

Version Definition

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About this document

Objectives

This document describes the new functionality of Feature Pack 5 of Infor ERP LN 6.1 in terms of business requirements.

Send us your comments

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Introduction

This document is a Version Definition Guide that describes the capabilities delivered in Feature Pack 5 GA for Infor ERP LN.

The capabilities include:

- improved business processes
- new features
- statutory reports for new countries
- usability and ability improvements

The improved Supply Chain Collaboration processes will give more support to Vendor Managed Inventory and Subcontracting processes.

Vendor-managed inventory (VMI) is a process in which a supplier generates orders for its customer based on demand information sent by the customer. Throughout the supply chain, VMI is a way to cut costs and keep inventory levels low. VMI lets manufacturers reduce overhead by shifting responsibility for managing and replenishing inventory to vendors. Both supplier and customer side are addressed.

More control on the flow of goods for subcontracting operations are delivered to improve shipment and receipts of WIP, and optionally additional components, to a subcontractor. Also functionality to plan and execute subcontracting for a whole manufactured item by a subcontractor, rather than a few operations is supported.

The Assembly Line Control functionality is further improved. Among others, Final Assembly items can be stored in inventory, the sequencing of orders on the assembly line is improved and costing is possible per unit effective item. Also, the kitting functionality is extended in Order Management as well as in Warehousing.

Multi-currency reporting capabilities are improved by bundling the existing functionality of Financial Statement and FASB52 reporting to enable reporting according to the commonly known standards and requirements like IFRS/IAS.

Furthermore, a new currency system is introduced: the standard currency system, which combines the advantages of the existing currency systems, reduces the dependency on the reference currency and has far more flexibility in valuation of assets in foreign currencies.

Infor MyDay and Business Information Systems are new independent components in the Infor Open SOA (Service Oriented Architecture) environment, which can be used on top of any Infor component (ERP or another). ERP LN has been enabled to feed these components with the required information. Role Based Home Pages, for example, are developed to support a user working in a certain role (e.g. a Production Planner, a Purchase Manager or an Accounting Manager) in the organization. These users want to benefit from an integrated system but not see the overhead. They are expected to only see the data they are responsible for, and their objective is to execute tasks fast with no non-value added steps. Infor MyDay will help with that.

Each of these new options and capabilities, and many more, are described in detail in the remainder of this document.

BRQ000791 - ERP Horizontal: Standard Multi Currency System

Description

The main objectives for a new currency system are:

- Direct conversion from transaction currency to the company's functional (local) currency;
- Direct conversion from either the transaction currency, or the local currency (conversion method user-definable at company level), to one or two, optionally to define, reporting currencies; the reporting currency rates being definable at ledger-account level;
- Elimination of the reference currency as carrier for transactions;
- Financial-statement reporting (US GAAP / FAS52) in any currency, using specific reporting rates to convert from the local currency amounts.

Business Need

The local home currency, rather than the reference currency, must be the carrier for amount translations in foreign-currency transactions. This is especially needed for financial reporting, in which prescribed currency rates must be used.

BRQ000819 - ERP Horizontal: Vendor-Managed Inventory

Description

Inventory of components (or end products for that matter) are often handled according to the Vendor-Managed Inventory Concept (VMI). Enabling VMI in the ERP system means that stock management (handling), ownership (financial) and/or inventory planning, can be the responsibility of different parties. Stock management is usually done by the supplier, but can be subcontracted to a Logistic Service Provider (LSP) and can even remain in the hands of the

customer. Ownership frequently lies with the supplier (consignment), but stock may also be customer-owned. (Inventory) planning usually is the responsibility of the party consuming the items (customer), but may be done by the supplier or even an LSP. Supporting VMI means that all scenarios should be supported, as VMI is a 'flexible concept' and varies per customer, market and country.

Business Need

Vendor-Managed Inventory is a popular formula for handling inventory. Many manufacturers (and other businesses) keep their inventory levels low by leaving the management and/or ownership (consignment) of (component) stock in the hands of the supplier, until components are actually issued and consumed. Occasionally this goes for inventory planning as well. Within a VMI scenario, inventory management and sometimes inventory planning as well, may be subcontracted to a 3rd party, which usually is a Logistic Service Provider (LSP).

BRQ000860 - ERP Horizontal: Financial Ownership in Inventory

Description

To facilitate financial ownership in inventory, the architectural framework regarding inventory ownership and the behavior around it is improved. Therefore, the modeling of financial ownership in inventory is improved. For example, it is possible to model (within one warehouse) ownership by location. Furthermore, different types of behavior will be supported, so in case of subcontracting or an internal warehouse transfer, ownership will not change, but in case of regular consignment items, a usage of these consigned goods on for example a production order will result in an ownership change from the supplier to the customer.

Business Need

Business Partners in the supply chain cooperate more and more. One example is the increasing popularity of Vendor Managed Inventory in which the supplier takes over some of the responsibilities the customer used to have. One of the aspects of Vendor Managed Inventory is that the supplier can deliver items to its customer, but remains the owner of the items until the customer uses these items. This is also called consignment or call-off stock. The situation in which an enterprise owns items not located at one of its own sites can also be found in subcontracting processes in which a manufacturer sends items to a subcontractor to be used in some subcontracted operations, but the manufacturer remains owner of the goods during the whole production process. This solution improves the support of Financial Ownership in inventory. This is required to support Vendor Managed Inventory and Subcontracting. Examples of these improvements are the support of ownership for subcontracting (in which case the subcontractor won't become the owner of the items), invoicing between the

BRQ000955 - ERP Horizontal: Support of material flow for subcontracting

Description

New functionality is provided to support the material handling of the components and the work in process that are sent to the subcontractor. A solution is provided for the manufacturer that purchases subcontracting activities and for the subcontractor that executes them. Manufacturer: When an operation is subcontracted the WIP (called subassembly) and components can be sent to the subcontractor specifically for a specific production order. The subassembly and components can be sent to the subcontractor together in one shipment. It will also be possible to send components in batch mode anonymously to the subcontractor. In that case it is also possible to send the components from a supplier directly. It will be possible to monitor the inventory levels of the subassemblies and components that reside at the subcontractor site. The product that is received from the subcontractor can be considered as normal item. Standard warehousing functionality is applicable to this item. It will take some time to move subassemblies to and from the subcontractor, therefore additional lead times can be defined before and after a subcontracting operation. Based on information received from the subcontractor the manufacturer can change the planning automatically. Besides subcontracting of specific operations, subcontracting of production processes of entire items will be supported. In this case a purchase order is created for a specific item. The components that are required for the subcontracting activities can be sent to the subcontractor too. Subcontractor The functionality for the subcontractor provides the ability to receive materials that are owned by the manufacturer. Those items are stored against a certain value (using current valuation logic). The actual cost of those items are however zero when they are consumed in a production order.

Business Need

The current subcontracting functionality is limited. It does not support the material handling of the components and the work in process that are sent to the subcontractor. Also no functionality is available for the subcontractor that executes the subcontracting activities. Many customers use subcontracting functionality and require functionality to fulfill this shortcoming.

BRQ000956 - ERP Horizontal: Allocation and Hard Pegging

Description

There is a requirement to reserve inventory and/or to create and reserve future supply orders against specific demand orders. This is achieved by the concept

of characteristic based allocation and hard pegging by means of a new object called the specification. The specifications object contains characteristics which extend demand and supply objects for the purpose of selecting and matching valid characteristics during the process of characteristic based demand and supply matching.

Business Need

To support lean manufacturing concepts as well as vendor managed inventory, financial ownership and subcontracting for ERP LN 6.1 FP4

BRQ000957 - ERP Horizontal: Multi table

Description

Some sessions are developed that consist of data originating from multiple tables. In the user interface those sessions are similar to the "normal" sessions. In this way the user only has to maintain one session instead of multiple sessions.

