

User's Guide for Configuration Management

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Table of Contents

About this document

Chapter 1 Introduction.....	1-1
Configuration Management (CFG).....	1-1
Chapter 2 Configuration Management Concepts.....	2-1
Cluster, Service.....	2-1
Cluster Lines.....	2-3
Cluster structure.....	2-3
Physical Breakdown Structure, Service.....	2-3
Physical breakdown log.....	2-4
Functional Element.....	2-4
Serialized Items.....	2-5
The serialized item status.....	2-6
Serial numbers.....	2-6
Serialized item groups.....	2-7
Serialized items in physical breakdown structures.....	2-7
Alternative Item.....	2-7
Serialized item dashboard.....	2-8
Cluster layout example.....	2-8
Sample ASCII file.....	2-10
Chapter 3 Master Data Setup.....	3-1
Configuration Data Setup.....	3-1
Configuration management parameters (tscfg0100m000).....	3-2
Serialized item groups (tscfg0110m000).....	3-2
Usage classes (tsspc0130m000).....	3-2
Service-item groups (tsmdm2110m000).....	3-2
Chapter 4 Configuration management procedures.....	4-1
To use serialized item groups.....	4-1

To maintain physical breakdowns.....	4-1
To create a physical breakdown from an as-built structure.....	4-2
To create a physical breakdown from an item breakdown.....	4-4
To create a physical breakdown from a sales order (line).....	4-5
To create a physical breakdown from an ASCII file.....	4-7
To create a physical breakdown from a project-breakdown structure.....	4-8
To create a physical breakdown from a Bill of Materials.....	4-9
To delete physical breakdowns.....	4-12
To define a cluster.....	4-13
To create a cluster line.....	4-13
To modify an item breakdown.....	4-14
To create an item breakdown from a standard production BOM.....	4-15
Appendix A Glossary.....	A-1

Index

About this document

Objectives

This user's guide is designed to meet the objectives described below. It is assumed that you already have a general understanding of Infor ERP LN Service.

Understand the following concepts:

- Serialized items
- Clusters
- Cluster lines
- Physical breakdown structure
- Serialized item dashboard
- Functional element

To perform the following tasks:

- To use serialized item groups
- To maintain and create physical breakdowns
- To delete physical breakdowns
- To define a cluster
- To modify an item breakdown
- To create an item breakdown from a standard production BOM

Document summary

This user's guide explains the various processes in the Configuration Management module and the procedure to create clusters and generate physical breakdowns.

How to read this document

This document is assembled from online Help topics. As a result, references to other sections in the manual are presented as shown in the following example:

For details, refer to the Infor ERP LN Service Online Help.

Please refer to the Table of Contents to locate the referred section.

Underlined terms indicate a link to a glossary definition. If you view this document online and you click on underlined text, you jump to the glossary definition at the end of this document.

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-

Chapter 1

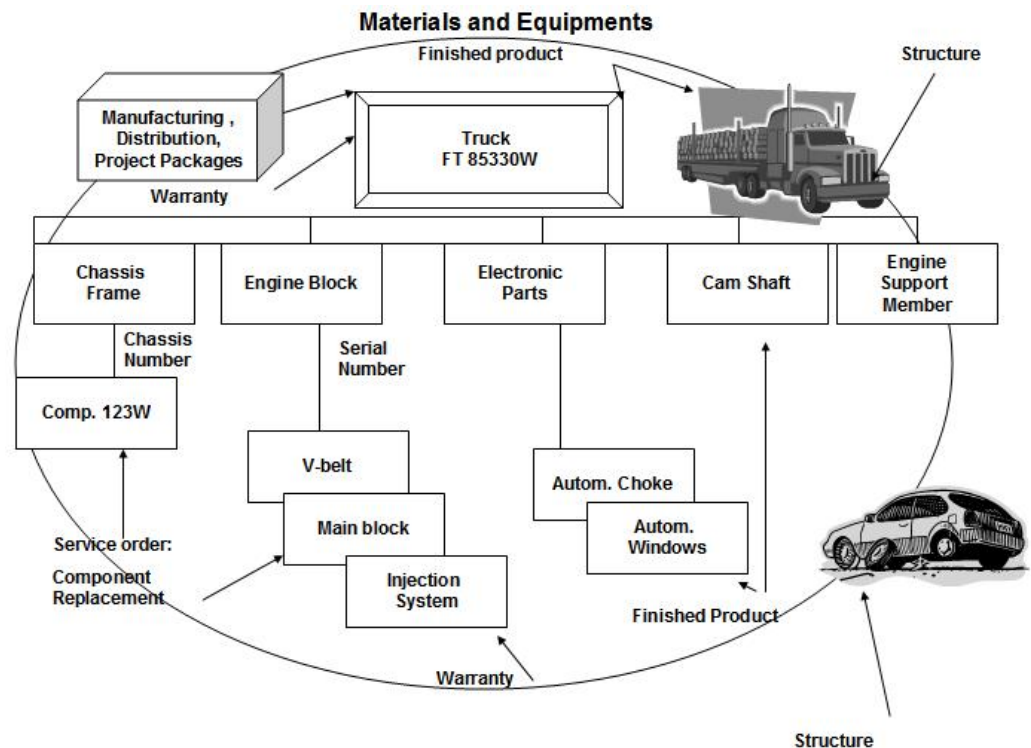
Introduction

1

This chapter provides a brief introduction of Configuration Management functionality.

Configuration Management (CFG)

Configuration Management provides the customer, production, or planning department with accurate information on the installed base and includes the details of the configuration of assets. The assets can be either serialized items or equipment owned by customers. The Configuration Management module offers a multilevel configuration structure definition and handling.



Concept

Use the Configuration Control module to define and maintain the following:

- Serialized-item groups: Serialized-item groups are used during the planning of service orders. The serialized items also act as the planning constraints when you select service engineers based on skills defined for a specific serialized item group.
 - Functional elements: A grouping of exchangeable items with identical functions. You can use functional elements in item breakdowns, physical breakdowns, and reference activities. For example, if you define a maintenance activity for a configuration, you can specify a functional element. In this way, the activity applies to all items covered by that functional element, and multiple, identical reference activities for similar items are avoided.
 - Clusters: A set of serialized items that have the same location and are owned by the same business partner. Grouping serialized items into a cluster enables you to maintain them collectively.
 - Cluster lines: The list of items or serialized items that belong to a cluster.
 - Item breakdowns: Item breakdowns can be used to create physical breakdowns. In addition, you can look up where items or child items are used in an item breakdown, copy standard production BOMs to item breakdowns, and replace/delete items in item breakdowns.
 - Serialized items. Serialized items can be used to create physical breakdowns.
 - Physical breakdowns: Defined for a cluster configuration, and enables you to view the as-built structure and as-maintained structure of the configuration and also the as-maintained structure.
-

