



Infor LN User Guide for Serialized Items

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Publication Information

Release: Infor LN 2022.x

Publication Date: December 5, 2022

Document code: ln_2022.x_crossseritemsug__en-us

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About this Guide

This document describes the setup and use of serialized item in Warehousing, Manufacturing, and Service.

Intended audience

This document is intended for persons in charge of the setup and maintenance of a serialized-items system in a company. Consequently, the intended audience can include key users, implementation consultants, product architects, and support specialists.

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.

Document summary

This table shows the chapters of this guide:

Chapter	Content
Serialization	Provides an introduction to serialized items and the usage of serialized items in Warehousing, Manufacturing, and Service.
Master Data	Provides general instructions on how to set up serialized items.
Warehousing	Provides instructions on how to set up and use serialized items in Warehousing.
Manufacturing	Provides instructions on how to set up and use serialized items in Manufacturing.
Service	Provides instructions on how to set up and use serialized items in Service.

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.

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Chapter 1: Serialization

Overview of serialized items

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

Some business examples of the use of serialized items are:

- The vehicle identification number (VIN) that is used in the car industry
- The tail numbers that are used in the Aerospace and Defense industry
- The serial numbers that are used in the electronics industry

A serialized item is identified by the item code in combination with the serial number.

In LN, you can define every type of item as a *serialized item*.

Note:

- A serialized item is not the same as a *unit effective item*. A serialized item has a serial number that is used to identify and track individual items, whereas a unit effectivity item has an effectivity unit that provides some information about the item's configuration.
- An item can be both serialized and unit effective.
- In the Item, Lot and Serial 360 (whltc3600m100) session, you can view the transactions related to an *item*, *lot*, and/or *serial number*. This session also displays the as-built and as-maintained structures of lot or serialized items in a graph.

You can allocate serial numbers to serialized items during specific stages of an item's life cycle in the following LN packages:

- Manufacturing
- Warehousing
- Service
- Manufacturing

Job shop operators can enter serial numbers for new manufactured items during various stages of the production process. They can enter a serial number manually, or they can generate a serial number based on a specific mask.

Serial numbers are entered in as-built structures. An as-built structure reflects the configuration of a product. The product has a serialized number; the component items in the as-built structure can be serialized or non-serialized. If the component items are serialized, serial numbers are either allocated to the components when they are issued from the warehouse, or the job shop operators allocate the serial numbers when they add the components to the as-built structure.

You can use the serial numbers assigned to manufactured items for tracking through warehousing, sales, and service processes.

In a repetitive production environment, the use of serialized and lot controlled items is typically less extensive, but it is possible to register a manufactured product that is either serialized or lot controlled as well as the use of either one during production.

You can also register an as-built during production, but due to the nature of repetitive manufacture, only manual registration of an as-built is supported.

Note: it is not possible to create a multi-product production model for serialized items.

- Warehouse Management

The need to track items by means of serial numbers arises from the items' cost. The more expensive the item, the more closely you want to monitor the item during its life cycle. In general, expensive items are produced and handled in relatively small quantities, whereas the goods flow of less expensive items involves larger quantities. In LN, this concept is modeled in the following scenarios:

- Low volume

This scenario is used for expensive items produced and handled in relatively small quantities that require intensive tracking throughout the warehouse flow. When received in the warehouse or issued from the warehouse, a serial number is allocated, either manually or automatically, to each serialized item. Upon receipt, each item/serial number combination is individually registered in inventory. For each inventory transaction, such as a receipt, transfer, or an issue, the inventory records of the serialized items are updated.

- High volume

The high volume scenario is used for relatively less expensive items produced and handled in large quantities that require less intensive tracking. In this scenario, serialized items are not registered in inventory. Consequently, no inventory records exist that show updates on inventory transactions. However, for each item-by-warehouse you can specify whether serial numbers must be registered for receipts, transfers, and/or issues. This helps you obtain an overview of the whereabouts of particular serialized items through warehousing but also enables you to skip scrutinizing serials where you do not need it.