Business Need

ERP versions thus far, only support editing a single table per session. This restriction sometimes results in an inefficient user interface, forcing the user to start multiple sessions to perform a single task. In some situations it will be more user friendly when the data of different tables can be maintained in one session.

BRQ000958 - ERP Horizontal: Selection of records

Description

Several batch sessions that can be started from an overview session will be executed for the records that were selected in the overview session. The selection can be a discontinuous set of records.

Business Need

Currently most batch sessions can only be executed for data, specified by ranges. In many situations users do not want to execute batch sessions for all data within a range. It is therefore required to select the data for which the functionality should be executed. This will be more user-friendly to the user.

BRQ001030 - ERP Horizontal: Business Object Document (BOD) Support

Description

In various areas in ERP LN, publishing of Business Object Documents (BOD s) has been implemented. This is required in order to work with Infor MyDay and with other new Infor components that are being developed. BOD s are created in the areas of Master Data, Order Management, Financials and Warehousing. New sessions are created to configure the required setup for BOD publishing and to initially publish existing data via BOD s.

Business Need

As part of the Infor Open SOA strategy, ERP LN should be connected to other Infor components via the Infor Enterprise Service Bus (ESB), such that customers can leverage from the added value of these components. Publishing BOD s is the mechanism to make this happen.

BRQ000941 - ERP: Usability enhancements - Homepages

Description

New screens, called Homepages, will be designed and developed to support a user working in a certain role within the company. A homepage should incorporate a workload and alerts overview, provide the user with relevant graphs and KPI statistics for monitoring progress and evaluating performance, and should provide quick links to most used sessions and reports. The following 'roles' have been identified, and for these roles homepages will be created: Production Planner (EP), Shop Supervisor (MFG), Buyer (OM), Sales Administrator (OM), Warehouse Manager (WH), Shipping/Receiving Manager (WH), Warehouse Administrator (WH), Accounts Payable Administrator (FIN), Accounts Receivable Administrator (FIN), Accounting Manager (FIN), Credit and Collection Representative (FIN), Project Manager (TP), Service Coordinator (SER).

Business Need

To improve the user experience with ERP, not just from a customer point of view (usability purposes), but also from a world-wide salability perspective. A homepage should serve the purpose of supporting several business personas ('roles') in their daily work routines. Because of the differences in the way companies and different users in their role manage their work, these homepages should be customizable.

BRQ000803 - ERP Multi Site: Support of Sales Price related transfer pricing

Description

Currently, the internal transfer price, for example in case of triangular invoicing, is based on a commercial price or on the valuation price of an item. Several customers would like to have an internal price based on the sales price minus a certain percentage.

Business Need

Use an internal price based on the external sales price for internal transfer pricing

BRQ000875 - ERP Localization - Spain: Electronic VAT reporting

Description

The model-347 and model-349 electronic VAT declaration for Spain must be supported. For this reporting, it is needed to store the business partner's tax country and tax ID with the tax analysis data. These additional data must be defaulted during transaction entry, including purchase invoices, and must be overwritable by the user. The tax declaration software must be extended to be able to process more than 1 model for a declaration.

Business Need

The model-347 and model-349 electronic VAT declaration for Spain must be supported.

BRQ000880 - ERP Localization - Spain: Bank credit

Description

In Spain, bank credit is a banking system which provides the borrowing capacity to the organization in form of the credit payment or a loan. The amount taken on credit (or loan) is used in paying the supplier or to run its business.

Business Need

An organization makes a payment (or borrows money) from a bank with the amount more than the balance amount available in that bank in order to utilize the credit payment facility provided by the bank to the organization.

BRQ000888 - ERP Localization - Spain: Spanish Checks

Description

Check is a commonly used payment instrument in many countries. However, the format of a check is not uniform throughout and the layout may differ between various Banks. In many countries, the layout of the check is standardized, to enable a common format for centralized clearing. ERP LN has already provided many country specific check layouts.

Business Need

While executing the Payment Process, the user should be able to print a check in the layout standardized in Spain (CARTA-PAGARÉ).

BRQ000889 - ERP Localization - Spain: Bank Norma Files

Description

Payment file is a commonly used payment instrument in many countries. However, the format of a payment file is not uniform throughout and the layout may differ between various Banks. In many countries, the layout of the payment file is standardized, to enable a common format for centralized clearing. ERP LN has already provided many country specific payment file layouts.

Business Need

Payment file should be generated in specific format which is a standard format used by different banks in Spain.

BRQ001021 - ERP Localization - MAPAS

Description

The Portuguese fixed asset reporting is adapted to the FAM module in Infor ERP LN so that it complies with the Portuguese legislation requirements. The main changes required to cover the Portuguese requirements are as follows:

- Legal reports and the layouts and the data modeling for the following:
 - Maps of reintegration and depreciation (Models 32.1 and 32.2 and Models 33.1 to 33.19).
 - Maps of revaluation (Models 34.5 and 34.6).
-

- Map of appreciation-depreciation value (Model 31).
- Revaluation process: A new method of fixed asset revaluation should be included.
- Degressive depreciation: A new depreciation method should be included, although this is an optional depreciation method.

These reports are based on the revaluation year and will consider the service date of the assets. Also, the assets disposed during the exercise will appear on a different report. The assets will be grouped depending on their category: QtangibleR, QintangibleR, and Qfinancial.

Business Need

In Baan IV and Baan 5c, the Portuguese legal requirements for fixed asset reporting were available only in the localization extensions; in LN, it was preferred to have these in the standard.

BRQ000932 - ERP Voice-to-Infor : Service

Description

The following requirements are realized for the voice-to-infor 2007.

MRQ001883- A possibility to copy preventive maintenance plans of an item from one period to another period.

- Deep duplication of the maintenance sales order and work order should be possible so that these orders can be copied easily to another new order.
- While creating a call if the user enters the serial number, the system retrieves the all the items for which the serial is present so that user can select the appropriate item. In case there is only one item present, the system defaults the item to the call. This feature will be extended to some of the important places where the item and serial number are present.

Business Need

BRQ000937 - ERP Voice-to-Infor: Accounts receivable and Cash management

Description

The following Market Requirements have been voted as Business Requirements as part of Voice-to-Infor 2007. MRQ001650 - Print receipts linked to the invoices. The open entry report (tfacr2421m000) should have an option to print the receipts linked with the invoices. MRQ001866 - Check and anticipated document details on reference field of reconciliation document. When an anticipated document is reconciled, the reference field of the reconciliation document in session tfcmg2100s000 should capture the check and anticipated document details, provided no manual reference is already given by the user. This is to enable

easy tracking of the reconciliation details when Automatic Selection for reconciliation is used and the same document number (with different sequence numbers) are generated by the system for multiple documents/checks.

MRQ001668 - Update sales listing when tax is adjusted for the deductions. When adjust tax on deductions is applicable in cash management, the tax base amount in the sales listing needs to be updated accordingly.

Business Need

BRQ000942 - ERP Voice-to-Infor: Add fields "buyer" and "planner" to planned PRP orders

Description

Buyer is an employee in the company who is the contact to the concerned buy-from business partner. The buyer is also known as the purchasing agent. It is important to know what are the items/purchase orders on that employee. Planner is the employee or department responsible for planning the production, purchase and distribution of items. The planner takes into account the inventory levels, availability of materials, and capacities of resources, and reacts on signals such as rescheduling messages that Infor ERP generates. So it is important in the PRP to know which are the orders by this employee.

Business Need

It is important to know at the requirement level in projects that which are the orders by a buyer and a planner. This functionality is already available in the order management module and is now required to have in the projects domain also before transferring the orders to Order Management.

BRQ000968 - ERP Voice-to-Infor: Warehouse Management

Description

The following requirements have been realized for the Voice-to-Infor 2007: MRQ000792 - Archiving of lot codes (and lot tracking) extended. MRQ000795 - Information on open receipts quantity extended in Warehouse Mgmt. MRQ001929 - Define number of copies to be printed (as part of Flexible Order Processing). MR1109039 - Skipping message when re-using (outbound/inbound) run. MRQ000015 - Option to convert warehouse from non-location to location control. MRQ001300 - Returns straight to consignment warehouse. MRQ001814 - Show ABC Code on Cycle Counting History

Report.MR1110201 - Blocking of entire warehouses.MRQ001176 - Allow project data to be printed on the picking list.MRQ001944 - Inventory transactions by item and warehouse overview.