Chapter 2

Configuration Management Concepts

2

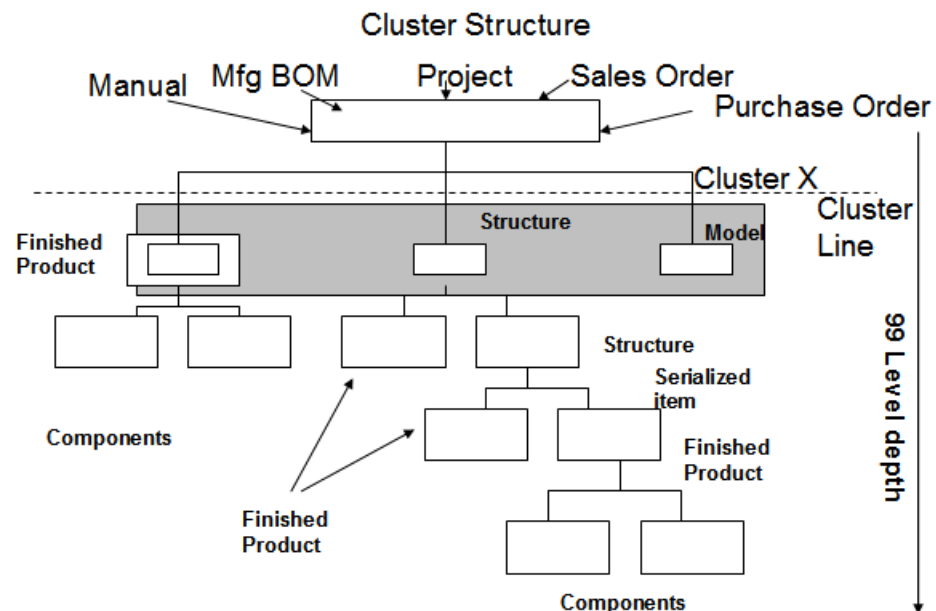
This chapter provides a brief description of the concepts in Configuration Management module.

Cluster, Service

A cluster is set of serialized items that have the same location and are owned by the same business partner. Grouping serialized items into a cluster enables you to maintain them collectively. Clusters help you to relate multiple objects for a particular customer, site, or contract.

You can also define a cluster as a location for a group of objects. The key data include the location details and service center details of a cluster. The other details serve only as defaults for the lower-level objects.

A cluster is at the highest level in the bill of objects and includes header information for all the objects that belong to the cluster, such as the business partner, location, and calendar. You can register the specific cluster (installed base) bought by the customers.



To include the serialized items or physical breakdown structures, you can include the item or top item in the cluster lines linked to the cluster.

Defining clusters

You can define a cluster and its structure manually. Alternatively, you can generate the clusters from service BOMs, purchase orders, sales orders, and project work breakdown structure or element structures.

Example

For example, you can define the following clusters:

- All computer hardware in a particular building
- An automobile or a truck
- A production machine, for example, a CNC operated milling machine
- An air-conditioning unit in a large building

Linking Clusters

You can link the cluster in one of the following ways:

- Link the cluster to a business partner to designate the cluster as an external cluster
- Link the cluster to a work center or department to designate the cluster as an internal cluster.

Cluster Lines

Cluster line is the list of items or serialized items that belong to a cluster. A cluster line can be a unique object or a generic model. A cluster line occupies the highest level in the cluster structure.

Cluster structure

The cluster structure is also referred to as the bill of serialized items. A cluster structure is the list of serialized items that share the same location and customer as the cluster. A cluster structure always consists of at least one cluster line. Each physical breakdown structure or serialized item can be a part or member of the cluster structure.

To create the structure, you must define serialized item relations. A cluster structure can have up to 99 levels and can be viewed graphically.

Physical Breakdown Structure, Service

Physical breakdown enables you to display the relation between serialized items. Physical breakdown relates the serialized items with each other (through parent-child relations). You can explode the physical breakdown to display a (multi-level) breakdown structure that displays the complete structure of the serialized items within a configuration. The concept of physical breakdown is introduced in Infor ERP LN 6.1.

Create physical breakdown

You can set up a physical breakdown to manage product configurations (breakdown structures) during service and maintenance activities.

In the **Service Order Control** module, you can handle the service-order activities, to update active physical breakdowns.

Select the **Configuration Status Usage** check box in the **Configuration Management Parameters (tscfg0100m000)** session. You can maintain the physical breakdowns in the **Physical Breakdowns (tscfg2110m000)** session.

You can create a physical breakdown using any of the following options:

- As-built structure
 - Item breakdown
 - ASCII file
 - Project-breakdown structure
-

Activate physical breakdown

Set the top-serialized item to **Active** to activate the physical breakdown. All the events and changes to the physical breakdown of an item are automatically logged.

Physical breakdown log

Physical breakdown log is used so that every change in physical breakdown structure is traceable and formally controlled. The initial physical breakdown and all the modifications identified with the action taken that have been executed on it are stored in the physical breakdown log.

Select the **Create Physical Breakdown Log** check box in the **Configuration Management Parameter (tscfg0100m000)** session to create a physical breakdown log.

Note

The installations or removals are logged automatically, but only if both of the following conditions are met:

- The serialized item's status in the Serialized Items (tscfg2100m000) session is **Active**.
- In the Configuration Management Parameters (tscfg0100m000) session, either the **Configuration Status Usage** check box or the **Create Physical Breakdown Log** check box is selected.

The graphical browser framework (GBF) that you can start in the Physical Breakdowns (tscfg2110m000) session, also uses the data in this session.

Functional Element

Functional elements are a group of exchangeable items with identical functions and can be used in item breakdowns, physical breakdowns, and reference activities.

You can use functional elements:

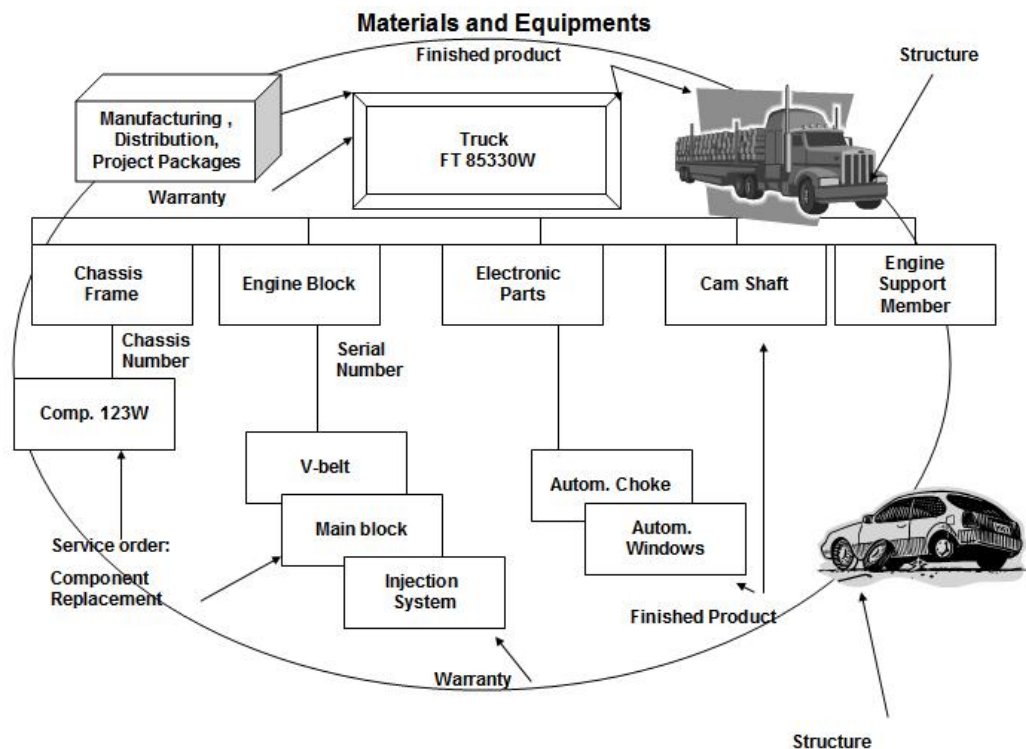
- To define reference activities for groups of similar items at once, rather than define multiple, identical reference activities.
- To list several exchangeable items for a specific position in the item breakdown.

