Infor Factory Track LN Administration Guide

Release 7.00.x

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Contents

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Chapter 1: Overviews and Procedures

This module includes topics that describe Infor Factory Track features and how to use them.

Adding and Modifying Devices

Use the Devices form to create and modify devices in your device tracking system.

1. Open the Devices form.
2. To add a new device, select a blank line from the grid. To modify an existing device, select it from the grid.
3. Specify this information:

   Device ID
   Specify an ID for the device. If you are modifying an existing device, this field is read only.

   Asset Number
   Optionally, specify an asset number. You can scan the serial number on the device, or you can specify a unique, custom number to identify the device.

   Device Type
   Select a device type.

   Description
   Specify a description for the device.

   Supervisor
   Optionally, select a supervisor who will be responsible for the device.

   Status
   The current status of the device is displayed. If you are creating a new device, the status is **`Available`**.

   Operator
   Optionally, if you are reporting a new condition for the device, for example, **`Broken`**, select your operator number.

   Facility
   Optionally, specify the facility where the device is located.

Location
Optionally, specify the location of the device.

Comment
Optionally, specify a comment about the modifications you are making to the device. Comments are saved in the device activity history displayed in the bottom grid.

4 Optionally, report a condition for the device by clicking **Lost**, **Found**, **Broken**, or **Fixed**.

Adding new sites and entities to an existing database

To initiate a request to add a site or entity to an existing database, use the **Site Management** form. The request includes information about the site as well as a contact email. If the request is successful, the site is added to the database associated with the configuration where you accessed the **Site Management** form. If the request fails, an email that describes the error is sent.

You can correct the errors and try again to add the site. To add a new site:

1 Select **Configuration > Administration > Site Management**.

2 Specify this information:

Site
The site ID.
Note: The maximum allowed site ID character is set to 8. This ID is used as the default configuration name

Site Name
The full site name.

Site Description
The description of the site environment.

Site Type
The type of site.
Note: The value in this field is set to Site, by default.

Site Time Zone
The time zone for the site.

Site Group
The group name for the environment that is created. A valid group name must be selected.

Notification Email Address
The contact email.
Note: This defaults to the **Primary Email Address** from the **Users** form. However, you can specify any valid email address.

If the request to add a site fails, an email that describes the errors is sent to this address. You can correct the errors and try again to add the site.

3 Click **Add Site**.

A task is submitted to process the request using the information from the form. An email is sent to the Notification Email Address, indicating whether the request was successful. If the request failed, error information is provided. You can correct the errors and provide the information again on the **Site Management** form.

Configuring Barcodes

You can define how barcodes work in your application by modifying the existing barcode prefixes, combination barcodes, and cross reference values.

Setting up barcode prefixes

You can use the Prefix Handling form to set up barcode prefixes. Barcode prefixes are embedded at the beginning of barcodes and are used to indicate the barcode type. You can set mandatory prefixes to control which barcode types can be scanned into certain field types. Using mandatory prefixes can help prevent users from scanning the wrong barcode into a field.

See Setting Up Barcode Prefixes on page 119.

Setting up combination barcodes

Combination barcodes can increase the efficiency of your scanner operations by combining multiple barcodes into a single barcode string. Use the Multi-Barcode Split form to set up combination barcodes. You can define which transactions will use combination barcodes and define the properties of those combination barcodes.

See Setting Up Combination Barcodes on page 10.

Setting Up Combination Barcodes

1 Select **BarCode Handling > Multi-Barcode Split**. The **Multi-Barcode Split** form is displayed.

2 Click **New**. A new line is added to the grid.

3 Specify this information:

Transaction Name
The name of the transaction to set up the combined barcode.

Source Field
The name of the source field for the new combined barcode.
Note: This field displays the list of fields used by the combined barcodes. You can scan the combined barcode in the initial field specified in the source field. The transaction then splits the scanned barcode.

Fixed Length
Select this check box to fix character length to define different information types within the combination barcode. Clear to use a separator character to define different information types within the combination barcode.
Note:
- The **Field Length** field is displayed. The field length defines the segment length for the **Target Field**.
- You cannot specify the value in **Mapping Separator** field.

Mapping Separator
Each segment of the combined barcode is of fixed length.

4. Specify the **Group Sequence** number for the selected target field.
5. Select the required **Target Field**. This field lists the values as displayed on the **Fields** tab of the **Transactions Setup** form. When the user selects a field the internal field name is stored in the multi barcode table.
6. Click **Save**.

Modifying Existing Barcodes

To modify an existing combination barcode for a transaction:

1. Select the transaction in the left hand grid, to modify.
2. Click field(s) to modify.
3. Change the selected field according to the descriptions in the combined barcode section.

Configuring an Employee (Named User or Kiosk User)

A cross-reference between the employee and their user profile is established on the Employees form to allow an employee to access Factory Track using their own profile. This allows the employee to log into Factory Track and perform transactions based on the Factory Track role specified in their user profile. Employees that are not configured as “Named Users” (Kiosk Users) access Factory Track through Console User Profiles.

To establish an employee record – user profile cross-reference:

1. Open the Employees form.
2. Select the employee for whom employee-user access is given.
3. In the **User Name** field, select the user that will be cross-referenced to the selected employee.
4. Specify this information in the Kiosk section of the Employee form:

   Attendance
   If this check box is selected, the employee can clock in using Factory Track transaction forms.

   Labor
   If this check box is selected, the employee can enter labor records using Factory Track transaction forms.

Absence Request
If this check box is selected, the employee can submit absence requests using Factory Track request forms.

Edit Labor
If this check box is selected, user can edit the labor records or insert the gap records. The user must be assigned the required edit privileges in the Employee form.

Edit Absences
If this check box is selected, the employee can change the status of an absence request from `Requested` to `Denied`. Based on the status update the request is cancelled.
Note:
- If the status is set to `Approved`, the employee cannot modify the status to `Denied`.
- Employees cannot edit or delete attendance transactions.

5. Save the employee record.
6. Open the **FT Users Maint** form.
7. Select the user that is specified in step 3.
8. Confirm that the employee ID and name now displayed in the **Employee** fields.

Configuring Employee Records - Time Track implemented

To configure employee records, use the Employees form. If you wish to grant kiosk access to an employee, you must create a Mongoose security profile for the employee on the Users form.

1. Open the Employees form.
2. In the Employees form, select a blank line or an existing employee record from the grid at left.
3. Specify the employee number, employee name, and job title.
4. On the **General** tab, specify the employee's last name, first name, and middle initial.
5. Specify this additional information:

Badge ID
The badge number. The default value is the employee number.

Payroll ID
The payroll ID value. This is required only if your payroll application requires a unique ID other than the employee number.

Active
Select to activate the employee record. Employee records must be active for them to appear in the Hours Summary and Hours Detail forms, and to perform transactions against the employee record. Deselect **Active** to prevent display of the employee's records and the execution of transactions for this employee. For example, consider an employee who has been terminated. As long as the employee record is active, all report dates prior to the termination date will be displayed and transactions may be performed or edited for those dates. If the record is deactivated, none of the employee's records will display and no further transaction entry or editing will be allowed.

PIN
Specify a PIN number. This number is used to sign into the application as a generic user when Time Track is not implemented. This field is only available if the PIN Required parameter is selected on the Global Parameters form.

User Initials
This field is set to a pre-established value, which indicates that the transaction originates in Factory Track. The value can be modified to display the employee's initials (three characters).

Facility
This field is only displayed in Time Track mode. Specify the facility where this employee works.

Department
The department code. This field is only displayed in Shop Floor and Time Track mode.

Work Group
The work group. This field is displayed in Time Track mode and shop floor. An employee's work group defines the supervisor.

Emp Type
The employee type. This field is only displayed in Time Track mode.

Shift
The shift during which the employee usually work. An employee's shift defines the clock-in and clock-out rules. This field is displayed as Schedule ID if Shop Floor in use.

Shift Pattern
This field is only displayed in Time Track mode. If appropriate, specify a shift pattern from the list.

Indirect Task
This field is only displayed in Time Track mode. Optionally, specify an indirect task from the list. This will be the default task used for filling clocking gaps.

ERP Cost Component
Optionally, specify an appropriate value. This value is required if your company has a defined cost structure. This value will be included when transactions post to ERP.

Workset Enabled
Select this check box to validate that an employee is eligible to work in worksets. Worksets allow employees to work on multiple jobs at the same time.
Note:
- Workset-enabled employees are unable to start just-in-time production orders or production schedules.
- When the employee has any open job, the check box cannot be modified. 'The employee has open job(s) cannot change workset.' message is displayed

6 In the Kiosk Access section, specify this information:

User Name
Specify a username for this employee. The employee must have a Mongoose security profile in order to establish kiosk access. The value entered in this field must be a valid Mongoose profile username.

Attendance
Select this checkbox to enable this employee to clock in and out from the kiosk only in Time Track mode.

Labor
Select this check box to enable this employee to start a job from the kiosk only in Time Track mode.

Absences Requests
Allow this employee to request absence time from the kiosk only in Time Track mode.

Edit Labor
Select this check box to allow this employee to edit and delete their own labor records or create gap records only in Time Track mode.

Edit Absences
Select this check box to allow this employee to withdraw absence requests only in Time Track mode.

Report/Move Quantity
Select this check box to allow this employee to report quantities and move quantities when using Time Track Labor entry forms.

Move To Inventory
Select this check box to allow this employee to move quantities to inventory on the last operation when using Time Track Labor entry forms.
Note: This parameter is not applicable for Factory Track integration with LN.

Default Order Type
An order type that must default into the Order Type field on any transaction entry form that the employee's employee number has been entered into.

Default Resource Group
The default resource group used by FT for the employee in all editable resource group fields

Default Resource
The default resource used by FT for the employee in all editable resource fields.

7 On the **Contact Information** tab, specify this information:

Hire Date
Specify the date the employee was hired, or click the arrow to select a date from the calendar. For active employee records, all report dates equal to or more recent than the hire date will display in the Hours Summary and Hours Detail forms. These dates will accept transactions for the employee. Dates prior to the hire date will not display or accept transactions.

Termination Date
If appropriate, specify a date of termination, or click the arrow to select a date from the calendar. For active employee records, all report dates prior to the termination date will display in the Hours Summary and Hours Detail forms and will accept transactions for the employee. Dates equal to or more recent than the termination date will not display or accept transactions.

E-mail Address
Optionally, if this employee will receive email notifications of absence request approvals or denials, specify an email address.

Note: Personal Identification fields are not required for most Factory Track features. The only exception is E-mail address for Console User-Employees.

8 On the **Absences** tab, if you are using absence tracking, specify the time off group ID and tracking year. The **Absences** tab is only displayed in Time Track mode.

Tracking year
Displays the tracking group for the available years.

To configure an employee's absence tracking:

a Click **New**.
b Specify Tracking Year, Time Off Group Id and Effective Date.
c Click **Save**.

Configuring Employee Records - Time Track not implemented

To configure employee records, use the Employees form. If you wish to grant kiosk access to an employee, you must create a Mongoose security profile for the employee on the Users form.

1 Open the Employees form.

2 In the Employees form, select a blank line or an existing employee record from the grid at left.

3 Specify the employee number, employee name, and job title.

4 On the **General** tab, specify the employee's last name, first name, and middle initial.

5 Specify this additional information:

Badge ID
The badge number. The default value is the employee number.

Payroll ID
The payroll ID value. This is required only if your payroll application requires a unique ID other than the employee number.

Active
Select to activate the employee record. Employee records must be active for them to appear in the Hours Summary and Hours Detail forms, and to perform transactions against the employee record. Deselect **Active** to prevent display of the employee's records and the execution of transactions for this employee. For example, consider an employee who has been terminated. As long as the employee record is active, all report dates prior to the termination date will be displayed and transactions may be performed or edited for those dates. If the record is deactivated, none of the employee's records will display and no further transaction entry or editing will be allowed.

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This field is only displayed in Time Track mode. Specify the facility where this employee works.

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The department code. This field is only displayed in Shop Floor and Time Track mode.

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Workset Enabled
Select this check box to validate that an employee is eligible to work in worksets. Worksets allow employees to work on multiple jobs at the same time.
Note:

- Workset-enabled employees are unable to start just-in-time production orders or production schedules.
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Specify a username for this employee. The employee must have a Mongoose security profile in order to establish kiosk access. The value entered in this field must be a valid Mongoose profile username.

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Select this checkbox to enable this employee to clock in and out from the kiosk only in Time Track mode.

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E-mail Address
Optionally, if this employee will receive email notifications of absence request approvals or denials, specify an email address.

Note: Personal Identification fields are not required for most Factory Track features. The only exception is E-mail address for Console User-Employees.

Device Tracking Overview

You can use the device tracking system to manage devices. The device tracking system provides a check-in system that tracks who is using a device and when it has been returned. You can also track device conditions, such as lost or broken, and view device availability and activity histories. To configure and use the device tracking system:

1. Create device types using the Device Types form.

   See Defining Device Types on page 98.
2. Create devices using the Devices form.

   See Adding and Modifying Devices on page 8.
3. Issue and return devices using the Device Allocation form and Device Allocation transaction. You can view device usage and availability using the Current Device Usage form.

   SeeIssuing and Returning Devices on page 20 and Viewing Device Usage and Availability on page 32.

You can report devices as Lost, Found, Broken, and Fixed using the Devices form.

See Reporting Devices as Lost, Found, Broken, and Fixed on page 25.

Data replication overview

This document provides the information on data movement from the ERP database to the Factory Track database both for initial setup and on-going operation. There are two types of data that is required to be synchronized:

- One type of data set are downloaded for a single time and are not required to be synchronized again (For example, shifts or time-off groups)
- The other type of data sets are synchronized on a continuing basis.

The data files supported for 6.01 release:

- Departments
- Tasks
- Shifts
- Time-Off Groups
- Employees
- Holidays

The operator can run queries to download the required data type.

The process can be divided into three stages:

- Download of data from Native ERP system to staging table in Factory Track
- Apply Defaults to Staging table
- Posting data to Factory Track Master Files

The general methodology employed must consist of these steps:

- Synchronization is considered as a "Batch" activity which can be scheduled using the background task feature of Mongoose, or can be started by the user.
- For each data set processed, control data is created that contains information from the download. This is created when the download starts and the master files are updated after the process is finished.
- As the data is received from the ERP, the file is placed on the staging tables/staged data that are created for later processing.
- After all the data is downloaded and the control record updated, the temporary data is updated with values before being processed. If the data exists in the database, each field is checked for the value and set, as required. If the record does not exist, the data is created and populated with the values from the temporary data. In some instances, creation of a record can cause the creation of additional record(s).
- After the data is updated/created, the temporary data is updated and processed.
- After all temporary records are updated, the control record is updated.

Organization

Use this form to register organizations in Factory Track. The users linked to the organization are also displayed in the form.

Note: This form is displayed only if LN Multi-Site functionality is enabled. To enable this functionality feature RS9230 must be activated.

Creating Organization

1. Select **Form > Open > Organizations**. The Organizations transaction form is displayed.
2. Click **New**.
3. Specify this information:

   Organization
   The name of the organization.

   Description
   A brief description of the organization.

4. Click **Save**.

Feature Management

The Feature Management functionality allows you to manage product features that are yet to be active, until the functionality is tested and ready to be implemented in the production environment.

You can use the **Feature Management** form to review Activated features.

The form comprises of these tabs:

- Available Features: This tab displays the features that are yet to be activated. The ID and the name of the feature, including the date from which the feature can be auto-activated, is also displayed.
- Activated Features: This tab displays all the features that are activated. The Feature ID, the activation date, and the name of the user who activates the feature, is also displayed.

The **Feature Details** section displays the Feature ID and a description of the feature.

Note: You cannot deactivate features that are already activated.

Managing Features

Some new functionalities are disabled by default, which provides an opportunity to fully understand how to use the features before enabling them. After a feature has been activated, it appears on the **Activated Features** tab.

Note: You cannot deactivate features that are already activated.

To activate a feature:

1. Open the **Feature Management** form.
2. Select the **Available Features** tab to enable a generally available feature.
3. Select **Activate** next to the feature you want to activate.
4. Click **Save**.
5. Log out and login again to view the newly activated feature.

Issuing and Returning Devices

You can issue and return devices using the Device Allocation form or, if you are using a mobile scanner, the Device Allocation transaction.

See Issuing and Returning Devices Using the Device Allocation Form on page 22.

See Issuing and Returning Devices Using the Device Allocation Transaction on page 116.

Kanban Overview

Use transactions in the Warehouse Mobility Kanban menu to manage your Kanban system. You can use these transactions to create, track, replenish, and cancel Kanbans in Infor LN.

Kanbans always have a status to indicate their current place in the replenishment cycle. They change status in this sequence:

1 `In Stock`: items are available
2 `Requested` (optional): replenishment is required
3 `Approved`: replenishment request is approved
4 `On Order`: production, purchase, or transfer replenishment order is created
5 `Received`: order is filled

Kanbans that are not in use have the `Canceled` status.

The replenishment cycle a Kanban follows is its Kanban Loop. You can configure Kanban Loops on the Kanban Loop form in Infor LN.

When performing some transactions, you can scan a Kanban number in the **Kanban** field instead of scanning the item number and other stock point information.

Parameters Overview

Use the Infor Factory Track parameters forms to customize the application to meet the specific needs of your organization. There are two types of parameters forms:

- **Parameter definitions forms**: These forms are only used by programmers who are authorized to customize your application. They define what transaction parameter settings are available.
- **Parameter settings forms**: You can use these forms to configure the behavior of the application and its individual transactions.

Parameter Definitions Forms

Caution: Only programmers who are authorized to customize your application should use the parameter setup forms. Changes made to these forms can cause your application to function incorrectly.

The parameter setup forms are used to define what transactions and parameters are available to administrators using the parameter settings forms. The Global Parameters Setup form is used to define the parameters to be displayed and specified on the Global Parameters form, which affect all Infor Factory Track transactions and forms.

The Transactions Setup form is used to determine what transactions are available in the application and to define the parameters used by each transaction. This form can be used to add custom transactions to your parameter management system.

The User Parameters form is used to define parameters at the user level. These parameters are displayed and configured on the User Extensions form.

Parameter Settings Forms

Use the parameter settings forms to configure the behavior of the application and its individual transactions. These parameter settings forms are available for the application:

- Global Parameters on page 120: You can use this form to configure parameters that apply to all Infor Factory Track transactions and forms.