Business Need

Miscellaneous changes to improve the overall functionality and/or usability for the business.

BRQ000931 - ERP Voice-to-Infor: Copy sales orders

Description

Sales Order Copy templates functionality is introduced that enables the user to model the copy-conduct. In aSales Order copy template the user can define for each attribute of the target-sales order if the new value should be either (1) copied from the source-order, (2) defaulted or (3) prompted via user interaction during copying. Default copy templates will be supported on both user and sales parameters level.

Business Need

A solution is required that allows users to model sales order copying functionality to match their specific expectations and requirements.

BRQ000995 - ERP Voice-to-Infor: Close Purchase-Sales Order

Description

In case a purchase order or sales order is closed, it should not be possible to add new lines.

Business Need

SOX required to prevent new purchase order lines to be added to closed purchase orders.

BRQ000939 - ERP Ease of Use: Fit & Finish for Warehouse Mgmt

Description

A range of enhancements have been realized regarding the usability, navigation and user interface / look & feel of sessions/screens within the Warehouse Management module within ERPLN 6.1.

Another objective is to make them more 'role/task-based'.

Modifications concern topics like:

- navigation within sessions
- descriptions of entities displayed on screens
- business terminology
- efficient messaging
- efficient zooming/drilling down
- editable grid
- keyboard support

Business Need

To improve the user experience with ERPLN 6.1, not just from a customer point of view (usability purposes), but also from a world-wide salability perspective.

BRQ000967 - ERP Ease of Use: Fit & Finish for Financials - Accounts Receivable and Cash Management

Description

A range of enhancements are required regarding the usability, navigation and user interface / look & feel of sessions/screens within the Financials modules within ERPLN 6.1.

Another objective is to make them more 'role/task-based'.

Modifications concern topics like:

- navigation within sessions
- descriptions of entities displayed on screens

Business Need

To improve the user experience with ERPLN 6.1, not just from a customer point of view (usability purposes), but also from a world-wide salability perspective.

BRQ000996 - ERP Ease of Use: Fit & Finish for Enterprise Planning and Manufacturing

Description

A range of enhancements have been realized regarding the usability, navigation and user interface / look & feel of sessions/screens within the Enterprise Planning and Manufacturing in ERPLN 6.1.

Modifications concern topics like:

- improved navigation within and between sessions
- descriptions of entities displayed on screens
- improved use of business terminology
- efficient messaging
- improved zooming/drilling down
- additional keyboard support
- additional icons on toolbar

Business Need

To improve the user experience with ERPLN 6.1.

BR1101835 - ERP Enterprise Planning: use Purchase /Sales patterns for Calendars

Description

In order to prevent redundancy of data, the patterns from purchase and sales should be used for setting upcalendar patterns. Currently, calendars use their own patterns

Business Need

reduce maintenance of data.

BRQ000998 - ERP Enterprise Planning: Improve views on Item Order Plan

Description

In many environments, there is a high volume of demand -, and supply transactions in the Item order plan. Especially in this situation, users prefer to have transactions listed, time phased, with a clear seperationinto demand and supply transactions. Currently, with all transactions into one view, it is not easy to have, from a user perspective, a cleardistinction between demand or supply transactions unless you filter out the specific transactions. Having these two separate views with demand and supply transactions will allow easier search, filtering and scanning through specific transactions, improving the usability of the session

Business Need

Many customers are using the Item Order Plan session to analyse the order plan which is generated by Enterprise Planning. In order to analyse, pinpoint issues, track changes more efficiently, users prefer to see demand -, and supply transactions in separate views within the item Order Plan rather than having all these transactions listed into one view

BRQ000999 - ERP Enterprise Planning: Select special contract when transfer from EP

Description

At the moment of transferring planned purchase orders from Enterprise Planning in a batch into purchase orders, planned purchase orders with an item containing more than one (active) special contract, should be excluded from the transfer. These orders should get special attention and dealt with on an individual basis. As these orders are excluded from the batch transfer these orders should be transferred manually. When the user invokes the action to transfer the order manually, an option to select the correct (special) will be presented to the user. At this point the user can select the contract which should be linked to the purchase order.

Business Need

Currently, it is the assumption that a 'buyer' (executed in ERP LN Order Management package) is in charge of linking the contracts in case multiple effective contracts exist for the item. This is not always the case. This can also be the responsibility of the (production) planner. Then, selecting and linking the contract already needs to be done in Enterprise Planning. The planner will ensure that, at transfer, the purchase order is already linked to the correct contract.

BRQ001026 - ERP Enterprise Planning: Exclude Items from Order Pegging

Description

An option has been made available on item planning data to indicate that the item should be excluded from order pegging. Orders for items, which are indicated as 'excluded from pegging', will not be taken into consideration during the generation of pegging relationships.

Business Need

Exclusion of items in order pegging contributes to better performance in the generation of pegging relationships; it allows users to exclude non-relevant orders in the pegging structure and to focus on pegging information of orders with 'critical' items.

BRQ001027 - ERP Enterprise Planning: Enhanced Update Signals Session

Description

The options on the Update Signals session are now in line with the options for updating signals on the Generate Order Planning session.

Business Need

When users run the update signals separate from order planning, the update signals functionality should offer the same functionality as is available when updating the signals during order planning.

BRQ001029 - ERP Enterprise Planning: Small Topics

Description

The following small topics have been realized:

- Option to ignore empty periods when printing the item order plan.
- Additional options to select and view SFC order groups and EP order groups in Browse Order pegging.
- Generate Order Planning: Ignore Top Down options and Bottom Up options when running for a full range of items.

Business Need

Miscellaneous topics to improve functionality and usability in Enterprise Planning.

BRQ001011 - ERP Enterprise Planning: ATP Delivery Schedule in Sales Unit

Description

While all ATP calculations are done in inventory unit, it is now possible to have the result in another unit(e.g. the sales unit). This will allow users to do ATP checks in a specified unit, have the total result in this unit, and check the details which are shown in inventory unit.

Business Need

Currently the ATP results are always expressed in inventory unit. As a result, accepting an ATP proposal(Fixed Warehouse Check) splits a Sales Order Line into multiple lines changing the unit from sales to inventory unit. This is not desired; the line should be split up using the sales order unit.

BRQ000531 - ERP Warehouse Management: High Volume Lots

Description

In ERP LN the concept of high and low volume serials is present. Till now for lots only the lowvolume concept is present; the concept of high volume lots has been introduced now at the outbound side. In FP4 this has been extended to the Service and Maintenance application.

Business Need

Especially companies in the airline industries have to register lots and / or serials, but this should be aseasy as possible. Next to the high volume serials concept the high volume lot concept is very important.

BRQ000970 - ERP Warehouse Management: Inventory Disposition

Description

After received goods are inspected, they can initially be 'Dispositioned' when not approved. This may then be followed by a more thorough check to decide what to actually do with the goods: scrap, use as is, rework or return to supplier. From a financial perspective, goods will be paid for after a receipt has been recorded and confirmed. Placing received goods in a 'Disposition/Reject' location will not automatically debit the supplier. No (potential) backorders will be generated during disposition. In case of 'Use as Is' no new receipt is recorded, but an inbound procedure is started straight from the reject location. In case of 'Return to Supplier' a new type of return order has been added to handle Disposition Returns.

Business Need

When goods are not approved at receipt, this does not necessarily imply that they are rejected and that the supplier is always responsible. Such decisions usually depend on agreements between business partners and may vary per business.