You can define a single reference activity that describes the removal of a fan rather than define the removal of item Fan-54576787. If the reference activity is linked to a work order, you can specify the actual item that is placed in the physical breakdown.

- Functional elements can only be defined if the **Functional Elements Active** check box in the General Service Parameters (tsmdm0100m000) session is selected.
- You cannot change the functional element in a physical breakdown.
- A parent item and child item combination can only belong to one functional element.

Serialized Items

A serialized item is a physical occurrence of a standard item that is given a unique lifetime serial number. This enables tracking of the individual item throughout its lifetime, for example, through the design, production, testing, installation, and maintenance phases. A serialized item can consist of other serialized components.



In Service, serialized items can be customer-specific or owner-specific clusters that consist of items such as photocopiers, computers, air conditioners, forklifts, lathe machines, or even aircraft.

A serialized item is identified by the combination of the item code and the serial number. You can set up the mask used to generate the serial numbers in such

a way that the serial number include some fields of the item data, such as the item group and the manufacturer.

In a multicompany structure, the companies can share the serialized item data. All the service departments in the various companies can refer to the same serialized items.

The serialized item can originate from a sales order or from a project. The details of a serialized item indicate their origin, for example, by using specific sets of serial numbers for items that originate from sales orders and from projects. Serialized items can also originate from an as-built structure or directly from the production bill of material in Manufacturing.

In Service, serialized items can start their respective life cycles in As-Built mode or As-Maintained mode. Each serialized item, with or without its cluster, can be covered by a service contract or a warranty.

The serialized item status

Serialized items can be status controlled.

Each serialized item can have the following status:

- **Startup**
The serial number has been assigned, but the item is not yet included in a service order or contract. You can only change the status to Active.
- **Active**
The serialized item is part of a service order or contract. You can only change the status to Revision.
- **Revision**
You can only change the status to Active.

Serial numbers

A unique serial number is assigned to every manufactured item or purchased item. The serial number is assigned to track the item in its life cycle.

You can define a dummy serial number for an item. The dummy serial number is a temporary number and can be used to monitor the item until a permanent number is assigned. For example, ...

For each serialized item, you can define an alternative serial number for customer reference. You can use the alternative serial number to search for items when you register calls, create service order activities, or register parts lines for a maintenance sales order.

Serialized item groups

You can group serialized items by serialized item groups. A serialized item group is a group of serialized items with similar features.

You can define the serialized item groups that you need, for example, to categorize the skills required for the maintenance of the items, or as a basis for enquiries and reporting.

For example, you can select service engineers on the basis of their skills for a specific serialized item group.

Serialized items in physical breakdown structures

Serialized items are the building blocks of physical breakdown structures. A physical breakdown structure is the relationship definition of a set of serialized items with their underlying parts and assemblies. Some serialized items, such as a photocopier, have a simple structure whereas other serialized items such as a ship or an aircraft have a complex structure.

A top serialized item occurs at the highest level in the physical breakdown structure, while the underlying structure consists of assemblies that are either effective or outdated. Use the Tree View option to display a graphic view of the structure.

Each serialized item in the breakdown can be linked to a functional element, with a common function across the entire structure, and can be used to group serialized items based on the functional importance.

Alternative Item

Alternative items serve as a substitute for the standard item when the standard item cannot be delivered or is being replaced. If several items can be substituted for a standard item, you can assign a priority code to each alternative item.

You can specify alternative items for the components in an item breakdown under different parent items. You can select the correct alternative item based on the parent item

When you delete an item breakdown relation then the corresponding alternative items are also deleted. When there is a change in the item breakdown then the corresponding item in the alternative items must be updated.

Serialized item dashboard

Use this session to, view the details of the serialized items, that are used across modules, in various active and history tables related to orders, calls, contract configuration lines, field change order lines, job quotations, inspection registrations, failure analysis, and subcontract agreement lines.

Use the **Serialized Item Dashboard (tscfg2100m100)** session to select serialized item from the serialized item list. The details of the serialized item , such as the functional element, life cycle, service area, warranty type and so on are displayed in the session.

To view the serialized item details, double-click the serialized item line in the list.

The selected check boxes under **Additional Information** indicate that specific data is available for the selected serialized item.

Cluster layout example

This example shows how the components of a cluster can be structured. Depending on the complexity of the structure, a cluster can consist of:

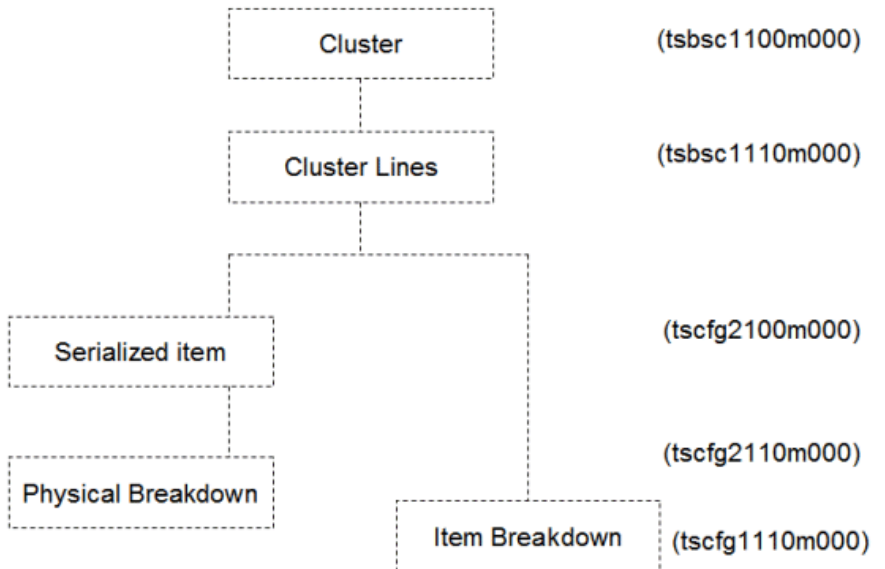
- Cluster lines
- Serialized items
- Physical breakdown
- Item breakdown

