1	EBI-Q	QC CONTROLLED PARENT ITEM	Manufacture		EA	46.000	151.000		197.000
0	EB1	EBI-Q1	QC CONTROLLED COMPONENT ITEM	Purchase	12345	EA	181.000	61.000	124.000	118.000
0	EB1	EBI-R	REP PARENT ITEM	Manufacture		EA	340.000	160.000		500.000
0	MPA	ACRYLIS	WHITE ACRYLIC PRIME COAT	Manufacture		EA				-72,465.000
0	MPA	PIZZA DEMO	PIZZA ITEM NUMBER	Manufacture		EA	-8.000			-8.000
0	MPA	WINDOWS	WINDOW DEMO	Manufacture		EA	-751.000			-751.000

Item Warehouses Planning card file

The Planning card file displays when you select **Display > Item Warehouse details** for an item warehouse or double-click the item warehouse line. The Planning card file allows you to 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: Requirements, General, Planning, and Stock Status. The General, Planning, and Stock Status cards are also viewable in the Default card file. The new Requirements card on the Planning card file provides planners with a complete view of material plan requirements for planned activity or recommended activity.

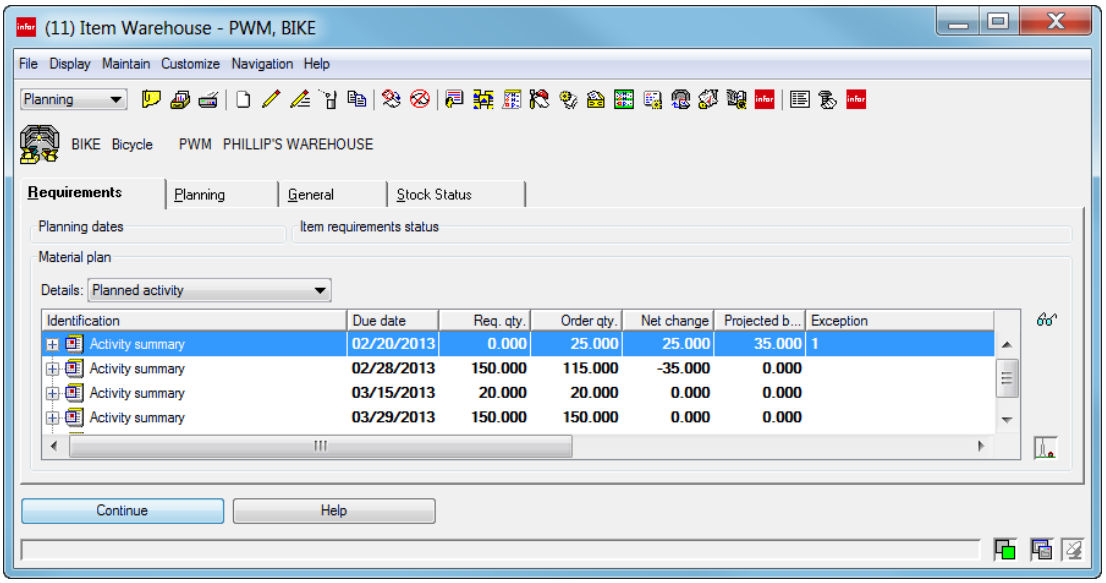


Requirements card

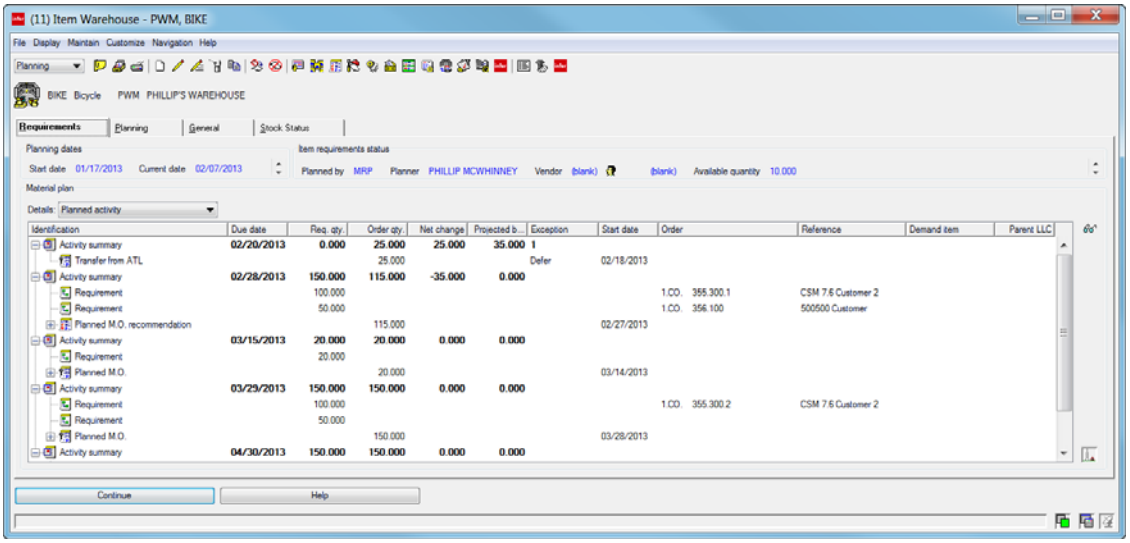
The Requirements card shows the planning dates, item requirements status, and material plan details. The most important information shown in the Requirements card is contained in the Material plan view. The Material plan overview contains the activity summary level. The activity summary level shows for each day in a planning horizon that has activity, whether it is for a requirement, scheduled receipt, or planned order, an activity record (summary). The activity summary shows for that day:

