



# Infor LN User Guide for Site Activation

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## About this Guide

This document describes the processes and procedures involved in concept activation.

### Assumed knowledge

Although you need no detailed knowledge of the LN software to read this guide, general knowledge of the LN functionality will help you understand this guide.

### References

Use this guide as the primary reference for concept activation. Use the current editions of these related references for information that is not covered in this guide:

- *User Guide for Enterprise Structures*
- *User Guide for Item Setup*

### How to read this document

This document is assembled from online Help topics.

Text in italics followed by a page number represents a hyperlink to another section in this document.

Underlined terms indicate a link to a glossary definition. If you view this document online, clicking the underlined term takes you to the glossary definition at the end of this document.

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# Chapter 1: Introduction

## Concept activation overview

Some functionality in LN must be activated before you can use it.

Activation is a set of processes that consist of a preparatory stage and an activation stage. The progress of the activation processes is indicated by various statuses.

During the preparatory stage, you must define or adjust master data and set parameters.

The activation stage entails launching the process that builds data based on the setup completed in the preparatory stage.

The functionality that must be activated is subdivided into overall concepts, concepts, and activation activities.

An overall concept consists of one or more concepts. A concept is a specific functionality subset.

For example, the **Multisite** overall concept includes these concepts:

- **Item Type Product**
- **Standard Cost by Enterprise Unit**
- **Planning Cluster Mandatory**
- **Sites**
- **Job Shop by Site**
- **Resources by Site**

The **Kanban Integration** overall concept includes only one concept, **Integrate Kanban with Warehousing**.

A concept, in turn, consists of multiple activation activities. An activation activity is a step that you must complete to activate a concept, for example, setting parameters in a specific session. When all activation activities of a concept are completed, you can activate the concept.

An overall concept is activated when all of its concepts are activated.

When a concept is **Active**, you cannot perform the activation activities or change the concept status, but you can view the activation data and access some of the activities in the **Activation Activity (tceemm4610m000)** session.

### Activation almost identical for overall concepts

The activation process is almost identical for all overall concepts.

The order in which the concepts must be activated is different for each overall concept. Differences in the activation processes are discussed in separate topics.

### Multicompany environments

Concept statuses are set for all companies of the multicompany environment at once.

Most activation activities are performed for individual companies.

Some activation activities, such as **Assign Sites** of the **Sites** concept in the **Multisite** overall concept, are also performed for the entire multicompany environment. This is because the database tables of the Enterprise Modeling Management module are shared among the companies of the multicompany environment.

Consequently, this data is identical for each company and therefore, this activity can be performed for the entire multicompany environment at once.

Before you can set a concept to **Active**, the mandatory activation activities of the concept must be completed in all companies of the multicompany environment.

To complete the activation activities, you can work simultaneously in multiple companies of the multicompany environment.

## General procedure for concept activation

Activating a concept involves these main steps:

- Set the status of the concept to **In Preparation** to enable the activation activities.
- Perform the activation activities.
- Set the status of the concept to **Active**.

### Activating a concept

- 1 In the **Concept Activation (tceмм4600m100)** session, select the overall concept to be activated.
- 2 In the **Concept Activation (tceмм4600m000)** workbench session, click the appropriate concept tab.
- 3 Click **In Preparation**. You are prompted to continue or cancel.
- 4 Click OK to enable the activation activities.
- 5 Perform the activation activities.
- 6 Click **Activate** to activate the concept.
- 7 Repeat the procedure to activate the next concept.

**Note:** Whether an option is available in the **Concept Activation (tceмм4600m000)** workbench session depends on your user rights and the status of other concepts or activation activities.

### Performing activation activities

- 1 On the appropriate concept tab of the **Concept Activation (tceмм4600m000)** workbench session, click an activation activity. For example, if you are activating the **Multisite** overall concept, on the **Item Type Product** concept tab, click **Print Item Defaults used for Product**.

**Note:**



The order in which to perform the activation activities is indicated by the availability of the activity options in the **Concept Activation (tceмм4600m000)** workbench session.

If you click an activation activity option in the **Concept Activation (tceмм4600m000)** workbench session, the **Activation Activity (tceмм4610m000)** session starts in which the options and sessions required to complete the activity are available.

- 2 In the lines section of the Activation Activity (tceмм4610m000) session, select the company for which to perform the activation activity.
- 3 From the *appropriate menu* of the lines section of the session, select **Start Activity**.  
Alternatively, on *appropriate menu* of the header section of the session, select **Start Activity for All Companies**.
- 4 From the *appropriate menu* of the lines section of the session, start the master data or the parameter sessions in which to complete the setup for the current activation activity and specify the data and settings as required.
- 5 From the *appropriate menu* of the lines section of the session, select **Finish Activity**.  
Alternatively, from the *appropriate menu* of the header section of the session, select **Finish Activity for All Companies**.
- 6 If multiple companies are present, perform steps 2 - 5 for the other companies.
- 7 Close the **Activation Activity (tceмм4610m000)** session.
- 8 In the **Concept Activation (tceмм4600m000)** workbench session, click the next activation activity and repeat the procedure until all activation activities are completed.

### Checking and correcting activation activities

After finishing an activation activity, you can start the **Activation Activity (tceмм4610m000)** session to check and correct the activity, if required. To correct an activity, select the relevant company and from the *appropriate menu* of the lines section, select **Restart Activity**. For steps that are performed for all companies simultaneously, from the *appropriate menu* of the header section of the session, select **Restart Activity for All Companies**.

Until the concept is activated, you can restart an activation activity as many times as you need.

## The Concept Activation (tceмм4600m000) workbench session

The **Concept Activation (tceмм4600m000)** workbench session is used to activate the concepts of the overall concept selected in the **Concept Activation (tceмм4600m100)** session.

The workbench provides an overview of the concepts and the activation activities for each concept. You can monitor and perform the activation activities of each concept.

For each concept and each activation activity, a status shows the progress of the activation process.

If an overall concept includes multiple concepts, the workbench session consists of a **Summary** tab and a separate tab for each concept.

The **Summary** tab shows the status of each concept.

Each concept tab shows this information:

- The status of the concept.
- The status of each activation activity required to activate the concept.
- The user who set the concept status or performed an activation activity.
- The date and time on which the user set a concept status or performed an activation activity.

In the workbench, the status of the concepts and the activation activities reflect the progress in the entire multicompany environment. The status of activation activities for individual companies of the multicompany environment is displayed in the Activation Activity (tceмм4610m000) session.

To set a concept status or to perform an activation activity, in the **Concept Activation (tceмм4600m000)** workbench session, click the relevant concept tab and click the appropriate button.

## Overview of the multisite concepts

To adopt the *multisite* functionality in a multicompany or single company environment previously without sites, these multisite concepts must have the **Active** status in the **Concept Activation (tceмм4600m000)** session:

- **Item Type Product**
- **Standard Cost by Enterprise Unit**
- **Planning Cluster Mandatory**
- **Sites**
- **Job Shop by Site**
- **Resources by Site**

### Item type Product

The supply of an item can differ for each *site*. The item can be purchased at one site and subcontracted or produced at another site. However, the item type is a static and global setting. Consequently, the item types **Purchased** and **Manufactured** must be merged into the item type **Product**.

### Standard cost by enterprise unit

In a multisite environment, the calculation of an item's *standard cost* must be performed at a more detailed level than the company level. Therefore, the item costing data must be available by *enterprise unit* instead of by company. Additionally, data such as the costing warehouse, costing source, and *intercompany trade* settings are required in the item costing data.

### Planning cluster mandatory

Item planning is performed for one or more sites if Enterprise Planning is implemented. Therefore, *planning clusters* must be linked to *sites*. This is to accomplish that planning is performed for the items related to the sites and the underlying *entities*.

## Sites

Various logistics data, commercial data, planning data, and other master data must be available at a more detailed level than the company level. For this purpose, this data must be grouped by site or by office for each company within the multicompany structure.

## Job shop by site

In a multisite environment, there can be differences in the *bills of material (BOMs)* and  *routings* used to manufacture items at the various production sites. To accommodate such variations, BOMs, routings and other master data must be maintained at the *site* level.

## Resources by site

In multisite environments, multiple types of resources must be available in Enterprise Planning to model the available capacity. Resources provide an insight into the available, used, and required capacities, expressed in machine hours, labor hours, or product volume.

Resources are derived from these operational *entities* in Manufacturing and Purchase Control:

Entity	Capacity
Work center	Labor hours
Machine capacity group	Machine hours
Work cell	Labor hours
Work cell machine	Machine hours
Operation subcontractor	Machine hours
Product subcontractor	Product volume
Supplying cluster	Product volume
Supplier	Product volume

The subcontractor entity has been introduced to model the resources and resource capacities for both product subcontracting and operation subcontracting.

Subcontractors relate to a buy-from business partner and include one or more subcontractor locations. At a production site you can assign the subcontractor locations to which the production of items or operations is outsourced. A production site is a site at which an item is produced. A subcontractor location is a location at which the subcontractor performs the subcontracted activities.

## Multisite activation outline

The need to activate the multisite concepts depends on the origin of your current LN version.

### First-time LN installation

If your current LN version results from a new, first-time installation, the multisite concepts are active. Therefore, activation of the multisite concepts is not required. Consequently, the **Multisite** overall concept is not displayed in the **Concept Activation (tceemm4600m100)** session, and the other sessions and functionality involved in the multisite activation processes are unavailable.

**Note:** If you do not want to use sites, you must inactivate the **Sites**, **Job Shop by Site**, and the **Resources by Site** concepts. See Resetting the multisite concepts.

### Migration from earlier LN version

If your current LN version was migrated from an earlier version previously without sites, you must activate the **Multisite** overall concept.

The **Multisite** overall concept is activated when all concepts of the **Multisite** overall concept are activated. The concepts are activated in the **Concept Activation (tceemm4600m000)** session.

The **Multisite** overall concept consists of these concepts:

- **Item Type Product**
- **Standard Cost by Enterprise Unit**
- **Planning Cluster Mandatory**
- **Sites**
- **Job Shop by Site**
- **Resources by Site**

You can activate the first three concepts in any order.

The **Sites** concept must be the fourth concept, and the **Job Shop by Site** concept must be the penultimate concept, and the **Resources by Site** must be the last concept to be activated.

### The Sites concept

The **Sites** concept has two preparatory stages. During the first preparatory stage, enterprise structure master data is defined. This stage has the **Enterprise Model in Preparation** status. During the second preparatory stage, item data and other master data is defined. This stage has the **In Preparation** status.

**Note:** To set a multisite concept to **Active**, you must have super user rights. Users with normal user rights can perform activation activities and set the concept statuses **Enterprise Model in Preparation** or **In Preparation**.

### Activation activities by concept

For each multisite concept you must perform multiple activation activities. This table shows information about the activation activities by multisite concept:

Multisite concept	Topic
<b>Item Type Product</b>	Activating item type Product for multisite
<b>Standard Cost by Enterprise Unit</b>	Activating standard cost by enterprise unit for multisite

Multisite concept	Topic
<b>Planning Cluster Mandatory</b>	Activating mandatory planning clusters for multisite
<b>Sites</b>	Activating Sites
<b>Job Shop by Site</b>	Activating Job Shop by Site for multisite
<b>Resources by Site</b>	Activating Resources by Site for multisite

### Activation stage

After performing the activation activities, you can activate the multisite concept. This launches the activation process based on the setup completed in the activation activities and sets the concept status to **Active**.

For most concepts, the activation process is launched by clicking **Activate**. For the **Standard Cost by Enterprise Unit** concept, the activation is launched after completing the activation activities.

When a multisite concept is **Active**, you cannot perform the activation activities or change the concept status, but you can view the activation data and access some of the activities in the **Activation Activity (tcomm4610m000)** session.

### Multicompany environments

Most activation activities are performed for individual companies.

Some activation activities, such as **Assign Sites**, are also performed for the entire multicompany environment. This is because the database tables of the Enterprise Modeling Management module are shared among the companies of the multicompany environment.

Consequently, this data is identical for each company and therefore, this activity can be performed for the entire multicompany environment at once.

### Prerequisites

Before starting the activation process, create a design of the intended enterprise structure, identifying the *sites* to be used, the activities to be carried out at each site, and the warehouses and departments to be included in each site.

If Enterprise Planning is implemented, determine the planning clusters to be used, and link these to the warehouses for which planning is to be performed collectively. The specified planning clusters and the linked warehouses affect the creation of sites.

Before activating the **Standard Cost by Enterprise Unit** multisite concept, identify the level at which to calculate the standard costs: company or enterprise unit. If the level is to be enterprise unit, identify the enterprise units for which to calculate the standard costs.

Set up item groups, because these affect the creation of item default data at site or company level.

### Recommended actions

- Perform table sharing. See *Infor LN User Guide for TableSharing (comtableshug U9505)*.
- Archive the companies of your existing multicompany structure.

- Perform the site activation process in a testing environment before actually adopting the multisite functionality.

## Chapter 2: Item Type Product

### Activating item type Product for multisite

**Item Type Product** is one of the multisite concepts that must be activated to enable the functionality for *multisite*. Activating this concept entails converting and merging the item types **Purchased** and **Manufactured** into the item type **Product**.

Before you can use the item type **Product**, the status of the **Item Type Product** concept must be **Active**. If this parameter is **Active**, the item type **Product** replaces the item types **Purchased** and **Manufactured**, which are no longer available.

To change the status from **Inactive** to **Active**, complete these steps:

#### 1 In Preparation

Click **In Preparation** in the **Item Type Product** tab in the **Concept Activation (tceemm4600m000)** workbench session. Consequently, the status changes from **Inactive** to **In Preparation** for each company of the current multicompany environment.

#### 2 Print Item Defaults used for Product

To verify if item defaults are used to create new items, use the Print Item Defaults used for Product (tcibd0402m100) session. The report displays, by *item group*, the item defaults that are available for the item types **Purchased** and **Manufactured**. You can also identify the item groups that do not have item defaults for **Product** items.

#### 3 Copy Defaults to Product

If item defaults are used to create new items, specify the item defaults for the **Product** item type and related item group.

In the Copy Defaults to Product (tcibd0207m100) session, you can copy the default item data for a combination of item group and **Purchased** or **Manufactured** item type to defaults for **Product**. The default item data also includes the sub-entity defaults, such as item sales defaults.

To start this session for specific item defaults, select a record in the Item Defaults (tcibd0102m000) session and click **Copy Defaults to Product** on the *appropriate menu*.

#### 4 (Optional) Reassign Item Group

If an item group includes both **Purchased** and **Manufactured** items, and you want to retain the differences between these variants, you can assign the **Purchased** and **Manufactured** items to separate item groups.

- a Copy an existing item group to a new item group, including the related master data, in the Copy Item Group (tcmcs0223m000) session.
- b Assign the **Purchased** and **Manufactured** items to separate item groups in the Reassign Item Group (tcibd0201m000) session.

To start the **Reassign Item Group (tcibd0201m000)** session for a specific item, select the item in the **Items (tcibd0501m000)** session and click **Reassign Item Group** on the *appropriate menu*.

## 5 Activate

To actually upgrade the item types **Purchased** and **Manufactured** to **Product** and to remove the item defaults for **Purchased** and **Manufactured** items, click **Activate** in the **Item Type Product** tab in the **Concept Activation (tcomm4600m000)** workbench session.

Consequently, the **Item Type Product** parameter is set to **Active**.

**Note:** The sessions of the multicompany environment are unavailable for end users during the execution of this step.



## Chapter 3: Standard Cost by Enterprise Unit

### Activating standard cost by enterprise unit for multisite

To use the functionality for *multisite*, the value of the Standard Cost by Enterprise Unit field must be **Active** in the **Concept Activation (tceмм4600m000)** workbench session.