Note

In the following sessions, on the **Specific** menu, click View Tree to display the structure trees:

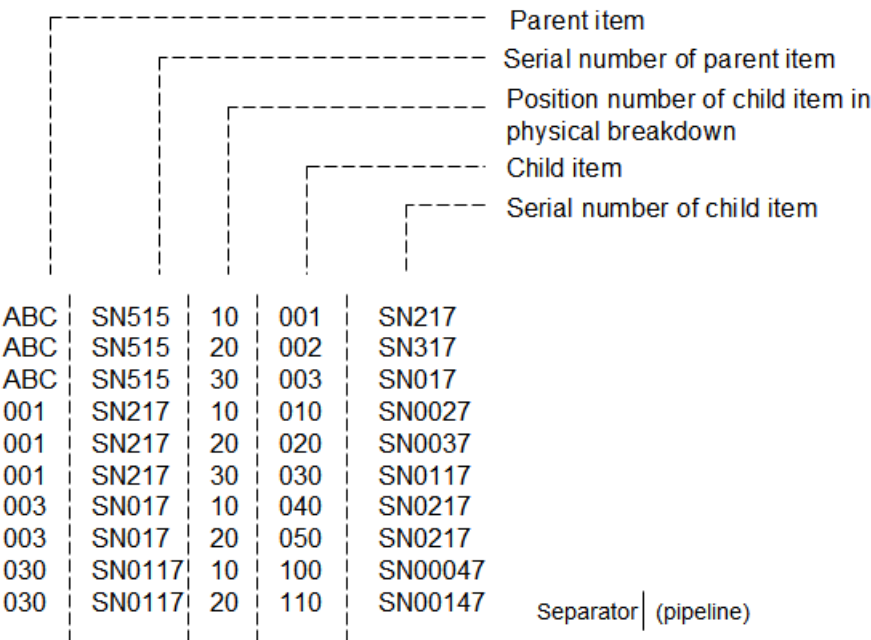
- Clusters (tsbsc1100m000) To display the cluster structure tree, the top level structure tree.
 - Physical Breakdowns (tscfg2110m000) To display the physical breakdown structure tree.
 - Item Breakdowns (tscfg1110m000) To display the item breakdown structure tree.
-

The structure of a cluster can look as follows:

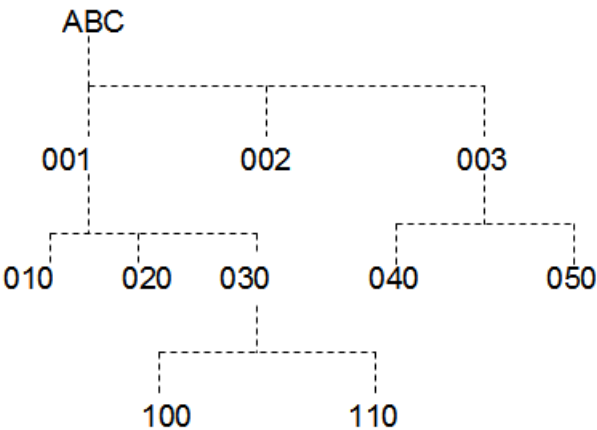


Sample ASCII file

The positions of the arguments in the ASCII file are as follows:



The physical breakdown that you create from this ASCII file looks like the following:



This chapter describes the steps you must follow to set up the master data for the Configuration Management module.

Configuration Data Setup

Before you can define service items, Service BOMs, objects and configurations, you must enter the data that can be used for creating the service items. Because configuration data is used throughout ERP LN, all data must be entered as completely as possible.

Functions of the other ERP LN modules in relationship with Configuration Control:

- Master Data Management (MDM) is used for and consists of service item groups and service items, which help define item breakdowns , serialized items and clusters.
- Item-Based Data (IBD) contains data about each item that must exist before you can create service items.
- Routing (ROU), which is used to maintain machines and work centers, can also be used when you define objects and configurations.
- Service Planning and Concepts (SPC) enables you to predict activities for each model, as well as generate maintenance plans for each configuration and the objects in the configuration.
- Call Management (CLM) tracks service calls on objects and configurations.
- Contract Management (CTM) keeps track of the contracts linked to objects and configurations.
- Service Order Control (SOC) creates service orders for objects and configurations.
- History and Statistics (HST) records historical and statistical information for objects and configurations.

Configuration setup sessions

Enter the configuration data in the following sessions:

1. Set configuration management parameters in the **Configuration Management Parameters (tscfg0100s000)** session.
2. Define Serialized item groups in the **Serialized Item Groups (tscfg0110m000)** session.
3. Define usage classes in the **Usage Classes (tsspc0130m000)** session.
4. Define service item groups in the **Service Item Groups (tsmdm2110m000)** session.

Configuration management parameters (tscfg0100m000)

The settings in the Configuration Management Parameters (tscfg0100s000) session affect the way the Configuration management (CFG) module operates.

Serialized item groups (tscfg0110m000)

Use the Serialized Item Groups (tscfg0110m000) session to define serialized item groups. A serialized item group is a group of objects with similar features. Serialized item groups can be used when you plan a service order. For example, you can select a service engineer on the basis of skill that the service engineer has for an serialized item group. The creation of the serialized item group is user defined, but generally relates to a group of similar objects.

Usage classes (tsspc0130m000)

The usage class is a categorization of usage based on environmental factors. Usage classes are attached to the models, configuration or objects. You can use usage classes to define more than one maintenance concept for an object or a model.

Example

Depending on the usage of a truck and the resulting specific maintenance requirements, the truck's usage class can be either National or International.

Service-item groups (tsmdm2110m000)

Service item groups are groups of items with common characteristics. The benefit of grouping service items is that grouping enables easier assignment of multiple items to a contract, quote, or warranty. For example, if you want to cover all your gaskets in a contract, assign the gaskets to the same service item group, then just include that item group in the contract. Before you can enter the data, you must define service item groups.

Chapter 4

Configuration management procedures

4

This chapter explains the configuration management procedures.

To use serialized item groups

A serialized item group is a group of serialized items with similar features. Use the **Serialized item Groups (tscfg0110m000)** session to define serialized item group.

You can use serialized item groups when you plan a service order.

Example

You can use serialized item groups to select a service engineer on the basis of skill that the service engineer has for a specific serialized item group. The creation of the serialized item group is user defined, but generally relates to a group of similar objects.

You can use serialized-item groups when you generate service order planning. The skills and serialized item group of a service employee can be used as planning constraints when ERP LN selects a service engineer to carry out a service order.

To maintain physical breakdowns

You can set up a physical breakdown to manage product configurations (breakdown structures) during service and maintenance activities. The physical breakdown is used to display the relation between serialized items

In the Service Order Control module, you can handle service-order activities, which you can use to update active physical breakdowns.