- due date
- total requirements and orders
- net change
- projected balance
- total number of exceptions

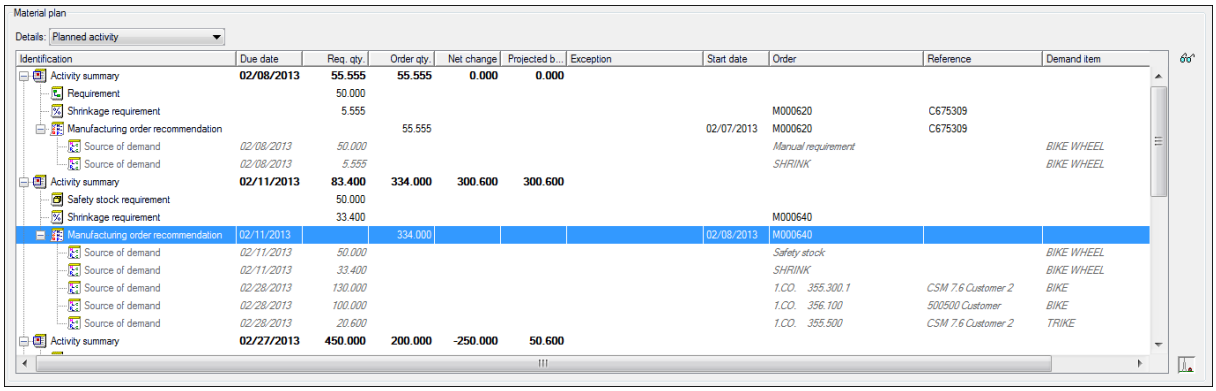
In addition to reviewing the activity summaries from the Material plan overview, you can maintain planned order recommendations.



The activity summary lines can be expanded to show requirement or allocation information, which includes pegged, safety stock, and shrinkage requirements, and planned or planned recommended M.O. or P.O. information. Earlier in the planning horizon, planned orders are shown as MRP recommendations because they are within your review horizon. When the planned orders are no longer in your review horizon, they are shown as planned orders (planned M.O.s or P.O.s). By default, the activity summaries are expanded to the order level as shown below.



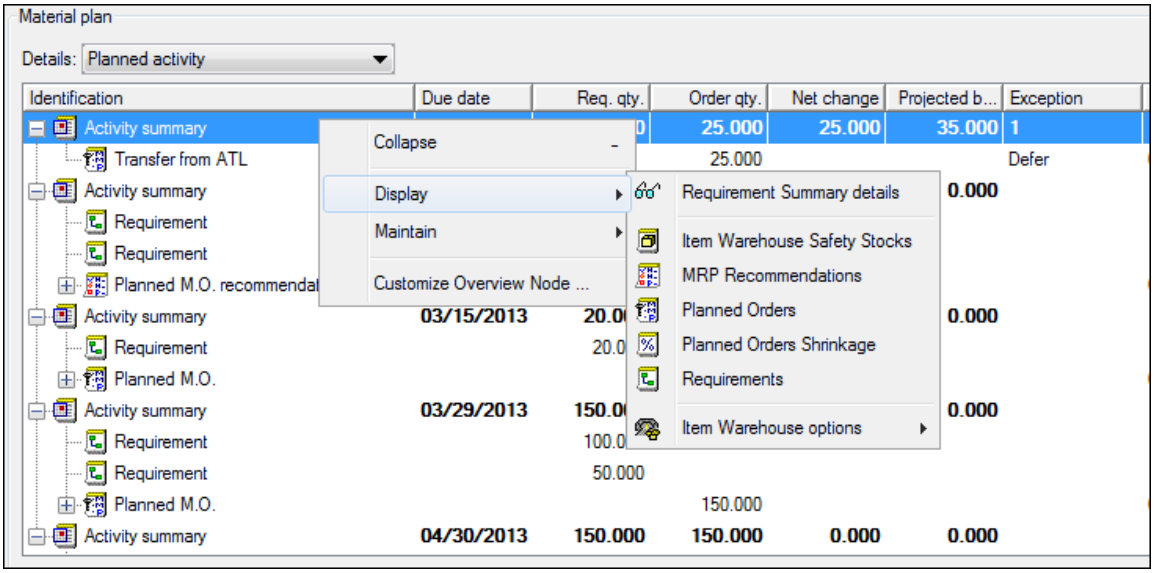
You expand replenishment orders to see the source of the demand (the original requirements from higher-level planned orders) if source of demand is active and you are tracking it.



You can view material plan details for planned activity or for recommended activity. Planned activity details show the current due dates and start dates for the recommendations. Recommended activity changes the due dates and start dates to the recommended planning run dates.