Warehousing also enables you to track the orders that initiated the receipt, transfer, or issue of serialized items, such as production orders, purchase orders, or sales orders. This option is available for both the high volume and the low volume scenario.

- Service

To obtain product information and to register item replacements for service and maintenance purposes, you can copy as-built structures created in Manufacturing to product structures called *physical breakdowns* in Service.

You can define an item as serialized to be able to track the item in all transactions that take place within Service. To interact with other areas such as production or warehousing, you must define the item as serialized in Common as well.

The Maintenance Sales Control and Work Control System modules deal with service and maintenance activities performed at your own company. The Service Order Control module deals with service and maintenance activities performed at customer locations. Both scenarios involve the sale and delivery of (spare part) items, the sale of repair and maintenance activities, the receipt of returned items, and replacement of items.

- Maintenance Sales Control

All sales activities involved in service and maintenance and all repair and maintenance jobs on customer-owned items performed at your own company are handled by means of *maintenance sales orders*. For each type of activity, you must add the appropriate type of order line to the **Maintenance Sales** order header. Selecting a particular order line triggers the procedure that performs the activity, such as creating receipt lines and/or outbound order lines, and so on. For more information, refer to **Line Procedure**

- Work Control System

All repair and maintenance activities performed at your own location are handled by means of *work orders*. These activities can include maintenance or repair jobs on both customer-owned items and items owned by your own company. Work orders for customer-owned items can be triggered by a **Maintenance Sales** order, which is described in the previous list item.

- Service Order Control

After you release a *service order*, LN issues the serialized component items required to carry out the activities described on the service order by means of outbound order lines of the **Service** origin.

When the item and the components are issued for work orders or service orders, the serial numbers are, either automatically or manually, registered for the issued items.

Chapter 2: Master data

To set up serialized items

To enable the allocation of serial numbers to items, you must define an item as a serialized item. You can define every type of item defined in LN as a serialized item.

To define an item as a serialized item, the *inventory unit* defined for the item multiplied by the item's *rounding factor* must be a full integer, such as 1.0. This is because serial numbers are only allocated to individual items, not fractions thereof. You can define units and rounding factors in the **Units (tcmcs0101m000)** session.

1 Define serialized item

- To define an item as a serialized item for all LN packages, you must select the **Serialized** check box in the Item Defaults (tcibd0102m000) session.
- Serialized in Warehousing
To use serialized items in Warehousing, you must also select the **Serialized Items in Use** check box in the **Warehouse Master Data Parameters (whwmd0500m000)** details session.
- Serialized in Service
To define an item as serialized in Service, you must define item data in the Serialized Items (tscfg2100m000) session and the Items - Service (tsmdm2100m000) session.

2 Define mask

LN generates serial numbers according to a *mask*. See Defining a mask for information on how you can define masks for serial numbers and link the masks to:

- *Item groups*
- *Items*
- *Tools*
- *Lots*

If no specific mask can be found, LN uses the company's default mask.

If the mask includes a **Infor LN Field** segment that reflects the contents of an LN field, the mask is only generated correctly if the following conditions are both true:

- The field belongs to the package in which the serial number is generated.
- The field has a value.

3 Select scenario for serialized item

The selected scenario determines whether serialized items are individually stored in inventory identified by their serial number. For further information on low volume and high volume scenarios, see Serialized items in Warehousing .

To select the low volume scenario, in the **Item - Warehousing (whwmd4600m000)** session, select the **Serials in Inventory** check box. Clear this check box if the high volume scenario is required.

If the **Serials in Inventory** check box is unavailable, make sure the **Direct Process Warehouse Order Line** check box in the **Item - Production (tiipd0101m000)** session is cleared.