If this parameter is **Active**, the *standard cost* calculation for an item is performed by *enterprise unit* instead of by logistic company.

To change the status from **Inactive** to **Active**, complete these steps:

#### 1 Calculation Office Setup

Before you can set the status to **In Preparation**, a default *calculation office* must be linked to each *production department*.

This is done as follows:

- a Click **Calculation Office Setup** in the **Concept Activation (tceмм4600m000)** workbench session.
- b In the **Production Order Parameters (tisfc0100s000)** session, set the Calculation Office defined in field from **Default Production Order Data to Prepare for Production Department**.
- c Assign a default calculation office to each production department.
- d In the **Production Order Parameters (tisfc0100s000)** session, set the Calculation Office defined in field to **Production Department**.

#### 2 In Preparation

Click **In Preparation** in the **Standard Cost by Enterprise Unit** tab of the **Concept Activation (tceмм4600m000)** workbench session. Consequently, the status changes from **Inactive** to **In Preparation**.

#### 3 Generate Interim Item Costing Data

Generate item costing (default) data that includes the enterprise unit for an item or a range of items, in the **Cost Calculation by Enterprise Units - Generate Migration Table (ticpr0220m000)** session. The costing data is generated based on the warehouse specified in the **Items - Ordering (tcibd2100m000)** session. The enterprise unit is also retrieved from this warehouse.

After running the **Cost Calculation by Enterprise Units - Generate Migration Table (ticpr0220m000)** session, temporary item costing data is generated in the **Standard Costs by Enterprise Unit - Conversion data (ticpr0120m000)** session. For an item, multiple records of item costing data can be generated by enterprise unit.

#### 4 Maintain Interim Item Costing Data

View and modify the generated temporary item costing (default) data in the **Standard Costs by Enterprise Unit - Conversion data (ticpr0120m000)** session. You can also specify temporary item costing data in this session.

## 5 Upgrade Item Costing Data

Upgrade the costing (default) data from the company level to the enterprise unit level for an item or a range of items in the **Cost Calculation by Enterprise Units-Upgrade (ticpr0220m100)** session. You can skip the unused items.

After running the **Cost Calculation by Enterprise Units-Upgrade (ticpr0220m100)** session, the temporary item costing data by enterprise unit is upgraded to actual item costing data by enterprise unit in the **Item - Costing (ticpr0107m000)** or **Item - Costing Defaults (ticpr0108m000)** sessions.

### Note:

- If an item cannot be upgraded, for example, on account of data inconsistencies, you can manually remove this item from the **Standard Costs by Enterprise Unit - Conversion data (ticpr0120m000)** session. After the Standard Cost by Enterprise Unit concept is set to **Active** in the **Concept Activation (tcecm4600m000)** workbench session, you can create the item manually in the **Item - Costing (ticpr0107m100)** session or the **Item - Costing Defaults (ticpr0108m000)** session.
- As soon as the first item is upgraded, the value of the **Standard Cost by Enterprise Unit** parameter in the **Concept Activation (tcecm4600m000)** session already changes to **Active**.

## 6 Calculate Standard Costs by Enterprise Unit

Calculate the standard cost by enterprise unit for the upgraded items in the Calculate Standard Cost (ticpr2210m000) session.

You can view the calculated standard cost for an item and enterprise unit in the related sessions, such as **Item - Costing (ticpr0107m000)**, **Item Standard Costs (ticpr3601m000)**, and **Item - Standard Cost (ticpr3500m000)**.

## 7 Delete temporary costing data

To delete the temporary costing data from the **Standard Costs by Enterprise Unit - Conversion data (ticpr0120m000)** session, use the Cost Calculation by Enterprise Units - Delete Migration Table (ticpr0220m200) session.

**Note:** Before deletion, verify if items exist that are still to be upgraded. To verify, check the value of the **Standard Costs at Level** field in the **Items (tcibd0501m000)** and **Item Defaults (tcibd0102m000)** sessions, which can be **Company** or **Enterprise Unit**.

## Chapter 4: Planning Cluster Mandatory

### Activating mandatory planning clusters for multisite

To use the functionality for *multisite*, the value of the **Planning Cluster Mandatory** field must be **Active** in the **Concept Activation (tceмм4600m000)** workbench session. If this parameter is **Active**, *planning clusters* are mandatory.

To activate mandatory planning clusters, complete these steps:

#### 1 In Preparation

Click **In Preparation** in the **Planning Cluster Mandatory** tab in the **Concept Activation (tceмм4600m000)** workbench session. Consequently, the status changes from **Inactive** to **In Preparation**.

#### 2 Manually Update Planning Clusters

Based on your enterprise structure design as described in *Activating multisite - overview*, assign specific planning clusters to warehouses. This is to limit the number of warehouses to which to assign the default planning cluster that is defined in the next step.

The default planning cluster is automatically assigned to warehouses with an "empty" planning cluster when you carry out step 4. Consequently, during the activation of the **Sites** parameter, when sites are assigned to warehouses, only the sites linked to the default planning cluster are available for the warehouses to which the default planning cluster is assigned in step 3.

This may offer a too limited choice of sites, especially if your enterprise structure includes multiple planning clusters and multiple sites. Therefore, you are recommended to assign specific planning clusters to warehouses, based on your enterprise structure design, before defining and activating the default planning cluster.

#### 3 Specify Default Planning Cluster

Specify a default planning cluster in the **Default Planning Cluster** field of the **Planning Parameters (cprpd0100m000)** session for each logistic company of the current multicompany environment.

**Note:** You cannot specify an existing planning cluster from the **Planning Clusters (tceмм1135m000)** session as the default planning cluster. The default planning cluster contains the new value that replaces the "empty" planning cluster of warehouses, effectivity units, and plan items when the **Planning Cluster Mandatory** concept is set to **Active**, see next step.

#### 4 Activate

**Note:** For this step, super user rights are required.

Click **Activate** the **Planning Cluster Mandatory** tab in the **Concept Activation (tceмм4600m000)** workbench session. Consequently, you must perform a data upgrade run, and these processes are performed:

- The **Initialize Data Upgrade Run (ttspt2200m000)** session starts. Refer to the Online Help of this session for further information about the data upgrade run.
- The status changes from **In Preparation** to **Active**.
- For the *warehouses*, *effectivity units*, and *plan items* with "empty" planning clusters, LN replaces the "empty" planning cluster with the default planning cluster specified in the previous step.
- Planning clusters have become mandatory. Therefore, a planning cluster must be present for each warehouse or plan item. During activation of the next concept, **Sites**, you must link a planning cluster to each site when you define *sites*.

## Chapter 5: Site Activation Overview

### Activating sites

To create *sites* and site related master data, you must activate the **Sites** concept in the **Concept Activation (tceмм4600m000)** workbench session.

#### Prerequisites

Before activating the **Sites** concept, these parameters must be set to **Active**:

- **Item Type Product**
- **Standard Cost by Enterprise Unit**
- **Planning Cluster Mandatory**

#### Activating the Sites concept

The **Sites** concept includes the settings displayed in the procedure steps below. For each setting, the user activities are briefly outlined. Details are provided in subsequent topics.

The step titles refer to the activation activity options in the **Concept Activation (tceмм4600m000)** workbench session. The sessions referred to in each step are accessed from the **Activation Activity (tceмм4610m000)** session. See General procedure for concept activation and The Concept Activation (tceмм4600m000) workbench.

#### 1 Enterprise Model in Preparation

The first stage of the site activation process involves adding sites to the enterprise model.

##### a Enterprise Model in Preparation

Set the **Sites** concept to **Enterprise Model in Preparation** in the **Concept Activation (tceмм4600m000)** workbench session.

##### b Create Sites

- 1 Define sites using the **Sites (tceмм0150m000)** and **Site (tceмм0650m000)** sessions.
- 2 Generate *subentity* settings by site, for example, warehousing settings by site.

##### c Assign Sites

- 1 Assign sites to *entities* using the **Assign Sites (tceмм0250m000)** session.
- 2 Verify the results of the site assignment process.

##### d Relate Machines to Sites

Optionally, manually link machines that are not related to work centers to sites using the **Machines (Machine Types) (tirou0102m000)** session.

**e Generate Master Data by Office**

Generate global default data by office in the **Generate Master Data by Office (tccom0232m000)** session.

**f Validate Enterprise Model**

Use the **Validate Enterprise Model for Multisite (tccom0230m000)** session to validate the enterprise model defined in the previous steps.

See Activate sites - Enterprise model in preparation.

**2 In Preparation**

The second stage of the site activation process involves adding sites to items and other master data.

**a In Preparation**

Set the **Sites** concept to **In Preparation** in the **Concept Activation (tcemm4600m000)** workbench session.

**b** Optionally, generate default item data by site, office, or by site and *subentity* in the Generate Master Data (tccom0231m000) session using these options in the **Concept Activation (tcemm4600m000)** workbench session:**1 Generate Item Defaults****2 Generate Item Planning Defaults**

See Activate sites - In preparation, generate item default data.

**3** Validate the data using the Validate Master Data for Multisite (tccom0230m100) session.**c** Generate item data by site, office, by site and subentity, or by office in the **Generate Master Data (tccom0231m000)** session using these options in the **Concept Activation (tcemm4600m000)** workbench session:**1 Generate Item Data****2 Generate Warehousing Item Data****3 Generate Planning Item Data****4 Generate Production Item Data****5 Generate Procurement Item Data****6 Generate Sales Item Data****7 Generate Service Item Data**

See Activate sites - In preparation, generate item data.

**d Validate Item Data**

Validate the data using the **Validate Master Data for Multisite (tccom0230m100)** session.

**e** Define additional master data by site in the **Generate Master Data (tccom0231m00)** session using these options in the **Concept Activation (tcemm4600m000)** workbench session:**1 Generate Common Master Data****2 Generate Production Master Data****3 Generate Procurement Master Data****4 Generate Sales Master Data****5 Generate Service Master Data****6 Generate Project Master Data****7 Generate Quality Master Data****8 Generate Warehousing Master Data**

See Activate sites - In preparation, generate other site related master data

**f Validate Other Master Data**

Validate all data using the **Validate Master Data for Multisite (tccom0230m100)** session.

**3 Active**

Set the **Sites** concept to **Active** in the **Concept Activation (tceem4600m000)** workbench session. See [Activate sites - Activating the Sites parameter](#).

## Chapter 6: Enterprise Model in Preparation

### Activate sites - Enterprise model in preparation

The first stage of the site activation process comprises adding sites to the enterprise model. This stage includes these steps:

- 1 In any of the logistic companies of the current company environment, click **Enterprise Model in Preparation** on the **Sites** tab in the **Concept Activation (tcemm4600m000)** workbench session.
- 2 Close and reopen LN. Consequently, the **Sites (tcemm0150m000)** and **Site (tcemm0650m000)** sessions become available.
- 3 Define sites using the **Sites (tcemm0150m000)** and **Site (tcemm0650m000)** sessions. In the **Sites (tcemm0150m000)** session, click New to define a new site.

In the **Site (tcemm0650m000)** session that opens, specify:

- The properties, such as the site's *planning cluster*, *logistic company*, and address.
  - An *enterprise unit*, if all of the site's *entities* must belong to the same enterprise unit.
- 4 In the **Settings** tab of the **Site (tcemm0650m000)** session, define *subentity* settings by site.

The subentity setting buttons refer to these sessions:

- **Procurement**  
**Procurement Settings by Site (tdpur0111m000)**
- **Sales**  
**Sales Settings by Site (tdsls0511m000)**
- **Warehousing**  
**Warehousing Settings by Site (whwmd2101m000)** .
- **Production**  
**Production Settings by Site (timfc0180m000)**
- **Service**  
**Service Settings by Site (tsmdm1103m000)**

When you start these sessions, default settings are generated from the company parameters related to the subentities. For example, if you click **Warehousing**, the **Warehousing Settings by Site (whwmd2101m000)** session opens and warehousing settings from various warehousing parameter sessions are defaulted to this session. You can change the default settings if required.

Defining subentity settings by site is a prerequisite to assign sites to *entities*, see next step. For example, you cannot link a site to a *production department* if production settings by site are not present. More information is provided in the Online Help of the settings by site sessions.



- 5** In the **Assign Sites (tcomm0250m000)** session, assign sites to *entities*. Select the sites to be assigned and the types of entities to which the selected sites must be assigned. You can run this session multiple times, each time using different address attributes as criteria.

**Note:** Sites cannot be assigned to *financial warehouses*.

It is recommended to run this session in simulation mode and print an error report before running the actual assignment process. This helps you to verify the results and identify errors in the site assignment process. You can repeat the simulation run to correct errors as often as needed.

After running the actual assignment process, you can still change the assigned sites.

- 6** Verify the results of the site assignment process. You must manually assign sites to entities for which the assignment process was unsuccessful. Repeat the assignment process and verify the results until all entities are assigned as required.

To manually assign sites to entities, from the relevant tabs in the **Enterprise Unit (tcomm0630m000)** or the **Sites (tcomm0150m000)** session you can start these sessions:

Entity	Session
Work center	<b>Work Centers (tirou0101m000)</b>
Line station	<b>Stations (tiasl1545m000)</b>
Work cells	<b>Work Cells (tirpt0140m000)</b>
Repair cells	<b>Repair Cells (tirpt0140m100)</b>
Production department	<p><b>Production Departments (tirou2100m000)</b></p> <p>When a site is assigned to a <i>production department</i> during the site assignment process, the site is automatically passed on to the shop floor components related to the production department.</p> <p>The shop floor components include:</p> <ul style="list-style-type: none"> <li>• <i>Work centers</i></li> <li>• <i>Work cells</i></li> <li>• <i>Line stations</i></li> <li>• <i>Machines</i> related to work centers.</li> <li>• <i>Repair cells</i></li> </ul> <p><b>Note:</b> If a site was not assigned to a production department, or if a site was not assigned to the related shop floor component, you must assign the site manually:</p> <ol style="list-style-type: none"> <li>Open the <b>Production Departments (tirou2100m000)</b> session.</li> <li>For each production department, specify a site (if not present) and click <b>Pass the Site</b> in the <b>Production Department (tirou2600m000)</b> session.</li> </ol>
Sales office	<b>Sales Offices (tdsls0512m000)</b>
Purchase office	<b>Purchase Offices (tdpur0112m000)</b>
Service office	<b>Service Offices (tsmdm1100m100)</b>
Accounting office	<b>Department (tcmcs0165s000)</b>
Shipping office	<b>Shipping Office (fmfmd0680m000)</b>
Assembly lines	<b>Assembly Lines (tiasl1530m000)</b>

Entity	Session
Warehouses	<b>Warehouses (whwmd2500m000)</b>
Service locations	<b>Locations (tswcs0125m000)</b>

- 7** If machines not related to work centers are present, manually link these machines to sites using the **Machines (Machine Types) (tirou0102m000)** session.

- 8** In the **Generate Master Data by Office (tccom0232m000)** session, define default data by office. The default data by office are created based on the global default data.

Global default data are settings from sales, procurement, and service parameter sessions that are defaulted to sales offices, purchase offices, and service offices, respectively. These default settings can be changed for individual sales offices, purchase offices or service offices after you clear the Use Global check box in these sessions:

Office	Session	Use Global
Sales office	<b>Sales Offices (tdsls0512m000)</b>	<b>Use Global Sales Parameters</b>
Purchase office	<b>Purchase Offices (tdpur0112m000)</b>	<b>Use Global Procurement Parameters</b>
Service office	<b>Service Offices (tsmdm1100m100)</b>	<b>Use Global Service Parameters</b>

- 9** Use the **Validate Enterprise Model for Multisite (tccom0230m000)** session to validate the enterprise model defined in the previous steps.