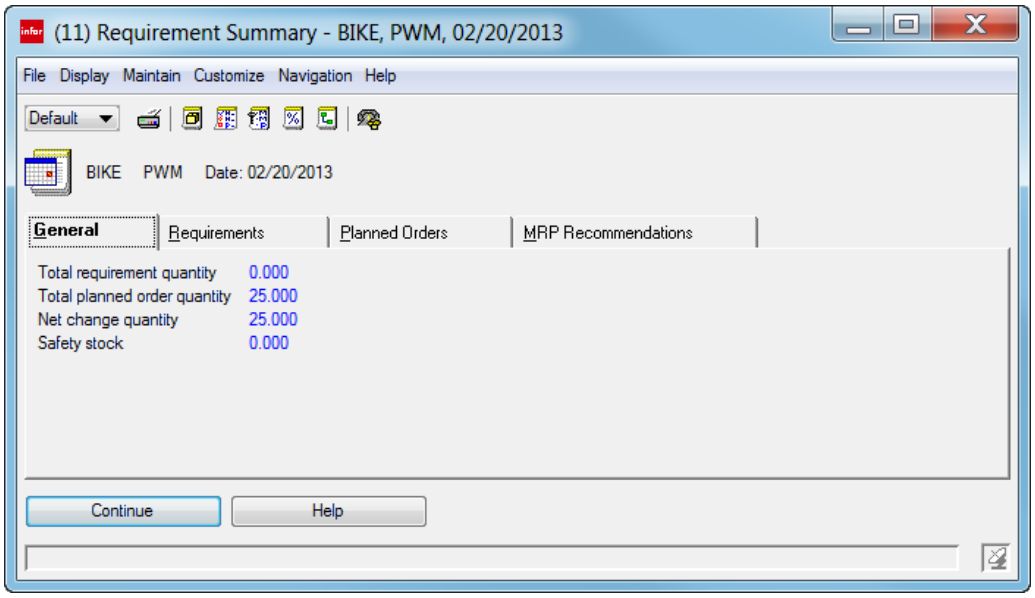
You can right-click on an activity summary and view the following objects from the Display menu.

- Requirement Summary details
- Item Warehouse Safety Stocks
- MRP Recommendations
- Planned Orders
- Planned Orders Shrinkage
- Requirements