4 Select additional tracking

To track the orders by means of which serialized items were received or issued, in the **Item - Warehousing (whwmd4600m000)** session, select the **Serial Tracking** check box. This setting applies to both the high volume and the low volume scenario. However, for the high volume scenario, to view orders for which serialized items are received, you must also select the **Serial Number Entry During Receipt** check box.

5 HIGH VOLUME SCENARIO ONLY: serial registration parameters

See High volume lot and serial registration parameters and Maintaining high volume lot and serial registration parameters.

6 Specify settings in Manufacturing

For details on the available settings in Manufacturing, see Serialized items in Manufacturing .

Converting items

You can convert non-serialized items and *low volume* serialized items that fulfil particular criteria to *high volume* serialized items. For further information, see [To convert items to high volume serialized items and The impact of serialized item conversion](#).

Note: Using serialized items and lot controlled items results in data growth, which may affect system performance. For more information, refer to [Using lots and serials](#).

High volume lot and serial registration parameters

In the *high volume scenario*, serial numbers are registered for serialized items during a warehouse transaction such as a receipt or an issue, or during production or maintenance of an item.

Serial registration parameters

In the **Item - Warehousing (whwmd4500m000)** or the **Item - Warehousing (whwmd4600m000)** session, these parameters are available to enable the registration of serial numbers:

- Serial Number Entry for Direct Delivery
- Serial Number Entry During Receipt
- Serial Number Entry During Transfer
- Register Serial Issue During As Built
- Register Serial Issue in Service
- Lot and Serial Registration Templates

If serial registration is enabled, the registration is mandatory.

In the **Warehousing Order Types (whinh0110m000)** session, select the **Generate Serials Automatically** check box if you want serial numbers to be automatically generated for warehouse receipts and transfers.

The **Register Serial Issue During As Built**, **Register Serial Issue in Service**, and the **Register Lot Issue During As Built** parameter overrule the lot and serial registration templates that you define. See Lot and serial registration templates and How to define lot and serial registration templates.

If you selected **Yes** for the Register Serial Issue During As Built and/or the Register Serial Issue in Service fields, you must register serial numbers for warehouse issues of origins other than **JSC Production**. For an overview of what these settings accomplish, see Overview of the high volume serial registration parameters.

Serial number registration is mandatory for warehouse issues unless otherwise specified by these parameters:

- Register Serial Issue During As Built
- Register Serial Issue in Service
- Lot and Serial Registration Template

Lot registration parameters

In the **Item - Warehousing (whwmd4500m000)** or the **Item - Warehousing (whwmd4600m000)** session, these parameters are available to enable the registration of lot numbers:

- Lot Entry for Direct Delivery
- Lot Entry During Receipt
- Lot Entry During Transfer
- Register Lot Issue During As Built
- Register Lot Issue in Service & Maintenance

If lot registration is enabled, the registration is mandatory.

You must always register lot codes for issues from the warehouse (except issues related to *transfer orders*).

LN falls back to these parameter settings if no relevant lot and serial registration template is available. See Lot registration in the high volume scenario.

Maintaining high volume lot and serial registration parameters

When initially setting up master data for an item, *high volume* lot and serial registration parameters are specified in these sessions:

- **Items - Warehousing Defaults (whwmd4101s000)**
- **Item - Warehousing (whwmd4500m000)**
- **Item - Warehousing (whwmd4600m000)**

After the initial setup, the registration options in these sessions are read-only if any of these conditions apply:

- Inventory is present in the **Stock Point Inventory (whinr1540m000)** session.
- Lots and serial numbers are present in these sessions:
 - **Shipment Notice Lines (whinh3101m000)**
 - **Warehouse Receipt Lines (whinh3512m100)**, and the receipt lines that contain the lots or serials are unconfirmed.

- **Inbound Order Lines in Transit (whinh2110m200)**, and the inbound order lines that contain the lots or serials are not yet received in the destination warehouse.

If the *high volume* lot and serial registration parameters are read-only in the sessions mentioned previously, the registration parameters are maintained in the **Change Item Lot and Serial Registration (whwmd4200m000)** session.