The error report lists, for example, the warehouses, offices or other department without sites, or shop floor elements whose sites are different from the sites of the related shop floor warehouses. The complete list of checks used in this validation is displayed in the report if the **Validation Information** check box is selected.

Repeat the validation until no more errors are listed.

## Chapter 7: In Preparation - Generate Item Default Data

### Activate sites - In preparation, generate item default data

The first steps of the second stage of the site activation process comprise adding sites to item default data. These steps are optional, skip these steps if no item default data is defined for your multicompany structure.

- 1 Click **In Preparation** on the **Sites** tab in the **Concept Activation (tceem4600m000)** workbench session. Consequently, the status of the concept changes to **In Preparation**.

- 2 **a** Generate default item data by site.

This is done in the Generate Master Data (tccom0231m000) session. This session is only available if the site activation status is **In Preparation**.

Recommended procedure:

- 1 Select these check boxes:
  - **Item Defaults** (in the **Item Defaults** column)
  - **Simulation**
  - **Process Report**
  - **Error Report**
- 2 Click **Generate**.
- 3 Check the process and error reports and correct any errors before actually generating master data. The error report is only generated if errors occur. You can repeat running the simulation until all errors are corrected.
- 4 Select the **Planning Defaults** check box and repeat the previous steps.

The resulting item by site default data is maintained in the Item Control and Defaults by Site (tcibd1552m000) session. See Generating item default data by site.

- b** Define item default data by sales, purchase, or service office.

For purchase offices and service offices, this is only required if the default data by office differ from the local default data. However, if the **Items Service by Office is Mandatory** check box is selected in the **General Service Parameters (tsmdm0100m000)** session, defining item default data is mandatory for service offices.

This is done manually:

- 1 In the Item Defaults (tcibd0502m000) session, define an item type and item group combination.
- 2 Add default data to this combination.
- 3 Add sales, purchase, and service offices to this combination.

Consequently:

- Based on the default data, item data by sales office is generated during the activation process. This also applies to service offices if the **Items Service by Office is Mandatory** check box is

selected in the **General Service Parameters (tsmdm0100m000)** session. For purchase offices, no item data is generated, you must manually specify this data.

- After the **Sites** concept is activated, when you create a new item based on the item defaults, item data by the sales or service office is generated. For purchase offices, no item data is generated, this must be created manually.

- c Define item default data by site and *subentity*.

This is done as follows:

- 1 In the **Item Defaults (tcibd0502m000)** session, specify a site.
- 2 In the **Item Control and Defaults by Site (tcibd1552m000)** session, select the relevant **Create Item - Sales** check boxes to specify the subentities for which default item data related to the site must be generated.

- 3 Validate the default data by checking the **Item Defaults** check box and clicking **Validate** in the **Validate Master Data for Multisite (tccom0230m100)** session.

The **Validation Information** report in this session lists the validation checks performed.

## Generating item default data by site

Default item data by site are generated in the Generate Master Data (tccom0231m000) session by selecting the **Item Defaults** and the **Planning Defaults** check boxes in the **Item Defaults** column and clicking **Generate**. Preferably, first generate the **Item Defaults** default data and then the **Planning Defaults** default data.

### Item Defaults

To add sites to the item default data, for each item related to an item group in the **Item Defaults (tcibd0102m000)** session, LN retrieves the sites of the warehouses linked to the items in these sessions:

- **Items - Ordering (tcibd2100m000)**
- **Items - Planning (cprpd1100m000)**
- **Item Data by Warehouse (whwmd2510m000)**
- **Planned Inventory Transactions (whinp1500m000)**
- **Item - Warehouse - Inventory Transactions (whinr1510m000)**
- **Items - Sales (tdisa0501m000)**
- **Item - Purchase**
- **Items - Service (tsmdm2100m000)**

The resulting item by site default data is maintained in the Item Control and Defaults by Site (tcibd1552m000) session.

### Planning Defaults

To add sites to the item-planning default data in the **Item Planning Defaults (cprpd1110m000)** session, in this session LN updates the **Ordering Site** field with the site of the warehouse in the **Ordering Warehouse** field.

## Chapter 8: In Preparation - Generate Item Data

### Activate sites - In preparation, generate item data

Generating item data by site is a mandatory step in the site activation process.

The site related item data are generated using the Generate Master Data (tccom0231m000) session. This session is only available if the site activation status is **In Preparation**.

**Important:**

To generate item data by site, you must perform steps 1 and 2 in the following procedure before generating any of the other item master data. This is because the data generated in these steps must be present before the other item data can be generated.

After completing steps 1 and 2, you are recommended to complete the following steps one by one, in the indicated order instead of selecting multiple options and generating master data for these options in one go. This is to achieve the best results and to avoid overburdening the system.

In each step performed in the **Generate Master Data (tccom0231m000)** session, it is recommended to select the **Simulation**, **Process Report**, and **Error Report** check boxes and correct any errors before actually generating master data. You can repeat the simulation and correct errors as often as required.

In the **Item Data** group box of the Generate Master Data (tccom0231m000) session:

**1** Select the **Common** check box to generate item data by *site*.

**2** Click **Generate**.

The item data by site are added to these sessions:

- Items by Site (tcibd1550m000)
- Items - Ordering by Site (tcibd2150m000)
- Date-Effective Supply Source by Site (tcibd1155m000)

See Generating general item data by site.

**3** Select the **Warehousing** check box to generate Warehousing item data by *site*.

**4** Click **Generate**.

The item data from the **Item Data by Warehouse (whwmd2510m000)** session is added to the Item - Warehousing by Site (whwmd4104m000) session. The site is retrieved from the warehouse of the item in the **Item Data by Warehouse (whwmd2510m000)** session.

**5** Select the **Planning** check box to update Enterprise Planning item data by *site*.

**6** Click **Generate**.

The site and the warehouse of the items in the **Items - Ordering by Site (tcibd2150m000)** session is added to the plan item in the **Items - Planning (cprpd1100m000)** session.

- 7** Select the **Manufacturing** check box to generate Manufacturing item data by *site*.
- 8** Click **Generate**.  
The Manufacturing item data is added to the Items - Production by Site (tiipd0151m000) session. See Generating Manufacturing item data by site.
- 9** Select the **Procurement** check box to generate Purchase Control item data by *site* and *purchase office*.
- 10** Click **Generate**.  
The Purchase Control item data is added to the Items - Purchase by Site (tdipu0181m000) and Items - Purchase by Office (tdipu0181m100) sessions. See Generating Procurement item data by site and office.
- 11** Select the **Sales** check box to generate Sales Control item data by *site* and *sales office*.
- 12** Click **Generate**.  
The Sales Control item data is added to the Items - Sales by Site (tdisa0181m100) and Items - Sales by Office (tdisa0181m000) sessions. See Generating Sales item data by site and office.
- 13** Select the **Service** check box to generate Service item data by *site*.
- 14** Click **Generate**.  
The Service item data is added to the Items - Service by Site (tsmdm2120m100) and Items - Service by Service Office (tsmdm2120m000) sessions. See Generating Service item data by site and office.
- 15** Select the **Project** check box and click **Generate** to add sites to the Project item and item default data and settings in the:
  - **Item Project Defaults (tppdm0506m000)** session. The site is retrieved from the warehouse defined for the item in the **Item - Ordering Defaults (tcibd2101m000)** session.
  - **Items - Project (tppdm0505m000)** session. The site is retrieved from the warehouse defined for the item in the **Items - Ordering (tcibd2100m000)** and **Items - Ordering by Site (tcibd2150m000)** sessions, and from the warehouse listed on deliverables, such as *planned purchase orders* and *planned warehouse orders*.
- 16** In the Validate Master Data for Multisite (tccom0230m100) session, complete these steps to validate the data:
  - In the **Item Data** column, select the **All** check box.
  - Click **Validate**.

## Generating general item data by site

General item data by site are generated in the Generate Master Data (tccom0231m000) session by selecting the **Common** and clicking **Generate**.

After selecting the **Common** check box and clicking **Generate** in the Generate Master Data (tccom0231m000) session, LN generates Common item data by site in these sessions:

- Items by Site (tcibd1550m000)
- Items - Ordering by Site (tcibd2150m000)
- Date-Effective Supply Source by Site (tcibd1155m000).

To generate general item data by site, for each item present in the **Items (tcibd0501m000)** session, LN completes these steps:

- 1 Check whether data is present in the **Item Defaults by Site (tcibd1551m000)** session.
- 2 If yes, based on the default data, generate item data by site in the Items by Site (tcibd1550m000) session. For these items, by default the **Use Global Item** check box is cleared in the Items by Site (tcibd1550m000) session.
- 3 If no, check whether the item is present in any of these sessions:
  - **Item Control and Defaults by Site (tcibd1552m000)**
  - **Items - Ordering (tcibd2100m000)**
  - **Items - Planning (cprpd1100m000)**
  - **Item Data by Warehouse (whwmd2510m000)**
  - **Planned Inventory Transactions (whinp1500m000)**
  - **Items - Sales (tdisa0501m000)**
  - **Item - Purchase**
  - **Items - Service (tsmdm2100m000)**
  - **Planned Inventory Transactions (whinp1500m000)**
  - **Item - Warehouse - Inventory Transactions (whinr1510m000)**
- 4 If no, take no further action. No data is generated.
- 5 If yes, retrieve the site of the warehouse of the item.
- 6 Add the site to the item data in the Items by Site (tcibd1550m000) session. For these items, by default the **Use Global Item** check box is selected in the Items by Site (tcibd1550m000) session.

For the Date-Effective Supply Source by Site (tcibd1155m000) session, data is also generated based on data from the **Date-Effective Supply Source (tcibd0510m000)** session and the **Items by Site (tcibd1550m000)** session.

### Supply sources

For non-planned items, and items for which no item-ordering data is present, the default supply source is set to **Distribution** in the **Items by Site (tcibd1550m000)** session.

For all other items, the default supply source is retrieved from the **Actual Supply Source** field of the **Items (tcibd0501m000)** session.

## Generating Manufacturing item data by site

After selecting the **Manufacturing** check box and clicking **Generate** in the Generate Master Data (tccom0231m000) session, LN generates Manufacturing item data by site in the Items - Production by Site (tiipd0151m000) session.

The data is retrieved from:

- The **Items (tcibd0501m000)** session
- The Item - Production (tiipd0101m000) session
- The **Item - Production Defaults (tiipd0102m000)** session, if default data have been specified.
- The value in the **Site** field is retrieved from the warehouse or the work center listed in these sessions:
  - **Bill of Material (tibom1110m000)**

- **Generic Bill of Material (tipcf3110m000)**
- **Production Orders (tisfc0501m000)**
- **Production Schedules (tirpt4101m000)**
- **Production Schedule Lines (tirpt4102m000)**
- **Routing Operations (tirou1102m000)**. Sites are not retrieved from subcontracting work centers.

## Generating Procurement item data by site and office

After selecting the **Procurement** check box and clicking **Generate** in the Generate Master Data (tccom0231m000) session, LN generates Purchase Control item data by *site* in the **Items - Purchase by Site (tdipu0181m000)** session and item data by *purchase office* in the **Items - Purchase by Office (tdipu0181m100)** session. In these sessions, you can verify and, if required, adjust the generated results.

### Items - purchase by site

The procurement data by site is generated for the sites retrieved from:

- The warehouses listed in these sessions:
  - **Delivery Patterns by Warehouse / BP / Item (tdipu0124m000)**
  - **RFQ Lines (tdpur1502m000)**
  - **RFQ Responses (tdpur1506m000)**
  - **Purchase Requisitions (tdpur2501m000)**
  - **Purchase Contract Lines Overview (tdpur3501m500)**
  - **Purchase Order - Lines to be Released (tdpur4501m140)**
  - **Purchase Orders - by Manual Activities (tdpur4501m150)**
  - **Purchase Order - Lines to be Received (tdpur4501m400)**
  - **Purchase Order Lines Monitor (tdpur4501m500)**
  - **Purchase Order Material Supply Lines (tdpur4116m000)**
  - **Purchase Order Change Request Material Supply Lines (tdpur4116m100)**
- The site of the line station linked order line information in the **Purchase Order Line - Linked Information (tdpur4502s000)** session.

### Items - purchase by office

If data is present for the relevant item type and item group in the **Item Purchase Defaults by Office (tdipu0182m100)** session, procurement item data by office is generated for the offices and items combinations retrieved from these sessions:

- **Request for Quotation (tdpur1600m000)**
- **RFQ Lines (tdpur1502m000)**
- **Purchase Requisitions (tdpur2501m000)**
- **Purchase Requisition (tdpur2600m000)**
- **RFQ Responses (tdpur1506m000)**
- **Purchase Contracts Overview (tdpur3500m500)**



- **Purchase Contract Lines Overview (tdpur3501m500)**
- **Purchase Contracts - by Item/Price Group (tdpur3510m000)**
- **Purchase Schedules (tdpur3110m000)**
- **Purchase Schedule (tdpur3511m000)**
- **Purchase Schedule Lines (tdpur3111m000)**
- **Project Related Data For Schedule (tdpur3111m100)**
- **Purchase Schedule Lines (tdpur3111m200)**
- **Purchase Orders - Overview (tdpur4500m500)**
- **Purchase Orders (tdpur4100m000)**
- **Purchase Order Lines (tdpur4101m000)**
- **Purchase Order Change Request Material Supply Lines (tdpur4116m100)**

## Generating Sales item data by site and office

After selecting the **Sales** check box and clicking **Generate** in the Generate Master Data (tccom0231m000) session, LN generates Sales Control item data by *site* in the **Items - Sales by Site (tdisa0181m100)** session and item data by *sales office* in the **Items - Sales by Office (tdisa0181m000)** session. In these sessions, you can verify and, if required, adjust the results.

### Sales items

In these sessions, the Site field is filled with the site of the warehouse in the Warehouse field:

- **Items - Sales (tdisa0501m000)**
- **Item Sales Defaults (tdisa0602m000)**

### Sales item data by site

If data is present for the relevant item type and item group in the **Item - Sales Defaults by Site (tdisa0182m100)** session, sales item data by site is generated in the **Items - Sales by Site (tdisa0181m100)** session based on the sites of the warehouses and the work centres listed in these sessions:

- **Sales Order Lines (tdsls4101m000)**
- **Sales Order Material Supply Lines (tdsls4116m000)**
- **Sales Order Line Components (tdsls4163m000)**
- **Sales Quotation Lines (tdsls1501m000)**
- **Sales Contract Lines (tdsls3501m000)**
- **Sales Release Lines (tdsls3508m000)**
- **Sales Release Lines - Sequence Shipping Schedule (tdsls3116m000)**
- **Sales Release Line Details - Pick-up Sheet (tdsls3116m100)**
- **Sales Release Lines - Sequence Shipping Schedule (tdsls3116m200)**
- **Sales Schedules (tdsls3111m000)**
- **Sales Schedule Lines (tdsls3107m000)**
- **Pick-up Sheets (tdsls3107m100)**

- **Inventory Consumptions (tdsls4140m000)**
- **Inventory Consumption Lines (tdsls4141m000)**
- **Orders by Inventory Consumption Line (tdsls4142m000)**
- **Sales Order Template Lines (tdsls2506m000)**

#### Sales item data by office

For existing item data by sales office in the **Items - Sales by Office (tdisa0181m000)** session, the site of the warehouse is added. New data is generated based on the sales office listed in these sessions:

- **Sales Order Lines (tdsls4101m000)**
- **Sales Order Line Components (tdsls4163m000)**
- **Sales Quotation Lines (tdsls1501m000)**
- **Sales Contract Lines (tdsls3501m000)**
- **Sales Schedules (tdsls3111m000)**

In the **Item Sales Defaults by Office (tdisa0182m000)** session, the Site field is filled with the site of the warehouse in the Warehouse field.