- Transaction Set Maintenance: Use this form to configure parameters for individual transactions. You can also designate which order types are enabled for each transaction and which will use order-specific parameter values.
- Transaction Warehouse Order Type Print Parameters on page 117: Use this form to configure label printing settings for specific transactions at the transaction, order type, or warehouse level.
- User Extensions on page 123: Use this form to configure settings for individual users.
- Warehouse Parameters on page 113: Use this form to configure transaction parameters that are specific to a warehouse.
- Shop Floor Parameters on page 115: Use this form to configure transaction parameters that are specific to shopfloor.
- Parameter Groups Settings on page 122: Use this form view the parameters that are applicable to the Infor FactoryTrack transactions and forms.

Deleting Devices

Use the Devices form to delete devices in your device tracking system.

1. Open the Devices form.
2. Select a device from the grid.
3. Click the **Delete an Object** button in the toolbar.

Issuing and Returning Devices Using the Device Allocation Form

The warehouse mobility icon based menu and list based menu comprises of the Utilities. Device Allocation is listed as a transaction under the Utilities.

On the Utilities:

1. Select **Device Allocation**.
2. Specify this information:

   Device ID
   Select an device.

   Asset Number
   The asset number for the device is displayed.

   Supervisor
   The supervisor responsible for the device is displayed.

Operator
If you are issuing a device, select the operator to whom the device is being issued. If you returning a device, the operator to whom the device was issued is displayed.

Type
The device type is displayed.

Current Status
The status of the device is displayed.

Status Last Updated
The date and time the device status was last updated is displayed.

Comment
Optionally, specify a comment about the issue or return.

3. Click **Issue** or **Return**.

Modifying Badges

To modify existing badges, use the Badges form.

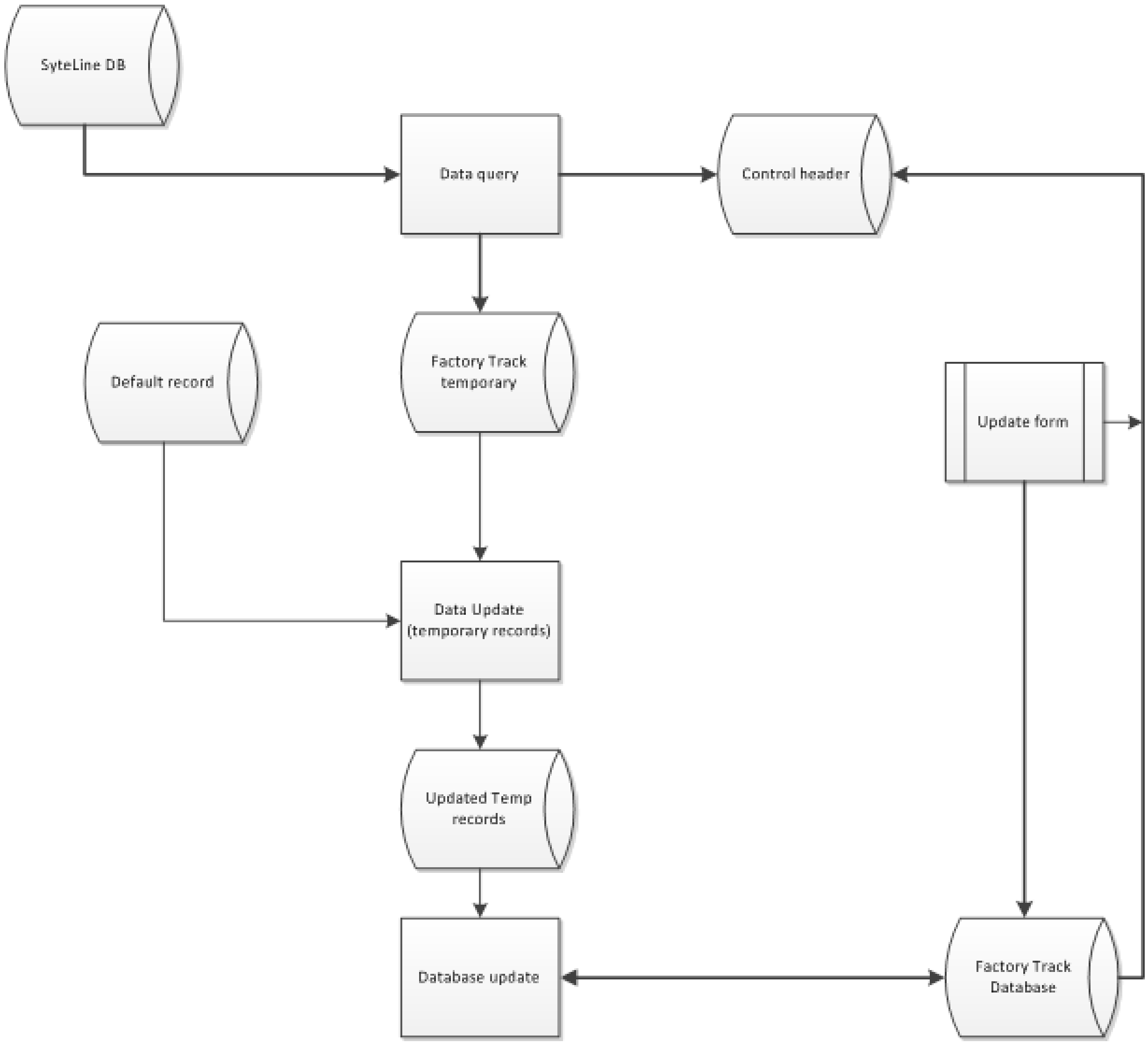
1. Open the Badges form.
2. Select the badge from the grid at left.
3. To assign an employee to the badge, specify a valid employee number.
4. To activate the badge, select **Active**. To deactivate the badge, clear this check box.
5. Click **Save**.

Processing Flow

The processing flow consists of three steps:

- Download data from the ERP into the temporary staging records
- Populate additional fields (as per default record) into staged record and
  Update the Factory Track Database

The figure provides the overview of the process:



The update consists of multiple parts (one per record type). Each part has three phases:

1 The first phase is to download the needed data fields from the ERP into the staged records.

  a The synchronization control record is updated to use a new batch number.

  b As each new record set is started, an update control record is built for that batch, and record type.

  c The data is now downloaded from the ERP and is stored into the staging records.

2 Next, the second phase is initiated.

  a In this phase each of the staged records is updated to include the fields which is not populated from the ERP. This is done using the default record.

  b After all records are updated, the third phase of processing starts.

3 In the third phase the Factory Track database is updated (when possible).

  a Using the key of the staged record, try to find the FactoryTrack master record.

  b If the record is not found (Add):

- The process tries to store the record based on whether all required fields are provided.
- If one or more fields are not provided, the record is marked as Error, and the count updated.
- If the record is successfully stored, the New Record count is updated.

c If the record is found (Update):

- For each field which is updateable, the program checks if the field has changed value.
- The default record determines which fields are updateable (update flag).
- The fields not present on the default record are not updateable.
- After the fields are compared, if any data change occurred, the record database record can be updated.

4 After all the records are checked and updated, the header record can be updated.

Reporting Devices as Lost, Found, Broken, and Fixed

Use the Devices form to report devices as lost, found, broken, and fixed.

1 Open the Devices form.

2 Select a device from the grid. The current condition of the device is displayed in the **Status** field.

3 In the **Operator** field, select your operator number.

4 Click a condition button:

- **Lost**
- **Found** (only available if the device was reported as lost)
- **Broken**
- **Fixed** (only available if the device was reported as broken)

5 Optionally, in the **Comment** field, specify a comment.

6 Click **Save**.

Setting Up Cross Reference Values

Use the Cross Referencing form to set up cross references between barcode values. These cross references automatically convert one barcode value to another when the initial value is scanned. For example, assume you regularly receive a part from a vendor with the vendor's barcode value of ABC, while that same part is recognized in your system as part XYZ. You can create a cross reference between the values ABC and XYZ, so that any time the value ABC is scanned, it will be read as XYZ.

1 Open the Cross Referencing form.

2 To set up a new cross reference code type, click **New** or select a blank line from the grid at the left. To modify an existing cross reference code type, select it from the grid.

3 Specify or review this information:

Xref Code Type
Specify a name for the cross reference code type. If you are modifying an existing cross reference code type, this field is read only.

Description
Specify a description for the cross reference code type.

Type Priority
Specify a number, `1` through `999`, to determine the priority for searching for this cross reference code type. For example, specify `1` to search for this code type first when a barcode is scanned.

4 In the Xref Values grid, define cross references for this cross reference code type. To define a cross reference, select a blank or existing line in the grid and specify this information:

Xref Field Type
Specify a field type: `C` (customer), `I` (item), or `V` (vendor).

Xref Field Value In
Specify a value, such as an item number, that will be scanned.

Xref Field Value Out
Specify an alternate value, such as an item number, to which to convert the scanned value.

5 Click **Save**.

Team Management

Use the **Team Management** form to add team members in Shop Floor. You must be assigned to the Administrator or Supervisor permission group to access the Team Management form. An employee can only be a member of one team. If you are trying to add an employee to a team who is already a member of another team, you must first remove that employee from the other team. If a team is currently working any jobs, any employee added to the team is assigned to those jobs.

Note: To implement this functionality, you must:
- Enable feature RS8975 on the **Feature Management** form.
- Enable Teams Implemented parameter on the **Global Parameters** form.
- Review these parameters on the **Shop Floor Parameters** form:
  - Operator Team Move
  - Operator Team Create
  - Ask Team Operator
  - Split Quantity In Team Options
    - Split Across Team
    - Allocate To Team
    - Allocate To Operator

Use the **Team Management** form to allow supervisor to:

- Add employees to the team
- Remove employee from the team
- Add an employee to another team.

Use the **Team Management** form to allow employee to:

- Leave an existing team and join another team
- Leave a team
- Join a team
- Create a new team.

Adding employees to a team

1. Login to the Shop Floor module as Supervisor. The **Assignment List** or **Resource Summary** screen is displayed.
2. Click **Team Management** on the menu. The **Team Management** screen is displayed.
3. Select a team from the list. The team members, employees and the active jobs associated with the selected team are displayed.

   Note: The sequence in which the list of employees displayed in the **Available** section are:

   a. Inactive employees who are currently not part of a team
   b. Inactive employees who are currently a part of another team
   c. Active employees who are not currently a part of any team
   d. Active employees who are currently a part of another team
4. Select and drag the employee name from the **Available** section to the **Team Members** section.

   An employee is added to the team and starts any job which the team is currently running. If the employee had previously been part of another team, they are automatically removed from the team. An employee previously been a part of another team is automatically removed from the team. An employee previously been active on any job(s), whether as part of a team or independently, are stopped.

Removing employees from a team

1. Login to the Shop Floor module as Supervisor. The **Assignment List** or **Resource Summary** screen is displayed.
2. Click **Team Management** on the menu. The **Team Management** screen is displayed.
3. Select a team from the list. The team members, employees and the active jobs associated with the selected team are displayed.
4. Select and drag the employee information from the **Team Members** section to the **Available** section. The **Leave Team** window is displayed.
5. Click **Confirm**. An employee is removed from the team and the jobs which the team is currently running are stopped although these jobs continue being active for all other members of the team.

Moving an employee from one team to another team

1. Login to the Shop Floor module as Supervisor. The **Assignment List** or **Resource Summary** screen is displayed.
2. Click **Team Management** on the menu. The **Team Management** screen is displayed.
3. Select a team from the list. The team members, employees and the active jobs associated with the selected team are displayed.
4. Select and drag the employee information from the **Team Members** section to the **Available** section. The **Leave Team** window is displayed.
5. Select the **Joining a New Team?** check box.
6. Select a new team to join, in the **New Team** field.
7. Click **Confirm**. An employee is added to the team and starts any job which the team is currently running.

   If the employee had previously been part of another team, they are automatically removed from the team. The employee is also automatically removed from an existing team and stops any active jobs for the team although these jobs are active for other members of the existing team.

Leaving Teams

1. Login to the Shop Floor module as a Generic User and specify your employee number. The **Assignment List** or **Dispatch List** screen is displayed.
2. Click menu option on the left and select **Team Move**. The **Leave Team** window is displayed if the employee is currently part of a team.

   Note: Do not select the **Joining a New Team?** check box in the **Leave Team** window if the employee does not join another team.
3. Click **Confirm**. An employee is removed from the team and the jobs which the team is currently running are stopped although these jobs continue being active for all other members of the team.

Joining Teams

1. Login to the Shop Floor module as a Generic User and specify your employee number. The **Assignment List** or **Dispatch List** screen is displayed.
2. Click menu option on the left and select **Team Move**. The **Join Team** window is displayed if the employee is currently not part of a team.
3. Select a new team to join, in the **New Team** field.
4. Click **Confirm**. An employee is added to the team and starts any job which the team are currently running. An employee previously been active on any job(s) are stopped.

Joining Another Team

1. Login to the Shop Floor module as a Generic User and specify your employee number. The **Assignment List** or **Dispatch List** screen is displayed.
2. Click menu option on the left and select **Team Move**. The **Leave Team** window is displayed if the employee is currently part of a team.
3. Select the **Joining a New Team?** check box in the **Leave Team** window.
4. Select a new team to join, in the **New Team** field.
5. Click **Confirm**. An employee is added to the team and starts any job which the team is currently running. The employee is automatically removed from an existing team and stops any active jobs for the team although these jobs are active for other members of the existing team.

   Note: An employee can access the **Team Move** form when the Operator Team Move parameter in the **Shop Floor Parameters** form is enabled.

Creating Teams

1. Login to the Shop Floor module as a Generic User and enter your employee number. The **Assignment List** or **Resource Summary** screen is displayed.
2. Click menu option on the left and select **Create Team**. The **Create Team** screen is displayed.
3. Select the **Create New Team?** check box in the **Create Team** window.
4. Click **Confirm**. A new team is created (YYMMDDHHMM format) and the employee is added to the team. All jobs which the employee was working on, are stopped and restarted as team jobs.

   Note: An employee can create a new team only when the Operator Team Create parameter in the **Shop Floor Parameters** form is enabled.

Using the More option

If the mobile scanner has limited display space, you can add (SETVARVALUES(DisplayMobileToolbar=none)) parameter to the URL to view the **More** option.

When the (SETVARVALUES(DisplayMobileToolbar=none)) parameter is specified in the URL, the **More** option is displayed which is used to view the Go to Menu, Reprint a Label and Logout options. When the parameter is not specified, the **More** option is not displayed, and these options are displayed on the toolbar of the Factory Track form.

Using Scan Formats

To create a new record, on the Scan Formats form:

1 Open the Scan Formats form.
2 Click **New**.
3 Specify the value for the **Scan Format ID**.
4 Specify the description for the new `Scan Format ID`.
5 Select the **System Record** check box, to include the newly created ID as the generic type of barcode to be supported.
6 Click **Save**.

Note:

The Scan Formats form consists of two tabs:

- **Separators**: Use this tab to define separators for Scan Format ID. See Using Separators tab on page 30
- **Identifiers**: Use this tab to define identifiers for Scan Format ID. See Using Identifiers tab on page 30

Using Separators tab

Use this maintenance form to define the separators such as; / - slash to be used for each Scan Format ID.

To create a separator, on the Scan Format Id:

1 Open the Scan Formats.
2 Select the Scan Format Id where the separator must be integrated.
3 Click **Separators** tab.
   a Click the blank space in the **Scan Separator** column, specify a single character.
      Note: Do not use this character as a separator:
      - backslash: \
   b Click the blank space in the **Description** column, and provide a description related to the separator character.
   c Click **Save**.

Using Identifiers tab

Use this maintenance form to define the Application Identifier for each Scan Format Id.

Note: Multiple versions can be created for each AI.

To create an identifier, on the Scan Format ID:

1 Open the Scan Formats.
2 Select the Scan Format ID where the identifier must be integrated.
3 Click **Identifiers**.
4 Specify this information:

Application Identifier
A code with not more than 5 characters. This is a mandatory field.

Version
The version of the application identifier. By default, this field is set to `1`. The user can create different versions for the same ID.

Description
A description for the identifier.

Data Type
A data type related to the identifier. The options are:

- `String`: Refers to the text.
- `Numeric`: Refers to the numbers.
- `Date`: Refers to the date. The format must be based on the settings defined in the **Scan Date Format** field.

This is a mandatory field.

Fixed Length
If this checkbox is selected, the identifier must be of a fixed length based on the value defined in the **Maximum Length** column.
Note: If this checkbox is cleared, the identifier can be of a length which is equal to or less than the value specified in the **Maximum Length** column

Maximum Length
The maximum number of characters that the identifier must have. This is a mandatory field.

Scan Date Format
The date format. The user can edit this field only if the **Data Type** field is set to `Date`. The applicable formats are; `YYYYMMDD`, `YYMMDD`, `MMDDYYYY`, `YYMM` and `MMYY` where `DD` is hardcoded to `01`.

Decimal Logic
If this checkbox is selected, the **Identifiers** use the decimal logic value.

For example; Sample:]C112422995, where]C1 is the **Scan Format ID**, 1242 is the **Identifier**, 2 is the **number of decimals** and 2995 is the value that is provided with decimals. Results: 29.95.

Note:

- This field is enabled if the **Identifier** is set to data type, `Numeric`.
- If this checkbox is cleared, the **Identifier** does not use the decimal logic value and the user can specify a value in the **Number of Decimals** field.

Number of Decimals
The specific number of decimals on the **identifier**, during configuration. For example; The Number of Decimals is 2 and Sample:]C11242995, where]C1 is the **Scan Format ID**, 124 is the **Identifier** and 2995 is the value that is provided with decimals. Results: 29.95.
Note: This field is enabled only if the **Decimal Logic** field is disabled.

5 Click **Save**.

Using Transaction Field Scan Mapping

1. Select **Composite Barcodes > Transaction Field Scan Mapping**
2. Select the transaction profile for configuration.
3. On the right side where the transaction profile description is displayed, specify this information:

   Field Name
   The Field Name from the list to be configured.

   Scan Format ID
   The **Scan Format ID** to be used.

   Application Identifier
   An application identifier related to the field name.

   Version
   The version of the application identifier. By default, this field is set to 1. The user can create different versions for the same ID.

   Description
   A description for the Barcode ID to be created.

4. Click **Save**.

Viewing Device Information

Use the Devices form to view information about a device including its activity history.

1. Open the Devices form.
2. Select a device from the grid. Basic details about the device are displayed in the fields on this form. In the bottom grid, the activity history of the device and any relevant comments are displayed.

Viewing Device Usage and Availability

Use the Current Device Usage form to view which devices are currently in use and which are available.