If you disable a high-volume lot or serial registration parameter for an item and click **Process** in the **Change Item Lot and Serial Registration (whwmd4200m000)** session, the related inbound or outbound lots or serial numbers for the item are deleted in these sessions:

- **Shipment Notice Line Stock Point Details (whinh3105m000)**
- **Shipment Line Stock Point Details (whinh4133m000)**
- **Inspection Lines (whinh2131m000)**
- **Quarantine Inventory Disposition (whwmd2172m000)**
- **Receipt Line Stock Point Details (whinh3123m000)**

If you enable a high-volume lot or serial registration parameter, no new lots or serial numbers are generated. See To register serial numbers in the high volume scenario and Lot registration in the high volume scenario on how to register *high volume* serial numbers or lots.

Note: Lot and serial registration parameters specified in the **Item - Warehousing (whwmd4600m000)**, **Item - Warehousing (whwmd4500m000)**, or the **Change Item Lot and Serial Registration (whwmd4200m000)** session are updated in the **Item - Warehousing by Site (whwmd4104m000)** session. This is because lot and serial registration parameters are mandatory warehouse – item parameters on company level. See *Warehousing User Guide for Multisite*.

To convert items to high volume serialized items

You can convert non-serialized items and *low volume* serialized items to *high volume* serialized items.

The following conditions apply to items that you want to convert:

Low volume serialized items

- Unprocessed adjustment order lines or cycle counting order lines cannot exist for the item.
- The **Serial Price** check box in the **Item Data by Warehouse (whwmd2110s000)** session must be cleared.

Non-serialized items

- You cannot convert non-serialized items present as end items in open production orders or assembly orders, or non-serialized items present as used material related to production orders. The reason is, because Assembly Control and Job Shop Control cannot handle non-serialized items being converted to high volume serialized items while in process.

For further information, see:

- Planning production orders in JSC
- Processing production orders
- Assembly Control

Low volume serialized items and non-serialized items

- For at least one warehouse, the item - warehouse status must be **Active**. This status is set in the **Item Data by Warehouse (whwmd2110s000)** session.
- The **Serial Price** check box in the **Item Data by Warehouse (whwmd2110s000)** session must be cleared.
- *effectivity unit* must not exist on orders that list the item.

The impact of serialized item conversion

Converting non-serialized items and *low volume* serialized items to *high volume* serialized items can impact the lots and serials sessions linked to the following types of lines that list the items to be converted:

- Inbound order lines
- Receipt lines
- Receipt lines BOM
- ASN lines
- Outbound advice lines
- Shipment lines

Non-serialized items

If non-serialized items are converted to high volume serialized items, LN generates serial numbers in the lots and serials sessions linked to the types of lines on which the item to be converted is present. The quantity of serial numbers depends on the quantity listed for the entity.

For example, if the staged quantity for a shipment line is 20, LN generates 20 serial numbers for the shipment line in the **Shipment Line Stock Point Details (whinh4133m000)** session. The staged quantity for a shipment line is inserted in the **Picked Quantity** field.

If a lot code is present in a lots and serials session, the lot-related line is split into separate lines with quantity one for the required serial numbers. If after splitting of a lot related line any serials are left, the remaining lines have no lot code.

Outbound advice lines

In the **Outbound Advice Lots and Serials (whinh4126m000)** session, LN generates the number of serial numbers that corresponds with the quantity listed in the **In Inventory Unit** field of the outbound advice. However, If the items listed on the outbound advice are picked and shipment lines are present, the serials are not generated in the **Outbound Advice Lots and Serials (whinh4126m000)** session, but in the **Shipment Line Stock Point Details (whinh4133m000)** session.

Shipment lines

In the **Shipment Line Stock Point Details (whinh4133m000)** session, LN generates serial numbers. The number of serials corresponds with the quantity listed in the **Picked Quantity** field of the **Shipment Lines (whinh4131m000)** session.