## Generating Service item data by site and office

After selecting the **Service** check box and clicking **Generate** in the Generate Master Data (tccom0231m000) session, LN generates Service item data by site.

#### Serialized Items (tscfg2100m000)

In the **Serialized Items (tscfg2100m000)** session, the value in the:

- **Production Site** field is retrieved from the site of the warehouse listed on the production orders, production schedules, or assembly orders that initiated the production of the item.
- **Repair Site** field is retrieved from the site of the warehouse listed in the **Warehouse** field of the **Serialized Items (tscfg2100m000)** session.
- **Location Site** field is retrieved from the site of the address listed in the Address field of the **Serialized Items (tscfg2100m000)** session.

#### Items - Service (tsmdm2100m000)

In the **Items - Service (tsmdm2100m000)** session, the value of the **Site** field is updated with the site of the warehouse in the **Warehouse** field.

#### Item Service Defaults (tsmdm2105m000)

In the **Item Service Defaults (tsmdm2105m000)** session, the value of the **Repair Site** field is updated with the site of the warehouse in the **Repair Warehouse** field.

### **Items - Service by Service Office (tsmdm2120m000)**

In the **Items - Service by Service Office (tsmdm2120m000)** session, new data is generated if:

- The **Items Service by Office is Mandatory** check box is selected in the **General Service Parameters (tsmdm0100m000)** session. The data is based on the service office present in:
  - Service orders
  - Maintenance sales orders
  - Maintenance work orders
  - Claims
  - Maintenance sales quotes
- Data is present in the **Item Service Defaults by Service Office (tsmdm2125m000)** session, the new data is based on the default data.

For existing data in the **Items - Service by Service Office (tsmdm2120m000)** session, the value in the **Site** field is updated with the site of the warehouse in the **Warehouse** field.

### **Items - Service by Site (tsmdm2120m100)**

In the **Items - Service by Site (tsmdm2120m100)** session, new data is generated based on:

- The site present in:
  - Service orders
  - Maintenance sales orders
  - Maintenance work orders
  - Claims
  - Maintenance sales quotes
- Data from the **Item Service Defaults by Site (tsmdm2125m100)** session, if default data is present.

### **Item Service Defaults by Service Office (tsmdm2125m000)**

In the **Item Service Defaults by Service Office (tsmdm2125m000)** session, the site of the warehouse in the **Repair Warehouse** field is updated to the **Repair Site** field.

## Chapter 9: In Preparation - Generate Other Site Related Master Data

### Activate sites - In preparation, generate other site related master data

Generating site related master data other than item data is a mandatory step in the site activation process. The other than item master data are generated using the Generate Master Data (tccom0231m000) session. This session is only available if the activation status is **In Preparation**.

For the best results, and to avoid overburdening the system, you are recommended not to generate all site related master data at once but to complete this process by carrying out the following steps one by one, in the indicated order.

In each step performed in the **Generate Master Data (tccom0231m000)** session, it is recommended to select the **Simulation**, **Process Report**, and **Error Report** check boxes and correct any errors before actually generating master data. You can repeat running the simulation until all errors are corrected.

In the **Other Master Data** group box of the Generate Master Data (tccom0231m000) session, select:

- 1** The **Common** check box to add the **Ship-from Site** and the **Ship-to Site** to the Scenarios by Landed Costs Set (tclct1105m000) session. In this session, the site of the **Ship-from Warehouse** is defaulted to the **Ship-from Site**, and the site of the **Ship-to Warehouse** is defaulted to the **Ship-to Site**.
- 2** The **Manufacturing** check box to add sites to Manufacturing data.  
See Generating other Manufacturing master data by site.
- 3** The **Procurement** check box to generate Purchase Control master data by *site*.  
See Generating other Procurement master data by site.
- 4** The **Sales** check box to generate Sales Control master data by *site*.  
See Generating other Sales master data by site.
- 5** The **Service** check box to generate Service master data by *site*.  
See Generating other Service master data by site.
- 6** The **Quality** check box to generate Quality master data by *site*.  
See Generating other Quality master data by site.
- 7** The **Warehousing** check box to generate Warehousing master data by *site*. If the kit type is **Product**, the **Site** field is populated with the site related to the supply-from and supply-to warehouse.

If the supply-from and supply-to warehouses have different sites, a site is not added and an error is listed in the report. If the kit type is **Line Station**, the site of the first warehouse of the first kit component is assigned.

- 8 In the Validate Master Data for Multisite (tccom0230m100) session, complete these steps to validate the data:
- In the **Other Master Data** column, select the **All** check box.
  - Click **Validate**.

## Generating other Manufacturing master data by site

After selecting the **Manufacturing** check box and clicking **Generate** in the Generate Master Data (tccom0231m000) session, LN adds *sites* to these sessions:

- Production Models (tirpt2100m000)
- Products (tirpt2130m000)
- Product Subcontractors List (tisub1100m000)
- Product Subcontractor Bill of Material (tisub1110m000)
- Tool Numbers (titrp0102m000)
- Tool Kits (titrp0103m000)

### Process

To add a site to a *production model* and a *product*, LN completes these steps:

- 1 Check if the *work cell*, *repair cell*, *receiving warehouse*, and *quarantine warehouse* related to the production model have the same site. If no, a site is not added to the production model and the process continues checking the next production model. See note.
- 2 Assign the site of the production model's work cell to the production model in the Production Models (tirpt2100m000) session.
- 3 Add a site to the production model's item in the Items by Site (tcibd1550m000) and Items - Production by Site (tiipd0151m000) sessions, if not yet added during the Generating Manufacturing item data by site process step.
- 4 Add the site of the production model to the product in the Products (tirpt2130m000) session.
- 5 Repeat these steps for the other product models and products present in the multicompany environment.

To add a site to a subcontracting model and a subcontracting *bill of material (BOM)*, LN completes these steps:

- 1 Check if the warehouses of the materials related to the subcontracting model have the same site.  
If no, a site is not added and the process continues checking the next subcontracting model. See note.
- 2 Add the site of the warehouses to the subcontracting model in the Product Subcontractors List (tisub1100m000) session.
- 3 Add the site of the subcontracting model to the subcontracting *bill of material (BOM)* in the Product Subcontractor Bill of Material (tisub1110m000) session.

### Note:

If a site cannot be added, an error is listed on the report. You must manually adjust the sites of the related warehouses.

Next, you must add the correct site to the production or subcontracting model either manually or by rerunning the process by selecting the **Manufacturing** check box and clicking **Generate** in the Generate Master Data (tccom0231m000) session.

To add a site to a tool number and a toolkit, LN completes these steps:

- 1 Assign site of the warehouse related to the tool number to the tool number in the Tool Numbers (titrp0102m000) session.
- 2 Check if the tool numbers of the toolkit relate to the same site. If no, a site is not added to the toolkit and you must manually adjust the sites of the tool numbers and add a site to the toolkit either manually or by rerunning the process.
- 3 Assign the site of the tool numbers of the toolkit to the toolkit in the Tool Kits (titrp0103m000) session.

## Generating other Procurement master data by site

After selecting the **Procurement** check box and clicking **Generate** in the Generate Master Data (tccom0231m000) session, LN adds *sites* to these sessions:

- Delivery Patterns by Warehouse / BP / Item (tdipu0124m000)
- Planned Delivery Moments (Shipment Based) (tdipu0125m000)
- Planned Delivery Moments (Receipt Based) (tdipu0126m000)
- Purchase Offices (tdpur0112m000)
- Procurement User Profiles (tdpur0143m000)
- Purchase Contracts (tdpur3100m000)
- Purchase Contract Lines (tdpur3101m000)

### Process

The site that is added to these sessions is retrieved from the related warehouse.

## Generating other Sales master data by site

After selecting the **Sales** check box and clicking **Generate** in the Generate Master Data (tccom0231m000) session, LN adds *sites* to these sessions:

- Items - Sales Business Partner (tdisa0510m000)  
The ship-from site is retrieved from the ship-from warehouse, and the ship-to site is retrieved from the ship-to warehouse.
- Items - Sales Business Partner by Office (tdisa0190m000)  
The site is retrieved from the ship-from warehouse.

- Items - Sales Business Partner by Site (tdisa0190m100)  
The site is retrieved from the ship-to warehouse.
- Sales Offices (tdsls0512m000)  
The site is retrieved from the related warehouse.
- Sales User Profiles (tdsls0139m000)  
The site is retrieved from the related warehouse.
- Sales Contract Lines (tdsls3501m000)  
The site is retrieved from the related warehouse and ship-to warehouse.

**Note:** If a site is not specified for a warehouse related to an object in the above sessions, you must add sites to the warehouses and to the **Site** field in the above sessions.

## Generating other Service master data by site

After selecting the **Service** check box and clicking **Generate** in the Generate Master Data (tccom0231m000) session, LN adds *sites* to these sessions:

- **Installation Group**  
To fill the **Location Site** field, LN takes the site related to the department specified in the **Department** field. The **Repair Site** field is populated with the site related to the **Operations Department**.
- **Service Offices (tsmdm1100m000)**

Field:	Is populated with warehouse related to field:
Site	Warehouse
Site Incoming Parts	Warehouse Incoming Parts
Site Outgoing Parts	Warehouse Outgoing Parts

- Service User Cost Defaults (tsmdm1162m000)  
Sites are only applicable for *cost type Material*. The **Site** field is populated with the site related to the warehouse specified in the **Warehouse** field.
- **Items - Service Business Partner by Site (tsmdm2130m200)**  
The **Site** field is populated with the site related to the warehouse specified in the **Warehouse** field.

## Generating other Quality master data by site

After selecting the **Quality** check box and clicking **Generate** in the Generate Master Data (tccom0231m000) session, LN adds *sites* to these sessions:

- **Testing Combinations (qmptc0119m000)**

Field:	Is populated with warehouse related to field:
Site	From Warehouse
To Site	To Warehouse

- **Quality Series Defaults (qmptc0131m000)**

If a warehouse is specified, the **Site** field is populated with the site related to the warehouse.

If a department and no warehouse is specified, the **Site** field is populated with the site related to the department.

If an enterprise unit and no warehouse or department is specified, the **Site** field is populated with the site related to the enterprise unit.



## Chapter 10: Activate

### Activate sites - Activating the Sites concept

The final stage in the activation process is the actual *multisite* activation.

You can only execute this stage if:

- You have super user authorization.
- The activation status is **In Preparation**.

Before launching the activation:

- Complete and successfully validate the setup in the **In Preparation** stage.
- It is strongly recommended to create a backup of the company environment.

To activate the *multisite* concept:

- 1 Click **Activate** on the **Sites** tab in the **Concept Activation (tcomm4600m000)** workbench session.
- 2 Click Yes in the dialog box displaying the message: "This step will lock the companies to start the Data Upgrade Run. Do you want to continue?"  
**Note:** Locking the companies means that the sessions of the company environment are unavailable for end users during the execution of the process.
- 3 In the Initialize Data Upgrade Run (ttspt2200m000) session that starts, specify the settings for the data upgrade run.
  - To immediately start the data upgrade run, select the **Start Data Upgrade Engine After Initialization** check box and click **Initialize**. See step 8 for the steps carried out during the data upgrade run.
  - Otherwise, clear this check box and see next step.
- 4 Click **Initialize** to complete the creation of the data upgrade run and close the **Initialize Data Upgrade Run (ttspt2200m000)** session.
- 5 Start the Data Upgrade Runs (ttspt2500m000) session.
- 6 Select the data upgrade run created in the previous steps and if required, adjust the settings.
- 7 In the *appropriate menu*, select Data Upgrade Engine.
- 8 In the Data Upgrade Engine (ttspt2201m000) session that opens, check the run settings if required and click **Continue** to start the data upgrade run. You can run the process in simulation mode first.

The data upgrade run includes these steps:

- a Revalidate the master data setup.
- b Add sites to operational data such as orders, quotations, claims, shipments, and so on, that are not stored in history tables.
- c Set the **Sites** concept to **Active** in the **Concept Activation (tcomm4600m000)** workbench session.
- d Unlock the sessions of the company environment.

**Note:** This means that from this step onward, end users can resume working in the company environment.

- e Assign sites to history data, that is, orders, shipments, quotations, and so on that are present in history tables.

**Note:** In case of errors during the revalidation of the master data setup, an error report is created and the process stops. You must manually correct the errors and restart the data upgrade run starting the Data Upgrade Runs (ttspt2500m000) session and clicking Data Upgrade Engine.

## Chapter 11: Activating Job Shop by Site

### Activating Job Shop by Site for multisite

To use the Job Shop by Site functionality, the **Job Shop by Site** concept must be **Active** in the **Concept Activation (tceмм4600m000)** workbench session.

If the concept is **Active**, the *bill of material (BOM)* and *routing* for an item are managed on site level.

Before you can activate the **Job Shop by Site** concept, you must activate these concepts in the **Concept Activation (tceмм4600m000)** workbench session:

- **Item Type Product**
- **Standard Cost by Enterprise Unit**
- **Planning Cluster Mandatory**
- **Sites**

#### 1 Set parameter to **In Preparation**

Click **In Preparation** on the **Job Shop by Site** tab of the **Concept Activation (tceмм4600m000)** workbench session.

The status changes from **Inactive** to **In Preparation** for each company of the current multicompany environment, including the *financial companies*.

In addition, various sessions become available in which you must define and validate the master data that are required to use the Job Shop by Site functionality. These sessions are accessed from the **Concept Activation (tceмм4600m000)** workbench session.

#### 2 Preparation and validation

In this step, you must set up various master data. This is done for each individual logistic company or company of type **Both** in your multicompany environment. This master data is not present in financial companies.

This setup includes the creation of Job Shop Bills of Material and Job Shop Routings that replace the current Bills of Material and the current Item routings.

The setup is performed in the **Job Shop by Site** tab in the **Concept Activation (tceмм4600m000)** workbench session. See General procedure for concept activation and The Concept Activation (tceмм4600m000) workbench.

In activation activities for which data is generated, generate the data and validate the data as often as needed until no more errors are listed in the report.

The step titles in this list refer to the activation activity options in the **Concept Activation (tceмм4600m000)** workbench session. The sessions referred to in each step are accessed from the **Activation Activity (tceмм4610m000)** session.

**a Preliminary Validation**

In the **Validate Master Data for Job Shop by Site (timfc0200m000)** session, select the **Conflicting Concepts** check box to verify that no conflicting parameter settings are present. See **Validate** that no conflicting concepts exist.

**b Define BOM and Routing Parameters**

In the **Job Shop Master Data Parameters (tirou0100m000)** session, specify these company settings:

- **BOM Number Group**
- **BOM Order Series**
- **Default Job Shop Routing**
- Optionally, adjust these settings:
  - **Allow Multiple Job Shop BOMs per Item and Site**
  - **Use Site-specific Reference Operations Only**
  - **Approve Structures Automatically**

**c Define BOM and Routing Settings**

- 1 In the **Production Settings by Site (timfc0180m000)** session, specify these settings by site:
  - **Operation Rate Currency**
  - Clear the **Use Global Master Data Parameters** check box and optionally, specify BOM series and default job shop routings by site.
- 2 Validate the settings specified in steps b and c by selecting the **New Job Shop Settings** check box in the **Validate Master Data for Job Shop by Site (timfc0200m000)** session.
- 3 Validate the use of Subcontracting rate factors by selecting the **Subcontracting Rates** check box in the **Validate Master Data for Job Shop by Site (timfc0200m000)** session.

**d Generate Machine Types and Capacity Groups**

- 1 Generate machine types and machine groups in the **Generate Machine Types and Machine Groups (tirou4260m000)** session. See **Job Shop by Site activation - Generate machine types and machine groups**.
- 2 To add machines to operations, routing operations, and task relationships related to work centers that use machine types, use these options in the **Concept Activation (tce mm4600m000)** workbench session :
  - **Correct Machines on Generic Routing**
  - **Correct Machines on Routing**
  - **Correct Machines on Production Order**
  - **Correct Machines on Task Relationships**

See **Job Shop by Site activation - Generate machine types and machine groups**.