1. Open the Current Device Usage form.
2. Optionally, specify a supervisor and facility, or a range of supervisors and facilities, and click **Refresh** to filter the devices displayed by their facility and supervisor.

   The status of each device is displayed on the **Device Details** tab.
3. To view a bar graph showing how many of each device type are **Available**, **Assigned**, **List**, and **Broken**, click the **Device Availability** tab. Optionally, click the **Available**, **Assigned**, **List**, or **Broken** icons in the graph legend to hide that condition in the graph.

Viewing Information About Current Transactions

Use the Current Transaction Workbench form to view information about transactions that have been performed on the current date. You can view how many transactions were performed in the last hour, the success rate for transactions, the average response time, and how many transactions were performed on the current day and in the last hour. You can filter information by user, department, warehouse, and work group, and you can view details for specific users or transactions.

1. Open the Current Transaction Workbench.
2. Specify this information:

   Auto-Refresh
   Select this check book to refresh transaction data every minute.

   Show All Transactions
   Select this check box to show data for all transactions. Clear this check box to only show data for a specific transaction.

   Transaction Name
   This check box is only displayed if the **Show All Transactions** check box is cleared. Select a transaction for which to display data.

3. Optionally, specify some or all of this information to filter the transaction data that is displayed:

   User Name
   Specify a user, or a range of users, for which to display transaction data.

   Department
   Specify a department, or a range of departments, for which to display transaction data.

   Warehouse
   Specify a warehouse, or a range of warehouses, for which to display transaction data.

   Work Group
   Specify a work group, or a range of work groups, for which to display transaction data.

4. To update the transaction data displayed on the form based on the information you specified, click **Refresh**.

   On the **Users** tab, this information is displayed for each user:

   - user name
   - how many transactions the user performed in the last hour
   - how many transactions were successful
   - how many transactions were unsuccessful
   - the time the most recent transaction was performed

   The User Activity graph shows how many transactions were performed today by each user.

5. Optionally, on the **Users** tab, select the **Refresh Graph on Data Change** to update the User Activity graph when new data is processed.
6. Optionally, on the **Users** tab, select a user from the grid and click **Drilldown** to view information about each transaction record associated with the user.

7 Optionally, on the **Users** tab, select a user from the grid and click **Details** to open the Transaction History Details form, which will display individual transaction history records associated with the user. On the Transaction History Details form, you can select a record and click the **Details** tab to view detailed information about a specific transaction record.

8 To view information for individual transactions, click the **Transactions** tab. This information is displayed for each transaction:

- transaction name
- how many transactions times the transaction was performed in the last hour
- how many times the transaction was performed successfully
- how many times the transaction was performed unsuccessfully
- the time the transaction was most recently performed

The Transaction Usage graph shows how many times each transaction was performed today. The Average Response Time graph shows the average response time for each transaction.

9 Optionally, on the **Transaction** tab, select a user from the grid and click **Drilldown** to view information about each transaction record associated with the user.

10 Optionally, on the **Transaction** tab, select a transaction from the grid and click **Details** to open the Transaction History Details form, which will display individual history records associated with the transaction. On the Transaction History Details form, you can select a record and click the **Details** tab to view detailed information about a specific transaction record.

Viewing Information About Past Transactions

Use the Transaction Summary Workbench form to view information about transactions that have been performed on past dates. You can view how many transactions were performed in a selected date range, the success rate for transactions, and the average response time. You can filter information by date range, user, department, warehouse, and work group, and you can view details for specific users or transactions.

1 Open the Transaction Summary Workbench.

2 Specify this information:

Transaction Date
Specify a date, or a range of dates, for which to display transaction data.

Show All Transactions
Select this check box to show data for all transactions. Clear this check box to only show data for a specific transaction.

Transaction Name
This check box is only displayed if the **Show All Transactions** check box is cleared. Select a transaction for which to display data.

3 Optionally, specify some or all of this information to filter the transaction data that is displayed:

User Name
Specify a user, or a range of users, for which to display transaction data.

Department
Specify a department, or a range of departments, for which to display transaction data.

Warehouse
Specify a warehouse, or a range of warehouses, for which to display transaction data.

Work Group
Specify a work group, or a range of work groups, for which to display transaction data.

4 To update the transaction data displayed on the form based on the information you specified, click **Refresh**.

On the **Users** tab, this information is displayed for each user:

- user name
- department
- warehouse
- work group
- how many transactions were successful
- how many transactions were unsuccessful

The User Activity graph shows how many transactions were performed on the specified dates by each user.

5 Optionally, on the **Users** tab, select a user from the grid and click **Drilldown** to view information about each transaction record associated with the user.

6 Optionally, on the **Users** tab, select a user from the grid and click **Details** to open the Transaction History Details form, which will display individual transaction history records associated with the user. On the Transaction History Details form, you can select a record and click the **Details** tab to view detailed information about a specific transaction record.

7 To view information for individual transactions, click the **Transactions** tab. This information is displayed for each transaction:

- transaction name
- department
- warehouse
- work group
- how many times the transaction was performed successfully
- how many times the transaction was performed unsuccessfully
- the average response time for the transaction

The Transaction Usage graph shows how many times each transaction was performed on the specified dates. The Average Response Time graph shows the average response time for each transaction.

8 Optionally, on the **Transaction** tab, select a user from the grid and click **Drilldown** to view information about each transaction record associated with the user.

9 Optionally, on the **Transaction** tab, select a transaction from the grid and click **Details** to open the Transaction History Details form, which will display individual history records associated with the transaction. On the Transaction History Details form, you can select a record and click the **Details** tab to view detailed information about a specific transaction record.

Working with Audit Control form

1. Select **Time Track Administration > Admin Home Page**. The **Admin Home Page** is displayed.
2. Click **Audit Control**. The **Audit Control** form is displayed.
3. Select the **Enable Audit Logging**check box to enable standard Mongoose audit logging.

   Note: Mongoose audit logging must be enabled to activate the other TT history logs.
4. Select these check boxes to log and view the transaction history data:
   - **Transaction History**: Displays the history data for the clocked hours related to various transactions. The data modified on the Hours Detail form are recorded in this log.
   - **Elapsed Time History**: Displays the history data for the elapsed hours related to various transactions. The data modified on the Elapsed Hours form are recorded in this log.
   - **Payroll History**: Displays the payroll history data . Each step of the payroll processing is recorded in this log.
5. Select the check box corresponding to the required configuration forms to track the history. When a check box is selected, data is recorded in the log when:
   - A new record is created
   - An existing record is modified
   - An existing record is deleted
6. Specify the number of days in the **Archive History Every** field to indicate the interval at which records must be archived.
   - The maximum interval for archiving the history data can be 1825 days (60 months or 5 years). The Please define a shorter backup period error message is displayed if the specified value is greater than 1825 days.
   - The Last Archived field displays the date on which the data is last archive. This date is updated each time an archive is performed, or a change occurs in the history table configuration.
   - You can use the**Clear Sub-Table** option to clear the archived data.
7. Click **Save**.
8. Click **View** to access the corresponding form.
9. Click **View System Audit Log** to access the **Mongoose System Audit Log** screen.

Chapter 2: Accessing FT modules

This module includes topics that describe the procedures to access Infor Factory Track applications.

About the Privacy Utility

GDPR (General Data Protection Regulation) is a European legal regulation used to secure the personal data and privacy of the native citizens.

The General Data Protection Regulation (GDPR) is a regulation that requires businesses to protect the personal data and privacy of European Union citizens. Effectively, from May 25 2018, the European Union citizens have the ability to control the access of the personal data. This feature must be executed by the company (local and international) that performs any business in Europe or handles the personal data of EU residents. In order to comply with the European Union General Data Protection Regulation (EU GDPR), Data Controllers and Data Processors can use the Data Anonymization by Employee form to find and report on personal data that is held in the application for a particular individual. The individual can review the report and request for removing the data from the application. In that case, after the legal retention period for the data records has passed, the administrator can either manually delete the records from the application.

The process includes data collecting, processing, storing, deleting, transferring, and using the citizens' information effectively.

Employees are provided with information on how the personal data is processed.

- Can transfer personal data between service providers with ease.
- Know when the personal data is hacked. Organizations must notify the national supervisory authority of data breaches as soon as possible so that appropriate measures can be taken.

Note: When an employee no longer wants the personal data to be processed, and if there are no legitimate grounds to retain this, the data is deleted.

Removing personal data for an employee

Employees can raise requests to the company to remove any personal information available in the database. After the legal retention period for preserving the data records is passed, you can manually delete some records from the application and run the **Data Anonymization by Employee** form to anonymize personal data about the employee.

The changes cannot be reversed after the form is run for anonymize action.

To use the **Data Anonymization by Employee** form for removing employee data:

1 Select **Open > Data Anonymization by Employee**.

   Note: The default values that are previously saved must be displayed when the form is accessed.

2 Select the employee number to process the anonymize action.

3 Click **Anonymize**.

   This employee related data is populated in the Defaults section after backend validation:

   - Department
   - Shift
   - Emp Type
   - SF Indirect Task
   - Work Group
   - Facility

   Specifying **Birth date**, **Hire Date** and **Termination Date** is optional.

   The application initiates the anonymization process for the employee data.

   Note: The application removes all the:

   - records from the ft_message_address table if the fields **Employee User Name** or **Login Employee Number** match the employee that is set to anonymize.
   - records from the ic_label_print_dtl table if the field **Employee Number** matches the employee that is set to anonymize.
   - employee-related information from the ft_audit_log and ft_audit_log_archive tables.
   - employee biometric records, when the Biometric Utility is run.

4 Click **Save Defaults**. The application saves the changes made to the Default section.

   Note: If you change any of the Defaults on the form and click**Anonymize** prior to saving the Defaults, the values on the form are used for data removal process.

About Infor Factory Track

Infor Factory Track is a comprehensive manufacturing, labor, and attendance operations and collection system. The application directly integrates to your ERP system, streaming up-to-date information directly to and from the shop floor. Infor Factory Track consists of three modules integrated directly into Infor LN:

- Infor Time Track
- Infor Warehouse Mobility
- Infor Shop Floor

Accessing Shop Floor Transactions

You can access Shop Floor transactions using a Web browser. Use this URL:

http://usalvwwmft6qa09/WSWebClient/mobile.aspx?page=light&form=FTSFEmployeeLogin.ts

Accessing Time Track Transactions

You can access Time Track transactions using a Web browser. Time Track may be run in "Full Client" or "Form Only" modes. In Full Client mode, the user will have full access to Mongoose Menus and navigational features. In Form Only mode, the user will have an access only to Time Track navigation features that is built into the forms. Use these URL paths to access the transactions for Time Track functionality in Full Client or Form Only Mode:

- **Full Client**: http://<utility servername>/WSWebClient/Default.aspx
- **Form Only-Employee Home Page**: http://<utilityservername>/WSWebClient/Default.aspx?page=formonly&form=employeehomepage.ts
- **Form Only-New UX Attendance Transaction Form**: http://<utilityservername>/wswebclient/Default.aspx?page=formonly&form=FTTTAttendanceTrackingTrans.ts
- **Form Only-Supervisor Landing Page**: http://<utilityservername>/WSWebClient/Default.aspx?page=formonly&form=FTTTSupervisorLandingpage.ts
- **Form Only-Employee Landing Page**: http://<utilityservername>/WSWebClient/Default.aspx?page=formonly&form=FTTTEmployeeLandingpage.ts

Note: You must update these URL paths with the name of your utility server.

In Full Client mode, you will specify forms to open when you log in. Use the Master Explorer to navigate to MyFolders/Autorun and create a new short cut to the form that should be opened on startup.

Adding Additional Fields to Barcode Labels

Use the Label Print Extensions form to add additional information fields to barcode labels.

1. Open the Label Print Extensions.
2. Click **New** or select a blank line from the grid.
3. Specify this information:

   Label Request ID
   Select a request ID for the field you are adding.

   Label Request Seq
   Optionally, specify a default sequence order in which to print this label.

   Label Request Sub Seq
   Optionally, specify a default sub-sequence order in which to print this label.

Field Name
Specify a name for the field.

Field Value
Optionally, specify a default value for this field. Leave blank to require users to specify the value.

4 Click **Save**.

Assigning Actions to Function Keys

Use the Function Key Action Values form to assign actions to the function keys on the mobile scanner devices at your site.

1 Open the Function Key Action Values form. The device type is displayed.
2 Specify a key value from your scanner and a key description for each of these actions:
- **Go To Previous Page**
- **Go To Main Menu**
- **Go To Help**: Currently, this action has no effect; this version of Infor Factory Track does not support opening help files from a mobile scanner device
- **Reprint**
- **Logout**
- **Submit Form**
- **Move Up In List**
- **Move Down In List**
- **Select Current From List**
- **Refresh List**
- **Run Popup Form**: opens a list of options from which to select for the current field; this action is only supported for certain fields
- **Special Value1**: if applicable, performs an action associated with customizations made to your site
- **Special Value2**: if applicable, performs an action associated with customizations made to your site
- **Special Value3**: if applicable, performs an action associated with customizations made to your site

3 To assign actions to the specified key values, click **Set**.

Factory Track Groups

These authorization groups are defined in Factory Track by default:

- FT-Supervisor: Factory Track Supervisor Group. This group is assigned to supervisors, who are responsible for employees and/or work centers. Time approval is controlled by settings associated with the employee's work group. This group has access to all the forms assigned to generic and dedicated users, so that the user has full access to all the forms that the respective subordinates can use.

- FT-Base: This group contains all the forms such as pop-ups and tiles which the user does not access directly. All the FT users excluding the administrators must have authorization to this group for all the ERPs.
- FT-Employee: This group is for the dedicated users in Factory Track, that are linked to an employee such as a back office employee.
- FT-TeamLeader: Factory Track Team Leader Group. Team leaders manage teams using the Shop Floor module. These groups are authorized to create teams by adding and removing team members. Team leaders can perform transactions for the entire team.
- FT-Integration: FT Integration Process. This is used for various FT ERP integration processes to perform.
- FT-Console: Factory Track Console group is for the generic users of Factory Track, that are not linked to an employee such as a shop floor terminal.
- FT-LNWMNonTT: Infor FactoryTrack Non Time Track Labor Transactions for LN. This group is used for WM (scanner) Transactions in LN implementations. This grants access to the Labor recording functions using the LN-based Time module. (This is not assigned, if Time Track is being implemented).
- FT-LNWMInventory: Infor Factory Track Inventory for LN. This group is used for WM (Scanner) Transactions in LN implementations. This grants access to the Inventory transactions for the scanner.
- FT-LNWMProduction: Infor Factory Track Production for LN. This group is used for WM (Scanner) Transactions in LN implementations. This grants access to the Production support transactions for the scanner.
- FT-TTWMTrans: Infor Factory Track Time Track WM Transactions - CSI & LN. This group is used for WM (Scanner) Transactions when Time Track module is implemented.
- Infor-SystemAdministrator: This group is used to add users to Factory Track through the Ming.le interface. This group is used by Factory Track for managing the Factory Track application. This is intended for users who usually maintain setup, reference, and system data, such as employee records, transaction parameters, and ERP connection information. This group includes all the FT forms, irrespective of the ERP or Module, so that an administrator can be assigned to this group for accessing any FT form.

Factory Track License Modules

Available Factory Track license modules and the related accessible capabilities are listed here:

Table 1: Usage of Factory Track License Modules

License Module Name	Description
FactoryTrackAuto	Contains license for all FT IDO's. This is a developers license. This is used for any application developing integrating into FT.
FactoryTrackBase	Contains license for all standard Mongoose Forms and common FT forms. This cover both configuration folder (excluding development folder) and System folders. This is useful for System administration purposes.
FactoryTrackCloud	Cloud license, contains license for all FT forms except the Dev forms.

License Module Name	Description
FactoryTrackDev	Contains License for IDO forms and Transaction Setup forms(development folder in Configuration menu). Useful for developers from customer side to develop new transactions in FT.
FactoryTrackMetrics	This license allows access to forms that are exclusively Warehouse Mobility forms.
FactoryTrackShopFloorELN	This module is for ShopFloor Transactions for LN.
FactoryTrackShopFloorTTTrans	This license allows access to Shop Floor forms that are used with Time Track.
FactoryTrackTimeEntry	This license allows access to Time Track sheet forms.
FactoryTrackTimeTrackELN	This license allows access to forms that are exclusively Time Track forms for Infor LN.
FactoryTrackWMELN	This license allows access to forms that are exclusively Warehouse Mobility forms for Infor LN.
FactoryTrackWMLNInv	This license allows site access to inventory transactions in LN.
FactoryTrackWMLNProd	This license allows site access to production transactions in LN.

Menu Management Overview

This process explains the logic of logging into the URL with a definite starting menu group for the user.

On the specific URL:

1. Click the specific URL.
2. Specify the user name, password, and configuration.
3. The application checks for the validity of the **menu group** on Users form.
   a. If no value is set on the Users form, the application checks for the **Menu Group** on the Site Parameters form.
4. Next, the application validates for the URL type which can be Icon or List URL.
   a. If the URL is Icon based, the application checks for the Icon Menu Style Top-level Menu, for the specific Menu Group.
   b. If the URL is List based, the application checks for the List Menu Style Top-level Menu, for the specific Menu Group.
5. Based on the above criteria, the application displays the **Menu**.

Teams Overview

Use the **Teams** form to streamline employee activities. Team members can start or stop jobs for all the members of their team in a single transaction. When a labor transaction is performed using the team number, that transaction is replicated for all members of the team. A supervisor can also perform activities on behalf of the team that affects all of its members. For example, a supervisor can start a job for the team. All members of the team can be assigned to the started job. Using teams reduces the number of transactions that need to be performed, thereby reducing employee errors, such as forgetting to start a job.

Note: Attendance transactions cannot be performed for a team. Employees must clock in and clock out individually.

You can create and manage teams using the Time Track module.

On the **Teams** form:

1. Create teams.
2. Assign employees to teams.
3. Use the team number instead of the employee number when performing labor transactions, such as starting or stopping jobs.

Transaction Metrics Overview

You can use the transaction metrics forms to view and analyze transactions data. On the Current Transaction Workbench form, data is collated and summarized in real-time, allowing you to see transaction information for current day, such as how many transactions have been performed in the last hour, success rates for transactions, and average response times. You can filter data by user, department, warehouse, and work group, and you can access detailed information for users and transactions, including details for each individual transaction record.