ASN lines

In the **Shipment Notice Line Stock Point Details (whinh3105m000)** session, LN generates serial numbers. The number of serial numbers that LN generates corresponds with the quantity listed in the **Shipped Quantity in Inventory Unit** field of the **Shipment Notice Lines (whinh3101m000)** session. However, if the ASN line is linked to a receipt, the serials are not generated in the **Shipment Notice Line Stock Point Details (whinh3105m000)** session, but in the **Receipt Line Stock Point Details (whinh3123m000)** session, provided that serials must be registered for receipts. To enforce serial registry for receipts, select the **Serial Number Entry During Receipt** check box in the **Item - Warehousing (whwmd4600m000)** session or the **Convert (to) Serialized Item (whltc5201m000)** session.

Receipt lines

If the **Serial Number Entry During Receipt** check box is selected in the **Item - Warehousing (whwmd4600m000)** session or the **Convert (to) Serialized Item (whltc5201m000)** session, serial numbers are generated in the **Receipt Line Stock Point Details (whinh3123m000)** session. The number of serial numbers that LN generates corresponds with the quantity inserted in the **Receipt Lines (whinh3112s000)** session.

BOM receipt lines

If the **Serial Number Entry During Receipt** check box is selected in the **Item - Warehousing (whwmd4600m000)** session or the **Convert (to) Serialized Item (whltc5201m000)** session, serial numbers are generated in the **Receipt Line BOM Lots and Serials (whinh3119m000)** session. The number of serial numbers that LN generates corresponds with the quantity inserted in the **Receipt Line BOM (whinh3118m000)** session.

Quality

If Quality is implemented, the serial numbers are copied to the Product Testing and Control module from the **Inspection Lines (whinh2131m000)** session.

Low volume serialized items

If *low volume* serialized items are converted to *high volume* serialized items, LN:

- generates serial numbers in the lots and serials sessions linked to the lines on which the item to be converted is present. Because the quantity for a low volume serialized item is always one on each type of line, the quantity of serial numbers generated for a lots and serials session is one.
For example, if you convert low volume serialized item A and item A is present on a shipment line, in the **Shipment Line Stock Point Details (whinh4133m000)** session, LN generates one serial number for this shipment line.
- Removes the serial numbers from the lines on which the item that you want to convert is present.
For example, if you convert low volume serialized item A and item A is present on a shipment line, LN removes the serial number from the **Serial Number** field.
LN removes the serial numbers from the following types of lines:
 - Sales order lines
 - Inbound order lines

- Receipt lines
- Receipt lines BOM
- ASN lines
- Outbound advice lines
- Shipment lines

Inbound order lines

For each inbound order line that lists a low volume item that you convert, one serial number is generated in the **Inbound Order Line Lots and Serials (whinh2116m000)** session, unless the inbound order line is linked to a receipt line. In that case, the serial number is generated in the **Receipt Line Stock Point Details (whinh3123m000)** session. In addition, LN removes the serial numbers from the inbound order line.

Outbound advice lines

For each outbound advice line that lists a low volume item that you convert, one serial number is generated in the **Outbound Advice Lots and Serials (whinh4126m000)** session, unless the item on the outbound advice line is picked. In that case, the serial number is generated in the **Shipment Line Stock Point Details (whinh4133m000)** session. In addition, LN removes the serial numbers from the outbound advice line.

Shipment lines

For each shipment line that lists a low volume item that you convert, one serial number is generated in the **Shipment Line Stock Point Details (whinh4133m000)** session. In addition, LN removes the serial numbers from the shipment line.

Receipt lines

For each receipt line that lists a low volume item that you convert, one serial number is generated in the **Receipt Line Stock Point Details (whinh3123m000)** session.

In the **Receipt Line Stock Point Details (whinh3123m000)** session, the **Rejected** and **Destroyed** fields are filled if a quantity destroyed or a quantity rejected is present in the **Inspection Lines (whinh2131m000)** session.