**3 Validate**

Validate the machine types and machine capacity groups by selecting the **Machine Types** and **Machine Groups** check boxes in the **Validate Master Data for Job Shop by Site (timfc0200m000)** session. See **Validating machine types and machine groups**.

**e Generate Reference Operations**

Generate reference operations in the **Generate Reference Operations (tirou4250m000)** session. In this session, reference operations are created from *tasks* and task relations. See **Job Shop by Site activation - Generating and validating reference operations**.

**f Generate New Operation Rates**

Generate new operation rates in the Generate Operation Rates (ticpr1251m000) session. See Job Shop by Site activation - Generate and validate operation rates.

**g Autofill Generic Routing**

If the Product Configurator (PCF) check box is selected in the Implemented Software Components (tccom0100s000) session, complete these steps:

- Use the **Autofill Generic Routing (tipcf3210m200)** session to add sites, reference operations, and machine types to generic routings.
- Validate the data by selecting the Existing Master Data check box in the **Validate Master Data for Job Shop by Site (timfc0200m000)** session.

See Autofill and validate generic routing.

**h Generate Job Shop Routing**

- 1 Use the **Generate Job Shop Routings (tirou4200m100)** session to copy routings from the **Item - Routings (tirou1101m000)** session to the **Job Shop Routings (tirou4100m000)** session and the **Standard Job Shop Routings (tirou4100m100)** session.

See Job Shop by Site activation - Converting sequences to revisions on the options to convert operation sequences to job shop routing versions.

- 2 Select the **Job Shop Routings** check box in the **Validate Master Data for Job Shop by Site (timfc0200m000)** session to check that routings are copied successfully, and that the routing codes present on orders and other objects match the generated routing codes.

For orders without routing codes, a check is performed whether routings have been generated that match the order quantities and revision reference dates.

See Validate Job Shop routings.

**i Generate Production and Job Shop BOM**

Use the **Generate Production and Job Shop Bills of Material (tibom3200m400)** session to copy *bills of material (BOMs)* from the **Bill of Material (tibom1110m000)** session to the **Job Shop Bills of Material (tibom3100m000)** and to the **Production Bills of Material (timfc3100m000)** session.

BOM lines whose expiry dates lie before the date specified in the Create From field of the **Generate Production and Job Shop Bills of Material (tibom3200m400)** session are not copied.

Revision controlled items are copied to a Job Shop BOM and a Production BOM.

Non-revision controlled items must be copied to a Job Shop BOM. Optionally, they can be copied to a Production BOM.

In the **Generate Production and Job Shop Bills of Material (tibom3200m400)** session, a check verifies that values are specified in the **BOM Number Group** and **BOM Order Series** fields in the **Job Shop Master Data Parameters (tirou0100m000)** session and in the **Production Settings by Site (timfc0180m000)** session for each site.

**j Define Machine Types in PCS Activities**

If the Project Control (PCS) check box is selected in the Implemented Software Components (tccom0100s000) session, use the **Activities (tipcs4101m000)** session to specify *machine types* for activities that are linked to *work centers* with machine groups. This is because machine types are mandatory for activities when the Job Shop by Site functionality is activated.

**k Autofill PCS Activities**

If the Project Control (PCS) check box is selected in the Implemented Software Components (tccom0100s000) session, use the **Autofill PCS Activities (tipcs4201m100)** session to add reference operations to activities. The task code is used as the reference-operation code. The reference operation related to the machine type and the work center of the activity is selected.

### 3 Activation

Click **Activate** on the **Job Shop by Site** tab of the **Concept Activation (tcomm4600m000)** workbench session.

**Note:** This button is only available for super users.

The status changes from **In Preparation** to **Active** for each company of the current multicompany environment at the end of the process.

The first step of the activation process is the automatic launch of the validation steps that you previously performed using the **Validate Master Data for Job Shop by Site (timfc0200m000)** session.

References to routings and BOMs are converted to Job Shop routings and Job Shop BOMs for these objects:

- Planned orders of type **Planned Production Order**
- Production orders in the **Production Orders (tisfc0501m000)** session.
- Production order advice in the **Production Order Advice (whina3100m000)** session.
- Testing combinations in the **Testing Combinations (qmptc0119m000)** session.
- Requisitions in the **Purchase Requisitions (tdpur2501m000)** session.
- Requests for Quotation in the **Requests for Quotation (tdpur1501m000)** session.
- Costing breaks in the **Costing Breaks - Production Resources (tppdm3102m000)** session.

This master data is corrected:

- Sub Work Centers (type will be Main Work Center)
- CPQ templates
- Testing Combinations
- Item Production

## Job Shop by Site activation - Generate machine types and machine groups

If the Job Shop by Site functionality is activated, machines are converted to *machine types*. The ID code of a machine becomes the ID code of the generated machine type. A machine type and the number of machines used in a work center constitute a *machine capacity group*.

Using machine types and machine capacity groups for work centers is optional. If a work center uses machine types and machine capacity groups, an operation for a work center must refer to a machine type of the work center.

If the Job Shop by Site functionality is not activated, operation A for work center X can refer to a machine, and operation B for the same work center can be without a reference to a machine. After the implementation of the Job Shop by Site functionality, either all operations, or none of the operations of a work center must refer to a machine.

Consequently, if you choose to use machine types for work center X, during the activation of the Job Shop by Site functionality, machine types must be added to work center X's operations without machine types.

### Generating machine types, machine groups and adding machines to operations

During the preparation stage of the activation procedure, complete these steps:

- 1 In the **Generate Machine Types and Machine Groups (tirou4260m000)** session, generate machine types and machine capacity groups for work centers.
- 2 In these sessions, add machines to operations, routing operations, and task relationships related to work centers that use machine types:
  - **Correct Machines on Routing Operations (tirou1102m100)**
  - **Correct Machines on Generic Routing Operations (tipcf3120m100)**
  - **Correct Machines on Production Order Operations (tisfc0110m200)**
  - **Correct Machines on Task Relationships (tirou0104m100)**
- 3 To ensure that the correct machines are specified for planned orders, generate planned orders in the **Generate Order Planning (cprp1210m000)** session after running the **Correct Machines on Routing Operations (tirou1102m100)** session.

In the **Generate Order Planning (cprp1210m000)** session, planned orders are generated based on the machines corrected for routing operations in the **Correct Machines on Routing Operations (tirou1102m100)** session.

After the activation of the Job Shop by Site functionality, the machines are converted to machine types.
- 4 Validate the machine types and capacity groups by selecting the **Machine Types** and **Machine Groups** check boxes in the **Validate Master Data for Job Shop by Site (timfc0200m000)** session. See Validating machine types and machine groups

## Job Shop by Site activation - Generate and validate operation rates

In the Generate Operation Rates (ticpr1251m000) session, the existing operation rates are copied to the Operation Rates (ticpr1151m000) session.

The new operation rates have these properties:

- Date effective
- The generated operation rates are without sites. Therefore, they are applicable for all sites.
- These Types of Operation Costs are supported:
  - **Labor**
  - **Labor Setup**
  - **Machine**
  - **Labor Overhead**
  - **Machine Overhead**

The new operation rates are approved upon generation. Therefore, you cannot add sites to these rates or insert any other changes.

An exception to this rule is the operation rates of type **Labor**. These operation rates are copied to rates of type **Labor** and type **Labor Setup**. These rates can be changed, and must be approved manually.

### Validating operation rates

After you have generated the machine types, machine groups, reference operations and operation rates, perform the **Operation Rates** validation in the Validate Master Data for Job Shop by Site (timfc0200m000) session.

The **Operation Rates** validation checks whether, in the Operation Rates (ticpr1151m000) session, operation rates have been generated that have an ID code that is identical to the existing ID codes of the operation rates present in these sessions:

- **Stations (tiasl1545m000)**
- **Work Centers (tirou0101m000)**
- **Reference Operations (tirou4150m000)**
- **Machine Capacity Groups (tirou4161m000)**
- **Work Cells (tirpt0140m000)**

In these sessions, operation rates are present that were defined before the Job Shop by Site functionality is set up. If such rates are present with ID codes that do not match the new operation codes generated in the Operation Rates (ticpr1151m000) session, these are listed in the validation report and you must manually adjust the ID codes.

LN also checks whether unapproved operation rates are still present. Operation rates of type **Labor Setup** are generated without being approved. These operation rates must be manually approved or removed.

## Validating machine types and machine groups

Validate machine types and capacity groups by selecting the **Machine Types** and **Machine Groups** check boxes in the **Validate Master Data for Job Shop by Site (timfc0200m000)** session.

The **Machine Groups** validation checks whether the machine type ID codes generated in the Machine Capacity Groups (tirou4161m000) session match the machine ID codes present in these objects for the related work center:

- Generic routings
- Production orders
- Planned production orders

The **Machine Types** validation checks whether, in the **Machine Type** field of the **Serialized Items (tscfg2100m000)** session, machine ID codes are present that match the machine type ID codes generated in the **Machine Types (tirou4160m000)** session.

If yes, the machine codes are converted to machine type codes on the production orders, planned production orders, generic routings, and serialized items.



Production orders, planned production orders, generic routings, and serialized items whose machine codes do not match the generated machine type ID codes, are listed on the validation report. The machine codes must be manually adjusted.

## Job Shop by Site activation - Generating and validating reference operations

In the **Generate Reference Operations (tirou4250m000)** session, reference operations are created from *tasks* and task relations.

Tasks and reference operations are modeled differently. A task consists of task details and, optionally, multiple task relationships. The task relationships constitute a sublevel of the task. In the reference operation, the task relationship and the task information are presented at the same level.

Therefore, as a rule, multiple reference operations are created from one task. The only exception is a task without a default machine and default work center, and the **Use Site-specific Reference Operations Only** check box is cleared in the **Items - Production by Site (tiipd0151m000)** session. In that case, a single reference operation is generated from a task.

The ID of a reference operation is composed of the reference operation code, machine type, site, and work center of the reference operation.

Based on a task and the related task relationships, these reference operations are generated:

- A default reference operation.
- One reference operation for each site, if the **Use Site-specific Reference Operations Only** check box is selected in the **Items - Production by Site (tiipd0151m000)** session.
- One or more reference operations based on the default settings of the task defined in the **Tasks (Reference Operations) (tirou0103m000)** session:
  - If a default work center and a default machine is specified, a reference operation is created for the machine type, work center, and the site related to the work center.
  - If only a default work center is specified, a reference operation is created for the work center and the site related to the work center.
  - If only a default machine is specified, a reference operation is created for the machine type and the site related to the machine type.
- One or more reference operations based on these settings of the task relationship defined in the **Task Relationships (tirou0104m000)** session:
  - If a work center and a machine are specified, a reference operation is created for the machine type, work center, and the site related to the work center.
  - If only a work center is specified, a reference operation is created for the work center and the site related to the work center.
  - If only a machine is specified, a reference operation is created for the machine type and the site related to the machine type.

**Note:** Machines are converted to machine types in the Job Shop by Site activation process. See Job Shop by Site activation - Generate machine types and machine groups.

### Validating reference operations

After you have generated reference operations, validate the reference operations by selecting the **Reference Operations** check box in the Validate Master Data for Job Shop by Site (timfc0200m000) session.

For tasks that are present in generic routings, PCS activities, production orders, and testing combinations, this validation checks whether the task ID matches the ID of a reference operation generated in the **Generate Reference Operations (tirou4250m000)** session.

The matching tasks present on the generic routings, PCS activities, production orders, and testing combinations are converted to reference operations when the Job Shop by Site functionality is activated.

If no matching tasks are present, you cannot run these sessions and consequently, the Job Shop by Site functionality cannot be activated:

- **Generate Job Shop Routings (tirou4200m100)**. This session is used to copy routings from the **Item - Routings (tirou1101m000)** session to the **Job Shop Routings (tirou4100m000)** and **Standard Job Shop Routings (tirou4100m100)** sessions.
- **Autofill Generic Routing (tipcf3210m200)**. This session is used to add sites, reference operations, and machine types to the Job Shop routing. See Autofill and validate generic routing

## Job Shop by Site activation - Converting sequences to revisions

To copy routings from the **Item - Routings (tirou1101m000)** session to the **Job Shop Routings (tirou4100m000)** and **Standard Job Shop Routings (tirou4100m100)** sessions, the routing operation sequences must be converted to routing revisions.

Before the implementation of the Job Shop by Site functionality, a routing operation had one or more versions. A version was represented by a sequence number and an effective date. Thus, each operation had one or more sequences, and each sequence had an effective date. For example, operation 10 could have three sequences, each with different effective dates than operation 20.

When the Job Shop by Site functionality is activated, the new Job Shop routings are used. For a Job Shop routing, versions are defined as revisions in the routing header instead of operation sequences.

### Creating routing revisions

In the **Generate Job Shop Routings (tirou4200m100)** and **Generate Production and Job Shop Bills of Material (tibom3200m400)** sessions, these options are available to convert operation sequences to revisions:

#### Minimal

One revision is created from the operation sequences that are present on or after the date specified in the **Create From** field. For each operation, the sequence that is effective on the current date is added as an operation to the new revision. The date specified in the **Create From** field is the effective date of the new revision and the new operations.

**Note:** Sequences that are not effective on the current date are not converted.

For example, the old routing or BOM has operations 10 and 20. Operation 10 has sequences 10/1, 10/2, and 10/3. Sequence 10/2 is effective on the current date. Operation 20 has sequences 20/1, 20/2, 20/3, and 20/4. Sequence 20/1 is effective on the current date.

Consequently, revision 001 is created with operations 10 and 20. Operation 10 is created from sequence 10/2, and operation 20 is created from sequence 20/1. The other sequences are not converted.

#### Extended

Multiple revisions can be created from the operation sequences.

One revision is created for each effective date and expiry date present in the operation sequences, that falls after the date specified in the **Create From** field. An exception is that effective or expiry dates that do not differ by more than one day are converted to a single revision.

The date specified in the **Create From** field is the effective date of the first new revision and the new operations.

**Note:** Sequences that are not effective after the date specified in the **Create From** field are not converted.

Revisions have no expiry dates. A revision is effective until the next revision becomes effective.

If the **Validate and Approve** check box is selected in the Generate Job Shop Routings (tirou4200m100) session or the Generate Production and Job Shop Bills of Material (tibom3200m400) session, the newly created revisions receive the **Approved** status, except for revisions with effective dates in the future. Revisions with effective dates in the future receive status **New**, which allows you to modify these revisions.