Transaction records are stored in the transaction history table, which you can view on the Transaction History form. To summarize and analyze transactions from previous dates, you can post records from the transaction history table to the summary records table using the Post Transaction History To Summary form. You can delete records in the transaction history table using the Purge Transaction History.

Once records have been posted to the summary records tables, you can view and analyze this information using the Transaction Summary Workbench form. You can view how many transactions were performed in a selected date range, the success rate for transactions, and the average response time. You can filter information by date range, user, department, warehouse, and work group, and you can view details for specific users or transactions.

You can view the data by user or transaction, for the current day or for a specified period.

The module is categorized into three sections:

1. Utilities
   - Post Transaction History To Summary: The details of each transaction is created and posted to the summary records. This form also provides the time for the previous run performed along with the number of unprocessed data. This utility needs to be run and up-to-date before the Transaction Summary Workbench can be used for a specified period.

- Purge Transaction History: The detail records are removed.

2 Current Transaction Workbench: This workbench displays the current day's transactions. .

3 Transaction summary workbench: This workbench displays a summary of the transactions for a specified date range.

The workbench sessions in Transaction Metrics have similar screen layouts, displaying the data either by transaction or by user. If the user drills down to an individual transaction, the actual input and output data to the ERP is displayed.

These are the details displayed on the XML tab of the workbench sessions for metrics specific to different ERPs:

- In the **Input To ERP**section, you can view the data sent to the ERP system.
- In the **Output From ERP** section, you can view the response from the ERP system.

Accessing Warehouse Mobility Transactions

You can access Warehouse Mobility transactions using a Web browser. Use these URL paths to access the transactions for these two modules:

- **Warehouse Mobility standard menu**: http://<utility server name>/wswebclient/Mobile.aspx?page=light&form=WMMenu.mobi
- **Warehouse Mobility icon-based menu**: http://<utilityservername>/WSWebClient/mobile.aspx?page=light&form=FTICONMenu.mobi
- **Warehouse Mobility number-based menu**: http://<utilityservername>/WSWebClient/mobile.aspx?page=light&form=FTICONMenuStatic.mobi

Note: You must update these URL paths with the name of your utility server.

If you are using Warehouse Mobility on a mobile scanner device, you must configure the device to point to one of the Warehouse Mobility menu paths: The standard menu is optimized for navigation using the directional keys on your device, while the icon-based menu is optimized for navigation using touch input.

If the mobile scanner has limited display space, you can add (SETVARVALUES(DisplayMobileToolbar=none)) parameter to the URL to view the **More** option. See Using the More option on page 29.

Single Sign-On (SSO)

The Warehouse Mobility forms can be accessed using IFS SSO. The Single Sign-On (SSO) functionality allows you to execute Warehouse Mobility processes centrally, without the deployment in Infor Ming.le. All the standard user management task can be performed at a central location in Ming.le. The user information is published by Ming.le as a BOD to update the data in the Factory Track application. See Single Sign-On URL for Warehouse Mobility on page 45.

Single Sign-On URL for Warehouse Mobility

You must use this URL pattern, if IFS is installed on a specific device:

https://usalvwft60110db.infor.com/WSWebClientIFS/Default.aspx?page=light&form=FTIconMenu.mobi &useWorkstation=1&config=FT7MG10304_DEMO&ForceSSO=1&IOS=usalvwwmxi01.infor.com.

The URL components include:

- **https://usalvwft60110db.infor.com/**: Indicates the Factory Track server.
- **WSWebClientIFS**: The Web Client configured for IFS validation.
- **Default.aspx?page=light&form=FTIconMenu.mobi**: Indicates the standard WM address.
- **useWorkstation=1**: Indicates that the login credential of the workstation user must be considered instead of allowing the operator to enter a user name and password.
- **config=FT7MG10304_DEMO**: Indicates the Factory Track configuration that is accessed.
- **ForceSSO=1**: Indicates that the SSO functionality is enabled.
- **IOS=usalvwwmxi01.infor.com**: Indicates the IFS location.

Note: The Warehouse Mobility user is automatically logged out of Infor OS when logging out from the Factory Track application. This results in the standard Ming.le login form being displayed which enables another user to login.

You must use this URL pattern, if IFS is in the cloud:

https://ft7a.ft.awsdev.infor.com/WSWebClient/default.aspx?tenant=FTK7LN3_DEM&config=FTK7LN3_DEM_LN &ConfigGroup=FTK7LN3_DEM&page=light&form=FTICONMenu.mobi&notitle=none&forcesso=1 &IOS=qac-sso.qac.awsdev.infor.com&Mode=cloud.

The URL components include:

- **tenant=FTK7LN3_DEM**: Indicates the tenant in the cloud.
- **ConfigGroup=FTK7LN3_DEM**: Indicates the configuration group which the configuration belongs to, in the cloud.
- **Mode=cloud**: Indicates the cloud-based installation and hence, ping federate is used for IFS validation.

Note: The Warehouse Mobility user is automatically logged out of Infor OS when logging out from the Factory Track application. This results in the standard Ming.le login form being displayed which enables another user to login.

You can use this URL pattern, if IFS is used for user control:

https://usalvwft60110db.infor.com/WSWebClientNOIFS/Default.aspx?page=light&form=FTIconMenu.mobi.

The URL components include:

- **https://usalvwft60110db.infor.com/**: Indicates the Factory Track server.
- **WSWebClientNOIFS**: The Web Client configured for IFS validation.
- **Default.aspx?page=light&form=FTIconMenu.mobi**: Indicates the standard WM address.

Chapter 3: Configuring Transaction Parameters

This module include topics that describe the procedure to configure parameters in Infor Factory Track application.

Configuring Close Handling Unit Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Close Handling Unit transaction.

1. Go to **Transaction Set Maintenance form > Transaction Name > Close Handling Unit**.
2. Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

   Note:
   - You can change this warehouse for a specific transaction if required.
   - If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
   - If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.
3. Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.
4. Select a Default Order Type for this transaction from the available values.

   Note: You can change this value.
5. Click **Save**.

Configuring Create Handling Unit Parameters

Use the Transaction Set Maintenance form to configure parameters for the Create Handling Unit transaction.

1. Go to **Transaction Set Maintenance form > Transaction Name > Create Handling Unit**.
2. Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

   Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Configure this parameter on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

Handling unit mask
The mask code for automatically generated handling unit numbers.

Create parent
Select this parameter to allow a new parent handling unit to also be created when a handling unit is created during this transaction.

Input Package Definition
Select this parameter to allow a package definition to be assigned to a new handling unit.

Input Packaging Item
Select this parameter to allow a packing item to be assigned to a new handling unit.

6 Select **Label Print Parameters** to configure label printing parameters for this transaction on the **Transaction Parameters** tab. See Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102 for more information.

7 Click **Save**.

Configuring Handling Unit Inquiry Transaction Parameter

Use the Transaction Set Maintenance form to configure parameters for the Handling Unit Inquiry transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Handling Unit Inquiry**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

   Note: You can change this value.

5 Click **Save**.

Configuring Kanban Cancel Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Kanban Cancel transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Kanban Cancel**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

   Note:

   - You can change this warehouse for a specific transaction if required.
   - If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
   - If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

   Note: You can change this value.

5 Click **Save**.

Configuring Kanban Create Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Kanban Create transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Kanban Create**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

   Note:

   - You can change this warehouse for a specific transaction if required.
   - If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
   - If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Configure this parameter on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

Temporary Kanban IDs in Use
Select this check box to create temporary Kanbans.

6 Select **Label Print Parameters** to configure label printing parameters for this transaction on the **Transaction Parameters** tab. See Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102 for more information.

7 Click **Save**.

Configuring Kanban Delivery Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Kanban Delivery transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Kanban Delivery**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Configure this parameter on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

User Input To Warehouse
Select this checkbox to scan the warehouse. If the scanned warehouse does not match the Kanban stock warehouse, the application displays an error message.

User Input To Location
Select this checkbox to scan the location. If the scanned location does not match the Kanban stock location, the application displays an error message.

User Input Kanban Location
Select this checkbox to scan the Kanban location. If the scanned location does not match the Kanban stock location, the application displays an error message.

Warehouse Order Type
The order type to use to transfer the Kanban from the original location to the destination.

6 Click **Save**.

Configuring Kanban Reinstate Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Kanban Reinstate transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Kanban Reinstate**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Select **Label Print Parameters** to configure label printing parameters for this transaction on the **Transaction Parameters** tab. See Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102 for more information.

6 Click **Save**.

Configuring Kanban Request Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Kanban Request transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Kanban Request**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

   Note: You can change this value.

5 Click **Save**.

Configuring Kanban Reset Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Kanban Reset transaction.

1. Go to **Transaction Set Maintenance form > Transaction Name > Kanban Reset**.
2. Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

   Note:

   - You can change this warehouse for a specific transaction if required.
   - If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
   - If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.
3. Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.
4. Select a Default Order Type for this transaction from the available values.

   Note: You can change this value.
5. Select **Label Print Parameters** to configure label printing parameters for this transaction on the **Transaction Parameters** tab. See Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102 for more information.
6. Click **Save**.

Configuring Kanban Status Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Kanban Status transaction.

1. Go to **Transaction Set Maintenance form > Transaction Name > Kanban Status**.
2. Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

   Note:

   - You can change this warehouse for a specific transaction if required.
   - If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
   - If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Click **Save**.

Configuring Print Item Labels Transaction Parameters

Use the Transaction Set Maintenance form to configure the parameters for the Print Item Labels transaction.

1 Select **Form > Open > Transaction Set Maintenance** form.

2 Select **Print Item Labels** in the Transaction Name column

3 Specify this information:

Warehouse
The warehouse for which you are configuring the transaction parameter.

Note: If you are configuring general parameters, which are applicable by default throughout the application, the **Warehouse** field is blank and disabled.

Fill Warehouse
Select this check box to default the warehouse specified for the user on the Warehouse Parameters form.

Successful Message
If this check box is selected, a message is displayed indicating that the transaction is processed successfully.

Transaction Name
The name of the transaction.

Default Order Type
The default order type for the transaction.

4 Select **Label Print Parameters** on the **Transaction Parameters** tab to configure the transaction parameters required for label printing. See Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102 for more information.

5 Click **Save**.

Configuring Allocate Release Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Allocate Release transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Allocate Release**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Configure these order type-specific parameters on the **Order Type Parameters** tab, in the **Parameter** and **Value** columns:

Cart Location
The cart location to which to transfer items at the time of picking.

Show Inventory List after Partial Pick
Select this checkbox if the list of inventory must be displayed after a partial pick is performed.

Outbound Run Number
The default number for outbound runs.

Release Outbound
Select this checkbox to release the outbound allocation when items are picked.

Over Picking Allowed (Sales, Transfer, Production only)
Select this checkbox to allow users to pick more than the required quantity, in compliance with standard Infor LN tolerance limits.

Stage Location
The staging location for items that are picked.

Input Zone
Select this checkbox to allow users to filter the pick list by zone.

No of Lines to Display
The number of order lines to be displayed.

Prefill Handling Unit Quantities
Select this checkbox if a picked HU must be pre-filled in the **Quantity** field automatically.

Prefill non-Handling Unit Quantities
Select this checkbox if a picked line must be automatically pre-filled when a HU is not picked.

Display Item Number
Select this checkbox to display the number of the item that is picked.

Scan Item Number
Select this checkbox to require the user to scan the item number. If the scanned item number does not match the item number on the inventory line, the application displays an error message.

Display Location
Select this checkbox to display the location of the item being picked.

Scan Location
Select this checkbox to require the user to scan the location. If the scanned location does not match the location on the inventory line, the application displays an error message.

Change Location
Select this checkbox to allow users to pick items from a location that is different from that on the inventory line. If you select this checkbox, this parameter overrides the **Scan Location** parameter.

Display Lot Number
Select this checkbox to display the lot number of the item that is picked.

Scan Lot Number
Select this checkbox to scan the lot number. If the scanned lot number does not match the lot number on the inventory line, the application displays an error message.

Change Lot Number
Select this checkbox to allow users to pick items with a lot number that is different from that on the inventory line. If you select this checkbox, this parameter overrides the **Scan Lot Number** parameter.

Display Handling Unit
Select this checkbox to display the handling unit assigned to the item that is picked.

Scan Handling Unit
Select this checkbox to require the user to scan the handling unit. If the scanned handling unit does not match the handling unit on the inventory line, the application displays an error message.

Change Handling Unit
Select this checkbox to allow users to pick items assigned to a handling unit that is different from that on the inventory line. If you select this checkbox, this parameter overrides the **Scan Handling Unit** parameter.

Display Date
Select this checkbox to display the inventory date of the item that is picked.

Scan Date
Select this checkbox to require the user to scan the inventory date. If the scanned inventory date does not match the inventory date on the inventory line, the application displays an error message.

Change Inventory Date
Select this checkbox to allow users to pick items with an inventory date that is different from that on the inventory line. If you select this checkbox, this parameter overrides the **Scan Date** parameter.

List by Work Center (Production only)
Select this checkbox to display open lines for the specified work center or order number range.

Enter Single Order Only
Select this checkbox if a range of orders is not required.

Match Handling Units
Select this checkbox if the picked Handling Unit must be matched with an existing shipment HU.

Pick and Pack
Select this checkbox if the operator is allowed to build a 2-level Handling Unit structure when picking a Handling Unit.

Shipment is Run Number
Select this checkbox if the shipment number must be used for the outbound run number.

6. Select **Label Print Parameters** to configure label printing parameters for this transaction on the **Order Type Parameters** tab. See Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102 for more information.
7. Specify this information for each order type on the **Order Types** tab:

   Enabled
   Select this checkbox to allow this order type to be used in this transaction.

   Specific Parameters
   Select this checkbox to use order-specific parameter settings for this order type. Clear this checkbox to use the default parameter settings for this order type.

8. Click **Save**

Configuring Approvals Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Approvals transaction.

1. Go to **Transaction Set Maintenance form > Transaction Name > Approvals**.
2. Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

   Note:
   - You can change this warehouse for a specific transaction if required.
   - If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
   - If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.
3. Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.
4. Select a Default Order Type for this transaction from the available values.

   Note: You can change this value.
5. Configure this parameter on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

Reference ID in Use
Select this checkbox to allow users to specify a Reference ID at the beginning of this transaction. For more information, see Reference IDs on page 118.

6 Configure these order type-specific parameters on the **Order Type Parameters** tab, in the **Parameter** and **Value** columns:

Filter by Warehouse
Select this checkbox to inspect items in the current warehouse.

Reject Code
The default reason code for rejections.

Allow Destroyed Qty Input
Select this checkbox to specify an item quantity to destroy.

Destroy Code
The default reason code for items destroyed during inspection.

Scrap Reason Code
The default reason code for scrapped items.

Putaway
Select this checkbox to allow users to perform putaway transactions from within this transaction. These parameters are held at group level by default but can be copied to the transaction if required.

Release inbound
Select this checkbox to automatically release inbound orders for putaway. This parameter is only displayed if the **Putaway** parameter is selected.

Default run no
This parameter is only displayed if the **Putaway** parameter is selected. This value is always used by the transaction.

Popup Location
Select this checkbox to allow users to select put away locations from a list instead of scanning them. If you select this checkbox, you must also select one of these parameters:

- **Use fixed locations**
- **Use empty locations**
- **Consolidate inventory**

This parameter is only displayed if the **Putaway** parameter is selected.

No of Locations
The maximum amount of location to display in the popup list. This parameter is only displayed if the **Popup Location** parameter is selected.

Use fixed locations
Select this checkbox to select putaway locations that are defined in Infor LN as fixed locations for the item. This parameter is only displayed if the **Popup Location** parameter is selected.

Use Empty Locations
This parameter is only displayed if the **Popup Location** parameter is selected. Select this checkbox to display empty locations in the popup list.

Check Capacity
Select this checkbox to only display locations with sufficient capacity in the popup list. This parameter is only displayed if the **Empty Locations** parameter is selected.

Check Storage Locations
Select this checkbox to only display locations that are acceptable for the item in the popup list. This parameter is only displayed if the **Empty Locations** parameter is selected.

Consolidate Inventory
Select this checkbox to direct inventory approval for existing stocks of the same item. If you select this parameter, the options list only displays locations containing a positive quantity of the item to be transferred. Users can still manually specify any location. This parameter is only displayed if the **Popup Location** parameter is selected.

Highest Inventory First
Select this checkbox to list locations with the highest quantity of the item first. Clear this checkbox to list locations with the lowest quantity of the item first. This parameter is only displayed if the **Consolidate Inventory** parameter is selected.

Include all Fixed Locations
Select this checkbox to list all fixed locations for the item even if they have a quantity of zero. This parameter is only displayed if the **Consolidate Inventory** parameter is selected.

Prefill Location
Select this checkbox to pre-fill the **Location** field. If you select this parameter, you must also select one of these parameters:

- **Use Default Location**
- **Use fixed locations**
- **Use LN Logic for inbound**
- **Consolidate Inventory**

Use Default Location
This parameter is only displayed if the **Prefill Locations** parameter is selected. Select this checkbox to specify a default location put away location to use for this location.

Default Location
This parameter is only displayed if the **Use Default Location** parameter is selected. Specify a default put away location for this transaction.

Use fixed locations
This parameter is only displayed if the **Prefill Locations** parameter is selected. Select this checkbox to use the first fixed location of the item as the default put away location for this transaction. If the item has no fixed locations, the **Location** field is not specified.

Use LN Logic for inbound
Select this checkbox to use Infor LN's inbound advice rules to specify a default put away location. This parameter is only displayed if the **Prefill Locations** parameter is selected.

Consolidate Inventory
Select this checkbox to prefill the location field with either the highest or lowest quantity, depending upon whether the **Highest Inventory First** parameter is selected, of the item. This parameter is only displayed if the **Prefill Locations** parameter is selected.

Highest Inventory First
Select this checkbox to use the location with the highest quantity of the item as the default location. Clear this checkbox to use the location with the lowest quantity. This parameter is only displayed if the **Consolidate Inventory** parameter is selected.

Crossdocking Enabled
Select this checkbox to allow users to perform cross transactions from within this transaction.

Print Handling Unit Labels before Crossdock
Select to print handling unit barcode labels before performing the crossdock transaction. This parameter is available if you select **Crossdocking Enabled**.

Print Serial Labels before Crossdock
Select to print serial number barcode labels before performing the crossdock transaction. This parameter is available if you select **Crossdocking Enabled**.

7 Select **Label Print Parameters** to configure label printing parameters for this transaction. See Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102 for more information.
8 Specify this information for each order type on the **Order Types** tab:

Enabled
Select this checkbox to allow this order type to be used in this transaction.