BRQ000977 - ERP Warehouse Management: Small Topics

Description

The following (smaller) requirements have been realized:

- When printing Purchase/Production Order Advices, a selection can be made based on 'Status'.
- The Inventory Handling Parameter 'Confirm Receipt as Final' has been added to make sure that the 'final' flag on a receipt is always active during confirmation.

This will trigger the back order process. Inventory graphs have been extended by adding a selection option on warehouse. Functionality to 'Check and Repair Inventory' has been created, based on the (Planned) Inventory

Transactions). For performance purposes and to reduce locking risk, a parameter has been added to decouple the update of Sales Deliveries from the 'Confirm Shipment' transaction. (Sales Deliveries can now be updated through a new batch session.) A default (printer) device can be defined in (Warehousing) User Profiles. In the 'Planned Inventory Transactions' expected inventory is now also shown by item/warehouse. The concept of Lot Control (Not in Inventory) is now also supported in Service & Maintenance. Parameters 'Lot Control in Use' and 'Serialized Items in Use' have been added to the Warehouse

Master Data Parameters. If these are switched off, related fields and options will disappear.

Business Need

Miscellaneous changes to improve the overall functionality and/or usability for the business.

BRQ000971 - ERP Warehouse Management: Kitting and Shipping

Description

Items often need to be shipped in a specific shipkit structure. This structure can be defined by the engineering department and recorded as Bills of Material. Subsequently these BOM's are copied to sales orders to trigger the necessary warehouse procedures and finance procedures. Before shipment of a topkit takes place, components are picked and packed together as subkits. Finally they can be packed in shipping containers and the necessary documents are generated. Subkits might be shipped partially, in case not all of the components are available and the customer still wants to receive the goods.

Business Need

To be able to ship goods as kits in a structured way; this will facilitate the use/assembly of the components at the destination.

BRQ001025 - ERP Warehouse Management: Small Topics

Description

- Searching for lots based on the lot code only is now possible, so that it is not necessary to also know the item (code) to find the desired lot.
- Personalizing the grid is possible in the Outbound Line Status Overview, which allows the user to activate the 'initially hidden' fields.

Business Need

Enhance usability.

BRQ000978 - ERP Freight Management: Default Device by User

Description

Within ERP LN Freight Management the user profiles have been extended with the option to define default (printing) devices to a user.

Business Need

Usability. (No popups when initiating print reports.)

BRQ001012 - ERP Freight Management: Freeze Calculated Freight Costs

Description

Whether the estimated/calculated costs of transport are still subject to change depends on the circumstances; it might depend on whether your own fleet is employed or an external carrier, or on the type of carrier (bulk or express/parcel delivery), or on the agreements made with carriers, and so on. Also the processing status of a freight plan and the loads and shipments it contains determines whether updating costs -either manually or automatically- is still desirable. Therefore, to allow a user to determine up to what stage cost recalculation is still permitted, a flexible solution has been implemented.

Business Need

More flexibility is required by several customers with regard to the freight cost calculations. Whether transport cost can be recalculated when changes take place at later stages depends on the circumstances.

BRQ001013 - ERP Freight Management: Inventory Monitoring directly from Freight Planning

Description

When you plan and process freight orders, you must do a (final) check on the available inventory; this avoids situations where a transport planner puts a lot of effort in an accurate and cost-efficient transport planning, while it is already obvious that the required quantities -such as from the sales orders- will never be available on time.

Business Need

The contents and structure of loads/shipments is also determined by the inventory available. Therefore, insight in stock levels can be of great help to a transport planner.

BRQ001024 - ERP Freight Management: Planning Flexibility at Final Stages

Description

More flexibility is added to Freight Planning- and Execution, mainly towards the end of the procedure. The FM planning & execution procedure also allows the adding of new orders/shipments after the status In Progress has been reached. The previous functionality suits some customers well but may be too rigid for other customers. For some customers adding orders/shipments is still required even after the status 'shipped' has been reached. This implies that also the related Warehouse Outbound/Staging procedure has additional flexibility! This issue refers to case SM - 00000-02072

Business Need

More flexibility in the transport planning- and execution procedure with regard to adding orders/shipments at (very) late stages.

BRQ000866 - ERP Service: Warranty Claim Processing (OEM Perspective)

Description

It should be possible to reimburse dealer for the contract/ warranty/ other obligatory service work performed for OEM.

Business Need

This option helps the OEM to effectively manage the service outsourcing part.

BRQ000882 - ERP Service: Flexible renewal of Service Contract

Description

Service Contracts have a possibility to renew them time to time. However in the current solution, of ERPLN, the renewal period is fixed once the Contract becomes Active. It is required to have flexibility from business point of view while renewing any Service Contract.

Business Need

Renewals happening to a Service Contract might have different durations in different points in time though they are happening to the same Installations and for the same customer. To facilitate this, it is required to define a renewal duration which should be flexible in nature independent of the status/life of the Service Contract.

BRQ000885 - ERP Service: Depot repair of PCS items

Description

Customized or PCS items are also represented as configuration structures, besides the generic items in Service in order to sustain the after market life cycle of these products/structures. The enhancement "Execution of RMA/Depot repair on customized items/structures" is required to make the handling of PCS items more flexible and effective:

Business Need

Companies adopting PCS projects to deliver customized items to their customers need to sustain the product life cycle effectively after sales. It is necessary to have these enhancements especially for companies handling large number of PCS projects.

BRQ000897 - ERP Service: Usage of Alternative items

Description

This requirement is to facilitate the user to identify and choose the alternative item for the original item in service package.

Business Need

Companies would like to use alternative items because of various reasons. Hence the service package should provide ease of use in identifying and selecting the alternative items for the original items.

BRQ000899 - ERP Service: Grouping of Planned Activities by Item

Description

A possibility should be provided to group the planned activities for the same item while transferring them to the service orders. This should be in addition to the already existing grouping possibilities of planned activities when they are transferred to service orders.

Business Need

Customers would like to have a single service order for all the preventive maintenance planned activities which belong to the same item.

BRQ000900 - ERP Service: Specify the preventive maintenance activities for independent serialized items

Description

There is a need to have a possibility of executing preventive maintenance on the independent serialized items even though they are not linked any cluster.

Business Need

Customers would like to have preventive maintenance plans for the items which are not part of any cluster.

BRQ000934 - ERP Service: ATP/CTP for service material lines

Description

Currently, sales has a functionality to check the ATP of items to make a reliable delivery date to the customers. Similarly, this functionality should be extended to service spare parts.

Business Need

It should be able to know the ATP of a spare part so that a reliable delivery of the supply of the spare parts or the service repair is provided to the customers.

BR1101030 - ERP Service Depot Repair: Quotation functionality

Description

Aims of The Easy Price Proposal/ Maintenance Sales Quotation functionality are as follows:

- Agreement with the customer about the repair price.
 - Processing the quote to maintenance sales order
 - Invoice the maintenance sales order according to the proposal
-

A possibility to interrupt Part Maintenance line and generate a quote is given. Also, work order can be interrupted and quotation can be generated. The quotation can be accepted from Part Maintenance Line or from

Work Order or from Maintenance Sales Quotation. Once the quotation is accepted then the interruption will be removed and the work can proceed. All the cost line information will be copied from quotation and the invoicing is done according to the quote.

The facility to generate a quotation is available since a Part Maintenance Line is created (free status) till the associated work order is released along with released status.

Business Need

When a customer seeking service approaches a service provider he is likely to ask for a quotation for the Service that needs to be performed as part of preventive or breakdown maintenance. The system should consider all applicable discounts and respect the obligations such as warranty or contract.

BRQ000874 - ERP Financials: VAT reporting

Description

VAT reporting must be extended, primarily for Spain. However, for this reporting, it is a/o needed to store the business partner's tax country and tax ID with the tax analysis data. This addition is of a more generic nature. It will be valuable for other tax reporting, as well. The reporting that must be extended for Spain comprises the VAT reporting for both received and delivered invoices.

Business Need

Extend the VAT reporting with reports on received and delivered invoices for Spain.