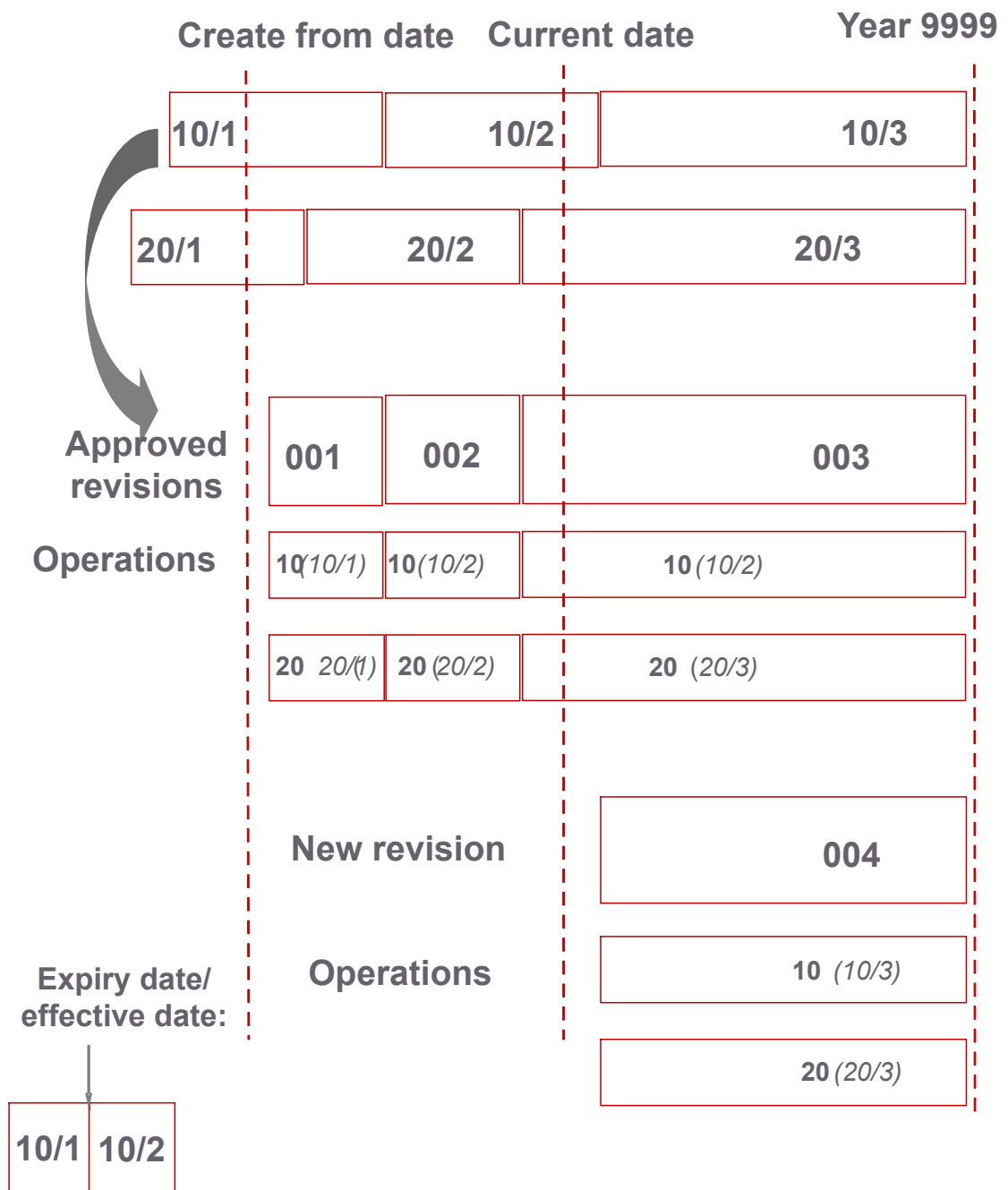
## Creating revisions using the Extend option - example

The old routing or BOM has operations 10 and 20. Operation 10 has sequences 10/1, 10/2, and 10/3. Operation 20 has sequences 20/1, 20/2, and 20/3.

This diagram displays the old operation sequences and the revisions and operations created from them using the **Extended** option in the **Generate Job Shop Routings (tirou4200m100)** session or the **Generate Production and Job Shop Bills of Material (tibom3200m400)** session.

In the diagram, the upper two bars represent the operation sequences. The subsequent bars represent the resulting revisions and operations.

The date specified in the **Create From** field is the effective date of the first revision, 001.



In the diagram, the expiry date of an operation sequence is the same as the effective date of the next operation sequence. Thus, the expiry date of 10/1 is identical to the effective date of 10/2.

Consequently, one revision is created for the expiry date of 10/1 and the effective date of 10/2, another revision for the expiry date of 20/2 and the effective date of 20/3, and so on.

The first revision is 001. The effective date of the first revision equals the date specified in the **Create From** field. Revision 001 ends where the next revision, 002 starts. The effective date of revision 003 marks the expiry of 002.

Revision 004 partly parallels 003. This is because revision 004 is not yet approved. When 004 receives the **Approved** status, the effective date of 004 will mark the expiry of revision 003.

Typically, the expiry date of the last BOM or operation sequence is set to the maximum date of 12/31/9999.

Because each routing has two operations, 10 and 20, the new revisions have two operations.

## Autofill and validate generic routing

This step is performed only if the Product Configurator (PCF) check box is selected in the Implemented Software Components (tccom0100s000) session.

Various values generated in previous steps must be added to the Job Shop routing in the **Job Shop Routing Operations (tirou4101m000)** session.

In the **Autofill Generic Routing (tipcf3210m200)** session, add these values to the Job Shop routing:

- The *site* from the **Items - Production by Site (tiipd0151m000)** session.
- The *task* from the **Tasks (Reference Operations) (tirou0103m000)** session. The task code is copied to the Reference Operation field in the **Job Shop Routing Operations (tirou4101m000)** session.
- The machine code of the machine related to the work center of the operation is copied to the **Machine Type** field in the **Job Shop Routing Operations (tirou4101m000)** session, if the work center is related to machine groups. If not, the machine type is not specified.

### Validating generic routings

Select the Existing Master Data check box in the **Validate Master Data for Job Shop by Site (timfc0200m000)** session to validate these data generated in the **Autofill Generic Routing (tipcf3210m200)** session:

- Reference operation
- Machine types
- The basic number of machines

For PCS Activities, a check is performed whether reference operations and machine types are added.

## Validate Job Shop routings

Select the **Job Shop Routings** check box in the **Validate Master Data for Job Shop by Site (timfc0200m000)** session to check that routings are copied successfully from the **Item - Routings (tirou1101m000)** session to the **Job Shop Routings (tirou4100m000)** and **Standard Job Shop Routings (tirou4100m100)** sessions, and that the routing codes present on orders and other objects match the generated routing codes.

When the Job Shop by site functionality is activated, routings are mandatory for planned production orders and production orders. For planned production orders and production orders without routing codes, a check is performed for whether routings have been generated that match the order quantities and revision reference dates.

For orders and other objects with a routing, these checks are performed:

- Does the routing code of an order or other object match one of the routing codes present in the **Job Shop Routings (tirou4100m000)** session?
- Is an approved revision of the routing present in the **Job Shop Routings (tirou4100m000)** session whose revision date matches the reference date of the order or other object?

The same checks are performed for these objects:

- Planned orders of type **Planned Production Order** in the **Planned Orders (cprrp1100m000)** session.
- Production orders in the **Production Orders (tisfc0501m000)** session.
- Production order advice in the **Production Order Advice (whina3100m000)** session.
- Testing combinations in the **Testing Combinations (qmptc0119m000)** session.
- Requisitions in the **Purchase Requisitions (tdpur2501m000)** session.
- Requests for Quotation in the **Requests for Quotation (tdpur1501m000)** session.
- Costing breaks in the **Costing Breaks - Production Resources (tpedm3102m000)** session.

For planned production orders and production orders without a routing, LN checks whether routings are present that have these properties:

- Planned production orders
  - Effective on the order reference date
  - Applicable for the order quantity
  - Approved
  - The **Use for Planning** check box is selected.
- Production orders
  - Production orders that are no rework orders and with status up to **Completed**.
  - Effective on the order reference date
  - Applicable for the order quantity
  - Approved

## Validate that no conflicting concepts exist

To validate that no parameters are set that conflict with the Job Shop by Site functionality, select the Conflicting Concepts check box in the **Validate Master Data for Job Shop by Site (timfc0200m000)** session.

These check boxes must be cleared:

- **Use Shared Work Centers** in the **Job Shop Master Data Parameters (tirou0100m000)** session.
- **Workload Control Implemented** in the **Planning Parameters (cprpd0100m000)** session.

These check boxes must be selected:

- **Version Control** in the **Production Order Parameters (tisfc0100s000)** session.
- **PBOM History** in the **Engineering Data Management Parameters (tiedm0100m000)** session, if the **Engineering Revisions** check box is selected in the **Implemented Software Components (tccom0100s000)** session.

**Table sharing**

The Item Production (tiipd001) and Item Production Defaults (tiipd002) tables must not be shared.

This is because when sites are activated, the **Job Shop Site** field of the **Item - Production (tiipd0101m000)** session contains the site of the BOM and the routings for the item related to the current company. Sites are activated if the Sites parameter is set to **Active** in the **Concept Activation (tcepm4600m000)** workbench session.

If these tables are shared, and you activate sites, the same site is allocated to the item for each company, whereas this site only applies to the current company. Therefore, you cannot activate sites properly if the item Production (tiipd001) and Item Production Defaults (tiipd002) tables are shared.

## Chapter 12: Activating Resources by Site

### Activating Resources by Site for multisite

To use the Resources by Site functionality, the **Resources by Site** concept must be set to **Active**.

The activation status is displayed in the **Concept Activation (tcomm4600m000)** workbench session and in the **Enterprise Structures** tab of the **Implemented Software Components (tccom0100s000)** session.

To set the activation status to **Active**, a manual activation process may be required. See Multisite activation outline for the conditions that determine whether manual activation of the **Resources by Site** concept is required.

The manual activation process is performed in the **Concept Activation (tcomm4600m000)** workbench session.

Before you can manually activate the **Resources by Site** functionality, the status of the other multisite concepts must be set to **Active**.

The manual activation process consists of these steps:

**1** Directly available after LN installation

After installing the latest version of LN, when starting the **Subcontracting Parameters (tisub0100m000)** session and the **Production Settings by Site (timfc0180m000)** session, these parameters are set automatically:

- For **Product Subcontracting** and **Operation Subcontracting** the purchase order series and purchase order type fields are left blank.
- The **Define Order Number By** field is set to **Procurement**.

**2** Set parameter to **In Preparation**

**a** Click **In Preparation** on the **Resources by Site** tab of the **Concept Activation (tcomm4600m000)** workbench session.

**b** In the **In Preparation (tccom0234m000)** session, click **Run** to launch the **In Preparation** process. If required, you can select the **Simulate** check box to run the update process in simulation mode before launching the actual process.

In this process, these steps are completed for each company of the current multicompany environment, including the financial companies:

- For external sites and external planning clusters, various new fields become available and are given initial values.
- The status changes from **Inactive** to **In Preparation**.

See Resources by Site – external planning clusters and sites.



### 3 Preparation and validation

In this step, you must perform these activation activities for the companies of your multicompany environment:

**a** Generate Subcontractors

Subcontractors are generated in the **Generate Subcontractors (tisub0220m900)** session. See Generating subcontractors.

**b** Set Product Subcontracting Lead Time

Lead times are defined in the **Set Product Subcontracting Lead Time (tisub1200m900)** session. See Product subcontracting lead times.

**c** Generate Operation Subcontractors List

Operation subcontractors lists are generated in the **Generate Operation Subcontractors List (tisub2200m900)** session. See Generating the operation subcontractors list.

**d** Generate Subcontracting Rates

To generate subcontracting rates for the **Operation Subcontracting Rates (ticpr1161m000)** session, the **Generate Subcontracting Rates (ticpr1261m000)** session is used. See Generating subcontracting rates.

**e** Generate Item Production by Site

Production settings by item and site are generated in the **Generate Item Production by Site (tiipd0251m000)** session. See Generating item – production settings by site.

**f** Generate Supplying Relationships

To create the new setup for supplying relationships, the **Generate Supplying Relationships (cprpd7231m000)** session is used. See Generating supplying relationships.

**g** Generate Suppliers by Site

The **Generate Suppliers by Site (tdipu0290m200)** session is used to generate resources of type Supplier. See Generating suppliers by site.

**h** Generate Resources

In the preparation stage, the **Generate Resources (cprpd2201m000)** session is used to generate resources. See Generating resources.

**i** Validate

The final step of the preparation stage is the validation of the master data created in the previous activation activities. See Validating resources by site .

**j** Activate

See the next step for details.

The activation activities are not applicable for financial companies.

The validate step verifies if activation activities are performed correctly. You must validate each activation activity after you complete the activation activity. Incomplete or incorrect data may affect the results of subsequent activation activities.

You must also perform the validation as the final step of the preparation stage, see step i) in the previous list. When validating activation activities, validate the data as often as needed until no more errors are listed in the report.

To validate an activation activity, in the **Activation Activity (tceмм4610m000)** session, select **Validate Resources by Site** on the *appropriate menu* and in the **Validate Resources by Site (tccom0235m000)** session, select a validation option.

The step titles in this list refer to the activation activity in the **Concept Activation (tceмм4600m000)** workbench session. The sessions referred to in each step are accessed from the **Activation Activity (tceмм4610m000)** session.

See General procedure for concept activation on how to perform activation activities.

#### 4 Activation

Click **Activate** on the **Resources by Site** tab of the **Concept Activation (tceмм4600m000)** workbench session.

**Note:** This button is only available for super users.

The status changes from **In Preparation** to **Active** for each company of the current multicompany environment at the end of the process. See Setting the Resources by Site concept to Active .

## Resources by Site – external planning clusters and sites

When the **Resources by Site** concept is set to **In Preparation**, for external sites and external planning clusters, various new fields become available, and values are set for these fields.

The values that are set for these new fields depend on the existing setup of the external sites and planning clusters.

When you click **In Preparation** in the **Concept Activation (tceмм4600m000)** workbench session, the **In Preparation (tccom0234m000)** session starts in which you must launch the update process that generates the new fields and sets the values for these fields.

If required, you can run the process in simulation mode before launching the actual update process. In this way, you can adjust the site and planning cluster setup to optimize the results before launching the actual process.

For external sites, during the update process these fields become available:

- **Customer Site**
- **Subcontractor Site**
- **Ship-from Business Partner**
- **Exclude From Enterprise Planning**

For external planning clusters, during the update process these fields become available:

- **Holds Subcontractor Sites**
- **Customer Site**
- **Exclude from Enterprise Planning**

#### External sites

- **Customer Site**

The **Customer Site** check box is selected for sites that belong to external planning clusters. If a subcontractor is specified in the **Subcontractor** field, the subcontractor is removed.

For sites that belong to internal planning clusters, the **Customer Site** check box is selected in these cases:

- If a sold-to business partner is specified, and no subcontractor is specified.
- If both a subcontractor and a sold-to business partner are specified for the site and no subcontracting work center or a product subcontracting model is linked to the site. In this case, the subcontractor is removed.

- **Subcontractor Site**

This check box can be selected for sites that belong to internal planning clusters. This check box is selected in these cases:

- If a subcontractor is selected in the **Subcontractor** field, and no sold-to business partner is specified.
- If both a subcontractor and a sold-to business partner is specified, this check box is selected if a subcontracting work center or a product subcontracting model is linked to the site. In this case, the sold-to business partner is removed.

**Note:**

If no sold-to business partner and no subcontractor are specified for the site, the **Customer Site** and **Subcontractor Site** check boxes are cleared. The site is not valid for **Resources by Site** activation. Therefore, you must manually change the site during the **In Preparation** stage. You can set up the site as a customer site or a subcontractor site, or you can make the site internal.

- **Ship-from Business Partner**

For subcontractor sites, that is, when the **Subcontractor Site** check box is selected, the ship-from business partner is retrieved from this data:

- The subcontractor warehouse of the first subcontracting model found for the subcontractor site, or, if not found:
- Via the buy-from business partner data of the subcontractor, which can be any of this data:
  - The linked ship-from business partner
  - The subcontractor's ship-from data, if, present
  - The parent business partner, or the parent's ship-from business partner

- **Exclude From Enterprise Planning**

This check box is cleared.

Sites are maintained in the **Sites (tceem0150m000)** session.

### External planning clusters

- **Holds Subcontractor Sites**

This check box is cleared.