Specific Parameters
Select this checkbox to use order-specific parameter settings for this order type. Clear this checkbox to use the default parameter settings for this order type.

9 Click **Save**.

Configuring As Built Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the As Built transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > As Built**.
2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.

- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Specify this information:

Fill Warehouse
This parameter has no effect for this transaction.

Successful Message
Select this checkbox to show a success message when the transaction is successfully completed.

6 Configure these parameters on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

Create As-Built Record
Select this checkbox to allow users to create as-built records even if not required by the order.

Create Lot Number
Select this checkbox to allow users to create lot numbers. Clear this checkbox to use existing lot numbers.

Create Serial Number
Select this checkbox to allow users to create serial numbers. Clear this checkbox to use existing serial numbers.

7 Click **Save**.

Configuring ASN Receipt Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the ASN Receipt transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > ASN Receipt**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Configure this parameter on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

Reference ID in Use
Select this checkbox to allow users to specify a Reference ID at the beginning of this transaction. For more information, see Reference IDs on page 118.

6 Configure these order type-specific parameters on the **Order Type Parameters** tab, in the **Parameter** and **Value** columns:

Note: The order type parameters are only applicable to this transaction when a user is receiving an individual ASN line.

Filter by Warehouse
Select this checkbox to receive items in the current warehouse.

Override LN Activities
Select this checkbox to override any LN activities that interfere with this transaction.

Execute LN Activities
Select this checkbox to run any subsequent automatic tasks within the current transaction. If any task that is run within the transaction fails, the entire transaction fails and the application displays an error message. Clear to run subsequent automatic tasks outside of the current transaction. If tasks that are run outside of the transaction fail, the application displays no error message is displayed.

Set Pack Slip Quantity to Open Quantity
Select this checkbox to allow users to specify the unit of measure with which to receive items. For example, if a conversion factor specifying that one box equals five pieces is defined in Infor LN, the user can receive an item quantity of one box instead of five pieces.

Allow User to Enter Final Receipt
Select this checkbox to allow users to provide a final receipt for the transactions.

Input Lot Certificate Code
Select this checkbox to allow the user to specify a certificate code, linking a document to the lot number.

Enter Received Quantity
Select this checkbox to require users to specify the received quantity. Clear to automatically receive the quantity listed on the packing slip.

Prefill Received Quantity with Pack Slip Quantity
This parameter is only displayed if the **Enter Received Quantity** parameter is selected. Select this checkbox to use the packing slip quantity as the default value for the **Received Quantity** field. The user can change this value.

Enter Inspection Flag
Select this checkbox to allow users to specify whether to inspect received items. Clear this checkbox to inspect or not inspect items based on their designation in Infor LN.

Enter Inventory Date
Select this checkbox to allow users to specify an inventory date for date-controlled items that are received. Clear this checkbox to always use the current date added to the shelf life of the item for the inventory date.

Enter Receipt Date
Select this checkbox to allow the user to specify the receipt date.

Inventory Time
The time to record for any date-controlled items that are received.

Input UOM
Select this checkbox to allow users to specify the unit of measure with which to receive items. For example, if a conversion factor specifying that one box equals five pieces is defined in Infor LN, the user can receive an item quantity of one box instead of five pieces.

Receipt Series in Use
Select this checkbox to enable the Receipt Series field in the transaction form.
Note: If this parameter is cleared, the application defaults the receipt series and does not allow the override option for the receipt series that is used in LN.

Receipt Series
The default value type available in the Receipts Series List form.
Note:
- This field is enabled only if the Receipt Series in Use parameter is selected.
- Based on the specified value, the related transaction form populates the same Receipt series type.

Putaway
Select this checkbox to allow users to perform put away transactions from within this transaction. These parameters are applied at group level by default but can be copied to the transaction if required.

Release inbound
This parameter is only displayed if the **Putaway** parameter is selected. Select this checkbox to automatically release inbound orders for putaway.

Default run no
This parameter is only displayed if the **Putaway** parameter is selected. This value is always used by the transaction.

Popup Location
Select this checkbox to allow users to select put away locations from a list instead of scanning them. If you select this checkbox, you must also select one of these parameters:
- **Use fixed locations**
- **Use empty locations**
- **Consolidate inventory**

This parameter is only displayed if the **Putaway** parameter is selected.

No of Locations
The maximum amount of location to display in the popup list. This parameter is only displayed if the **Popup Location** parameter is selected.

Use fixed locations
Select this checkbox to only allow users to select put away locations that are defined in Infor LN as fixed locations for the item. This parameter is only displayed if the **Popup Location** parameter is selected.

Use Empty Locations
Select this checkbox to display empty locations in the popup list. This parameter is only displayed if the **Popup Location** parameter is selected.

Check Capacity
Select this checkbox to only display locations with sufficient capacity in the popup list. This parameter is only displayed if the **Empty Locations** parameter is selected.

Check Storage Locations
Select this checkbox to only display locations that are acceptable for the item in the popup list. This parameter is only displayed if the **Empty Locations** parameter is selected.

Consolidate Inventory
Select this checkbox to direct Putaway for existing stocks of the same item. If you select this parameter, the options list only displays locations containing a positive quantity of the item to be transferred. Users can still manually specify any location. This parameter is only displayed if the **Popup Location** parameter is selected.

Highest Inventory First
Select this checkbox to list locations with the highest quantity of the item first. Clear this checkbox to list locations with the lowest quantity of the item first. This parameter is only displayed if the **Consolidate Inventory** parameter is selected.

Include all Fixed Locations
Select this checkbox to list all fixed locations for the item even if they have a quantity of zero. This parameter is only displayed if the **Consolidate Inventory** parameter is selected.

Prefill Location
Select this checkbox to pre-fill the **Location** field. If you select this parameter, you must also select one of these parameters:

- **Use Default Location**
- **Use fixed locations**
- **Use LN Logic for inbound**
- **Consolidate Inventory**

Use Default Location
Select this checkbox to specify a default location put away location to use for this location. This parameter is only displayed if the **Prefill Locations** parameter is selected.

Default Location
This parameter is only displayed if the **Use Default Location** parameter is selected. Specify a default put away location for this transaction.

Use fixed locations
Select this checkbox to use the first fixed location of the item as the default put away location for this transaction. If the item has no fixed locations, the **Location** field is not specified. This parameter is only displayed if the **Prefill Locations** parameter is selected.

Use LN Logic for inbound
Select this checkbox to use Infor LN's inbound advice rules to specify a default put away location. This parameter is only displayed if the **Prefill Locations** parameter is selected.

Consolidate Inventory
Select this checkbox to prefill the location field with either the highest or lowest quantity, depending upon whether the **Highest Inventory First** parameter is selected, of the item. This parameter is only displayed if the **Prefill Locations** parameter is selected.

Highest Inventory First
Select this checkbox to use the location with the highest quantity of the item as the default location. Clear this checkbox to use the location with the lowest quantity. This parameter is only displayed if the **Consolidate Inventory** parameter is selected.

Crossdocking Enabled
Select this checkbox to allow users to perform cross transactions from within this transaction.

Print Handling Unit Labels before Crossdock
Select to print handling unit barcode labels before performing the crossdock transaction. This parameter is available if you select **Crossdocking Enabled**.

Print Serial Labels before Crossdock
Select to print serial number barcode labels before performing the crossdock transaction. This parameter is available if you select **Crossdocking Enabled**.

7. Specify this information for each order type on the **Order Types** tab:

   Enabled
   Select this checkbox to allow this order type to be used in this transaction.

   Specific Parameters
   Select this checkbox to use order-specific parameter settings for this order type. Clear this checkbox to use the default parameter settings for this order type.

8. Click **Save**.

Configuring Consignment Receipt Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Consignment Receipt transaction.

1. Go to **Transaction Set Maintenance form > Transaction Name > ASN Receipt**.
2. Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

   Note:

   - You can change this warehouse for a specific transaction if required.
   - If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
   - If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Configure this parameter on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

Popup Location
Select this checkbox to allow users to select put away locations from a list instead of scanning them. If you select this checkbox, you should also select one of these parameters:

- **Use fixed locations**
- **Use empty locations**
- **Consolidate inventory**

This parameter is only displayed if the **Putaway** parameter is selected.

No of Locations
The maximum amount of location to display in the popup list. This parameter is only displayed if the **Popup Location** parameter is selected.

Use fixed locations
Select this checkbox to select putaway locations that are defined in Infor LN as fixed locations for the item. This parameter is only displayed if the **Popup Location** parameter is selected.

Use Empty Locations
Select this checkbox to display empty locations in the popup list. This parameter is only displayed if the **Popup Location** parameter is selected.

Check Capacity
Select this checkbox to only display locations with sufficient capacity in the popup list. This parameter is only displayed if the **Empty Locations** parameter is selected.

Check Storage Locations
This parameter is only displayed if the **Empty Locations** parameter is selected. Select this checkbox to only display locations that are acceptable for the item in the popup list.

Consolidate Inventory
Select this checkbox to direct receipt to existing stocks of the same item. If you select this parameter, the options list only displays locations containing a positive quantity of the item to be transferred. Users can still manually specify any location. This parameter is only displayed if the **Popup Location** parameter is selected.

Highest Inventory First
Select this checkbox to list locations with the highest quantity of the item first. Clear this checkbox to list locations with the lowest quantity of the item first. This parameter is only displayed if the **Consolidate Inventory** parameter is selected.

Include all Fixed Locations
Select this checkbox to list all fixed locations for the item even if the quantity of item is zero. This parameter is only displayed if the **Consolidate Inventory** parameter is selected.

Prefill Location
Select this checkbox to pre-fill the **Location** field. If you select this parameter, you must also select one of these parameters:

- **Use Default Location**
- **Use fixed locations**
- **Use LN Logic for inbound**
- **Consolidate Inventory**

Use Default Location
The default put away location for this transaction. This parameter is only displayed if the **Use Default Location** parameter is selected.

Use fixed locations
Select this checkbox to use the first fixed location of the item as the default put away location for this transaction. If the item has no fixed locations, the **Location** field is not specified. This parameter is only displayed if the **Prefill Locations** parameter is selected.

Use LN Logic for inbound
Select this checkbox to use Infor LN's inbound advice rules to specify a default put away location. This parameter is only displayed if the **Prefill Locations** parameter is selected.

Consolidate Inventory
Select this checkbox to prefill the location field with either the highest or lowest quantity, based on the **Highest Inventory First** parameter selected, for the item. This parameter is only displayed if the **Prefill Locations** parameter is selected.

Highest Inventory First
Select this checkbox to use the location with the highest quantity of the item as the default location. Clear this checkbox to use the location with the lowest quantity.

6 Select **Label Print Parameters** to configure label printing parameters for this transaction on the **Transaction Parameters** tab. See Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102 for more information.

7 Click **Save**.

Configuring Cross Docking Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Cross Docking transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Cross Docking**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.

- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Always Scan Serial/Lot
Select this checkbox to always require users to scan serial and lot numbers. Clear this checkbox to automatically specify serial and lot numbers when users are cross docking the full quantity of an item from a stock point.

6 Configure these order type-specific parameters on the **Order Type Parameters** tab, in the **Parameter** and **Value** columns:

Crossdock Location
The temporary location status for cross docking items prior to delivery to the staging area.

Inbound Run Number
The default number for inbound runs.

Outbound Run Number
The default number for outbound runs.

Release Outbound
Select this checkbox to automatically release outbound orders for shipment.

7 Specify this information for each order type on the **Order Types** tab:

Enabled
Select this checkbox to allow this order type to be used in this transaction.

Specific Parameters
Select this checkbox to use order-specific parameter settings for this order type. Clear this checkbox to use the default parameter settings for this order type.

8 Select **Label Print Parameters** to configure label printing parameters for this transaction on the **Order Type Parameters** tab. See Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102 for more information.

9 Click **Save**.

Configuring Customer Returns Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Customer Returns transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Customer Returns**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Configure these parameters on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

Sales Order Series
The order series to use when generating sales orders for returns.

Customer Returns Sales Order Type
The order type to use when generating sales orders for returns.

Sales Office
The sales office to use when generating sales orders for returns.

Print SO
Select this checkbox to print sales orders when generated.

Device
The device to use to print sales orders. This parameter is only displayed if the **Print SO** parameter is selected.

Release to Warehousing?
Select this checkbox to release newly-created sales orders to warehousing.

Receive Inventory?
Select this checkbox to physically receive items when they are returned. Clear this checkbox to only create an order line for the items.

Putaway
Select this checkbox to perform putaway transactions from within this transaction. These parameters are applicable at group level by default but can be copied to the transaction if required.

Release inbound
Select this checkbox to automatically release inbound orders for putaway. This parameter is only displayed if the **Putaway** parameter is selected.

Default run no
This value is always used by the transaction. This parameter is only displayed if the **Putaway** parameter is selected.

Popup Location
Select this checkbox to allow users to select putaway locations from a list instead of scanning them. If you select this checkbox, you must also select one of these parameters:

- **Use fixed locations**
- **Use empty locations**
- **Consolidate inventory**

This parameter is only displayed if the **Putaway** parameter is selected.

No of Locations
The maximum amount of location to display in the popup list. This parameter is only displayed if the **Popup Location** parameter is selected.

Use fixed locations
Select this checkbox to only allow users to select putaway locations that are defined in Infor LN as fixed locations for the item. This parameter is only displayed if the **Popup Location** parameter is selected.

Use Empty Locations
Select this checkbox to display empty locations in the popup list. This parameter is only displayed if the **Popup Location** parameter is selected.

Check Capacity
Select this checkbox to only display locations with sufficient capacity in the popup list. This parameter is only displayed if the **Empty Locations** parameter is selected.

Check Storage Locations
Select this checkbox to only display locations that are acceptable for the item in the popup list. This parameter is only displayed if the **Empty Locations** parameter is selected.

Consolidate Inventory
Select this checkbox to suggest existing locations containing stocks of the same item. If you select this parameter, the options list only displays locations containing a positive quantity of the item to be putaway. Users can still manually specify any location. This parameter is only displayed if the **Popup Location** parameter is selected.

Highest Inventory First
Select this checkbox to list locations with the highest quantity of the item first. Clear this checkbox to list locations with the lowest quantity of the item first. This parameter is only displayed if the **Consolidate Inventory** parameter is selected.

Include all Fixed Locations
Select this checkbox to list all fixed locations for the item even if the quantity of item is zero. This parameter is only displayed if the **Consolidate Inventory** parameter is selected.

Prefill Location
Select this checkbox to pre-fill the **Location** field. If you select this parameter, you must also select one of these parameters:

- **Use Default Location**
- **Use fixed locations**
- **Use LN Logic for inbound**
- **Consolidate Inventory**

Use Default Location
Select this checkbox to specify a default location put away location to use for this location. This parameter is only displayed if the **Prefill Locations** parameter is selected.

Default Location
The default putaway location for this transaction. This parameter is only displayed if the **Use Default Location** parameter is selected.

Use fixed locations
Select this checkbox to use the first fixed location of the item as the default putaway location for this transaction. If the item has no fixed locations, the **Location** field is not specified. This parameter is only displayed if the **Prefill Locations** parameter is selected.

Use LN Logic for inbound
Select this checkbox to use Infor LN's inbound advice rules to specify a default put away location. This parameter is only displayed if the **Prefill Locations** parameter is selected.

Consolidate Inventory
Select this checkbox to prefill the location field with either the highest or lowest quantity, based on the **Highest Inventory First** parameter selected, for the item. This parameter is only displayed if the **Prefill Locations** parameter is selected.

Highest Inventory First
Select this checkbox to use the location with the highest quantity of the item as the default location. Clear this checkbox to use the location with the lowest quantity. This parameter is only displayed if the **Consolidate Inventory** parameter is selected.

6. Sselect **Label Print Parameters** to configure label printing parameters for this transaction on the **Transaction Parameters** tab. See Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102 for more information.
7. Click **Save**.

Configuring Cycle Count Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Cycle Count transaction.

1. Go to **Transaction Set Maintenance form > Transaction Name > Cycle Count**.
2. Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

   Note:

   - You can change this warehouse for a specific transaction if required.
   - If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
   - If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Configure these parameters on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

Display Item Number
Select this checkbox to display the counted item number.

Scan Item Number
Select this checkbox to scan the item number. If the scanned item does not match the count item, the application displays a message.

Display Location
Select this checkbox to display the location of the counted item.

Scan Location
Select this checkbox to scan the location. If the scanned location does not match the location of the count item, the application displays a message.

Display Lot Number
Select this checkbox to display the lot number of the counted item.

Scan Lot Number
Select this checkbox to scan the lot number. If the scanned lot number does not match the lot number of the count item, the application displays a message.

Display Date
Select this checkbox to display the inventory date of the counted item.

Scan date
Select this checkbox to scan the inventory date. If the scanned inventory date does not match the inventory date of the count item, the application displays a message.

Display Handling Unit
Select this checkbox to display the handling unit assigned to the counted item.

Scan Handling Unit
Select this checkbox to scan the handling unit. If the scanned handling unit does not match the handling unit of the count item, the application displays a message.

Reset System Count
Select this checkbox to reset the recorded inventory quantity at the time that items are counted.

Create Serial Numbers
Select this checkbox to allow the application to create new serial numbers at the time that items are counted.

No of Lines to Display
The number of uncounted cycle count lines to display simultaneously.

Default Reason Code
The default reason code for count quantities that exceed that variance tolerance of an item.

Bypass List Page
Select this checkbox if the cycle count details are to be displayed only on first entry of the transaction.

6 Click **Save**.

Configuring Elapsed Hours Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Elapsed Hours transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Elapsed Hours**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:
- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Configure the available parameters on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns. These parameters are applicable at group level by default but can be copied to the transaction if required.

Is Employee Code Numeric
Select this checkbox if employee badge numbers contain only numbers. Clear this checkbox is employee badge numbers are alphanumeric.

6 Configure these order type-specific parameters on the **Order Type Parameters** tab, in the **Parameter** and **Value** columns:

Input Hourly Labor Type
Select this checkbox to specify an hourly labor type. Clear this checkbox to automatically use the default value.

Input Work Center
Select this checkbox to specify a work center. Clear this checkbox to automatically use the default value.

Input Cost Component
Select this checkbox to specify an hourly labor type. Clear this checkbox to automatically use the default value.

Input Machine
Select this checkbox to specify a machine code. Clear this checkbox to automatically use the default value.

Input Task
Select this checkbox to specify a task. Clear this checkbox to automatically use the default value.