BRQ000876 - ERP Financials: Journal Report Summary

Description

The yearly journal report output size may well amount to thousands of pages. Therefore, a summary report, by fiscal period and protocol code, must be made available for the journal report. This report is especially developed for Spain, but may turn out to be useful for customers based in other countries, as well.

Business Need

A summary report, by fiscal period and protocol code, must be available for the journal report.

BRQ000918 - ERP Financials: Improved currency rotation in the standard currency system

Description

In the new Standard Currency System, it is possible to define a single currency as both local and reporting currency. Therefore, if the currency system is Standard, in sessions in which currency rotation is enabled, it must be made visible to the user which currency is current: either Local, or Reporting 1, or Reporting 2.

Business Need

BRQ000924 - ERP Financials: Reversal of Depreciation for Additional posting books

Description

When an asset is depreciated, depreciation postings in GLD are logged only for the Posting books. But it is allowed that a user can also post into GLD for certain Additional Posting books. When the asset is disposed the depreciation on these books were not reversed. It is required that the accumulated depreciations on these books should be reversed during disposal of the asset.

Business Need

Global companies today need to create a balance according to corporate rules and to local (TAX) rules it is practice to setup two Books in FAM. The strategy for the Non-GL Posting book is to post the depreciation related transactions only to Finance. But the depreciation during disposal (so the reversal of the Accum. Depr.) was not posted for Non-GL Posting books with SAllow Depreciation postingsT = SYEST.

BRQ000926 - ERP Financials: ICO and FAM Report Enhancements

Description

ICO Reports and other FAM reports need to be modified to show more information. Also ICO reports and Depreciation Projection reports must be modified to display periodic data also.

Business Need

To provide information on capital invested in fixed assets and depreciations to the management.

BRQ000927 - ERP Financials: Fixed Asset Management - Asset Cost Adjustment for Cash Discounts

Description

When a cash discount is availed on a payment for a purchase invoice that was used to create an asset, the availed discount must be reduced from the cost of the asset.

Business Need

When an asset is purchased and subsequent payment is done for the invoice, the discount availed on payment must reduce the asset cost.

BRQ000947 - ERP Financials: Upgrade Financial Transactions Entry

Description

Firstly, a facilitated, authorizable, multi-company transaction entry startup session must be made available. From this session, it must be possible to directly enter transactions, invoices, etc. for those listed transaction types, for which one is authorized. Secondly, the central transactions entry startup session (tfgld1101m000) must be designed according to the latest UI standards (multi-main table). This enables the presentation of all relevant data in one view. By default, all manually-entered batches must be shown. User-defined filtering may restrict the view to open batches only.

Business Need

Upgrade financial transaction and invoice entry to the latest standards.

BRQ000963 - ERP Financials: Copy Functionality for Dimension Ranges by Ledger Account

Description

Dimension ranges by ledger account often are the same for similar accounts. Copying of these ranges from one account to another must be enabled.

Business Need

Copying of dimension ranges from one account to another must be enabled.

BRQ000964 - ERP Financials: Last Period Status Change Monitoring / Period Closing Behavior Changes

Description

It must be monitored by who and when the last period status change was brought about. Secondly, period closing must always be possible; potentially blocking situations will only generate a warning message. Final closing checks will remain as is, i.e. final closing will be blocked in case pending transactions exist for the period.

Business Need

It must be monitored by who and when the last period status change was brought about.

BRQ000965 - ERP Financials: Extend Dimension Codes from Length 6 to 9

Description

The dimension code must be extended from 6 to 9 positions. Such an extension facilitates the usage of dimensions for actual project codes, employee codes, etc. Automatic import of project codes into dimension codes must be enabled.

Business Need

The dimension code must be extended from 6 to 9 positions to allow hold project codes.

BRQ000966 - ERP Financials: Enrich Financial Statements Functionality

Description

Enrich ERP LN's Financial Statements (FST) functionality with the relevant parts that are present in BaanIV, in order that the end user will be enabled to define his or her own statement layouts.

Business Need

Enrich ERP LN's Financial Statements (FST) functionality with the relevant parts that are present in BaanIV.

BRQ001002 - ERP Financials: SEPA Credit Transfers

Description

The European Payment Council (EPC) has introduced a set of schemes to be followed by the member countries for credit transfer and direct debits; the aims are to reduce cost and to improve the processing time for the payments/direct debits. These schemes provide the rules to be followed by the different parties concerned about the structure and the content of the instructions. While the interbank messages must be followed, the customer to bank and bank to customer messages specifications by the EPC are recommendations, and bilateral agreements between the bank and the customer can determine the final message that is communicated. The SEPA Credit transfer scheme has been in use since January 28, 2008. The expected date for adoption of the SEPA direct debit scheme is December 2009. In case of Infor ERP LN, only the credit transfer and direct debit-related messages from customer to bank and bank to customer as stated in the SEPA rule books are relevant. This document addresses only the credit transfer. The requirements about the direct debit initiation and the bank to customer message consumption are not yet available, and must be taken up when they become available. It is expected that a successful adoption of the SEPA framework would result in the disuse of the existing file formats that are used in the different member countries.

Business Need

Companies that operate in the European Union must be prepared for the new payment standard, which will be mandatory as of January 1, 2010. Being able to comply with the new standard will also reduce bank costs.

BRQ001017 - ERP Financials: Hedging and Valuation of Inventory

Description

When hedging of purchased inventory is applicable to eliminate the risk of fluctuating currency rates, the value of the inventory must reflect the hedged currency rate. Based on a parameter in the business partner data, and when the rate determiner is set to fixed or manual, the purchase order will be hedged and the correct value will be processed in inventory.

Business Need

IFRS/IAS requires the reflection of all relevant costs into inventory, which means that the purchase of goods must be valued against the rate at which the goods have been purchased and/or paid.

BRQ001018 - ERP Financials: Business Partner Balances & Credit Limits

Description

You can now manage credit limits and balances by business partner and department in a business partner currency across companies. In the current company, the balances and credit limits for that finance company are also displayed in the local currency and the business partner currency.

Business Need

Managing the business partner balances and credit limits in the reference currency is not what the business needs.

BRQ001019 - ERP Financials: Switch off Integration Document Types

Description

You can now completely switch off Integration Document Types (IDT) in the mapping scheme data. When an IDT is switched off, no integration elements, integration transactions, and reconciliation elements will be logged; this will drastically reduce the amount of data for a customer with specific mapping requirements.

Business Need

Performance issues for customers with a large amount of logistic transactions.

BRQ001020 - ERP Financials: Additional Manual Posting Exception

Description

In the chart of accounts master data, an extra manual posting exception has been added for Fixed Assets Management (FAM). Now a fixed asset account for purchases of assets through finance (ACP) with the Operations Management indicator switched on can also be marked as an integration account and used in the mapping scheme to avoid balances on two ledger accounts.

Business Need

In LN, it was not possible to nullify the account for capitalization used in ACP when an asset is bought. It was also not possible to nullify the account in the mapping scheme for capitalization.

BRQ001022 - ERP Financials - Italian Requirements

Description

Several topics related to but not restricted to Italian legal requirements are covered:

- VAT book declaration report.
- Several General Ledger reports.
- Tax exemption letter/monthly plafond.
- FAM report.
- Customer/Supplier analysis.
- Print Debit/Credit amounts for non-finalized transactions.

Business Need

BRQ000975 - Performance - Delete purchase/sales order history (keep last transaction)

Description

Customers maintain history records on the long term to allow for historical inquiries and in order to be able to copy from history. This solution supports the above mentioned scenarios without forcing the user to retain full-blown history records in his transactional system. Functionality is introduced that allows to keep the last history record of an order/schedule line when deleting history.