- **Customer Site**

This check box is selected when the planning cluster is external. If this check box is selected, the planning cluster is used in planning for VMI Forecast. This check box is available if the **VMI (supplier side)** check box is selected in the **Implemented Software Components (tccom0100s000)** session.

**Note:**

Internal sites can be linked to internal planning clusters. A site and a planning cluster is internal if the **External Site** and the **External** check boxes are cleared, respectively.

External sites can be linked to internal and external planning clusters.

Planning clusters are maintained in the **Planning Clusters (tcomm1135m000)** session.

## Generating subcontractors

The next step of the manual activation of the Resources by site functionality is generating this data:

- Subcontractors
- Subcontractor locations
- Subcontractors by site

This data is generated in the **Generate Subcontractors (tisub0220m900)** session.

This data is defined for operation subcontracting and product subcontracting.

You can view and maintain the generated data in these sessions:

- Subcontractors in the **Subcontractors (tisub0120m000)** session
- Subcontractor locations in the **Subcontractor Locations (tisub0125m000)** session
- Subcontractors by site in the **Subcontractors by Site (tisub0130m000)** session
- All generated data combined in the **Subcontractors by Site (tisub0130m000)** session.

A subcontractor is a business partner from whom you buy the production of one or more operations, or an entire product. The definition of a subcontractor is based on a buy- from business partner.

A subcontractor location is defined as a combination of subcontractor and subcontracting site. The subcontracting site represents the factory at which the subcontractor performs the subcontracted activities.

A subcontractor can have multiple subcontractor sites. A subcontractor site is defined as an external site. When a subcontractor is assigned for production, this includes the location of the subcontractor.

The **Subcontractors by Site (tisub0130m000)** session lists the subcontractors that are available for production sites. Multiple subcontractors can be available for a production site.

### Operation subcontracting

To generate subcontractors for operation subcontracting, the subcontractors are taken from the **Subcontractor** field in the **Work Center (tirou0601m000)** session or the **Subcontractor** field on production order operations.

The subcontractor location is generated based on the site of the work centers.

The information in the **Subcontractors by Site (tisub0130m000)** session is generated in this way::

- The production site is retrieved from the site of production orders, job shop routings, or generic routings. For generic routings, the site is retrieved from the **Job Shop Site** field in the **Item - Production (tiipd0101m000)** session.
- The **Transportation Time Method** field is set to **Derived**.
- The carrier is retrieved from the buy-from business partner of the production site.
- The transportation time is calculated from the distance between the production sites and the subcontractor sites.

**Note:**

- Work centers defined in the **Work Center (tirou0601m000)** session are not selected to generate subcontractors, subcontractor locations, or subcontractors by site in these cases:
  - The **Subcontractor Independent** check box is selected.
  - No subcontractor is specified in the **Subcontractor** field.
- If two work centers are linked to the same business partner, the first work center that is retrieved creates a subcontractor.
- The work center can be linked to a production site. In this case, the subcontractor location is the same as the production site. This applies to operation subcontracting, only subcontracted operations can be performed at the production site.

### Product subcontracting

The subcontractors in the **Subcontractors (tisub0120m000)** session are generated from the **Subcontractor** field of the **Product Subcontracting Model (tisub1600m000)** session.

The subcontractor locations in the **Subcontractor Locations (tisub0125m000)** session are generated from the site of the warehouse specified in the **Subcontractor Warehouse** field of the **Product Subcontracting Model (tisub1600m000)** session.

The production sites in the **Subcontractors by Site (tisub0130m000)** session are generated from the site specified in the **Production Site** field of the **Product Subcontracting Model (tisub1600m000)** session.

### Using the Generate Subcontractors (tisub0220m900) session

The selection ranges in this session are used to specify the data ranges for which subcontractors, subcontractor locations, and subcontractors by site are to be generated:

- The **Business Partner** range is used to specify a range of buy-from business partners.
- The **Subcontractor Site** range is used to specify a range of sites linked to work centers.
- The **Production Site** range is used to specify a range of sites linked to routings.

The **Routing/Model Revision Status** range fields are used to specify the revision status range of the routings and the model revisions for which to generate subcontractors, subcontractor locations, and subcontractors by site.

The **Skip Generic Routing before** field is used to narrow down the selection of generic routes. Generic routes expired before the date specified in this field are excluded.

Job shop routings and subcontracting models that are linked to customized items whose projects are closed are not used to create data in the **Subcontractors by Site (tisub0130m000)** session.

Closed production order operations are not used to create subcontractors, subcontractor locations, and subcontractors by site.

## Product subcontracting lead times

When the **Resources by Site** concept is activated, these product subcontracting lead times are supported:

- Transportation time from

The transportation time from the subcontractor to the manufacturer, that is, from the subcontractor site to the production site.

- Transportation time to  
The transportation time from the manufacturer to the subcontractor, that is, from the production site to the subcontractor site.
- Supply time  
The production time of the subcontractor.

The transportation times are specified in the **Subcontractor Location (tisub0625m000)** session and apply to operation subcontracting and product subcontracting. The transportation times can be manually specified or derived from these data:

- The distance between the ship-from business partner and the address of the warehouse defined in the **Items - Purchase Business Partner by Site (tdipu0190m000)** session.
- The calendar of the carrier.

The supply times for product subcontracting are specified in the **Product Subcontracting Model (tisub1600m000)** session.

If the **Resources by Site** concept is inactive, the lead times for regular purchase orders maintained in the **Item - Purchase Business Partner (tdipu0610m000)** session are also used as subcontracting lead times.

When the **Resources by Site** concept has the **In Preparation** status, the subcontracting lead times must be converted to the new lead times.

For this purpose, the **Set Product Subcontracting Lead Time (tisub1200m900)** session is used.

In this session, you can select the lead times that must be added up to compose the fixed supply times of the production models. You can select these lead times:

- **Internal Processing Time**
- **Supply Time**
- **Business Partner Safety Time**
- **Additional Lead Time**

You can specify these ranges for which the lead times are to be converted:

- Production sites
- Products
- Subcontractors
- Ship-from business partners
- Model revision statuses

**Note:**

Alternatively, you can manually specify the lead times in the **Subcontractor Location (tisub0625m000)** session and the **Product Subcontracting Model (tisub1600m000)** session.

## Generating the operation subcontractors list

After the subcontractors, subcontractor locations, and the subcontractors by site data have been generated, you can generate the operation subcontractors list. The operation subcontractors list is generated in the **Generate Operation Subcontractors List (tisub2200m900)** session.

You can maintain the generated operation subcontractors list data in the **Operation Subcontractors List (tisub2100m000)** session.

The information in the **Operation Subcontractors List (tisub2100m000)** session is generated from this data:

- The production site in the **Production Site** field is retrieved from the site of production orders or job shop routings.
- The reference operation in the **Reference Operation** field is taken from production order operations, job shop routings, or generic routings.
- The subcontractor in the **Subcontractor** field is taken from subcontracting work centers.
- The subcontractor site in the **Subcontractor Site** field is taken from the site of subcontracting work centers.
- The effective and expiry dates in the **Effective Date** and **Expiry Date** fields are taken from routing operation start and end dates. If a subcontractor is generated from routing A, and routing B has the same subcontractor but with an earlier effective date or a later expiry date, the date range for the subcontractor is extended to cover the effective periods for both routings.
- The warehouse in the **Warehouse** field is taken from the work centers. If no warehouse is linked to a work center, the first warehouse that is linked to the subcontractor site is taken, but only if the subcontractor site is external. If the subcontractor site is not external, the warehouse is not linked.
- The capacity by week in the **Capacity / Week** field is taken from the calendar of the work center.
- The **Use for Planning** check box is selected for the first subcontractor that is created for a combination of site and reference operation. For subsequent combinations, this check box is cleared.
- The **Available for Planning** check box is selected.
- The **Use for Costing** check box is selected in the same way as the **Use for Planning** check box.

### Using the Generate Operation Subcontractors List (tisub2200m900) session

The selection ranges in this session are used to specify the data ranges for which subcontractors, subcontractor locations, and subcontractors by site are to be generated:

- The **Subcontractor** range is used to specify a range of subcontractors from the **Subcontractors (tisub0120m000)** session. These are the subcontractors that have been generated when performing activation activity **Generate Subcontractors**.
- The **Subcontractor Site** range is used to specify a range of sites linked to work centers.
- The **Production Site** range is used to specify a range of sites linked to routings.

The **Routing Revision Status** range fields are used to specify the revision status range of the routings and the model revisions for which to generate operation subcontractors.

The **Skip Generic Routing before** field is used to narrow down the selection of generic routes. Generic routes expired before the date specified in this field are excluded.

Job shop routings that are linked to customized items whose projects are closed are not used to create data in the **Subcontractors by Site (tisub0130m000)** session.

Closed production order operations are not used to create operation subcontractors.

### Generating reference operations

If required, reference operations are generated in this session. This is required if a reference operation refers to a specific work center, because the reference operations that are used in the **Operation Subcontractors List (tisub2100m000)** session are related to global reference operations or specific sites.

A reference operation for a subcontracting operation can be defined at these levels:

- Globally for all sites
- For a specific site
- For a specific work center

A reference operation for the operation subcontractor list can be defined at these levels:

- Globally for all sites
- For a specific site

When a subcontractor operation for an order or a routing refers to a reference operation that is defined for a specific work center, a new reference operation is generated. This is done by copying the data of the reference operation of the work center to the new reference operation related to the site. In this way, the new reference operation is available for new operation subcontractors that you may need to create.

## Generating subcontracting rates

If the **Resources by Site** concept is inactive, you can define subcontracting rates in the **Subcontracting Rates (ticpr1160m000)** session and the **Subcontracting Rates by Project (tipcs1160m000)** session. Alternatively, you can define subcontracting rates for project items by defining cost calculation codes for specific projects.

When the **Resources by Site** concept is active, subcontracting rates for standard items and for project items are defined in the **Operation Subcontracting Rates (ticpr1161m000)** session, but you can still define subcontracting rates for project items by defining cost calculation codes for specific projects.

To generate subcontracting rates for the **Operation Subcontracting Rates (ticpr1161m000)** session, the **Generate Subcontracting Rates (ticpr1261m000)** session is used.

### Using the Generate Subcontracting Rates (ticpr1261m000) session

In the **Generate Subcontracting Rates (ticpr1261m000)** session, you can use these options to specify the source from which the subcontracting rates are to be retrieved:

- Select the **Project Specific Rates** check box if the subcontracting rates must be generated from a specific project.
- In the **Project (PCS)** field, select the project from which the subcontracting rates must be generated.
- In the **Cost Calculation Code** range fields, specify the range of cost calculation codes of the subcontracting rates from which the subcontracting rates must be generated. These are the cost calculation codes from the **Subcontracting Rates (ticpr1160m000)** session.

In these fields, you can specify the objects for which the subcontracting rates must be generated:

- In the **Subcontractor** range fields, specify the range of subcontractors for whom the subcontracting rates must be generated.



- In the **Reference Operation** range fields, specify the range of reference operations for which the subcontracting rates must be generated.
- In the **From Item** range fields, specify the range of items for which the subcontracting rates must be generated.

## Generating item – production by site settings

When the **Resources by Site** concept is active, for items related to a product subcontracting model, settings must be present in the **Item - Production by Site (tiipd0151m100)** session and the **Item - Production (tiipd0101m000)** session.

In addition, for production sites, settings must be present in the **Production Settings (timfd0180m000)** session.

If not present, these settings are generated in the **Generate Item Production by Site (tiipd0251m000)** session.

In the **Site** range fields, you can specify the range of production sites for which to generate item – production data by site, item – production data, and production settings.

In the **From Product** range fields, you can specify the range of items for which to generate item – production data by site, item – production data, and production settings.

In the **Based on** group box, you can specify the range of buy-from business partners and the production model statuses from which the item – production data by site, item – production data, and production settings must be generated.

## Generating supplying relationships

When the **Resources by Site** concept is inactive, supplying relationships are maintained in the **Supplying Relationships (cprpd7130m000)** session. When the **Resources by Site** concept is activated, the supplying relationships are maintained in the **Supplying Relationships (cprpd7131m000)** session and they are set up in a different way. These are the differences:

- The new supplying relationships are defined by plan item, whereas previously, supply relationships could be defined by planning cluster, item group, or plan item.
- Only one supplying relationship within the same active-expiry time frame can be present for a supplying planning cluster.
- The supplying item has same item code as the receiving item for supplying relations within a company.
- A supplying relationship has new settings for lead times and lot sizing, and changed settings for capacity.

In the preparation stage, the **Supplying Relationships (cprpd7130m000)** session is renamed to **Supplying Relationships (cprpd7130m000)** and the previous settings are converted to the new setup and copied to the new **Supplying Relationships (cprpd7131m000)** session. This is done in the **Generate Supplying Relationships (cprpd7231m000)** session.

To convert the data, these steps are performed:

- For supplying relationships defined for planning clusters or item groups, a new supplying relationship is defined for each plan item that belongs to the planning cluster or the item group if the plan item has supply source Distribution or a sourcing strategy with a distribution percentage.
- If supplying relationships are present for an item at multiple levels, that is, at the planning cluster, the item group, or the item level, the supplying relationship at the item level is copied to the **Supplying Relationships (cprpd7131m000)** session.
- In these cases, which are reported in the error report, and which require manual setup, supplying relationships cannot be copied to the **Supplying Relationships (cprpd7131m000)** session:
  - Supplying relationships with overlapping active-expiry time frames that are present for the same supplying planning cluster.
  - The item code of the supplying item is different from the item code of the receiving item.

These new settings for lead times and lot sizing, and changed settings for capacity are generated:

### Lead times

If the carrier is specified in the **Carrier** field, the **Calculate** field is set to **Automatic**. This means that the lead times are calculated based on the distance tables defined in Freight.

If the carrier is not specified, the **Calculate** field is set to **Manual**, in which case the value in the **Supply Lead Time** field is taken from the **Supplying Relationships (cprpd7130m000)** session.

The supply calendar is taken from the calendar of the supply work center. If the work center has no calendar, or no work center was specified, the supply calendar is not specified.

The fixed order quantity in the **Fixed** field, the economic order quantity in the **Economic** field, and the increment in the **Increment** field are taken from the site of the plan item in the **Items - Ordering by Site (tcibd2150m000)** session.

For all new supplying relationships, the **Available for planning** check box is selected.

The **Use for Planning** check box is selected for one of the supplying relationships defined for a plan item. If multiple supplying clusters are present for a plan item, the **Use for Planning** check box is selected for the supplying relationship linked to the supplying cluster with the highest priority.

If a supply strategy is defined, the strategy determines whether this is the supplying relationship with the highest priority, the lowest cost, or the shortest lead time.

### Using the Generate Supplying Relationships (cprpd7231m000) session

In this session, you can generate supplying relationships for ranges of planning clusters and plan items.

In the **Skip Relations before** field, you can specify a date. Supplying relations that are expired before that date are not converted to the new supplying relations.

Supplying relationships defined for customized items related to closed projects are not converted to the new supplying relationships.

## Generating suppliers by site

The **Generate Suppliers by Site (tdipu0290m200)** session is used to create supplier data by site and by item. This is a preparatory step needed to create *resources* of type **Supplier**. Suppliers can be defined at several levels. Only suppliers by item and by site can be turned into resources.

The supplier data is created from the **Items - Purchase Business Partner (tdipu0110m000)** session and copied to the **Items - Purchase Business Partner by Site (tdipu0190m000)** session.

### Using the Generate Suppliers by Site (tdipu0290m200) session

In the **Generate Suppliers by Site (tdipu0290m200)** session, you can specify the range of production sites for which to generate the supplier data.

In the **Based on** group box, you can specify the ranges of buy-from business partners, ship-from business partners and items on which the supplier data is to be based.

In the **Skip before Date** field, you can specify a date. Suppliers that are expired before that date are not used to create supplier data by site.