Report Order if Last Operation
Select this checkbox to report to the order that parts are completed. This parameter only applies when the user is reporting the last operation on the job.

Report Production to Inventory
Select this checkbox if completed quantities are to be placed into inventory. This parameter only applies when the user is reporting the last operation on the job and the Report Order if Last Operation is enabled.

Report Stop Details
Select this checkbox to specify completed quantities when reporting quantities for a job.

Report Setup
Select this checkbox to report set up time.

Report Complete Flag
Select this checkbox to specify when an operation is competed. Clear this checkbox to complete operations using the Infor LN interface.

Allow Over Reporting
Select this checkbox to complete operation quantities that exceed the quantity specified on the order.

Allow Rejects
Select this checkbox to reject operation quantities.

Default Reason Code
The default reason for rejections. Users can change this value.

Back Flush
Select this checkbox to automatically issue materials to orders. Materials on the bill of materials that are designated for back flushing are issued.

Calculate Machine Hours based on Machine Occupation
Select this checkbox to calculate machine hours based on the machine occupation settings defined for the current operation.

Check Order Status
Select this checkbox to validate the order and operation when scanned. Clear this checkbox to only validate the operation when scanned.

7 Specify this information for each order type on the **Order Types** tab:

Enabled
Select this checkbox to allow this order type to be used in this transaction.

Specific Parameters
Select this checkbox to use order-specific parameter settings for this order type. Clear this checkbox to use the default parameter settings for this order type.

8 Click **Save**.

Configuring Global Parameters

Use the Global Parameters form to configure parameters that apply to all Infor Factory Track transactions and forms.

To configure Global Parameters:

1 Open the Global Parameters form.
2 Specify this information:

Kanban implemented
Select this check box to specify whether Kanban is implemented in this configuration. If this checkbox is not selected, the Kanban processes are not supported in Factory Track.

Kanban Label
Specify a label ID for Kanban labels. This field is only displayed if the **Kanban implemented** parameter is selected.

Handling units in use
Select this check box to use handling units.

ERP Lot is Supplier Lot
Select this check box to automatically use the supplier lot number as the ERP Lot Number.

EAN code in use
Select this check box to enable the users to scan European Article Numbers instead of the item numbers. When you scan a European Article Number, the corresponding item number is displayed on the scanner, if a match is found.

ICS code in use
Select this check box to enable the users to scan Item Code System numbers instead of the item numbers. When users scan an Item Code System number, the corresponding item number will be displayed on the scanner, if a match is found.

Module
The Module (WM, TT, SF or All) which this parameter belongs to.

Shop Floor in Use
Select this check box to allow users to access the shop floor module in Factory Track.

TT is implemented
Select this check box to allow users to access the time track related transactions in factory track.

None
Select this checkbox if both Shop Floor and Time Track are not implemented.

PIN Required
Select this check box to make PIN number mandatory when employees sign in as a generic user.

3 Click **Save**.

Configuring Global Transfer Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the global Transfer transaction.

1. Go to **Transaction Set Maintenance form > Transaction Name > Global Transfer**.
2. Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

   Note:

   - You can change this warehouse for a specific transaction if required.
   - If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
   - If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.
3. Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.
4. Select a Default Order Type for this transaction from the available values.

   Note: You can change this value.
5. Configure this parameter on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

   Warehouse Order Type
   The order type used in Infor LN to generate warehouse order used for the transfer.
6. Click **Save**.

Configuring Inventory Adjustment Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Inventory Adjustment transaction.

1. Go to **Transaction Set Maintenance form > Transaction Name > Inventory Adjustment**.
2. Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

   Note:

   - You can change this warehouse for a specific transaction if required.

- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Configure these parameters on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

Reference ID in Use
Select this parameter to specify a reference ID. See Reference IDs on page 118 for more information.

Allow Handling Unit Input
Select this parameter to specify a single handling unit instead of specifying the item number and each stock point characteristic. See Handling Units on page 112 for more information.

Allow Serial Number Input
Select this parameter to allow users to write off a single, serial-controlled item without using the **Serial/Lot Entry** screen.

Default Reason Code
The default reason for inventory adjustments. Users can change this value.

Input UOM
Select this parameter to specify the unit of measure with which to write off items. For example, if a conversion factor specifying that one box equals five pieces has been defined in Infor LN, the user can write off an item quantity of one box instead of five pieces.

6 Click **Save**.

Configuring Inventory Transfer Transaction Parameters

1 Select **Master Explorer > Modules > Configuration > Parameters > Transaction Set Maintenance > Inventory Transfer**.

2 Select **Fill Warehouse** check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** check box to display a success message when the transaction is successfully completed.

4 Configure these parameters on the **Transaction Parameters** tab:

Reference ID in Use
Select this check box to specify a Reference ID at the beginning of this transaction. For more information, see Reference IDs on page 118.

Allow Handling Unit Input
Select this check box to specify a handling unit instead of specifying the item number and each stock point characteristic.

Keep Original Handling Unit
Select this check box to create a Handling Unit with the moved quantity in another Location and retain the existing (original) Handling Unit with the remaining quantity in the current (original) Location.
Note: The **Allow Handling Unit Input** check box must be selected.

Default order type for the transaction
Select this check box to specify the default order type to use for inventory transfers.

PreFill Lot
Select this check box to select lot numbers from a list. Clear this check box to scan the lot number.
Note: If this check box is cleared, you can scan the lot number.

PreFill Date
Select this check box to select inventory dates from a list.

Popup Location
Select this check box to select put away locations from a list instead of scanning them. If you select this check box, you must also select one of these parameters:

- **Use fixed locations**
- **Use empty locations**
- **Consolidate inventory**

No of Locations
The maximum amount of location to display in the popup list.
Note: This parameter is displayed only if the **Popup Location** parameter is selected.

Use fixed locations
Select this check box to only allow users to select putaway locations that are defined in Infor LN as fixed locations for the item.
Note: This parameter is displayed only if the **Popup Location** parameter is selected.

Use Empty Locations
Select this check box to display empty locations in the popup list.
Note: This parameter is displayed only if the **Popup Location** parameter is selected.

Check Capacity
Select this check box to only display locations with sufficient quantity in the popup list.
Note: This parameter is displayed only if the **Empty Locations** parameter is selected.

Check Storage Locations
Select this check box to only display locations that are acceptable for the item in the popup list.
Note: This parameter is displayed only if the **Empty Locations** parameter is selected.

Consolidate Inventory
Select this check box to direct inventory transfers to existing stocks of the same item. If this parameter is in use, the options list only displays locations containing a positive quantity of the item to be transferred. The location can be manually modified, if required.
Note: This parameter is displayed only if the **Popup Location** parameter is selected.

Highest Inventory First
Select this check box to list locations with the highest quantity of the item first. If this check box is cleared, the locations with lowest quantity of item are displayed first.
Note: This parameter is displayed only if the **Consolidate Inventory** parameter is selected.

Include all Fixed Locations
Select this check box to list all fixed locations for the item even if they have a quantity of zero.
Note: This parameter is displayed only if the **Consolidate Inventory** parameter is selected.

Prefill Location
Select this checkbox to pre-fill the **Location** field. If you select this parameter, you must also select one of these parameters:

- **Use Default Location**
- **Use fixed locations**
- **Use LN Logic for inbound**
- **Consolidate Inventory**

Use Default Location
Select this check box to specify a default location put away location to use for this location.
Note: This parameter is displayed only if the **Prefill Locations** parameter is selected.

Default Location
The default putaway location for this transaction
Note: This parameter is displayed only if the **Use Default Location** parameter is selected.

Use fixed locations
Select this check box to use the first fixed location of the item as the default put away location for this transaction. If the item has no fixed locations, the **Location** field is not specified.
Note: This parameter is displayed only if the **Prefill Locations** parameter is selected.

Use LN Logic for inbound
Select this check box to use Infor LN's inbound advice rules to specify a default put away location.
Note: This parameter is displayed only if the **Prefill Locations** parameter is selected.

Consolidate Inventory
Select this check box to prefill the location field with either the highest or lowest quantity. It will pick the highest quantity only if the Highest Inventory First parameter check box is selected. If the Highest Inventory First parameter check box is cleared, it will pick the lowest quantity first.
Note: This parameter is displayed only if the **Prefill Locations** parameter is selected.

Highest Inventory First
Select this check box to use the location with the highest quantity of the item as the default location. If the check box is cleared, the location with lowest quantity is considered.
Note: This parameter is displayed only if the **Consolidate Inventory** parameter is selected.

Prefill To Warehouse
Select this check box to populate the **To Warehouse** field with the warehouse assigned to the user, for the inventory warehouse transactions.
Note: The warehouse can be modified for a specific transaction if required.

5. Select **Label Print Parameters** to configure label printing parameters for this transaction on the **Transaction Parameters** tab. See Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102 for more information.
6. Click **Save**.

Configuring item inquiry transaction parameters

To configure parameters for the Item Inquiry transaction:

1. Select **Configuration > Parameters > Transaction Set Maintenance**. The **Transaction Set Maintenance** form is displayed.
2. Select `Item Inquiry` from the grid.
3. Specify this information:

   Fill Warehouse
   Select this check box to default the warehouse for this transaction. The warehouse assigned to the user is defaulted.
   Note:
   - You can change this warehouse for a specific transaction if required.
   - If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
   - If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

   Successful Message
   Select this check box to display a message when the transaction is completed successfully.

4. Select a Default Order Type for this transaction from the available values.

   Note: You can change this value.
5. Configure these parameters on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

   Show Inventory in all Locations
   Select this checkbox to display inventory in all locations. Clear this checkbox to exclude inventory in receipt, inspection, staging, and rejection locations.

6. Click **Save**.

Configuring Inventory Write On Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Inventory Write On transaction.

1. Go to **Transaction Set Maintenance form > Transaction Name > Inventory Write On**.
2. Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

   Note:
   - You can change this warehouse for a specific transaction if required.
   - If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
   - If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.
3. Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.
4. Select a Default Order Type for this transaction from the available values.

   Note: You can change this value.
5. Configure these parameters on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

   Allow Handling Unit Input
   Select this parameter to specify a single handling unit instead of specifying the item number and each stock point characteristic. See Handling Units on page 112 for more information.

   Allow Serial Number Input
   Select this parameter to write on a single, serial-controlled item without using the **Serial/Lot Entry** screen.

   Default Reason Code
   The default reason for inventory adjustments. Users can change this value.

   Input UOM
   Select this parameter to allow users to specify the unit of measure with which to write on items. For example, if a conversion factor specifying that one box equals five pieces is defined in Infor LN, the user can write off an item quantity of one box instead of five pieces.

   Add Lot
   Select this parameter to create new lots using this transaction.
6. Click **Save**.

Configuring Inventory Write Off Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Inventory Write Off transaction.

1. Go to **Transaction Set Maintenance form > Transaction Name > Inventory Write Off**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Configure these parameters on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

Reference ID in Use
Select this parameter to specify a reference ID. See Reference IDs on page 118 for more information.

Allow Handling Unit Input
Select this parameter to specify a single handling unit instead of specifying the item number and each stock point characteristic. See Handling Units on page 112 for more information.

Allow Serial Number Input
Select this parameter to write off a single, serial-controlled item without using the **Serial/Lot Entry** screen.

Default Reason Code
The default reason for inventory adjustments. Users can change this value.

Input UOM
Select this parameter to allow users to specify the unit of measure with which to write off items. For example, if a conversion factor specifying that one box equals five pieces is defined in Infor LN, the user can write off an item quantity of one box instead of five pieces.

6 Click **Save**.

Configuring Job Booking Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Job Booking transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Job Booking**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.

- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Configure these parameters on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

Is Employee Code Numeric
Select this checkbox if employee badge numbers contain only numbers. Clear this checkbox if employee badge numbers are alphanumeric.

6 Configure the available order type-specific parameters on the **Order Type Parameters** tab, in the **Parameter** and **Value** columns. These parameters are applicable at group level by default but can be copied to the transaction if required.

Input Hourly Labor Type
Select this checkbox to specify an hourly labor type. Clear this checkbox to automatically use the default value.

Input Work Center
Select this checkbox to specify a work center. Clear this checkbox to automatically use the default value.

Input Cost Component
Select this checkbox to specify an hourly labor type. Clear this checkbox to automatically use the default value.

Input Machine
Select this checkbox to specify a machine code. Clear this checkbox to automatically use the default value.

Input Task
Select this checkbox to specify a task. Clear this checkbox to automatically use the default value.

Report Order if Last Operation
Select this checkbox to report to the order that parts are completed. This parameter only applies when the user is reporting the last operation on the job.

Report Production to Inventory
Select this checkbox if completed quantities are to be placed into inventory. This parameter only applies when the user is reporting the last operation on the job and the Report Order if Last Operation is enabled.

Report Stop Details
Select this checkbox to specify completed quantities when stopping jobs.

Report Setup
Select this checkbox to allow users to report setup time.

Report Complete Flag
Select this checkbox to specify when an operation is competed. Clear this checkbox to complete operations using the Infor LN interface.

Allow Over Reporting
Select this checkbox to complete operation quantities that exceed the quantity specified on the order.

Allow Rejects
Select this checkbox to reject operation quantities.

Default Reason Code
The default reason for rejections. Users can change this value.

Back Flush
Select this checkbox to automatically issue materials to orders. Materials on the bill of materials that are designated for back flushing are issued.

Calculate Machine Hours based on Machine Occupation
Select this checkbox to calculate machine hours based on the machine occupation settings defined for the current operation.

Check Order Status
Select this checkbox to validate the order and operation when scanned. Clear this checkbox to only validate the operation when scanned.

7. Specify this information for each order type on the **Order Types** tab:

   Enabled
   Select this checkbox to allow this order type to be used in this transaction.

   Specific Parameters
   Select this checkbox to use order-specific parameter settings for this order type. Clear this checkbox to use the default parameter settings for this order type.

8. Click **Save**.

Configuring Loading Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Loading transaction.

1. Go to **Transaction Set Maintenance form > Transaction Name > Loading**.
2. Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

   Note:
   - You can change this warehouse for a specific transaction if required.
   - If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.

- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Specify this information for each order type on the **Transaction Parameters** tab:

Ignore Sealing Check
Select this box, to load a container irrespective of the not sealed status.

Allow Unpicked Lines
Select this checkbox to load the unpicked lines in the transaction.

Load by Shipment
Select this checkbox to use shipment numbers for loading.

Dock Options
Select one of the Dock Options for loading transaction:

- Use Shipment as Dock- Select this checkbox to use the Shipment Number as the Dock Number.
- Use Load as Dock- Select this checkbox to use the Load Number as the Dock Number.
- Manually Enter- Select this checkbox to manually provide the Dock Number.
- Ignore Dock Check & Default Dock- Select this checkbox, to avoid providing dock number manually at time of loading.

Asset Tag
Select this checkbox to allow the Asset Tag of the Handling Unit to be specified or modified.

6 Specify this information for each order type on the **Order Types** tab:

Enabled
Select this checkbox to allow this order type to be used in this transaction.

Specific Parameters
Select this checkbox to use order-specific parameter settings for this order type. Clear this checkbox to use the default parameter settings for this order type.

7 Click **Save**.

Configuring Location Inquiry Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Location Inquiry transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Location Inquiry**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Configure this parameter on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

Show Inventory in all Locations
Select this checkbox to display inventory in all locations. Clear this checkbox to exclude inventory in receipt, inspection, staging, and rejection locations.

5 Click **Save**.

Configuring Manage Team Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Manage Team transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Manage Team**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Configure these parameters on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

Calculate Production Machine Hours based on Machine Occupation
When an employee leaves a team, all active jobs linked to that employee are automatically stopped. Select this check box to calculate the effective machine hours for stopped production operations based on the machine occupation settings defined for that operation.

Calculate PCS Machine Hours based on Machine Occupation
When an employee leaves a team, all active jobs linked to that employee are automatically stopped. Select this check box to calculate the effective machine hours for stopped PCS projects based on the machine occupation settings defined for that PCS project.

6 Click **Save**.

Configuring Packing by Order Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Packing by Order transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Packing by Order**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Select **Label Print Parameters** to configure label printing parameters for this transaction on the **Order Type Parameters** tab. See Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102 for more information.

6 Specify this information for each order type on the **Order Types** tab:

Enabled
Select this checkbox to allow this order type to be used in this transaction.

Specific Parameters
Select this checkbox to use order-specific parameter settings for this order type. Clear this checkbox to use the default parameter settings for this order type.

7 Click **Save**.

Configuring Packing by Shipment Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Packing by Shipment transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Packing by Shipment**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

Note:

- You can change this warehouse for a specific transaction if required.
- If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
- If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

Note: You can change this value.

5 Select **Label Print Parameters** to configure label printing parameters for this transaction on the **Order Type Parameters** tab. See Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102 for more information. Also specify this information:

Route to Sealing for Directed Packs
Select this checkbox, if Directed Packs are to be automatically routed to the Sealing Transaction.

Seal Pre-Packed Containers
Select this checkbox to automatically seal the Pre-Packed Containers while scanning.

Freeze Shipment Lines
Select this checkbox to automatically freeze the contents of the Sealed Pre-Packed Containers.
Note: This field is enabled, only if the Seal Pre-Packed Containers option is selected.

Scan Handling Unit
Select this checkbox to force the scan of the Handling Unti being packed rather than just confirming that the Handling Unit is packed.

Asset Tag
Select this checkbox to allow the Asset Tag to be updated on the Handling Unit that is shipped.

6 Specify this information for each order type on the **Order Types** tab:

Enabled
Select this checkbox to allow this order type to be used in this transaction.

Specific Parameters
Select this checkbox to use order-specific parameter settings for this order type. Clear this checkbox to use the default parameter settings for this order type.

7 Click **Save** .

Configuring Packing Inquiry Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Packing Inquiry transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Packing Inquiry**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

   Note:

   - You can change this warehouse for a specific transaction if required.
   - If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
   - If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

   Note: You can change this value.

5 Specify this information for each order type on the **Order Types** tab:

   Enabled
   Select this checkbox to allow this order type to be used in this transaction.

   Specific Parameters
   Select this checkbox to use order-specific parameter settings for this order type. Clear this to use the default parameter settings for this order type.

6 Click **Save**.

Configuring Physical Inventory Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Physical Inventory transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Physical Inventory**.

2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.

   Note:

   - You can change this warehouse for a specific transaction if required.
   - If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
   - If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.

3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.

4 Select a Default Order Type for this transaction from the available values.

   Note: You can change this value.

5 Configure these parameters on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

Allow Handling Unit Input
Select this checkbox to allow users to specify a handling unit instead of specifying the item number and each stock point characteristic.