If, in the Configuration Management Parameters (tscfg0100m000) session, the **Configuration Status Usage** check box is selected, a physical breakdown becomes active when the top-serialized item is set to Active. This event, as well as subsequent changes to an item's physical breakdown, are automatically logged.

How to maintain physical breakdowns

Use the Physical Breakdowns (tscfg2110m000) session to maintain the physical breakdowns.

Use the commands on the **Specific** menu in the session to create a physical breakdown from one of the following:

- As-built structure
- Item breakdown
- ASCII file
- Project-breakdown structure

Note

You can set up breakdown structures for non-customized items in an item breakdown.

To create a physical breakdown from an as-built structure

You can use the Create Physical Breakdown Structure (tscfg2210m000) session to create the physical breakdown from an as-built structure.

If you create a physical breakdown from an as-built structure, this results in a direct copy of serialized items present in the Serial End Item - As-Built Headers (timfc0110m000) session of Manufacturing to the Serialized Items (tscfg2100m000) session of Service. The physical breakdown is created with the same structure as the as-built structure.

Note

- Manufacturing must be implemented to create a physical breakdown from an as-built structure. Refer to the Manufacturing (ti) check box in the Implemented Software Components (tccom0500m000) session.
- Anonymous items cannot have serialized items as child items.

To create a physical breakdown from an as-built structure

1. Start the Create Physical Breakdown Structure (tscfg2210m000) session.
 2. In the Source field, select As-built Structure.
-

3. Under As-built Structure, enter or select the as-built (top) item and serial number to copy from. The as-built (top) item cannot be lot controlled. Make sure that as-built component data is present in the Serial End Item - As-Built Components (timfc0111m000) session for the as-built (top) item. The non-serialized items in the as-built component data must be present in the Items - General (tcibd0501m000) session. Otherwise, no physical breakdown is created.
4. In the Link To section, in the Target field, select one of the following:
 - **Cluster**
The top item in the item breakdown is set as the top-serialized item in the physical breakdown. The components in all levels in the item breakdown are exactly copied to the serialized items. The serial number of the serialized item is created according to a mask.
 - **Breakdown**
The top item of the item breakdown must exist as a child item in the physical breakdown you enter. The components in all levels in the item breakdown are exactly copied to serialized items. The serial number of the serialized item is created according to a mask.
 - **New Breakdown**
ERP LN creates a new physical breakdown.
5. Under Defaults, enter or select the following:
 - The serialized item group to which the newly created serialized items belongs.
 - Service department (optional).
 - Delivery time (optional).
6. Select the **Generate Process Report** check box and the **Generate Error Report** check box as required.
7. Click Create.

As-built structure copied to a cluster

- A new cluster configuration is created.
- The top item in the as-built structure is set as the top-serialized item in the physical breakdown.
- The child items (as-built component data) on all levels in the as-built structure are copied exactly to the physical breakdown.
- The serialized as-built components are copied to the Serialized Items (tscfg2100m000) session. The non-serialized as-built components are copied to the Items - Service (tsmdm2100m000) session.

As-built structure copied to a breakdown

- The top item of the as-built structure must exist as a child item in the physical breakdown you enter.
-

- The child items (as-built component data) on all levels in the as-built structure are copied exactly to the physical breakdown.
- The serialized as-built components are copied to the Serialized Items (tscfg2100m000) session. The non-serialized as-built components are copied to the Items - Service (tsmdm2100m000) session.

As-built structure copied to a new breakdown

- The child items (as-built component data) on all levels in the as-built structure are copied exactly to the physical breakdown.
- The serialized as-built components are copied to the Serialized Items (tscfg2100m000) session. The non-serialized as-built components are copied to the Items - Service (tsmdm2100m000) session.

To create a physical breakdown from an item breakdown

You can use the Create Physical Breakdown Structure (tscfg2210m000) session to create the physical breakdown from an [item breakdown](#).

To create a physical breakdown from an item breakdown, take the following steps:

1. Start the Create Physical Breakdown Structure (tscfg2210m000) session.
 2. In the **Source** field, select Item Breakdown.
 3. Under Item Breakdown, enter the top item of the item breakdown.
 4. In the **Target** field, select one of the following:
 - **Cluster**
The top item in the item breakdown is set as the top-serialized item in the physical breakdown. The components on all levels in the item breakdown are exactly copied to serialized items. The serial number of the serialized item is created according to a [mask](#).
 - **Breakdown**
The top item of the item breakdown must exist as a child item in the physical breakdown you enter. The components on all levels in the item breakdown are exactly copied to serialized items. The serial number of the serialized item is created according to a mask.
 - **New Breakdown**
ERP LN creates a new physical breakdown.
 5. Under Defaults, enter or select the following:
 - The serialized item group to which the newly created serialized items will belong.
 - Service department (optional).
 - Delivery time (optional).
-

6. Under Item Effectiveness, select the Check Effectivity check box to enter a date that ERP LN uses to check the validity of the item-breakdown components. ERP LN only copies the components that are valid on the entered date. If you want to copy all components, leave the Check Effectivity check box cleared.
7. Under Options, select the **Generate Dummy Serial Numbers** check box, and any of the other check boxes, as required.
8. Click Create.

Note

The item breakdown can be copied from a standard production BOM.

To create a physical breakdown from a sales order (line)

You can use the Create Physical Breakdown Structure (tscfg2210m000) session to create the physical breakdown from a sales order (line).

Note

- Order Management must be implemented to create the physical breakdown from a sales order or sales order line. Refer to the Order Management (td) check box in the Implemented Software Components (tccom0500m000) session.
- If you read "order" in the text hereafter, sales order is intended.

The customized BOM is used when the items in the order lines are customized to create a new physical breakdown structure. Customized BOMs are identified by the item's project segment in the Bill of Material (tibom1110m000) session.

Before you can create a physical breakdown from a sales order line, you must perform three preliminary steps:

1. Link the sales order lines to a cluster.
2. Release the sales order to warehousing.
3. Perform the outbound procedure of the warehouse issue.

Preliminary steps

Step 1: Link the sales order lines to a cluster

1. Start the **Sales Order Lines (tdsls4101m000)** session.
2. On the **Specific** menu, point to After Sales, and click Link Cluster to Sales Order Lines.

3. In the Link Cluster to Sales Order Lines (tscfg2201m000) session, under Selection Range, enter or select the sales order and, if applicable, the sales order line.
4. Enter or select the cluster to which the sales order (line) must be linked.
5. Click Link.

Step 2: Release the sales order to warehousing

1. Start the **Sales Orders (tdsls4500m000)** session.
2. Select the appropriate sales order and, on the **Specific** menu, click Release to Warehousing.
3. In the Release Sales Orders to Warehousing (tdsls4246m000) session, enter any other required data.
4. Click Release.

Step 3: Perform the outbound procedure of the warehouse issue

1. In the Warehousing Orders (whinh2100m000) session, check whether the warehouse order is created.
2. Use the appropriate options on the **Specific** menu to generate and release the outbound advice.
3. On the **Specific** menu in the Warehousing Orders (whinh2100m000) session, click Shipment Lines.
4. In the **Shipment - Lines (whinh4531m000)** session, select the outbound line and, on the **Specific** menu, click Confirm or Freeze/Confirm Shipments/Loads.