Business Need

Some customers experienced difficulties with regard to the performance of ERP LN. These issues concern both performance of the system and data growth in ERP LN. History logging of sales/purchase V order and schedule

BRQ001032 - ERP Order Management: Small enhancements for price and discount maintenance

Description

For the following sessions in Pricing the grid is made editable:

- Discount Schedules
- Discount Schedules - by Origin
- Discount Schedules for Promotions
- Price Books

Business Need

From a price and discount maintenance point of view it is required to do the maintenance of the prices and discounts in the overview session instead of in the detailed session.

BRQ001033 - ERP Order Management: Two new Sessions for displaying Item History

Description

Two new sessions are available for displaying the item history in purchase and in sales. These sessions can be started from the Relation Management Dashboard.

Business Need

With the existing Sales/Purchase Order Line history session it is not possible to answer the question which items have been bought/sold by the customer. It is required to have the possibility to retrieve this information from ERP LN.

BRQ000945 - ERP Order Management: Usability enhancements - 360 screens

Description

New screens, called 360 screens (inferred of "360 degree views"), are introduced that provide a comprehensive status overview of specific business partners. A 360 screen must incorporate an overview of linked business objects, a business partner status synopsis, relevant graphs and KPI statistics for monitoring progress and evaluating performance, and provide quick links to most used sessions. These 360 screens must be customizable in order to meet the specific needs of different companies and end-users. Two new 360 screens will be created; one centered on customers and one for suppliers.

Business Need

New business partner centric screens are required in order to improve the user experience with ERP, not just from a customer point of view (usability purposes) but also from a world-wide usability perspective. These screens serve the purpose of providing the user with a comprehensive and user-friendly status overview of specific business partners.

BRQ000922 - ERP Order Management: Enhanced Price Simulator

Description

he attributes which are used by the quote and or order for retrieving prices and discounts will be made available in the Price Simulator session. The User Interface of this session will be changed.

Business Need

When asking for a price/discounts via the simulator the same price/discounts must be retrieved as when entering a quote/order line.

BRQ000993 - ERP Purchase: Automatic Combining of open Backorders (CR 64)

Description

Backorders, within an order line sequence, will be combined as much as possible.

Business Need

Some ERP applications more specific some EDI providers, can not handle multiple open backorders.

BRQ000969 - ERP Purchase: Implementation of Small Enhancements

Description

The following topics are implemented in a generic way:

- Topic 836 BR00PUR10 - Release Sales Back Orders automatically to Warehousing
 - Topic 839 BR00PUR2 - ASN visibility on a purchase order line
 - Topic 840 BR00PUR5 - Allow a zero price on a purchase contract price revision
 - Topic 841 BR00PUR7 - Print "Final" on Purchase Contract Acknowledgement
 - Topic 856 BR00PUR14 - Multiple Terms of Payment for a Business Partner
 - Topic 858 BR00PUR16 - Pay by Receipt Date or Ship Date
-

- Topic 861 BR00PUR3 - Automatic assignment of PO Revision numbers
- Topic 863 BR00PUR4a - Change Codes mandatory in Purchase Order Changes

In order to keep Purchase and Sales consistent, above mentioned topics are implemented in Sales too wereapplicable.

Business Need

Customer Commitment

BRQ000992 - ERP Purchase: Purchase Order Lines to be Received

Description

The authorization of the Specific Menu option "Automatic Receipt" in the Purchase Order Lines can not be handled by DEM right now. This because it is a function and not a session. In order to be able to set the authorization for the function also in DEM a session will be created. The new session will have the same functionality as the current function.

Business Need

The Dynamic Enterprise Modeler must be able to define the correct authorization for the Automatic Receiptsession.

BRQ000919 - ERP Sales: Add the option "Equate Project with Sales Order" in Process Sales Quotation

Description

When Generating a Project Structure for a Sales Order an option is available to equate the Project numberwith the Sales Order Number.

Business Need

An option is required that the project number (identification) that is used on a sales order - that isprocessed from a quotation - equals the sales order number (identification). So after processing a quotation to a sales order, the project and sales order have the same number (identification).

BRQ000912 - ERP Sales: In case of Customized Items the cost price must be available after order line entry

Description

Calculating the Cost Price for a Project can be modelled as an sales order activity. When Generate ProjectStructure is executed, the status of the order line is ready for calculating the cost price of the projectinvolved.

Business Need

For some business functions like e.g. Margin Control it is required to have the cost price available afterorder line entry in oder to calculate a correct margin.

BRQ000974 - ERP Sales: Register Consumptions

Description

The consumptions of company owned inventory (from the suppliers point of view) and consigned inventory (fromcustomers point of view) are registered. The registered consumption can be processed. When processing a consumption an invoice line will be created. This invoice line will be released to Invoicing.

Business Need

From a VMI-suppliers point of view it is required to have insight in the consumptions of owned inventory in awarehouse located at a customer. The customer has to pay for these consumptions and inventory levels need to be adjusted.

BRQ001001 - ERP Sales: Extended Inventory Shortage Handling

Description

The solution allows the postponement of inventory checks and shortage handling until after the order isentered or created. Specifically, it will be possible to save sales order lines with plan items that have insufficient ATP /CTP. These lines can be handled for shortages at a later point in time. A new overview session is introduced, which displays all order lines that still must be checked for available inventory. This session will also display lines that are already checked but still need to be handled for inventoryshortages. In this session, the user can manually initiate various inventory shortage handling options. An inventory check batch

session is also introduced. The new inventory shortage handling functionality will also be available for sales order component lines.

Business Need

Extended functionality is required with regard to inventory shortage handling. This includes the possibility to register sales order lines in the case of insufficient CTP/ATP but without making ATP reservations. An additional requirement is to support inventory shortage handling for sales orders that originate from EDI, CRM, and other origins. It is also required to extend the inventory shortage handling functionality to sales order component lines.

BRQ000914 - Usability - Easy Creation of Business Partners

Description

A new Business Partner record can be created by just entering name and address info. The rest of the fields are defaulted from a new default session.

Business Need

From a usability point of view it is required for some business environments (wholesale) to be able to create in an easy and fast manner a new customer and/or supplier record.

BRQ000979 - ERP Common: Update Warehouse on Item-master subentities

Description

Currently, when a Warehouse code is revised on the Item Master, the user must manually update each item sub-entities and related BOM line to match the warehouse code. Now, when a warehouse code is initially assigned or revised on the Item Ordering sub-entity, the system will now provide the option to automatically change warehouse codes on the remaining item sub-entities and related Bill of material lines.

Business Need

To eliminate extra key strokes and reduce the risks of data entry errors when modifying the warehouse code on the item ordering sub-entity

BRQ000980 - ERP Common: Show item signal on planned order

Description

Item signals can now also be defined specifically for Enterprise Planning. Also, in general, for item signals, it will now also be possible to define per package item signals, but indicate that signals don't show up

Business Need

For Enterprise planning it is required to have the possibility to indicate for specific items that they need to get special attention. When the user opens or creates planned orders in the planning system consisting of those items, the user should get a message like 'Special ordering condition'. In this way the user is in the item signal should not be displayed for all items that have a signal code. Many signals do not relate to the ordering process at all.

BRQ000981 - ERP Common: Allow actualizing of cost price from item costing data

Description

Currently it is not possible to actualize the item-cost price from the item master for items which have on-hand inventory, allocated inventory or inventory on order. However, it is possible to actualize for such item the cost price using the cost calculation and cost update session. This has been changed. It is now possible that a user who is authorized to perform cost updates for items (so, for item which have already on-hand inventory, allocated inventory or inventory on order), can actualize these items directly from the item master (item costing data)

Business Need

Customers find this procedure too cumbersome to navigate to and through 2 different sessions to do this update.