In addition, LN removes the serial numbers from the receipt line.

BOM receipt lines

For each BOM receipt line that lists a low volume item that you convert, one serial number is generated in the **Receipt Line BOM Lots and Serials (whinh3119m000)** session.

In addition, LN removes the serial numbers from the BOM receipt line.

Quality

If Quality is implemented, the serial numbers are copied to the Product Testing and Control module from the **Inspection Lines (whinh2131m000)** session.

Handling units

For each handling unit that lists a low volume item that you convert, one serial number is generated in the **Handling Unit Stock Point Details (whwmd5136m000)** session.

In addition, LN removes the serial numbers from the handling unit.

Item - Serials and Warehouses (whltc5100m000)

For the converted item, LN removes the serial numbers in the **Item - Serials and Warehouses (whltc5100m000)** session.

Warehouse - Item - Stock Point Transactions (whinr1500s000)

For the converted item, LN removes the serial numbers in the **Warehouse - Item - Stock Point Transactions (whinr1500s000)** session.

Defining a mask

A mask is a template that specifies the structure of identification codes such as serial numbers, lot codes, handling units, shifts, and Kanban IDs. A mask defines the total length of the identification code and the way the code is divided up. For a mask example, refer to Example of defining a mask.

Defining and using masks

- 1 In the **Masks (tcibd4102m000)** session, define the mask code and description, and the separator between the mask segments.
- 2 Select the defined mask code in the **Masks (tcibd4102m000)** session, and start the **Mask Segments (tcibd4503m000)** session from the *appropriate* menu to define *mask segments*.
If the segment type is **Translation Table**, which means that the segment consists of a converted value, you must define a *translation table*.
- 3 A mask is a general concept in LN to generate identification codes. In places where identification codes are required, you must link a mask for:
 - Serial numbers
Link a mask in the **Mask by Item/Item Group/Site (tcibd4505m100)** session. If no mask is found, LN uses the mask linked in the **Item Base Data Parameters (tcibd9199m000)** session. For more information, refer to Masks for serialized items.
 - Lot codes
 - a Link a default mask in the **Lot Control Parameters (whltc0500m000)** session.
 - b Link a mask in the **Mask by Item/Item Group/Site (tcibd4505m100)** session.
 - c If no masks are found, LN uses the mask linked in the **Item Base Data Parameters (tcibd9199m000)** session.

Note:

To link masks for lot codes or serial numbers to items or item groups by site, the *multisite* concepts must be set to **In Preparation** or **Active** in the **Concept Activation (tcecm4600m000)** session.

If the multisite concepts are inactive, masks for lot codes and serial numbers are maintained in the **Mask by Item/Item Group (tcibd4505m000)** session.

- *Handling units*
Link a mask in the Internal Handling Unit Mask field and the Shipment Handling Unit Mask field in the **Warehouses (whwmd2500m000)** session, or in the **Warehouse Master Data Parameters (whwmd0500m000)** session.
- *Kanban IDs*
Define a mask in the ID Mask field in the **Warehouses (whwmd2500m000)** details session, or in the **Warehouse Master Data Parameters (whwmd0500m000)** session.
- *Shift IDs*
Link a mask in the **Shift Mask** field in the **Availability Types (tcccp0101m000)** session.

Defining a translation table

If the segment type of a mask segment is **Translation Table**, the segment's value is translated to another value. The translation table contains the original values and the translated values. To define a translation table, take the following steps:

- 1 Define a translation table in the **Translation Tables (tcibd4504m000)** session. Note that the use of a translation table is not restricted to one mask. You can use a translation table in multiple masks.
- 2 Select a translation table In the **Translation Tables (tcibd4504m000)** session to start the **Translation Tables (tcibd4104s000)** session in which you can select the type of segment to be translated into another value. See Defining segment type Infor LN Field for further information about selecting a field whose contents are to be used as a mask segment.
- 3 From the *appropriate* menu, start the **Values by Translation Table (tcibd4106m000)** session to enter the translation table values.