To create a physical breakdown from a sales order line

1. Start the Create Physical Breakdown Structure (tscfg2210m000) session.
 2. In the Source field, select Item Breakdown.
 3. Select the Sales Deliveries check box.
 4. Under Selection Range, enter or select the appropriate cluster, item, or serialized item data.
 5. On the Target tab, under Defaults, enter or select the serialized item group to which the newly created serialized items can belong.
 6. Specify a service department and a delivery date as required.
 7. Under Item Effectiveness, select the Check Effectivity check box to enter a date that ERP LN uses to check the validity of the item-breakdown components. ERP LN only copies the components that are valid on the entered date. If you want to copy all components, leave the Check Effectivity check box cleared.
-

8. Under Options, select the Generate Dummy Serial Numbers check box, and any of the other check boxes, as required.
9. Click Create.

ERP LN processes as follows:

- Creates a serialized item for the item on every order line. The serial number of the serialized item is created according to a mask.
- Creates serialized items for the item-breakdown components also, if the item on an order line has an item breakdown.
- Uses these serial numbers to create the top-serialized items, if sales items are shipped from Warehouse Management and serial numbers are created for these sales items in Warehouse Management.

To create a physical breakdown from an ASCII file

You can create a physical breakdown from an ASCII file in the Create Physical Breakdown Structure from ASCII-File (tscfg2210m100) session.

Note

- The service items do not have to exist in the Items - Service (tsmdm2100m000) session. ERP LN creates the service items.
- The serialized items do not have to exist in the Serialized Items (tscfg2100m000) session. ERP LN creates the serialized items.
- Before you create the physical breakdown from an ASCII file, make sure that the item data is available in the Items - General (tcibd0501m000) session.

To create a physical breakdown from an ASCII file

1. Start the Create Physical Breakdown Structure from ASCII-File (tscfg2210m100) session.
2. In the Target section, under Link To field, select one of the following:
 - **Cluster**
Select the cluster to which the physical breakdown must be linked.
 - **Breakdown**
Select the serialized item to which the physical breakdown must be linked.
 - **New Breakdown**
ERP LN creates a new physical breakdown.
3. Under Defaults, enter or select the following:
 - The serialized item group to which the newly created serialized items belongs.

- Delivery time (optional).
- 4. In the **Input File** field, enter the path on which the ASCII file is located.
- 5. Select the **Process Report** check box and the **Error Report** check box as required.
- 6. Click Create.

To create a physical breakdown from a project-breakdown structure

You can create a physical breakdown structure by copying from a Project structure with the underlying Element or Activity structure and the material lines of the specific structure. In this process, you can also copy the material lines that underlie any of the elements or activities that are copied. You can create a physical breakdown from a project-breakdown structure in the Copy Project Breakdown Structure (tscfg2210m200) session.

In this session, you can create the physical breakdown from:

- An element structure.
- An activity structure.

Note

You can only use this session if Project is implemented.

To create a physical breakdown from a project-breakdown structure, take the following steps:

Step 1: Project field

Enter or select the project. For the entered project, the value of the Project Package Link field in the General Projects (tcmcs0552m000) session, must be Project (Project). If you use free projects, note that the changes made to the project after you have copied the project, are not processed to Service.

Step 2: Origin Structure field

Select from:

- **Activity Structure**

The leading plan is used (refer to the Planning tab in the Project (tppdm6100s000) session). The charge breakdown structure, as displayed in the Activities (tppss2500m000) session, is used as input for the physical breakdown. ERP LN creates a serialized item for each activity. The top element is used as the top-serialized item in the physical breakdown. The serial number of the serialized item is created according to the mask.

■ Element Structure

The budget top element is used (refer to the Budget tab in the Project (tppdm6100s000) session). The element structure as displayed in the Element Budget Structure (tpptc1509m000) session is used as input for the physical breakdown. ERP LN creates a serialized item for each element. The top element is used as the top-serialized item in the physical breakdown. The serial number of the serialized item is created according to the mask.

Step 3: Cluster field

Enter the code of the cluster that the newly-created physical breakdown belongs to. ERP LN creates a cluster line in the Cluster - Lines (tsbsc1110m000) session that specifies the newly-created top-serialized item.

To create a physical breakdown from a Bill of Materials

You can use the **Create Physical Breakdown Structure (tscfg2210m000)** session to create the physical breakdown from a Bill of Material (BOM).

If you create a physical breakdown from a bill of material, this results in a direct copy of effective items present in the Bill of Material (tibom1110m000) session of ERP LN Manufacturing to the **Serialized Items (tscfg2100m000)** session of ERP LN Service. If no item service data is present, ERP LN uses the item service defaults maintained for item type and item group to create items in Service.

To create a physical breakdown from a Bill of Materials

1. Start the **Create Physical Breakdown Structure (tscfg2210m000)** session.
2. In the **Source** field, select **Bill of Material**.
3. Use the **Sales Deliveries** option to create a physical breakdown from Sales (after sales). The end item of the sales order, the production BOM is copied to a physical breakdown. If you select this check box, you can use the fields in the **Selection Range** group box to create a physical breakdown from a range of clusters, items, or serialized items. For this selection range, a physical breakdown is created.
4. If you select the **Item Effectiveness** check box, the items' validity is checked before the items are copied to physical breakdown.

ERP LN validates the following:

If the item is revision controlled and derived from sales deliveries, ERP LN checks for revision from the sales order line. ERP LN checks for the effective date from engineering items for the given item and revision.

If the item is not revision controlled and derived from sales deliveries, ERP LN checks for the effective date from sales based on the **Configuration Date in Sales** field.

If the item is not from sales deliveries then, ERP LN takes the effective date given as input.

- **Unit Effectivity:** When ERP LN creates the physical breakdown structure from a Bill of Material (BOM), ERP LN considers unit effectivity as a validation. The items that belong to the unit effectivity are only created in service. Unit effectivity is checked from the serialized item. If unit effectivity is not present in the serialized item, ERP LN checks the unit effectivity from a sales order line if the item originates from sales.
- **Fall Back on BOM if source is not found:** If you select this check box when you create the physical breakdown structure from an as-built structure or item breakdown and no source item is found, ERP LN copies the bill of material of that item to the physical breakdown structure.
- **Consistency checks:** If the physical breakdown is generated directly from a production BOM, ERP LN performs a consistency check, both at ERP LN **Manufacturing** and ERP LN **Service**, to ensure the structure is defined without any mismatch. The items in such a structure must be defined in ERP LN Service with appropriate service-item data with related configuration control, and checked for consistency.

ERP LN performs the following consistency checks:

To distinguish between the items relevant and not relevant to service, ERP LN copies the configuration-controlled items, namely serialized or anonymous items, into physical breakdown. If no service-item data is available for an item, based on service defaults, the item data will be created in items service and copied to physical breakdown.

Note

You must create service item data for all the items copied from a production bill of material to the physical breakdown structure.