BRQ001007 - ERP Common: Hide Fields and Sessions if Concept Parameter is disabled

Description

In ERPLN, the concepts of Unit Effectivity and Engineering Revisions are controlled by concept parameters. Both concepts have a rich functionality in the

Enterprise Planning, Manufacturing and Common package, meaning that many standard , commonly-used ERPLN sessions contain fields and columns on the grids related to these concepts, and that these packages contain specific sessions which are only relevant when this concept is implemented. Therefore, when the specific concept parameter is disabled, the system should:Block sessions that can only be used when concept parameter is enabledHide from sessions the specific navigation options related to the conceptsHide concept related fields from sessions and columns from grids

Business Need

Throughout the years, new (logistics) concepts have been introduced in Infor ERPLN. Most of the newlyintroduced concepts are controlled by concept parameters . This means that at implementation (or in a later stage e.g. post-implementation), users can enable (or disable) these concepts in the ERPLN application. Enabling or disabling a concept parameter results in enabling/disabling related sessions and (specific)navigation options, parameters, fields on forms and grids etc. In case the concept parameter is enabled, users can make use of the functionality, and when the concept parameter is disabled, the user will not be bothered with irrelevant sessions, parameters, fields and columns.

BRQ001031 - ERP Common: Recurrences and Patterns in Calendar module

Description

The Recurrences functionality in Calendar Management has been improved and enhanced, and has replaced thedefinition of Fixed Delivery Moments in Enterprise Planning, Patterns in Order Management, and Assignments in People.

Business Need

Different modules make use of the concept of recurrences. Instead of defining these patterns and recurrencesin each module, there should be one central place where these can be set up and available for all modules in ERP LN.

BRQ000940 - ERP Manufacturing: Reset Production Order from status "Completed" to "Active"

Description

Currently, there is a session 'Reset Production Orders' (ticst0203m000), but this session only resets the status of the production order from status 'Closed' to status 'Completed'. In this same session, an additional option should be made available to reset production order status from completed to status active.

Business Need

If a production order is set to status completed' by mistake, or completed with a wrong quantity, then there should be the possibility for the user to put back the status from 'completed' to 'active' and correct the order.

BRQ000946 - ERP Manufacturing: Define output device for printing labels

Description

Currently when printing labels, the user needs to select the output device manually. It should be possible to define a default output device for printing labels. This device should be used as default output device when printing labels.

Business Need

To avoid that users need to select, time after time, their (default) output device for printing. Now the system will automatically fill the device with the defined default device

BRQ000948 - ERP Manufacturing: Phantom indicator on overview session BOM

Description

On the details of the BOM line there is a checkbox which indicates when the item on the BOM line is a phantom item. This checkbox is currently only present on the details session, and not in the overview session that shows all BOM lines for a specific item. Next to having this checkbox on the detail session, this checkbox should also be available on the overview session.

Business Need

Many customers like to see if a specific item has BOM lines containing a phantom item or not without having to navigate to the details of each the BOM line first to find out.

BRQ000952 - ERP Manufacturing: Check phantoms for planning

Description

When a "planned" item has a phantom component that is not a "planned" item, the system does not explode the requirement down, so the material and operation of the phantom item is not considered. When the "not planned" phantom item has operations then this causes a problem when transferring the planned production order. An error report is generated with the message "Operations are not (all) planned". When the "not planned" phantom has a component that is "planned" then this item is not planned by enterprise planning. This is misleading to the user. Functionality will be provided to prevent those problems. A process will check if there are 1) "planned" items that have "non planned" phantom components, which have components that are "planned" 2) "planned" items that have "non planned" phantom components, which have components operations.

Business Need

Many customers use phantom items. It is possible to use a wrong data setup in relation to those items, causing undesired errors. It is important that the system prevents a wrong data setup.

BRQ000953 - ERP Manufacturing: Enable text feature in some Assembly Control sessions

Description

Ability will be provided to create text on the following sessions in the assembly control module: Line Station - Assembly Orders (tiasl6510m000)Clustered Line Station Orders - Assembly Part Requirements (tiasc7140m000)Line Station Variant - Operations (tiasc2522m000)Line Station Variant - Assembly Parts (tiasc2521m000)

Business Need

When changes are made on an Line station order, clustered line station order, Operationsor Assembly Parts enabling the text feature allows users to document authority for the change and reference pertinent information regarding the change.

BRQ000954 - ERP Manufacturing: Improve data entry Conversion factors

Description

Currently, when conversion factors are entered and saved, these cannot be changed anymore.It happens that accidentally, wrong values are entered.The only option to solve this is to remove the incorrect conversion factor lines and redefine the correctfactors once again. To allow modifications in conversion factors that are being defined, a formal approval step of conversionfactors will be introduced. Conversion factors can be entered in a non-approve state; in this state it is possible to still modify the factors. Once defined correctly, the user need to approve the conversion factors to make use of these in the system. Note that is not possible to use 'non-approved' conversion factors in the system(these conversion factors are non-existing until 'approved'). Also, once approved, there is no option to reset the status to 'non-approved' and make modifications.

Business Need

Customers indicated that in cases where wrong values are defined (entered and saved) during the set up ofconversion factors, it is cumbersome to change these.

BRQ000982 - ERP Manufacturing: Enhance Update Routing Operation functionality

Description

In order efficiently perform a mass update of routing operations data, the current Qupdate routing operatio

- Include update of specific lead time elements on mass update routing operations

Queue, wait, and move times are available on Routing Operations, and mass change of these fields on routingoperations is now also available. Ability to specify fields for mass update routing operations users can specify which fields need to be included in mass update of routing operations.

Business Need

Continuous improvements in manufacturing environments often results in more accurate routing data. In orderto update the current routing and routing operation data in the ERP LN system, users need to have a method to selectively mass change all fields in the routing operations based on changes made in task relationship and work center data. Since most environments have large volume of routings , the task of updating routing operations individually is unmanageable. Mass change allows users to efficiently keep the Routings up to date. This is important because routings are the foundation for order scheduling, capacity planning, and costing.

BRQ000983 - ERP Manufacturing: Automatically Remove Queue, Wait, and Move From Routing Operations

Description

For a specific item routing, it is now be possible to remove Queue, Wait, and Move times from routingpperations performed sequentially in the same Work Center. The user can determine which lead time elements need to be considered for 'removal' (that is, reduced to '0').

Business Need

When operations are added to a routing, Queue, Wait, and Move Times automatically default into routingoperations. These values can be adjusted further by the user. When there are multiple routing operations performed sequentially in the same work center, it is not necessary to assign queue, wait, and move

time to every sequential operation performed in that work center. This dramatically inflates order lead time-time. To ensure the lead time is properly represented, the Queue, Wait, and Move time must be maintained by the capacity planner (shop floor planner) on the routing operation. When the initial routing is created, this is fairly easy to do but still requires extra effort. The bigger challenge occurs when existing routings are changed by the planner. There is no easy way to know when the routing has been changed, so it is difficult to know when maintenance of the Queue, Wait, and Move time is necessary. An easy way is required to remove queue, wait, and move times from routing operations performed sequentially in the same work center.

BRQ000984 - ERP Manufacturing: Where used machines, work centers and tasks

Description

The where used functionality on routing operations (currently only 'where used machines') is extended to also perform a 'where used' work centers and 'where used' tasks.

Business Need

The "where-used" functionality is used by capacity planners on almost a daily basis to find all instances of where a work center or task is used in order to determine impacts of temporary offload or to judge the magnitude of mass change requirements.

BRQ000985 - ERP Manufacturing: Enhancements to the material issue note

Description

The Material Issue Note has been enhanced by

- adding sorting capability by location,
 - displaying inventory information,
 - improved lay-out
 - display of storage conditions
-

Business Need

Report used very frequently. The enhancements will improve warehouse processes, make it more efficient, providing more information.

BRQ000988 - ERP Manufacturing: Mass reschedule Production Orders

Description

To avoid performing a mass rescheduling of SFC production orders by dealing with each SFC production order individually, there will be a function to mass update user selected SFC production orders. Users will be able to generate a list with production orders to be rescheduled, modify per SFC production order either start or delivery date and have, by way of a batch update process, all modified SFC production orders rescheduled (using current SFC production order QreplanningR logic).