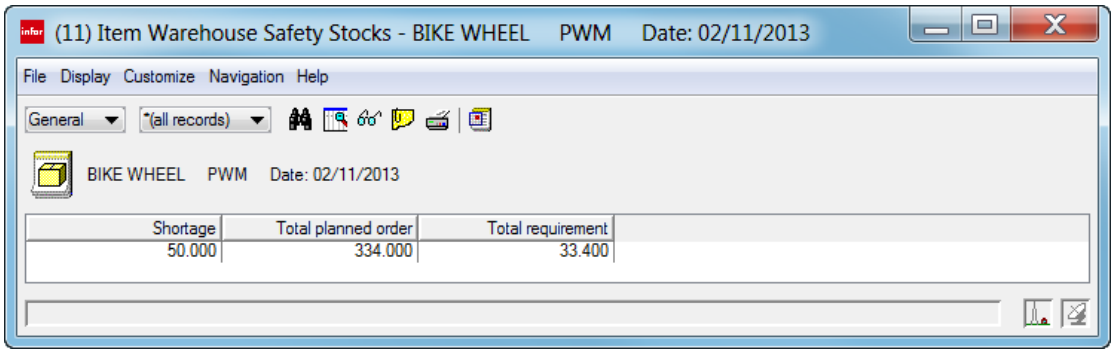
Requirement Summary details

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



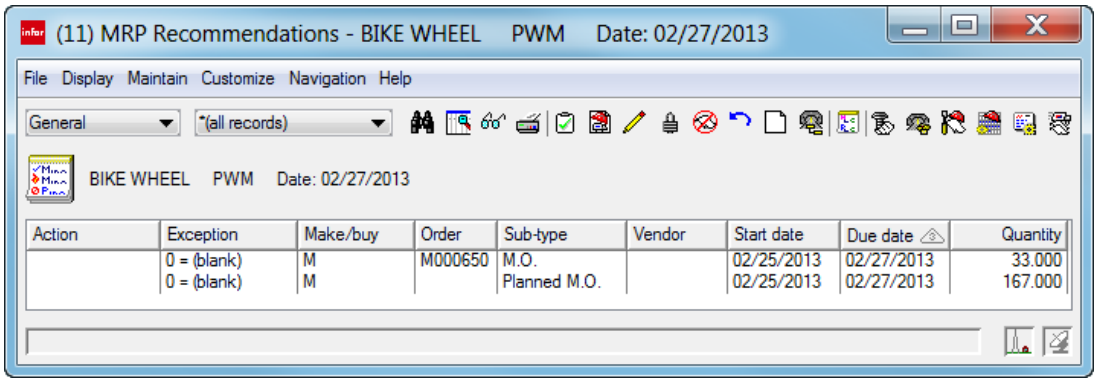
Item Warehouse Safety Stocks

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

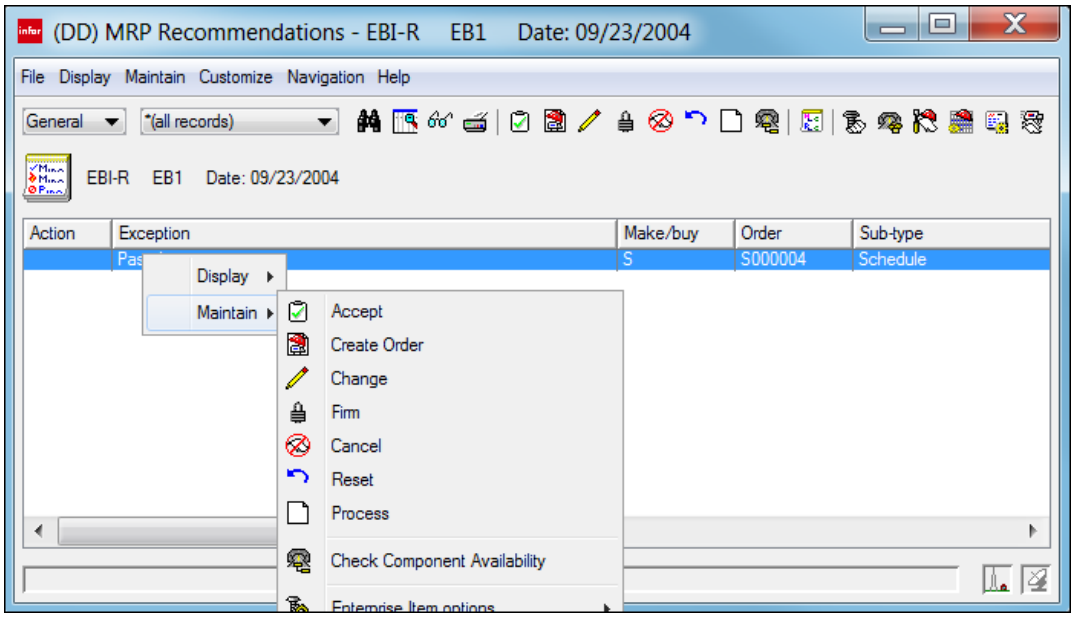


MRP Recommendations

The MRP Recommendations object shows 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.

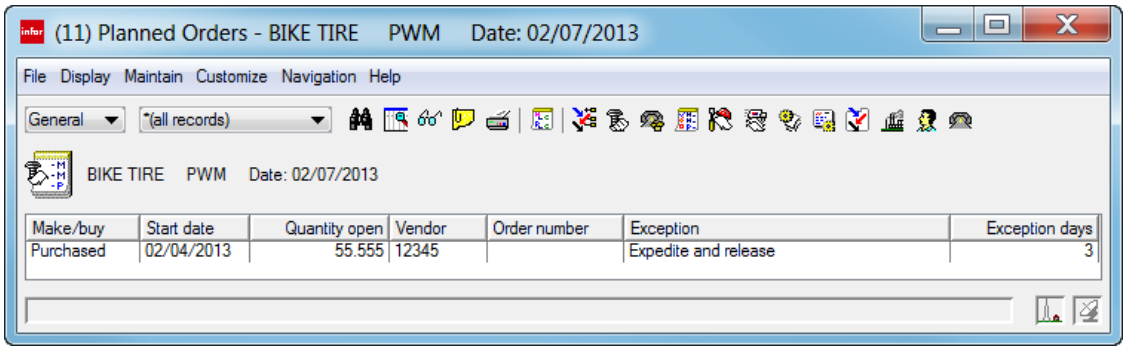


You can perform maintenance tasks by right-clicking a MRP recommendation and selecting from the Maintain menu.



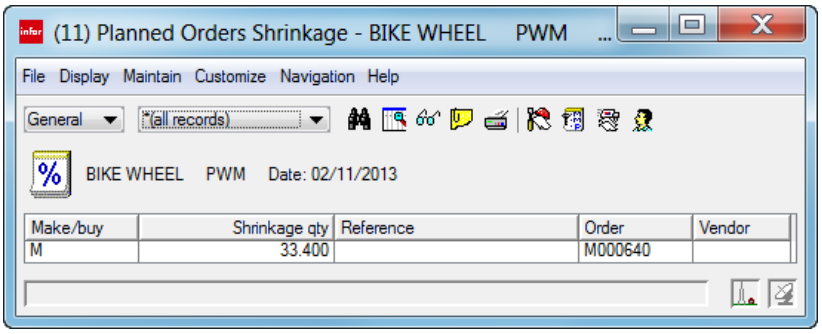
Planned Orders

The Planned Orders object shows 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.