Default reason code
The default reason code to use for any count variances.

Default Accumulate Value
Select this parameter to use `Yes` as the default value for the **Accumulate** field. Clear this field to use `No` as the default value.

Retain Cycle Count Order
Select this parameter to retain cycle count order numbers after a successfully count. Clear this parameter to remove cycle count order number after a counts are completed.

Inventory Time
The inventory time to assign to stock points that are created as part of a count.

Add Lot
Select this checkbox to add lot numbers during a count.

Create Serial Numbers
Select this checkbox to create serial numbers during a count.

Reset System Count
Select this checkbox to reset the system quantity when a count is started.

6 Click **Save**.

Configuring Picking Transaction Parameters

Use the Transaction Set Maintenance form to configure parameters for the Picking transaction.

1 Go to **Transaction Set Maintenance form > Transaction Name > Picking**.
2 Select **Fill Warehouse** checkbox to pre-fill the warehouse on the transaction with the warehouse assigned to the user.
   Note:
   - You can change this warehouse for a specific transaction if required.
   - If you are configuring parameters that only applicable for a specific warehouse, the same warehouse is displayed in the Warehouse field.
   - If you are configuring general parameters, which are applicable by default in the application, the Warehouse field is unspecified and unavailable.
3 Select **Successful Message** checkbox to display a success message when the transaction is successfully completed.
4 Select a Default Order Type for this transaction from the available values.
   Note: You can change this value.

5 Configure this parameter on the **Transaction Parameters** tab, in the **Parameter** and **Value** columns:

Picking Option
Select one of the Default Picking Options:

- Default by Order - Select this box to use the "by order" picking method by default. The user can change this method.
- Default by Run - Select this box to use the "by run" picking method by default. The user can change this method.
- Default by Mission - Select this box to use the "by mission" picking method by default. The user can change this method.

Filter by Warehouse
Select this checkbox to only allow users to pick items in the current warehouse.

Serial Picking Implemented
Select this checkbox to allow users to pick serialized items.

Lost Material Order Type
The order type to use for lost material.

Consolidate Picks
Select this checkbox to allow identical picks to be summarized in a single line on the display.

Prefill Consolidate with Yes

Select this check box to set the **Consolidate** field to `Yes` on the**Picking** form.

This check box is displayed only if the **Consolidate Picks** check box is selected.

6 Configure these order type-specific parameters on the **Order Type Parameters** tab, in the **Parameter** and **Value** columns:

Number of Rows in List
The maximum number of rows to display in the picking list. If the number of items available for picking exceed this number, the list is truncated. As items are picked, these are removed from the list, providing space for the truncated items to be displayed.

Cart Location
The cart location to which to transfer items at the time of picking.

Stage Location
The staging location for items that are picked.

Lost Material in Use
Select this checkbox to allow users to report lost material during picking. If you select this checkbox, you must specify a lot material warehouse, a lost material location, or both.

Lost Material Warehouse
The warehouse to which lost material is transferred. Optionally, leave this field blank to use the original warehouse to hold lost material. This parameter is only displayed if the **Lost Material in Use** parameter is selected.

Lost Material Location
The location to which lost material is transferred. Optionally, leave this field blank to use the original location to hold lost material. This parameter is only displayed if the **Lost Material in Use** parameter is selected.

Over Picking Allowed (Sales, Transfer, Production only)
Select this checkbox to allow users to pick more than the required quantity, in compliance with standard Infor LN tolerance limits.

Cascade
Select this checkbox to take over picking into account for other advice lines. Clear this checkbox to prevent over picking for one advice line from affecting any others. This parameter is only displayed if the **Over Picking Allowed (Sales, Transfer, Production only)** parameter is selected.

Release Outbound
Select this checkbox to release the outbound advice when items are picked.

Display Item Number
Select this checkbox to display the number of the item that is picked.

Scan Item Number
Select this checkbox to require the user to scan the item number. If the scanned item number does not match the item number on the pick list, the application displays and error message.

Display Location
Select this checkbox to display the location of the item that is picked.

Scan Location
Select this checkbox to require the user to scan the location. If the scanned location does not match the location on the pick list, the application displays and error message.

Change Location
Select this checkbox to allow users to pick items from a location that is different from that on the pick list. If you select this checkbox, this parameter overrides the **Scan Location** parameter.

Display Lot Number
Select this checkbox to display the lot number of the item that is picked.

Scan Lot Number
Select this checkbox to require the user to scan the lot number. If the scanned lot number does not match the lot number on the pick list, the application displays and error message.

Change Lot Number
Select this checkbox to allow users to pick items with a lot number that is different from that on the pick list. If you select this checkbox, this parameter overrides the **Scan Lot Number** parameter.

Display date
Select this checkbox to display the inventory date of the item that is picked.

Scan Date
Select this checkbox to require the user to scan the inventory date. If the scanned inventory date does not match the inventory date on the pick list, the application displays and error message.

Change Inventory Date
Select this checkbox to allow users to pick items with an inventory date that is different from that on the pick list. If you select this checkbox, this parameter overrides the **Scan Date** parameter.

Display Handling Unit
Select this checkbox to display the handling unit assigned to the item that is picked.

Scan Handling Unit
Select this checkbox to require the user to scan the handling unit. If the scanned handling unit does not match the handling unit on the pick list, the application displays and error message.

Change Handling Unit

Select this check box to allow users to pick items assigned to a handling unit that is different from that on the inventory line. If you select this check box, this parameter will override the **Scan Handling Unit** parameter.

Change Serial Numbers
Select this checkbox to allow users to pick items with a serial number that is different from that on the outbound advice.

Display Destination Location
Select this check box to display the destination location.

Allow Destination to be Changed
Select this check box to allow users to change the destination location.
Note: User can change the destination location if:

- the **Release Outbound** and **Display Destination Location** parameters are selected for this transaction
- the **From** and **To** warehouses are not the same.

7 Select **Label Print Parameters** to configure label printing parameters for this transaction on the **Order Type Parameters** tab. See Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102 for more information.

8 Specify this information for each order type on the **Order Types** tab:

Enabled
Select this checkbox to allow this order type to be used in this transaction.

Specific Parameters
Select this checkbox to use order-specific parameter settings for this order type. Clear this checkbox to use the default parameter settings for this order type.

9 Click **Save**.

Configuring Report Repetitive transaction parameters

1 Select **Master Explorer > Modules > Configuration > Parameters > Transaction Set Maintenance**. The **Transaction Set Maintenance** form is displayed.
2 Select the Report Repetitive transaction to configure the parameters.
3 Select the **Successful Message** check box to display a message when the transaction is processed successfully.
4 Configure these parameters on the **Transaction Parameters** tab:

   Use Default Order Type
   Select this check box to set the default order type for the transaction.

   Default Order Type
   Specify the default order type for the transaction.
   Note: This parameter is displayed only if the Use Default Order Type parameter is selected.

   Allow Entry of Reject Quantity
   Select this check box to allow users to reject quantities.

   Reject Code
   The default reject code for rejections.
   Note: This parameter is displayed only if the Allow Entry of Reject Quantity parameter is selected.

   Enable Scrap/Quarantine Handling
   Select this check box to enable scrapping and quarantine of items.

   Default Scrap Reason Code
   The default reason code for scrapped items.
   Note:

   This parameter is displayed only if the Enable Scrap/Quarantine Handling parameter is selected.

   Directly process quarantine inbound
   Select this parameter to quarantine the inbound items automatically.

   Restrict Transfer Quantity for Lot-Controlled Items
   Select this check box to restrict the reporting of quantities more than the Transfer Quantity for lot controlled items.

   Allow Schedule Line Selection
   Select this check box to allow users to select the schedule line that is reported.
   Note: The oldest schedule line is automatically selected if this check box is cleared.

   Allow Operator to Complete Line
   Select this check box to allow users to complete a schedule line.
   Note: This parameter is displayed only if the Allow Schedule Line Selection parameter is selected.

5 Select **Label Print Parameters** to configure label printing parameters for this transaction, on the **Transaction Parameters** tab.
6 Click **Save**.

Configuring Assembly Control Transaction Parameters

1 Select **Master Explorer > Modules > Configuration > Parameters > Transaction Set Maintenance**. The Transaction Set Maintenance form is displayed.
2 Select the Assembly Control transaction to configure the parameters.
3 Select the **Successful Message** check box to display a message when the transaction is processed successfully.
4 Select the Access by Serial Number parameter on the **Transaction Parameters** tab to access assembly control station orders by serial numbers.
5 Select the Label Print Parameters option on the **Transaction Parameters** tab to enable label printing for this transaction.
6 Click **Save**.

Chapter 4: Defining Master Data

This module includes topics that describe Infor Factory Track master data and how to use them.

Copy site data process

You can copy the Factory Track master data from one site (environment) to another using the Export and Import process. This process is generally used to copy the development setup to production during the implementation process. The **Export Site Data** form is used to extract the data to an XML file from the source environment. The **Import Site Data** form is used to import this XML file into the destination environment.

The data that is copied comprises of these categories:

- Technical Master Data: The database table that consists of technical data such as parameters, menus, groups, account authorizations, and so on.
- Factory Track Application Master Data: Includes Factory Track Application Master data such as shifts, employee types, and so on, which is set up primarily for the Time Track module.
- ERP Application Master Data: Includes the data related to employees, departments, work centers, and so on. This data is downloaded from the ERP. The data that is not specified in ERP but collated using the data in ERP, such as Worksets is also exported.
- User Data: Includes user account information that is stored in the site.

Export Site Data form

Use the **Export Site Data** form to export the site data to an XML file.

To export the XML file:

1. Open the **Export Site Data** form.
2. Specify this information:

   Export File Name
   The XML file is used to export the specified data.
   Note: This value is defaulted. However, you can modify this value.

   From Site
   The name of the site you access. The data is exported from this site.

Note: This value is defaulted.

Technical Master Data
Indicates that the technical data such as parameters, menus, groups, account authorizations, and so on, is exported. By default, this check box is selected.

FactoryTrack Application Master Data
Select this check box to export the application master data such as employee types, shifts, and so on.

ERP Application Master Data
Select this check box to export the data from ERP. The data such as employees, departments, work centers, and so on, is exported.

Include Transaction Data
Select this check box to export the transactional information.
Note: If this checkbox is selected, the administrator can specify a start date, an end date, and employee information to indicate the specific transactional data that must be exported.

Include Users
Select this check box to export the transactional information.

From Date
The Start Date used to determine the transactional data that must be exported.

To Date
The End Date used to determine the transactional data that must be exported.

Employee
The **From** and **To** fields define the range of employee IDs. The data for this specified range of employees is exported. You can also export the transactional data for a specific employee.

Anonymize
Select this checkbox to mask the employee related information in compliance with the GDPR.

3. Click **Generate** to export the data to an XML file.

Import Site Data form

Use the **Import Site Data** form to import the data from the XML file.

To import an XML file:

1. Open **Import Site Data** form.
2. Click **Import XML** to browse and select the XML file.
3. Click **Upload**
4. Review and specify this information:

   From Site
   The name of the site to which the data is imported.

Note: This value is defaulted. Before the process of copying the data is initiated, the existing data in this site is deleted.

Technical Master Data
Indicates if the technical data such as parameters, menus, groups, account authorizations, and so on, is imported.
Note: This value is defaulted based on the setting in the **Export Site Data** form and cannot be modified.

Factory Track Application Master Data
Indicates if the application master data such as employee types, shifts, and so on, is imported.
Note: This value is defaulted based on the setting in the **Export Site Data** form and cannot be modified.

ERP Application Master Data
Indicates if the ERP application data such as employees, departments, work centers, and so on, is imported.
Note: This value is defaulted based on the setting in the **Export Site Data** form and cannot be modified.

Include Users
Indicates if the user data from ERP is imported.
Note: This value is defaulted based on the setting in the **Export Site Data** form and cannot be modified.

From Date
The Start Date on which the transactional data is exported from the **Export Site Data** form.

To Date
The End Date on which the transactional data is exported from the **Export Site Data** form.

Employee
The **From** and **To** fields define the range of employee IDs. The data for this specified range of employees is imported.

Factory Track Version
The version number of the Factory Track.

ERP Version
The version number of the ERP.

Export Date
The date and time when the XML data has been exported.

5 Click **Import**.

Creating Badges

To create employee badges, use the Badges form.

1 Open the Badges form.
2 Select the last row from the grid at left.

3 Specify the badge number.
4 Select **Active**.
5 Specify a valid employee number.

Defining a Factory track User Role

1 Open the User Extensions form.
2 Select a user record.
3 In the **User Type** field, select Administrator, Supervisor, or User. The type you specify will assign the selected user to a group authorization that allows access to forms appropriate to that type.
- Administrators can access and update all forms.
- Supervisors can view most forms, and can enter and edit employee times but will not be able to edit configuration and organization tables.
- Users can enter transaction information in real time but will not be able to edit records or modify transaction times.

Defining Data Domains

Use the Data Domains form to define data domains.

Caution: Only programmers who are authorized to customize your application should use the Data Domains form. Changes made to this form can cause your application to function incorrectly.

1 To modify an existing data domain, select it from the grid. To create a new data domain, select a blank line from the grid.
2 Specify this information:

ERP Type
Select the ERP type.

Data Domain
Specify the name of the domain to which this entry applies.

Data Type
Select a data type:
- `String`
- `Date`
- `Time`
- `Date-Time`
- `Boolean`
- `Integer`
- `Decimal`

Data Size
Specify a length for the string or integer.

Digits Before Decimal
Specify the number of digits that appear before the decimal.

Digits After Decimal
Specify the number of digits that appear after the decimal.

Auto Expand
Select this check box if the input needs to be expanded to fit the field definition.

Convert to Uppercase
Select this check box to convert the string to uppercase.

3. Click **Save**.

Defining Device Types

Use the Device Types form to define device types for your device tracking system.

1. Open the Device Types form.
2. To create a new device type, select a blank line from the grid. To modify an existing device type, select it from the grid.
3. Specify this information:

   Device Type
   Specify a code to use for the device type. For example, `P` for printer.

   Description
   Specify a description for the device type. For example, `Printer`.

4. Click **Save**.

Defining Transactions

Use the Transactions Setup form to define transactions for the Infor Factory Track application. For example, you can add custom transactions to the application using this form. You can also configure settings for transactions on this form.

Caution: Only programmers who are authorized to customize your Infor Factory Track application should use the Transaction Setup form. Changes made to this form can cause your application to function incorrectly.

1. Open the Transactions Setup form.

2 To add a new transaction, click **Create a New Object** or select a blank line from the grid. To modify an existing transaction, select it from the grid.

3 Specify or review this information:

ERP Type
Select the ERP to which this parameter applies. If you are modifying an existing parameter, this field is unavailable.

Transaction Name
Specify a name for this transaction. If you are modifying a core transaction that is pre-installed with the application, this field is read only.

Transaction Form Name
Select the form name associated with the transaction.

Transaction Description
Specify a string and description for this transaction. The description will be visible to end users and might be translated into another language. There are separate fields for the string and the description.

4 Optionally, to configure settings for this transaction, specify this information:

Trans Fill Whse
Select this check box to use the warehouse assigned to the user as the default warehouse. The user can change this value.

Show Success Message
Select this check box to show a success message when the transaction is successfully completed.

Applies To Order Types
Select this check box if there are specific order types that apply to this transaction.

Supports Label Printing
Select this check box if the transaction supports label printing.

Order Type Group
Specify the order type group used for this transaction. This field is only available if **Applies To Order Types** is selected.

Default Order Type
Optionally, specify a default order type for the transaction. The user can change this value. This field is only available if **Applies To Order Types** is selected.

5 Optionally, to configure label printing parameters for the selected transaction, click **Label Print Parameters**. For more information about how to configure label printing parameters, see Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102.

6 On the **Transaction Parameters** tab, select a parameter or, to create a new parameter, select a blank line on the grid.

7 Specify or review this information for each parameter you are modifying or creating on the **Transaction Parameters** tab:

Parameter Name
Specify a name for the parameter. If you are modifying an existing parameter, this field is unavailable.

Parameter Type
Select a parameter type: `String`, `Boolean`, or `Numeric`.

Parameter Value
Optionally, specify a default value for this field. Leave blank to require users to specify the value.

Description
Specify a description for the parameter.

Parent Parameter
Optionally, specify a parent parameter. A parameter is only visible if its parent parameter is enabled.

Form Label
Specify a label to display to end users.

Parameter Sequence
Optionally, specify a sequence number to determine where this parameter should be displayed in the parameter list. If you do not specify sequence numbers for parameters, they are displayed alphabetically.

8. If applicable, on the **Order Type Parameters** tab, select a parameter or, to create a new parameter, select a blank line on the grid. The **Order Type Parameters** tab is only available if the **Applies to Order Types** check box is selected.
9. Specify or review this information for each parameter you are modifying or creating on the **Order Type Parameters** tab:

Parameter Name
Specify a name for the parameter. If you are modifying an existing parameter, this field is unavailable.

Parameter Type
Select a parameter type: `String`, `Boolean`, or `Numeric`.

Parameter Value
Optionally, specify a default value for this field. Leave blank to require users to specify the value.

Description
Specify a description for the parameter.

Parent Parameter
Optionally, specify a parent parameter. A parameter is only visible if its parent parameter is enabled.

Form Label
Specify a label to display to end users.

Parameter Sequence
Optionally, specify a sequence number to determine where this parameter should be displayed in the parameter list. If you do not specify sequence numbers for parameters, they are displayed alphabetically.

10. **Order Types** are driven by the Order Type Group associated with the transaction. The **Order Types** tab is only available if the **Applies to Order Types** check box is selected.
11. Specify or review this information for each order type you creating:

Order Type
Specify the order type.

Description
Specify a description.

12 Click **Save**.

Chapter 5: Label Printing

This module includes topics that describe support to barcode label printing.

Configuring Printers

Use the Label Printer Configuration form to configure printers.

1. Open the Label Printer Configuration form.
2. To create a new printer, click **New**. To configure an existing printer, select it from the grid.
3. Specify or review this information:

   Printer Name
   Specify a name for the printer. If you are configuring an existing printer, this field is read only.

   Physical Location
   Specify the physical location of the printer. For example, `Receiving Dock`.

   Printer Path
   Specify the network path for the printer.

   Mobile Printer
   Select this check box if the printer is mobile.

4. Click **Save**.

Configuring Label Printing Settings for Specific Transactions, Warehouses, and Order Types

Use the Transaction Warehouse Order Type Print Parameters form to configure label printing settings for specific transactions, warehouses, and order types. You can only configure settings that are specific to order types for transactions that are order type dependent.