## Generating resources

When the **Resources by Site** concept is active, the use of resources for planning is changed. The old resources functionality, which was fully based on work centers and work-center capacity, is still available.

The new Resources functionality uses various types of resources and resource capacities.

The table shows the available types of resources, the data from which the resource types are created, and the data from which the resource capacities are created:

Resource type	Resource created from	Resource capacity created from
Work center	Work Centers (tirou0101m000)	
Work Cell	Work Cells (tirpt0140m000)	
Work Cell Machine	Work Cells (tirpt0140m000)	
Machine Capacity Group	Machine Capacity Groups (tirou4161m000)	
Operation Capacity	Subcontractors by Site (tisub0130m000)	Operation Subcontractors List (tisub2100m000)
Production Capacity	Subcontractors by Site (tisub0130m000)	Product Subcontractors List (tisub1100m000)
Supplying Cluster	Supplying Relationships (cprpd7131m000)	
Supplier	Items - Purchase Business Partner by Site (tdipu0190m000)	

In the preparation stage, the **Generate Resources (cprpd2201m000)** session is used to generate resources. When the **Resources by Site** concept is set to **Active**, resources and resource capacities are viewed and maintained in the **Resources (cprpd2501m000)** session and the resource capacity sessions.

In addition, when you create an operational entity such as a work center or a supplying relationship in Manufacturing, a resource of type **Work center** or **Supplying Cluster** is automatically created in Enterprise Planning. If an operational entity is deleted, the corresponding resource is also deleted.

### Using the Generate Resources (cprpd2201m000) session

In the **Generate Resources (cprpd2201m000)** session, you can specify these selection ranges for which to generate resources:

- **Clusters**  
This range includes external planning clusters, that is, planning clusters that represent customers with supplying relations, and planning clusters that are excluded from planning are ignored.
- **Resource types**  
The resource types for which to generate resources.

In the **Supply Models from** field, you can specify a date. Product subcontracting models, supplying models, and entries in the **Items - Purchase Business Partner by Site (tdipu0190m000)** session with expiry dates before this date are skipped.

In addition, product subcontracting models that meet these criteria are excluded:

- **Status New Or Expired**
- Defined for customized items whose projects are closed.

## Validating resources by site

The final step of the preparation stage is the validation of the master data created in the previous activation activities. The final validation step is mandatory, even though you validated individual activation activities previously.

The validation is performed in the **Validate Resources by Site (tccom0235m000)** session. In this session, these validation options are available, each of which corresponding to an activation activity:

Validation	Activation activity
<b>Sites and Clusters</b>	<b>In Preparation</b>
<b>Subcontractors</b>	<b>Generate Subcontractors</b>
<b>Product Subcontracting Lead Time</b>	<b>Set Product Subcontracting Lead Time</b>
<b>Operation Subcontractors List</b>	<b>Generate Operation Subcontractors List</b>
<b>Subcontracting Rates</b>	<b>Generate Subcontracting Rates</b>
<b>Item Production by Site</b>	<b>Generate Item Production by Site</b>
<b>Supplying Relationships</b>	<b>Generate Supplying Relationships</b>
<b>Resources</b>	<b>Generate Resources</b>

## Validating sites and clusters

The **Sites and Clusters** option validates the fields and field settings that have been generated for external sites and external clusters when setting the **Resources by Site** concept to **In Preparation**.

The new check boxes **Customer Site** and **Subcontractor Site** for external sites could not be selected during the generation process in these cases:

- The site is external, but no subcontractor or sold-to business partner is linked to the site.
- The site is external and administrative. This is not allowed if the **Resources by Site** concept is activated.

The new check box **Holds Subcontractor Sites** for planning clusters is not selected during the generation process because the option to model subcontractors in an external cluster is new.

The new check box **Customer Site** is selected for all external planning clusters.

The settings resulting from the generation process may not be correct for all planning clusters. To specify the correct settings for a planning clusters, create a new planning cluster and specify the correct settings.

The validation process checks if product subcontracting models and Job Shop routings that use subcontracting have links to external sites that are not linked to a subcontractor. If yes, these errors are reported:

- A subcontracting work center is linked to an external site that is not linked to a subcontractor.
- A product subcontracting model has a subcontractor warehouse that is linked to an external site that is not linked to a subcontractor.

A subcontracting site cannot have an internal department. If this is found during the validation, this error is reported: "A subcontracting site has a department other than a subcontracting work center."

## Validating subcontractors

The **Subcontractors** option checks if data is present in the **Subcontractors by Site (tisub0130m000)** session for these objects:

- Open production orders with subcontracted operations
- Job Shop routings with subcontracted operations
- Subcontracted operations of generic routings

In case of product subcontracting, the validation checks if the subcontracted production orders have a reference to a subcontracting model.

If no data is found for one or more of these objects, an error is displayed in the report.

## Validating product subcontracting lead times

The **Product Subcontracting Lead Time** option reports warnings if product subcontracting models have these values:

- **Lead Time Type:** Fixed
- **Fixed Supply Time:** 0

- Product subcontracting model status: **New Or Approved**

**Note:**

A warning, and not an error, is provided, because these values do not block the activation process.

## Validating operation subcontractors lists

The **Operation Subcontractors List** option checks if data is present in the **Operation Subcontractors List (tisub2100m000)** session for these objects:

- Open production orders with subcontracted operations
- Job Shop routings with subcontracted operations
- Subcontracted operations of generic routings

The validation also reports this warning if a subcontracting work center is used in more than one production site: “Work Center <> cannot be moved to the production site, because it is used in multiple production sites.”

This warning is given because this would hamper the activation process. Work centers cannot be present in more than one production site when the functionality is activated.

## Validating subcontracting rates

The **Subcontracting Rates** option checks if subcontracting rates are specified for subcontracted operations present in these objects:

- Generic routings
- Job Shop routings with status **New Or Approved**
- Production orders

If no subcontracting rates are found for a subcontracted operation related to any of these objects, an error is displayed in the report.

## Validating item – production data by site

The **Item Production by Site** option checks if data is present in the **Item - Production by Site (tiipd0151m100)** session for new and approved product subcontracting models, the products of the models, and the related production sites.

## Validating supplying relationships

The **Supplying Relationships** option checks if supplying relations are present in the **Supplying Relationships (cprpd7131m000)** session for plan items that have supply source **Distribution** or that has a sourcing strategy with a distribution percentage.

For each of these plan items, at least one supplying relation that is effective on the current date must be present.

Customized items related to closed **PCS** projects are excluded from this validation.

## Validating resources

The **Resources** option checks if resources and resource capacities are present.

For these objects, a resource and a resource capacity must be present:

- Work centers, except for work centers of type **Subcontracting** or **Costing**
- Work cells
- Machine capacity groups

For every subcontractor specified in the **Subcontractors by Site (tisub0130m000)** session, a resource of type **Operation Capacity** and a resource of type **Production Capacity** must be present.

A resource capacity must be present for these objects:

- Every subcontractor specified in the **Operation Subcontractors List (tisub2100m000)** session.
- Every new or approved subcontracting model specified in the **Product Subcontractors List (tisub1100m000)** session.
- Every record in the **Items - Purchase Business Partner by Site (tdipu0190m000)** session.

## Setting the Resources by Site concept to Active

The final stage of the activation process is setting the **Resources by Site** concept to **Active**.

**Note:** This step is only allowed for super users.

The procedure to set the **Resources by Site** concept to active is almost identical to setting the **Sites** concept to active.

See Activate sites - Activating the Sites parameter. These are the differences:

- In step 1, the activation stage of the **Resources by Site** concept is launched by clicking **Activate** on the **Resources by Site** tab of the **Concept Activation (tcomm4600m000)** workbench session.  
This creates a new run with category RESOURCESBYSITE in the Data Upgrade Runs (ttspt2500m000) session.
- The validation and the data upgrade run performed for the **Resources by Site** concept are different. See the next sections for details.

### Validation

The first step of the activation process is the automatic launch of the validation steps that you previously performed using the **Validate Resources by Site (tccom0235m000)** session.

When the validation is completed, this data is converted:

### Job Shop routing

In the **Job Shop Routings (tirou4100m000)** session, the **Available for Planning** check box is selected for plan items.

### Job Shop routing operation

In the **Job Shop Routing Operations (tirou4101m000)** session, these values are set for operations with a subcontracting work center:

- The **Subcontracting** check box is selected.
- The **Labor Resources for Setup** and **Labor Resources for Production** fields are set to 0 (zero).  
The **Report Labor Hours** field is set to **Not Applicable**.
- If the **Subcontractor Independent** check box is selected for a work center in the **Work Centers (tirou0101m000)** session, the **Selection Method** field is set to **Requisition**.
- If the **Subcontractor Independent** check box is cleared in the **Work Centers (tirou0101m000)** session, the selection method is set to **Planning**.

### Job Shop BOM

In the **Job Shop Bills of Material (tibom3100m000)** session, the **Available for Planning** check box is selected for plan items.

### Received Job Shop BOM

In the **Received Job Shop Bills of Material (tibom5105m000)** session, the **Available for Planning** and the **Use for Planning** check boxes are selected for plan items.

### Generic routing

In the **Generic Routing (tipcf3120m000)** session, these values are set for operations with a subcontracting work center:

- The **Subcontracting** check box is selected for subcontracting work centers.
- The **Labor Resources for Setup (FTE)** and **Labor Resources for Production (FTE)** fields are set to 0 (zero).
- The **Report Labor Hours** field is set to **Not Applicable**.
- If the **Subcontractor Independent** check box is selected for a work center in the **Work Centers (tirou0101m000)** session, the **Selection Method** field is set to **Requisition**.
- If the **Subcontractor Independent** check box is cleared for a work center in the **Work Centers (tirou0101m000)** session, the selection method is set to **Planning**.

### Production model

In the **Production Models (tirpt2100m000)** session, the **Available for Planning** check box is selected for plan items.



### Product subcontracting model

In the **Product Subcontractors List (tisub1100m000)** session, these values are set:

- The **Subcontractor Site** field is filled with the site of the subcontractor's warehouse from the **Subcontractor Warehouse** field.
- The **Available for Planning** check box is selected for plan items.

#### Note:

When the **Resources by Site** concept is activated, the value in the **Ship-from Business Partner** field is taken from the **Ship-from Business Partner** field of the site specified in the **Subcontractor Site** field.

### Production order

In the **Production Order (tisfc0101m100)** session, these values are set for operations with a subcontracting work center:

- The **Subcontracting** check box is selected.
- The **Labor Resources for Setup (FTE)**, **Labor**, and **Labor Resources for Production (FTE)** fields are set to 0 (zero).

The **Report Labor Hours** field is set to **Not Applicable**.

- If the **Subcontractor Independent** check box is selected for a work center in the **Work Centers (tirou0101m000)** session, these values are specified:
  - The **Subcontractor Selection Method** field is set to **Requisition**.
  - No site is specified in the **Subcontractor Site** field.
- If the **Subcontractor Independent** check box is cleared for a work center in the **Work Centers (tirou0101m000)** session, these values are specified:
  - The selection method is set to **Planning**.
  - The value in the **Subcontractor Site** field is taken from the **Work Center Site** field.

### Planned order

In the **Planned Orders (cprrp1100m000)** session, these values are set for subcontracted purchase orders, that is, orders for which the **Subcontracted Purchase Order** check box is selected:

- The **Order Type** field is set to **Planned Subcontracting Order**.
- The **Subcontracted Purchase Order** check box is cleared.
- The value in the **Subcontractor** field is taken from the **Buy-from BP** field.
- The **Buy-from BP** field is made blank.
- The values from these fields are taken from the **Product Subcontracting Model (tisub1600m000)** session:
  - **Subcontracting Site**
  - **Supplier (Ship-From)**
  - **Subcontracting Model Revision**

In the **Capacity Use by Planned Order (cprrp2100m000)** session, these values are set:

- The **Subcontracting** check box is selected for subcontracting work centers.
- If the **Subcontractor Independent** check box is selected for a work center in the **Work Centers (tirou0101m000)** session, the **Subcontractor Selection Method** field is set to **Requisition**.

- If the **Subcontractor Independent** check box is cleared for a work center in the **Work Centers (tirou0101m000)** session, these values are set:
  - the selection method is set to **Planning**.
  - The value in the **Subcontractor** field is taken from the **Subcontractor** field of the **Work Centers (tirou0101m000)** session.
  - The value in the **Subcontractor Site** field is taken from the **Site** field in the **Work Centers by Plan Group (tirou0101m400)** session.
- The value in the **Reference Operation** field is taken from the routing.

#### Work center

In the **Work Centers (tirou0101m000)** session, these values are set for subcontracting work centers:

- The **Shop Floor Warehouse** field is made blank.
- The **Subcontractor Independent** check box is cleared.
- The **Subcontractor** field is made blank.
- The **Available Labor Resources** field is set to 0 (zero).
- The **Report Labor Hours** field is set to **Report Labor Hours**.

In the **Departments (tcmcs0565m000)** session, the **Calendar Code** field and the **Availability Type** field are made blank.

The site of the work center is changed in these cases:

- The work center is a subcontracting work center.
- The site of the work center is external.
- Job Shop and production order operations linked to the work center are related to the same production site. The production site is set as the site for the work center.

## Appendix A: Reset Concept Status

### Resetting the multisite concepts

When LN is newly implemented, that is, the new implementation is a first-time implementation and not an upgrade of an earlier version, the multisite concept parameters are set to **Active**. The multisite concept parameters and the other sessions and options involved in multisite activation are not displayed.

Organizations who require to inactivate the multisite functionality for specific reasons can reset the **Sites**, the **Job Shop by Site**, and the **Resources by Site** concept parameters to **Inactive**.

This applies to organizations who have an LN configuration without the multisite functionality and who want to install a new LN configuration that is to be similar to the existing configuration, using similar setup and processes. Therefore, the **Sites**, **Job Shop by Site**, and the **Resources by Site** concept parameters of the new configuration must be inactive. The new configuration is to run independently from the existing configuration.

To reset the **Sites**, the **Job Shop by Site**, and the **Resources by Site** concept parameters, complete these steps:

- 1 On the *appropriate menu* of the **Implemented Software Components (tccom0500m000)** session, select **Personalize Toolbar**.
- 2 In the **Personalize Toolbar** dialog box, unhide the **Reset Resources by Site**, **Reset Job Shop by Site**, and the **Reset Sites** options to display these options in the **Implemented Software Components (tccom0500m000)** session.
- 3 Save and close the **Personalize Toolbar** dialog box.
- 4 In the **Implemented Software Components (tccom0500m000)** session, select the **Reset Resources by Site**, **Reset Job Shop by Site**, and the **Reset Sites** options and set these concept parameters to **Inactive**.

Resetting the **Item Type Product**, **Standard Cost by Enterprise Unit**, and **Planning Cluster Mandatory** concept parameters is not required, because the impact of these settings on the business processes is limited.

#### Reset Resources by Site

You can reset this concept from **Active** to **Inactive** for new companies, and from **In Preparation** to **Inactive** to undo the **In Preparation** step.

You can reset the **Resources by Site** concept from **In Preparation** to **Inactive** if no data is present for these sessions:

- **Subcontractors (tisub0120m000)**
- **Operation Subcontracting Rates (ticpr1161m000)**
- **Supplying Relationships (cprpd7131m000)**
- **Resources (cprpd2501m000)**

If the **Resources by Site** concept is **Active**, the **Reset Resources by Site** option is available as long as no sites have been defined.

**Note:**

The **Reset Job Shop by Site** option is unavailable once you have defined or more *machine capacity groups*, *reference operations*, *Job Shop routings*, or *Job Shop BOMs*.

The **Reset Sites** option is unavailable once you have defined one or more *sites*.

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