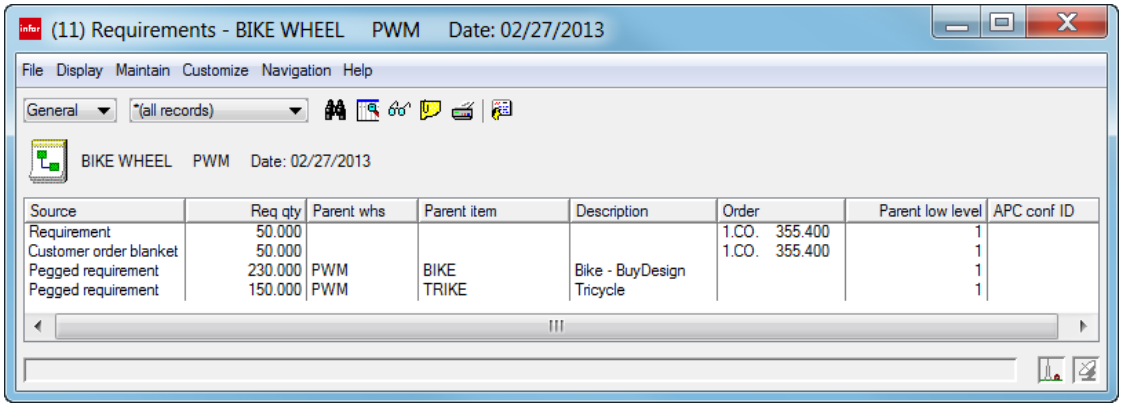
Planned Orders Shrinkage

The Planned Orders Shrinkage object shows 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.

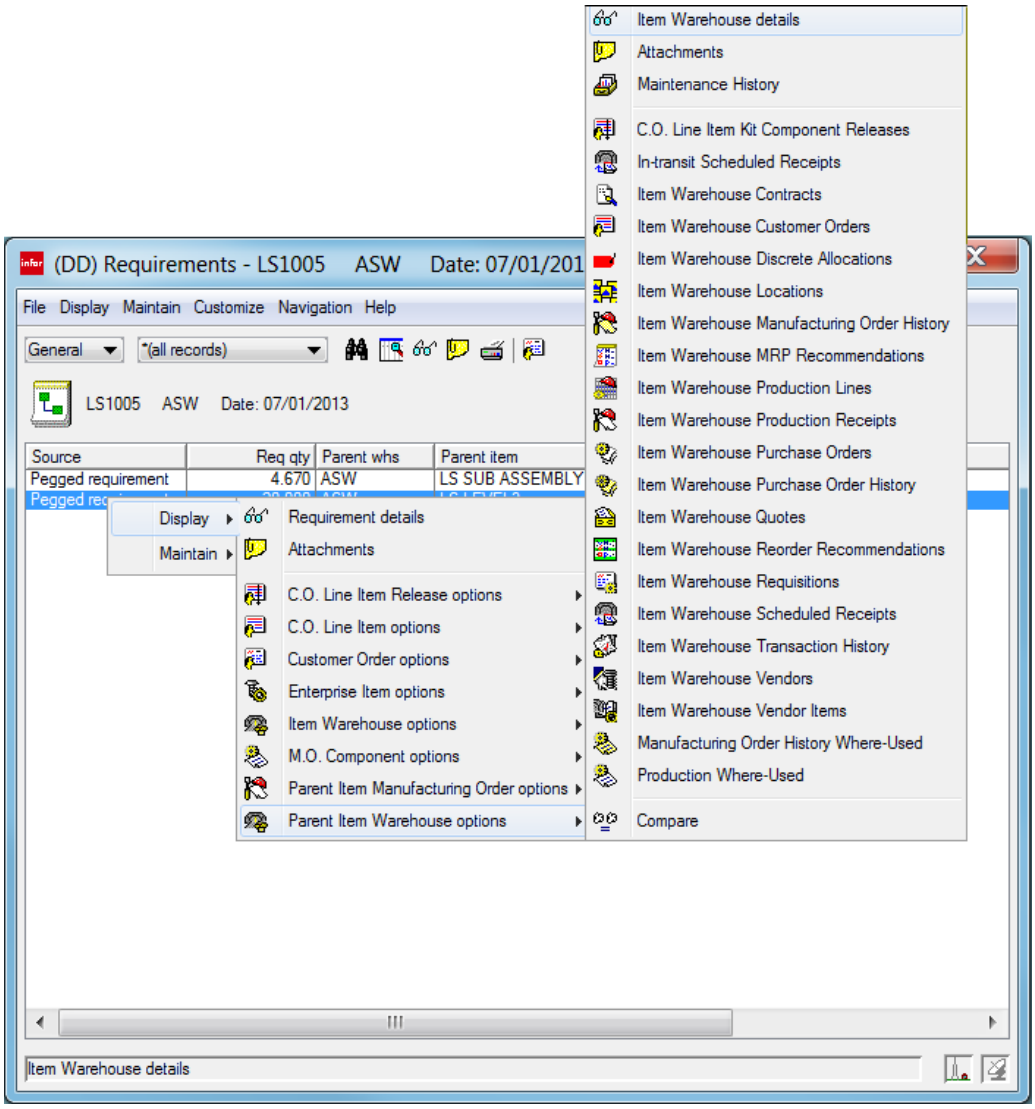


Requirements

The Requirements object shows the details for each item requirement of the selected activity summary. The requirement details shown 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.