ERP LN checks for consistency with respect to the structure formation. A serialized item must always be situated above an anonymous item to ensure that the structure remains consistent with the item definition. ERP LN begins to copy when inconsistency is detected in the structure formation and an error report is generated.

ERP LN prints an error report if a serialized item is present under an anonymous item, as illustrated in the following example:

Example

Level	Item	Conf. Cont.	Item Service Data Present
0	X	Serialized	Yes
1	Y	Anonymous	Yes
2	A	Serialized	Yes ----- Problem 1
2	B	None	No
1	Z	Anonymous	Yes
2	A	Serialized	Yes ----- Problem 2
3	B	None	No
4	C	Anonymous	Yes ----- Problem 3

All three problems are caused by serialized items present under anonymous items.

ERP LN prints the following error report:

No PBD was generated for item X for the following reasons:

- Parent item (Y-anonymous) has a lower configuration control setup than Child item (A-serialized).
- Parent item (Z-anonymous) has a lower configuration control setup than Child item (A-serialized).
- Parent item (B-none) has a lower configuration control setup than Child item (C-anonymous).

ERP LN checks for consistency with respect to the loops in the bill of material (BOM). If two anonymous items occur in an opposite fashion, with respect to an existing structure definition, the anonymous items can subsequently end up in a loop.

ERP LN detects a loop in a bill of material, ERP LN prints an error report, as illustrated in the following example:

Example

Level	Item	Conf. Cont.	Item Service Data Present
0	X	Serialized	Yes
1	Y	Serialized	Yes
2	A	Serialized	Yes
2	B	Serialized	Yes
1	Z	Serialized	Yes
2	A	Serialized	Yes
3	B	Serialized	Yes
4	X	Serialized	Yes ----- Problem 1

ERP LN prints the following error report:

For item X, no PBD could be generated for the following reasons:

- Cycle detected in BOM.

To delete physical breakdowns

Use the Delete Physical Breakdown (tscfg2210m600) session to delete the physical breakdowns, the related top-serialized items and all related child serialized items.

Use the session to delete the physical breakdown, the related top-serialized items and all related child serialized items simultaneously.

Enter the item and the serial number of the item to delete the item and all its child items from the physical breakdown

To generate an error report in case of errors that occur when you delete the physical breakdown, select the Generate Error Report check box .

Note

You cannot delete serialized items that have the status Active or that are linked to a cluster.

To define a cluster

You can define a cluster, and the cluster's structure, manually, or you can generate the clusters from the following:

- Service BOMs
- Purchase orders
- Sales orders
- Project work breakdown structure
- Element structures

You can define a cluster as a location for a group of serialized items. The key data include the location details and service center details of a cluster. The other details serve only as defaults for the lower-level serialized items.

Clusters can be created in the following ways:

- Manually, in the **Clusters (tsbsc1100m000)** session.
- Automatically generated by ERP LN

To create a cluster manually

Use the **Clusters (tsbsc1100m000)** session to create a cluster.

Note the following points:

- **Ownership**
You must indicate who owns the cluster. If the cluster belongs to a business partner, select the business partner in the **Sold-to BP** field. If your company owns the cluster, leave the **Sold-to BP** field empty and in the **Department** field, select the department that owns the cluster. For example, this can be the work center that uses the production machine.
- ERP LN derives the sold-to business partner or the department that owns the cluster from the **Sold-to Business Partners (tccom4510m000)**
- If the **Use Service Area** check box is selected in the **General Service Parameters (tsmdm0100m000)** session, you must enter the service area.

To create a cluster line

For a list of serialized items that belong to cluster , you must define a cluster line.

To create cluster lines for the cluster, take the following steps:

1. On the **Specific** menu of the **Clusters (tsbsc1100m000)** session, click **Lines**. The **Cluster - Lines** session starts.
2. In the **Cluster - Lines** session, click **New**. The **Cluster - Lines** session starts.
3. Enter the cluster line details.

To modify an item breakdown

You can modify an item breakdown in the Replace Item in Item Breakdowns (tscfg1210m000) session.

Note

- You can select to replace or delete the item (component) from the item breakdown.
- You can select to print a process report and an error report.
- The old item and new item can only be the same if you enter a different item revision for the new item.
- You can also modify the item breakdown with a change request.
- If an existing item breakdown component is related to a change order, you cannot replace or delete this component with the Replace Item in Item Breakdowns (tscfg1210m000) session.

To replace an item in an item breakdown

1. Enter the old item under Replace.
2. Enter the new item under Replace With.
3. Enter the date on which the new item becomes valid.
4. Select the **Retain Old Item** check box if you want to keep the old item as an expired item in the item breakdown.
5. Enter the range of item breakdowns for which the item must be replaced.
6. Click **Replace**.

To delete an item from an item breakdown

1. Enter the item that must be deleted under Replace.
 2. Leave the Item field under Replace With empty.
 3. Enter the date when the item expires in ERP LN.
 4. If you want to keep the deleted item as an expired item, select the Retain Old Item check box.
-

5. Enter the range of item breakdowns for which the item must be replaced.
6. Click Replace.

To create an item breakdown from a standard production BOM

You can use the Create Item Breakdown from Standard Production BOM (tscfg1210m200) session to copy a production BOM to an item breakdown. This functionality can help you create clusters.

Note

- Manufacturing to use this session. Select the **Manufacturing (TI)** check box in the Implemented Software Components (tccom0500m000) session.
- The item breakdown can contain less items than the production BOM.

Procedure

1. Start the Item Breakdowns (tscfg1110m000) session.
2. On the **Specific** menu, click Create from Standard Production BOM to start the Create Item Breakdown from Standard Production BOM (tscfg1210m200) session.
3. Enter or select the top item to copy from in the Production BOM field.
4. Under Settings, select the Check Effectivity check box to enter a date that ERP LN uses to check the validity of the production-BOM item. ERP LN only copies the items that are valid on the entered date. To copy all the items, clear the Check Effectivity check box .
5. Click Create.

Note

- If the item breakdown already exists for the top item in the production BOM, the question "Item Breakdown Already Exists. Overwrite?" appears. If you click Yes, the existing item breakdown is completely replaced.
- Make sure that the default item data is present in the Items - General Defaults (tcibd0502m000) session for the combination of item type and item group of the production-BOM items.
- The BOMs of customized items cannot be copied. You can copy the customized BOM to a standard production BOM with the Copy Customized Product Structure to Standard Structure (tipcs2232m000) session and proceed as described in this topic.
- ERP LN always creates the item breakdown for one (1) parent item. Therefore, if the BOM quantity of the top item in the production BOM is

greater than one (1), ERP LN converts the quantity of the BOM items to a top-item quantity of one (1).