Business Need

After an SFC production order has been released to the shop floor, the schedule on the order must be manually maintained. When a major event occurs that impacts the entire order base, such as an emergency rate change or a significant work stoppage, it is very labor intensive to manually reschedule the SFC production orders. ERP LN should have the capability to easily mass reschedule user selected SFC production orders across the entire order base in response to major events such as emergency rate changes and work stoppages.

BRQ000989 - ERP Manufacturing: Status dependent SFC Order Reprocessing

Description

A new selection criterion QOrder StatusR has been added to the session Reprocess Production Order. This

Business Need

There is currently no easy way to separate the planned orders from the documented printed orders during reprocessing unless orders are reprocessed one at a time (which is not very efficient).

BRQ000991 - ERP Manufacturing: Streamline Production order release

Description

It will be possible to 'pull', from out of Shop floor control, planned production orders from EnterprisePlanning, with options to automatically print order documents and release the order to the shop floor without any additional action or intervention of the user.

Business Need

Many Qlean manufacturingR cells are triggered by a Kanban signal when the next order is ready to be work

BRQ000997 - ERP Manufacturing: Reverse Backflushing

Description

In some cases it is required to correct the quantity reported complete on an SFC production order. Quantities can be corrected on the SFC production order to reflect the quantity reported completed on the production order, but the operations related to the SFC production order keep the status ScompletedT and the quantity. Because of this, the backflushing process will not correct the number of materials consumed on the different operations. It is now possible to do 'reverse' backflushing; per operation, the quantity of consumed materials is now also corrected based on the (corrected) output quantity reported on the SFC production order.

Business Need

When using backflushing functionality, accurate material consumption information based on the reported quantity completed on the SFC production order is of importance for correct handling and processing (logistical as well financial) of the SFC production order throughout the ERP package.

BRQ001000 - ERP Manufacturing: Performance improvements

Description

Performance related improvements to reduce the data growth in Manufacturing on the area of generated financial (integration) transactions and production warehouse orders. The user will now have options to:

- Use of default Cost Component for each operation rate
- Aggregate Completion Posting
- Combine Production Warehouse Order for end items
- Reduction of completion postings

Business Need

Options to reduce the number of transactions generated and influence system performance are important to control data growth and maintain system performance

BRQ001008 - ERP Manufacturing: Cost Price Overview of Customized Items by Project

Description

To analyze cost prices for customized items that belong to a project, there is now a single view that shows the cost price for all customized items that belong to the project; this view can act as a starting point to analyze detailed cost prices per customized item, such as cost component level, or cost price by project.

Business Need

In the project calculation overview, users can view the detailed cost price of a customized item that is related to a project, and on a higher level, users can see the cost price of the project. There is no single view that shows all cost prices of customized items by project.

BRQ001009 - ERP Manufacturing: Extended copy Bill of Material Functionality

Description

In the Bill of material session, users can now use the Duplicate Group functionality to select on a source Bill of material the lines which should be copied to a target (existing) manufacturing BOM. Further on, the Copy Bill of Material session functionality has been enhanced with a 'copy method' ; when copying you can select to either create, overwrite, or add/renumber BOM lines.

Business Need

The copy BOM functionality offered in ERP LN was not equal to the copy BOM functionality already available in Baan IVc.

BRQ001010 - ERP Manufacturing: Alternatives and Use-up Items included in Where-Used Components

Description

The Where-Used Components session and report now include alternative information and use-up information. For a specific component, the parent manufactured item is now also shown when the following happens:

- is defined as an alternative item of a BOM line.
- is defined as a use-up item on a BOM line.

Business Need

The Where-Used Components session shows the Bill of Material upside down: the manufactured parent items for a particular component are shown, but only if the component is directly defined on the BOM, not if it is defined as an alternative or a use-up item for a BOM line. The result is that the user is missing critical information when they analyze the where-used data of the component.

BRQ001028 - ERP Manufacturing: Small topics

Description

The following (small) topics have been realized:

- Ability to generate an error reporting when generating alternatives
- Copy of quantity dependent routings when generating project structure

Business Need

Miscellaneous topics to improve functionality and usability in Manufacturing.

BRQ001004 - ERP Assembly Control: Use PCF to configure Assembly Product Variants

Description

In Assembly Control and Planning environments, users can now configure product variants using the ProductConfigurator (PCF); this allows configuration of an assembled product, based on defined product features and options.

Business Need

The integration between Assembly Control and Product Configurator is required for mixed model flow production environments, such as tier 0 companies and tier 0.5 companies in the automotive industry. One characteristic of this industry is that assembled end items are complex, configurable products. To support the configuration process of these assembled items, the functionality of the product configurator is required.

BRQ001005 - ERP Assembly Control: Sequence Engine for Assembly Line (Segment) Sequencing

Description

Users can now make use of an advanced sequencing engine to sequence assembly orders on an assembly line segment. Based on defined features and options, line rules can be set up, which are considered by this engine when sequencing the assembly orders.

Business Need

The ability to configure assembled items based on a set of features and options is a highly diverse mix of assembly orders for different configurations that must be produced on the assembly line. This, combined with the setup of complex

line rules to be taken into consideration, requires an advanced sequencing engine to create an optimal line sequence.

BRQ001006 - ERP Assembly Control: Store Assembled Items in Inventory

Description

Currently, assembled items cannot be stored in a warehouse, but they are delivered directly to the customer when they roll off the assembly line. Now users can do "assembly-to-stock", which means that finished assembled items can be stored in inventory before they are sold and/or shipped to the customer.

Business Need

The ability to 'assemble-to-stock' within assembly control environments.

BRQ000943 - ERP Projects: Projects 360 degree view

Description

There should be a session which gives all details of the projects like what is the budget, what is the schedule, what is the progress of the project what is the cash out and what is the cash in and so on. Such a session is already present as a Dashboard. This has to be enhanced to give a clear view of the project. Activity session is changed to maintain session and dal2 is used.

Business Need

The 360 view of the project should be clear in the project dashboard.

BRQ000944 - ERP Projects: Usability enhancements - Most demoed sessions, Custom fields and Selection of records

Description

The most user centric sessions are Projects Dashboard, Projects, Print project control and Print costcontrol. These sessions should be enhanced to look better and clear. There are sessions where warning messages can be made visible on the status bar so that the user is not disturbed. Also there should be a possibility a random selection of records in a session to process further.

Business Need

To improve the user experience with ERPLN 6.1, not just from a customer point of view (usability purposes), but also from a world-wide salability perspective.

BRQ001023 - ERP Project: Integration with Microsoft Project 2007

Description

There have been requests from several customers about the support of Microsoft Project 2007 as part of the Infor ERP LN 6.1 Project - MsProject Integration. This will be supported with the delivery of the FP5 release. Moreover; it will also be supported with earlier feature packs. Previously every feature pack had its own version of the Integration. But from now on, there will be only 1 version of the Integration. So the integration delivered with FP5, can also be used with earlier feature packs.

Business Need

Office 2007 becomes the new generation of office applications.

BRQ000973 - ERP EDI: EDI Error Message Session

Description

Provide a session that allows EDI Error Messages to be viewed/sorted by: Planner, Business Partner, Date, Item, EDI Message and Batch No. The session should as well provide the user with key data elements to work the error message such as: Order Reference (Customer Order or Release #) , Sales Order or Sales Schedule, and Purchase Schedule information.

Business Need

Ease of Use Lean initiative - Cost savings and efficiency. Standard Baan doesn't provide for the ability to locate EDI Error Messages by key fields to enable a user to

BRQ001003 - ERP Taxation: Tax Streamlining and Performance Improvement

Description

So far, the Sales Order Acknowledgement uses a different method to calculate tax than the Central Invoicing process; this could lead to a difference in tax calculation between Order Management and Central Invoicing. Also, the performance of the Sales Order Acknowledgement tax calculation was bad, but technically there was no room for improvement.

Business Need

It is important that the Sales Order Acknowledgement shows the tax details in the same way as it will be printed during invoicing

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