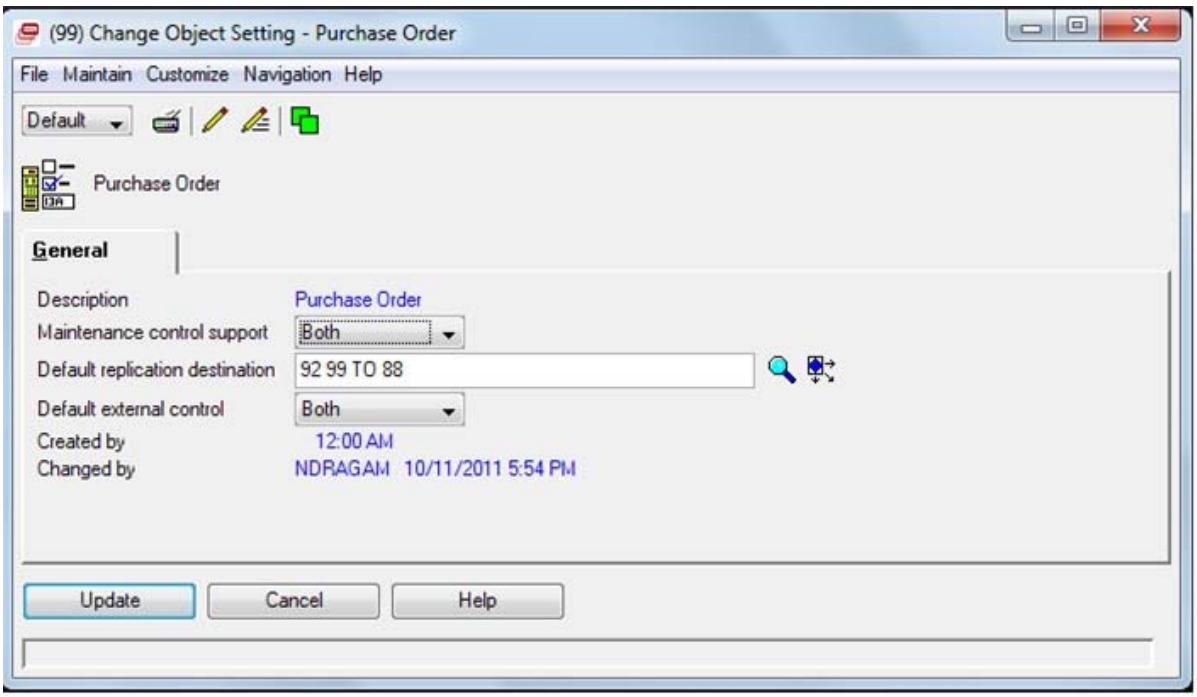
You can view the parent item details for the pegged requirements by right-clicking and selecting **Display > Parent Item Warehouse options >Item Warehouse details**.



Maintenance Control

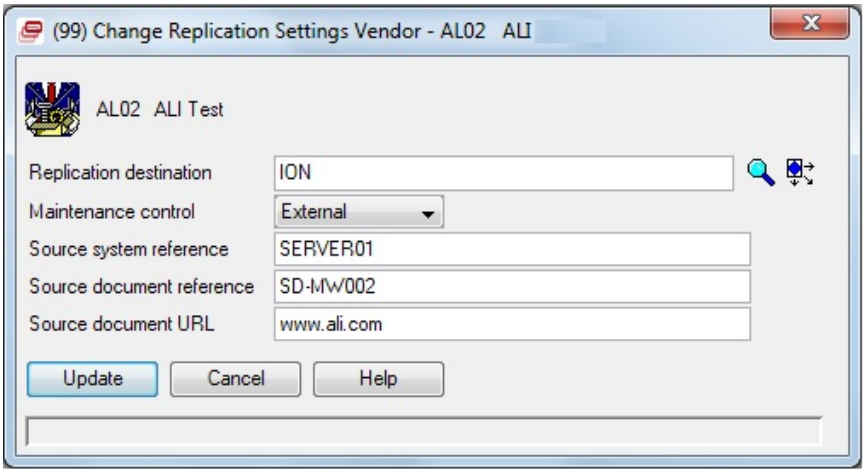
The Maintenance Control functions allow you to choose how an XA application object is maintained. With maintenance control, you can specify that an application object is maintained locally by the XA environment, externally by another XA or IDF environment or by another system, or by both an external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

The new Object Settings object contains a record for 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.



For example, a company might 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 for 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 for a vendor could have source system information that identifies the external system that updates the information for that vendor.



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 or, 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 shows the external transaction identifier and the date and time the externally received information was processed. The status record also shows 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.

Product Data Management

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 shows on Price Inquiry cards with details of how the price was calculated.