- *If you create an item breakdown for manufactured items with a BOM quantity greater than one (1), this can result in a decimal quantity of the item-breakdown components.*
 - ERP LN copies production-BOM (P-BOM) items listed in the Items - Service (tsmdm2100m000) session or the Items - Service Defaults (tsmdm2105m000) session to the new item breakdown. Note P-BOM Items that are only listed in the Items - Service Defaults (tsmdm2105m000) session are copied (based on the defaults) to the Items - Service (tsmdm2100m000) session, by ERP LN, when you create the new item breakdown.
 - ERP LN copies the production-BOM items with a quantity greater than zero (0).
 - ERP LN copies the production-BOM items that are serial-number controlled. Make sure that the Serialized check box in the Items - General (tcibd0501m000) session is selected for the BOM items.
 - You can create a physical breakdown from the item breakdown with the Create Physical Breakdown Structure (tscfg2210m000) session.
-

Appendix A

Glossary

A

activity

The smallest part of the activity structure used for a time-scaled budget. An entity that is used to represent a part of a project in an activity structure.

ERP LN distinguishes four activity types:

- WBS Element.
- Project Cost Account.
- Work Package.
- Planning Package.

activity structure

A hierarchical structure that organizes and defines the total scope of the project. Each level represents an increasingly detailed definition of a work project. In contrast to the element structure, the activity structure is activity time oriented.

anonymous item

An item with an **Anonymous** order policy. This means that the item is produced or purchased before a customer order is received. If an anonymous item is a manufactured item, it is produced in a make-to-stock production environment.

A generic item is typical for a to-order environment. The order policy can be **To Order** but also **Anonymous**. In case a generic item is anonymous, a product variant is configured without using a PCS project.

as-built structure

The actually built structure of a product including the serial numbers.

bill of material (BOM)

A list of all parts, raw materials, and subassemblies that go into a manufactured item and show the quantity of each of the parts required to make the item. The BOM shows the single-level product structure of a manufactured item.

change order

Orders that are used to record, approve, and carry through all kinds of changes.

For example, a change order can be related to engineering matters or to business processes.

Change Request

Change request initiates the change process. Change requests are recorded from a variety of request sources, such as demands in the marketplace, product reviews, and customer response for making product innovations and upgrades. Information stored in each change request form enables you to track various changes as requested by various sources.

cluster

A set of serialized items that have the same location and are owned by the same business partner. Grouping serialized items into a cluster enables you to maintain them collectively.

cluster lines

The list of (serialized) items that belong to a cluster.

customized item

An item produced on a customer specification for a specific project. A customized item can have a customized BOM and/or a customized routing and is normally not available as a standard item. A customized item can, however, be derived from a standard item or a generic item.

element structure

The multilevel, multiparent, hierarchical tree-like structure of elements that can be the basis of a budget.

functional element

A grouping of exchangeable items with identical functions. Functional elements can be used in item breakdowns, physical breakdowns, and reference activities.

Example

When a maintenance activity is defined for a configuration, a functional element can be specified. This way, the activity applies to all items covered by that functional element, and multiple, identical reference activities for similar items are avoided.

graphical browser framework

A tool that is used to display a hierarchical structure in the form of a tree. Often, this tool also enables you to perform drag-and-drop operations.

Example: To display a breakdown structure.

Acronym: GBF

item

A standard maintenance item.

item breakdown

A standard item's list of constituent components. The item breakdown can be displayed as a multilevel structure or as a single-level structure, and can be used as input for a physical breakdown.

life cycle

The item's economic lifetime.

lot

A number of items produced and stored together that are identified by a (lot) code. Lots identify goods.

mask

A template that specifies the structure of an identification code. The mask defines the total length of the identification code and the way the code is divided into mask segments.

See: mask segment

physical breakdown

A serialized item's composition and structure, defined by the parent-child relationships of its constituent items. The physical breakdown can be displayed in a multilevel structure or a single-level structure.

production BOM

An alternative term for the bill of material and is used to distinguish the Production BOM from the Engineering BOM.

project

An endeavor with a specific objective to be met within the prescribed time and financial limitation, and that has been assigned for definition or execution.

project-breakdown structure

A charge (element) breakdown structure or an element structure that is defined in Project.

sales order

An agreement that is used to sell items or services to a business partner according to certain terms and conditions. A sales order consists of a header and one or more order lines.

The general order data such as business partner data, terms of payment, and terms of delivery are stored in the header. The data about the actual items to be supplied, such as price agreements and delivery dates, is entered on the order lines.

segmentation

A subdivision of the item code in different logical parts, called segments.

These segments are visible in the sessions as separate fields. Examples of segments are:

- Project segment
- Cluster segment
- Item identification

serialized item

A physical occurrence of a standard item that is given a unique lifetime serial number. This enables tracking of the individual item throughout its lifetime, for example, through the design, production, testing, installation, and maintenance phases. A serialized item can consist of other serialized components.

Examples of serialized items are cars (Vehicle Identification Number), airplanes (tail numbers), PCs, and other electronic equipment (serial numbers).

serialized item

An item that is uniquely identified by the item code (manufacturer part number) in combination with the serial number.

serialized item group

A group of serialized items with similar features.

service area

A specific geographic area that is covered by one or more service engineers (employees). A service area can be linked to a service center.

service employee

Person(s) working for the service department.

service engineer

A trained technician who carries out the service activities within his/her own organization or on the customer's site.

service-item data

Information about the service item.

Index

activity, A-1
activity structure, A-1
Alternative Item, 2-7
anonymous item, A-1
as-built structure, A-1
ASCII file
 sample, 2-10
bill of material (BOM), A-1
Breakdown example
 configuration, 2-8
Breakdowns
 maintain physical, 4-1
change order, A-2
Change Request, A-2
cluster, 2-1, A-2
Cluster layout example, 2-8
Clusterlines, 2-3
cluster lines, A-2
Configuration Data Setup, 3-1
Configuration Management, 4-9
Configuration Management (CFG), 1-1
Create item breakdown from standard production BOM, 4-15
customized item, A-2
Define cluster, 4-13
Delete an item from an item breakdown, 4-14
Delete physical breakdowns, 4-12
element structure, A-2
Example
 ASCII file, 2-10
functional element, A-2
Functional element, 2-4
graphical browser framework, A-3
item, A-3
item breakdown, A-3
life cycle, A-3
lot, A-3
Maintain physical breakdowns, 4-1
mask, A-3
Modify an item breakdown, 4-14
physical breakdown, A-3
Physical breakdown
 create from as-built structure, 4-2
 create from ASCII file, 4-7
 create from item breakdown, 4-4
 create from project-breakdown structure, 4-8
 create from sales order (line), 4-5
Physical breakdowns, 4-12
 maintain, 4-1
Physical breakdown structure, 2-3
production BOM, A-3
Production BOM to item breakdown
 copy, 4-15
project, A-3
project-breakdown structure, A-4
Replace an item in an item breakdown, 4-14
sales order, A-4
segmentation, A-4
serialized item, A-4, A-4
Serialized item dashboard, 2-8
serialized item group, A-4
Serialized item group
 use, 4-1
Serialized items
 Service, 2-5
service area, A-4
service employee, A-5
service engineer, A-5
service-item data, A-5
Standard production BOM
 create item breakdown from, 4-15
Use serialized item groups, 4-1