1. Open the Transaction Warehouse Order Type Print Parameters form using one of these methods:

- If you are configuring general transaction parameters for use throughout the application, access the Order Type Print Parameters form by opening the Transaction Set Maintenance form and clicking the **Label Print Parameters** button on the **Transaction Parameters** tab or **Order Type Parameters** tab.
- If you are configuring warehouse-specific parameters, access the Order Type Print Parameters form by opening the Warehouse Parameters form, selecting a warehouse, selecting a transaction, and clicking the **Label Print Parameters** button.
- If you are configuring order type-specific parameters, access the Order Type Print Parameters form by opening the Transaction Set Maintenance form, selecting the **Order Types** tab, selecting an order type, and clicking the **Specific Parameter Settings** button.

2 If you are configuring specific settings for a transaction, select a transaction from the grid. If you are configuring transaction specific settings for a warehouse or order type, the transaction is automatically selected.

3 Specify or review this information:

Transaction Name
The transaction name is displayed.

Order Type Group
The order type group is displayed.

Warehouse
If you are configuring parameters that are specific to a warehouse, the warehouse is displayed.

Order Type
If you are configuring parameters that are specific to an order type, the order type is displayed.

Print Labels
Select this check box to print labels for this transaction, warehouse, and order type.

Label Name
Select a label name. This field is only available if the **Print Labels** check box is selected.

Number of Labels
Specify the number of labels to print. This field is only available if the **Print Labels** check box is selected.

Default Printer
Select a default printer from which to print. This field is only available if the **Print Labels** check box is selected.

Quiet Mode
Select this check box to automatically print labels without opening the Label Printing form. This field is only available if the **Print Labels** check box is selected.

Is Label Printed for Item in Container
Select this check box to print labels for items in containers. This field is only available if the **Print Labels** check box is selected.

Override User Printer
Select this check box to always use the default printer for the transaction instead of the printer assigned to the user's account. This field is only available if the **Print Labels** check box is selected.

Print Child Level
Select this check box to print labels for containers that do not contain any child containers and to print labels for containers that have neither parent nor child containers. Container labels are automatically printed without opening the Label Printing form. This parameter only applies to ERP LN integrations.

Label Name
Select a label name. This field is only available if the **Print Child Level** check box is selected.

Description
The label description is displayed. This field is only available if the **Print Child Level** check box is selected.

Printer Name
Select a printer to use for printing container labels at this container level. This field is only available if the **Print Child Level** check box is selected.

Physical Location
The physical location of the printer is displayed. This field is only available if the **Print Child Level** check box is selected.

Number of Labels
Specify the number of labels to print. This field is only available if the **Print Child Level** check box is selected.

Print Middle Level
Select this check box to print labels for containers that have both parent and child containers. Container labels are automatically printed without opening the Label Printing form. This parameter only applies to ERP LN integrations.

Label Name
Select a label name. This field is only available if the **Print Middle Level** check box is selected.

Description
The label description is displayed. This field is only available if the **Print Middle Level** check box is selected.

Printer Name
Select a printer to use for printing container labels at this container level. This field is only available if the **Print Middle Level** check box is selected.

Physical Location
The physical location of the printer is displayed. This field is only available if the **Print Middle Level** check box is selected.

Number of Labels
Specify the number of labels to print. This field is only available if the **Print Middle Level** check box is selected.

Print Top Level
For SyteLine Integrations, select this check box to print labels for containers. For ERP LN integrations, select this check box to print labels for containers that contain child containers but do not have parent containers. Container labels are automatically printed without opening the Label Printing form.

Label Name
Select a label name. This field is only available if the **Print Top Level** check box is selected.

Description
The label description is displayed. This field is only available if the **Print Top Level** check box is selected.

Printer Name
Select a printer to use for printing container labels at this container level. This field is only available if the **Print Top Level** check box is selected.

Physical Location
The physical location of the printer is displayed. This field is only available if the **Print Top Level** check box is selected.

Number of Labels
Specify the number of labels to print. This field is only available if the **Print Top Level** check box is selected.

Print Container Label
Select the check box to print container labels for this transaction, warehouse, and order type.

Is Label printer for Item in Container
Select this check box to enable item label printing for each transaction that involves a container. This field is only available if the **Print Container Label** check box is selected.

Label Name
Select a label name for the container. This field is only available if the **Print Container Label** check box is selected. This is a mandatory field.

Printer Name
Select a printer to print the container labels. This field is only available if the **Print Container Label** check box is selected.

Physical Location
Specify the physical location of the printer. This field is only available if the **Print Container Label** check box is selected.

Number of Labels
The number of container labels that must be printed. This value is defaulted. This field is only available if the **Print Container Label** check box is selected.

Note: The Transaction Warehouse Order Type Print Parameters form (for LN) has two additional container (HU – Handling Unit) level to configure. The other two sets of fields (Middle Level and Top Level) are displayed in the LN form only.

4 Click **Save**.

Configuring Label Printing Connections

Use the Label Interface form to establish connections with the label printing software. There is only one record available on this form. This record contains connection information that allows Infor Factory Track to communicate with the BarTender label printing software.

1 Open the Label Interface form.
2 Specify this information:

Interface Type
If you are running Factory Track in the cloud, select `Database Only`. If you are running Factory Track locally, select `File`. The Interface Number must always be 'BarTender'.

File Path
Specify where Factory Track should create the data files needed to generate barcode labels. The BarTender label printing software converts this data into actual files.

Field Separator
Specify a field separator to use for data files. By default, this must be set to a Pipe (|).

Label Template Path
Specify the file path location of the label templates. If you are running Factory Track in the cloud, this location must be on the same server as the Cloud Printing Utility.

3 Click `Save`.

Using Label Print Utility

1 Select **Configuration > Label Printing > LN Label Print Utility**. The **LN Label Print Utility** form is displayed.
2 Specify this information in the **Location** tab:

Warehouse
The warehouse for which the labels are printed.

From/To Location
The range of the location for which labels are printed.

Label Name
The name of the label.

Printer
The printer used to print the labels.

3 Specify this information in the **Inventory**tab:

Warehouse
The warehouse for which the labels are printed.

From/To Location
The range of the locations for which labels are printed.

From/To Item
The range of the items for which labels are printed.

Label Name
The name of the label.

Printer
The printer used to print the labels.

4 Specify this information in the **Handling Unit** tab:

Warehouse
The warehouse for which handling unit labels are printed.

From/To Location
The range of the locations for which labels are printed.

From/To HU
The range of the handling unit for which labels are printed.

Label Name
The name of the label that is printed.

Printer
The printer used to print the labels.

5 Specify this information in the **Reject Code** tab:

Label Name
The name of the label that is printed.

Printer
The printer used to print the labels.

6 Specify this information in the **Task**tab:

Task type
The type of task (Absence or Indirect) for which the labels printed.

Label Name
The name of the label that is printed.

Printer
The printer used to print the labels.

7 Specify this information in the **Employee**tab:

From/To Employee
The range of the Employee IDs for which the labels are printed.

Label Name
The name of the label that is printed.

Printer
The printer used to print the labels.

8 Click **Print**. A warning message is displayed.

9 Click **Yes**to initiate the printing process.

10 Click **Save As Default** to save the values specified in the tabs as default values in the **Defaults** tab.

Note: You can also specify the default values for Label Name, Printer, and Number of Copies fields in the **Defaults** tab.

Setting Up Label Printing

1. Create label formats using the BarTender application. See the Bartender for Infor Factory Track Configuration Guide for more information.
2. Establish connections with the BarTender application using the Label Interface form. See Configuring Label Printing Connections on page 106 for more information.
3. Define label formats using the Label Formats form. See Defining Label Formats on page 114 for more information.
4. Optionally, add additional information fields to barcode labels using the Label Print Extensions form. See Adding Additional Fields to Barcode Labels on page 39 for more information.
5. Configure printers using the Label Printer Configuration form. See Configuring Printers on page 102 for more information.
6. Specify label formats and printers for transactions using the Transaction Warehouse Order Type Print Parameters form. SeeConfiguring Label Printing Settings for Specific Transactions, Warehouses, and Order Types on page 102 for more information.

Specifying Alternate Labels

Use the Label Exceptions form to specify an alternate label to print for specific items or customers.

1. Open the Label Exceptions form.
2. To create a new alternate label, click **New**. To modify an existing alternate label, select it from the grid.
3. Specify this information:

Label Name
Select the name of the label to replace with an alternate label.

Exception Type
Select whether the alternate label is for an item or customer.

Exception Key
Specify the item or customer account number.

Alter Label Name
Select the name of the alternate label to print.

4 Click **Save**.

LN Label Print Utility

The LN Label Print Utility form is used to print labels for entities such as location, inventory, and employees.

The form consists of these tabs:

- **Location**: This tab is used to print labels for each location.
- **Inventory**: This tab is used to print labels for each stock point.
- **Handling Unit**: This tab is used to print labels for every handling unit.
- **Reject Code**: This tab is used to print labels for every reject reason code.
- **Task**: This tab is used to print labels for every indirect and absence task.
- **Employee**: This tab is used to print labels for a range of employees.

Note: The badge number that is printed on the labels is retrieved from the FT database.

Defaults: This tab is used to set the values that are defaulted in the other tabs. These values are defaulted:

- Label Name
- Default Printer
- Num of Copies

Note: You can also use the **Save as Default** option displayed on the other tabs to set the specified data as the default data. The application defaults this data on the **Defaults** tab.

Printing utility labels

1 Select **Master Explorer > Modules > Label Printing > LN Label Print Utility**. The **LN Label Print Utility** transaction form is displayed.
2 Select the required tab and specify the information. These tabs are available:

Location
- **Warehouse**: The warehouse for which location labels are printed. The application displays the warehouses defined in LN.
- **From/To Location**: The range of locations for which the labels are printed.
- **Label Name**: The name of the label that is printed.
- **Printer**: The printer used to print the labels.

- **Number of Copies**: The number of copies that has to printed.

Inventory

- **Warehouse**: The warehouse for which inventory labels are printed. The application displays the warehouses defined in LN.
- **From/To Location**: The range of locations for which the labels are printed.
- **From/To Item**: The range of items for which labels are printed.
- **Label Name**: The name of the label that is printed.
- **Printer**: The printer used to print the labels.
- **Number of Copies**: The number of copies that has to printed.

Handling Unit

- **Warehouse**: The warehouse for which handling unit labels are printed. The application displays the warehouses defined in LN.
- **From/To Location**: The range of locations for which the labels are printed.
- **From/To HU**: The range of handling units for which the labels are printed.
- **Label Name**: The name of the label that is printed.
- **Printer**: The printer used to print the labels.
- **Number of Copies**: The number of copies that has to printed.

Reject Code

- **Label Name**: The name of the label that is printed.
- **Printer**: The printer used to print the labels.
- **Number of Copies**: The number of copies that has to printed.

Task

- **Task type**: The type of task (Absence or Indirect) for which the labels are printed.
- **Label Name**: The name of the label that is printed.
- **Printer**: The printer used to print the labels.
- **Number of Copies**: The number of copies that has to printed.

Employee

- **From/To Employee**: The range of employee for which the labels are printed.
- **Label Name**: The name of the label that is printed.
- **Printer**: The printer used to print the labels.
- **Number of Copies**: The number of copies that has to printed.

3. Click **Print** on the selected tab. The "This could result in printing a bulk number of labels and could block the label printing functionality for regular business. Do you want to continue?" warning message is displayed.
4. Click **Yes** to initiate the printing process.

   Note: Click **Save As Default** to save the values specified in the **Label Name**, **Printer**, and**Number of Copies** fields as the default values in the **Defaults** tab for each entity (Location, Task, Inventory, and so on).

Viewing Printed Label Records

1. Open the Label Print Summary form.
2. To define label search criteria, specify some or all of this information:

   Transaction Name
   Select the transaction for which the label was originally printed.

   User ID
   Specify the user ID of the person who originally printed the label.

   Request ID
   To search for a label by its request ID, specify a starting and ending request ID. A request ID is recorded for each label that is printed.

   Create Date
   To search for a label by the date it was created, specify a starting and ending date.

3. Click the **Search** button. The label request IDs that match the search criteria specified above are listed in the grid.
4. To view additional details for each label printed for a label request ID, right-click the request ID and select **Details**. The Label Print Details form is displayed.
5. Optionally, to view additional fields printed on the label that have been added by your organization, click the **Label Extensions** tab.

Handling Units

You can use handling units to simplify inventory management by tracking containers, such as boxes and pallets, rather than individual items. When you assign a handling unit to a container, the contents of that container are bound to the handling unit. Any transactions you perform involving the handling unit also affects its contents. As an example, let’s consider the requirement to move a box containing six serialized computers to another location. If you assign a handling unit to the box, you can simply scan the handling unit barcode, and all six computers will be transferred to the new location in ERP LN. You do not need to open the box and scan each computer.

When performing some transactions, you can scan a handling unit in the **Handling Unit or Reference ID** fields instead of the scanning the item number and other stock point information.

Handling units can contain other handling units, allowing you to perform transactions with multiple containers. These handling units are called parents, and the handling units that they contain are called children. Any transactions you perform on a parent handling unit also affects its children.

Warehouse Parameters

Use this form to configure transaction parameters that are specific to a warehouse.

Defining Label Formats

Use the Label Formats form to define label formats.

1. Open the Label Formats form.
2. To define a new label format, click **New**. To modify an existing label format, select it from the grid.
3. Specify this information:

   Label Name
   Specify a name for the label. This name must match the label format file name used in the Bartender application.

   Description
   Optionally, specify a description for the label.

   Label Size
   Optionally, specify a size for the label.

4. Click **Save**.

Shop Floor Parameters

Use this form to configure parameters that is applicable to all Infor Factory Track LN Shop floor transactions and forms.

Issuing and Returning Devices Using the Device Allocation Transaction

The warehouse mobility icon based menu and list based menu comprises of the Utilities. Device Allocation is listed as a transaction under the Utilities.

On the Utilities:

1. Select **Device Allocation**.
2. Specify this information:

   Device ID
   Select a device.

   Asset Number
   The asset number for the device is displayed.

   Supervisor
   The supervisor responsible for the device is displayed.

   Operator
   If you are issuing a device, select the operator to whom the device is being issued. If you returning an device, the operator to whom the device was issued is displayed.

   Type
   The device type is displayed.

   Current Status
   The status of the device is displayed.

   Last Updated
   The date and time the device status was last updated is displayed.

3. Select **Issue** or **Return**.

Transaction Warehouse Order Type Print Parameters

Use the Transaction Warehouse Order Type Print Parameters form to configure label printing settings for specific transactions, warehouses, and order types.

Reference IDs

You can use reference IDs to perform transactions more efficiently. Reference IDs are unique barcode labels that identify a specific item and stock point combination. Instead of scanning each stock point characteristic, such as the item number, location, and lot number, to perform a transaction, you can scan the reference ID, which will automatically specify the stock point characteristics. Reference IDs are usually scanned at the beginning of a transaction.

The Valid Reference IDs are:

- 'serial number ~ item number'
- handling unit
- lot number

The composition of your reference IDs will depend upon how you track and organize inventory at your organization.

Note: You can only use a lot number as a reference ID when lot numbers are unique across all items and cannot be split.

Setting Up Barcode Prefixes

Use the Prefix Handling form to set up barcode prefixes. Barcode prefixes are embedded at the beginning of barcodes and are used to indicate the barcode type. You can set mandatory prefixes to control which barcode types can be scanned into certain field types. Using mandatory prefixes can help prevent users from scanning the wrong barcode into a field.

1. Open the Prefix Handling form.
2. To set up a new barcode prefix field type, click **New** or select a blank line from the grid at the left. To modify an existing barcode prefix field type, select it from the grid.
3. Specify or review this information:

   Prefix Field Type
   Specify a name for the field type. If you are modifying an existing barcode prefix field type, this field is read only.

   Prefix Mandatory
   Select this check box to prevent barcodes that do not contain the prefix from being scanned into this field type.

4. In the Data Prefix Details grid, define prefix values for this prefix field type. To define a prefix value, select a blank or existing line in the grid and specify this information:

   Prefix Seq
   Specify the sequence in which to search for this prefix. For example, specify **1** to search for this prefix first when a barcode is scanned in this field type.

   Prefix Code
   Specify a character value for the prefix.

5. Click **Save**.

Global Parameters

Use this form to configure parameters that apply to all Infor Factory Track transactions and forms.

Setting Up Combination Barcodes

1. Select **BarCode Handling > Multi-Barcode Split**. The **Multi-Barcode Split** form is displayed.
2. Click **New**. A new line is added to the grid.
3. Specify this information:

   Transaction Name
   The name of the transaction to set up the combined barcode.

   Source Field
   The name of the source field for the new combined barcode.
   Note: This field displays the list of fields used by the combined barcodes. You can scan the combined barcode in the initial field specified in the source field. The transaction then splits the scanned barcode.

   Fixed Length
   Select this check box to fix character length to define different information types within the combination barcode. Clear to use a separator character to define different information types within the combination barcode.
   Note:
   - The **Field Length** field is displayed. The field length defines the segment length for the **Target Field**.
   - You cannot specify the value in **Mapping Separator** field.

   Mapping Separator
   Each segment of the combined barcode is of fixed length.

4. Specify the **Group Sequence** number for the selected target field.
5. Select the required **Target Field**. This field lists the values as displayed on the **Fields** tab of the **Transactions Setup** form. When the user selects a field the internal field name is stored in the multi barcode table.
6. Click **Save**.

Parameter Groups Settings

Use the **Parameter Groups Settings** form to view the functional parameters that are applicable for multiple transactions and forms. The parameters are grouped using the **Group** check box in the **Transaction Set Maintenance** form. The parameter settings defined in this form are applicable to the transactions only if the **Specific Parameters** check box is cleared in the **Transaction Set Maintenance** form.

The **Parameter Group** section displays the list of parameter groups currently used in Factory Track. You can select a group to view and/or modify the parameters associated with that group.

The **Parameter Groups Settings** form comprises of these tabs:

- **Parameters**: This tab displays the parameter settings for the selected Parameter Group. If the parameter settings are modified, the changes are applicable to all the transactions that use the parameters of the selected group and for which the Override check box is not selected.
- **Transactions**: This tab displays the transactions for which the parameters are applicable.

User Extensions

Use this form to configure settings for individual users.

Note: The User Extension Form is not used in the FT application.