Printing price lists

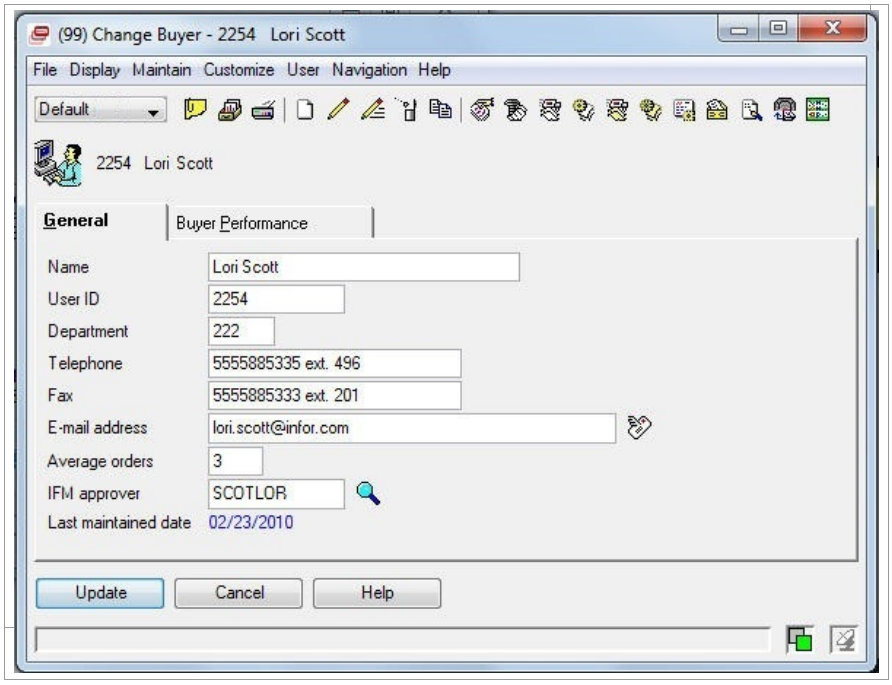
You can use the Item Price List report on the Item Base Prices object to print all possible base prices, or a subset of base prices, for an item based on the effective date, currency ID, and price book ID.

Procurement Management

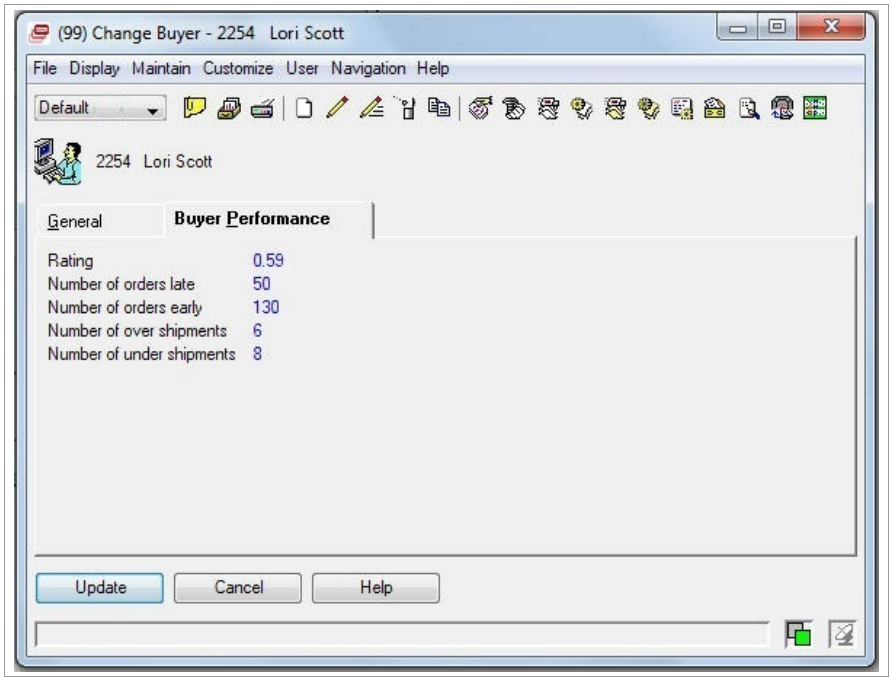
The primary area of new and enhanced functionality for Release 9.1 is in the Procurement Management application.

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 to allow you to narrow 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 shows only purchase orders for which approval is pending.



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



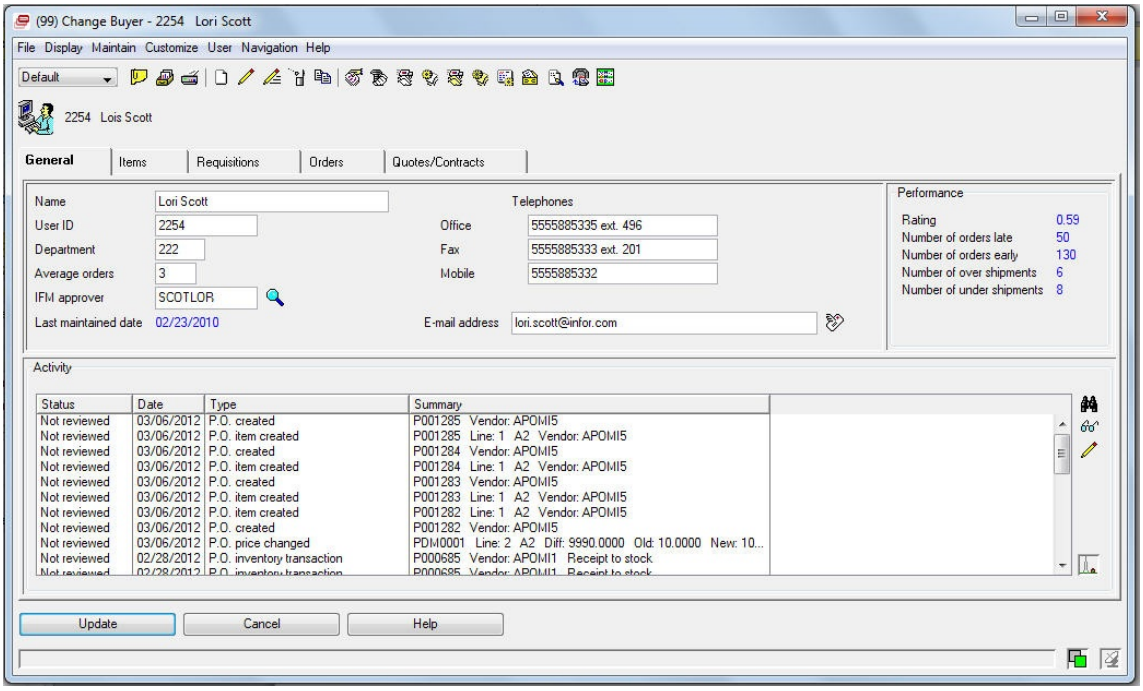
For Release 9.1, the redesigned Buyers information combines the general information and the performance information on a new General card that also includes a list of activities for the buyer. In addition, new cards show lists of related objects that are automatically subset for the selected object. For example, the new Requisitions card shows the list of requisitions that belong to buyer 2254.

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 having to specify 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 will appear 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 to use 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 to use for 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 shown 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 to provide easy access to the item revisions purchased by each buyer, requisitions assigned to the buyer, purchase orders entered by the buyer, and quotes and contracts assigned to the buyer.

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 and 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.

System-Link

System-Link adds the new System-Link Outbox and System-Link Inbox processes to 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 they can be 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 they are 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.

Extending BODs

In R9.1 and 9.2, an Enterprise Integrator developer can use the Extending BODs function to send additional information through existing BODs without any code changes in the User Area section of the BOD. The user area attributes can be used as is by the receiving application, or they can be transformed using ION to any standard BOD element. Currently, the Extending BODs function is only available to outbound BODs from XA. See “Appendix G – Extending BODs using User Area” in the *Infor XA Configuration Guide for Infor ION*.

Integrations

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

Product	Date added
Infor CRM	April 2016

See Infor XA integration documents on the Infor Xtreme Support portal at www.infor.com/inforxtreme.

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

Product Configurator

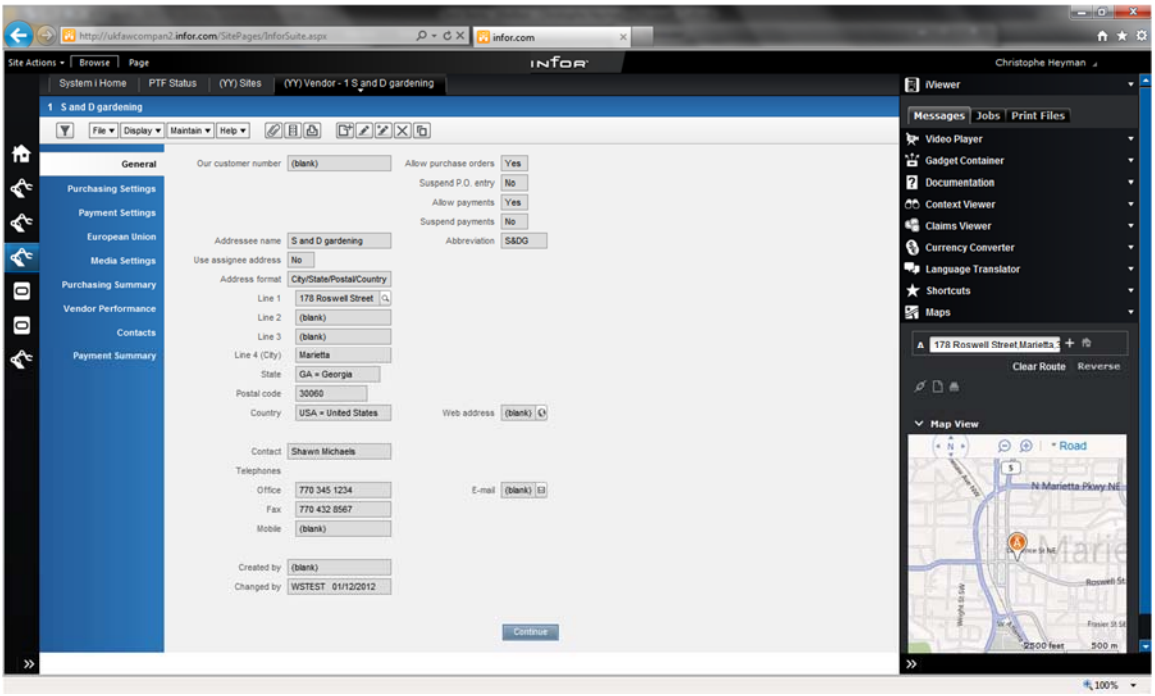
The Product Configurator integration with XA has been enhanced to support multi-site configurations. Each configured item may now have multiple configurations defined across multiple sites. The Configuration ID identifies the alternate item process for each specific configuration of an item revision 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 logon 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 9.1 includes file-level changes to enable future applications that can be installed with any of the Infor System i products. For example, Thru-Put enhancements to support vendor daily call offs and improvements to multisource planning.

The file changes will allow these new applications and functions to be installed easily with XA when they are available.