Using the Masks Setup wizard

If you use the Enterprise Modeler Content Pack with LN, consider using the DCO0010 (Masks Setup) *wizard* to set up *masks*. You can execute this predefined wizard from the **Wizards by Project Model (tgwzr4502m000)** session after you specified the *business function model* for your company. See Business function model .

Defining mask segments

A mask consists of *mask segments*, defined in the **Mask Segments (tcibd4503m000)** session. The mask segments determine how a identification code looks like.

Segment type

Each segment can add a specific type of information to the identification code that is generated by the mask. The following mask-segment types are available:

- **Option**
Adds a product feature. Product features are only used in an assembly-controlled environment.
- **Infor LN Field**
Adds the contents of a specific LN field. Note that this segment is only generated correctly if the field has a value and belongs to the package in which the identification code is generated. See Defining segment type Infor LN Field for further information about selecting a field whose contents are to be used as a mask segment.
- **Sequence**
Adds a sequence number.
- **Translation Table**
Adds converted information to the identification code. For example, instead of the year 2006, the letter D is added; instead of 2005, the identification code contains C. Translation tables can convert the information types **Option**, **Infor LN Field**, and **Date**. Define a translation table in the **Translation Tables (tcibd4504m000)** session; define the translations table's values in the **Values by Translation Table (tcibd4106m000)** session.
- **Date**
Adds a month number, year, date, weekday, or time.
- **Alphanumeric**
Adds a fixed string of numbers or characters.

Segment order

The segments appear in the mask in the order of their segment number. LN generates the segment numbers 10, 20, 30, and so on. If you wish, you can change the default number. For example, you can enter the segment number 25 to define a new segment that must appear between the existing segments 20 and 30.

Mask length

If you define mask segments, LN displays a default segment length in the **Mask Segment (tcibd4103s000)** session. For some segment types you can change the default length.

LN calculates the total mask length, which is displayed in the **Masks (tcibd4102m000)** session in the Length field.

The maximum length depends on the mask's usage:

Usage	Maximum mask length
Serial numbers	30
Lot numbers	20
Warehousing labels	18

Reset frequency

If the mask contains a **Sequence** segment, you can specify the **Reset Frequency**. If the reset period expires, LN resets the sequence number to 1.

The reset period must be the same as the period that you selected for the date segment. For example, if the date type is Month, you can select a reset frequency of one month. If the mask contains more than one date segment, you can select any of the used date-segment periods as the reset frequency.

Defining segment type Infor LN Field

You can use the contents of specific LN fields as *mask* segments.

To select a specific LN field in the **Mask Segment (tcibd4103s000)** session or the **Translation Tables (tcibd4104s000)** session, complete these steps:

- 1 In the Segment Type field, select **Infor LN Field**.
- 2 In the **Field Type** field, select the LN table from which to select the field.
- 3 In the **Infor LN Field** field, zoom to the **Table Fields (ttadv4529m000)** session to select the field.

If you select **Item - Site Data** in the **Field Type** field, you are prompted to select the required item by site table, for example, Items by Site (tcibd150) or Item - Ordering by Site (tcibd250) before the **Table Fields (ttadv4529m000)** session starts.

If you select **Item Data** in the **Field Type** field, you are prompted to select the required item data table, such as Items (tcibd001) or Item - Purchase (tdipu001), before the **Table Fields (ttadv4529m000)** session starts.

Note:

To select fields related to sites, the *multisite* concepts must be set to **In Preparation** or **Active** in the **Concept Activation (tcevm4600m000)** session.

Example of defining a mask

This example shows how to define and use a *mask* to generate the following identification code:

DAF NL*D*Manu*RD*00437

The code consists of the following segments:

Segment	Description
DAF NL	Fixed alphanumeric string
D	Code that represents the year 1993
Manu	Feature code that represents a manually operated gearbox (as opposed to a variomatic gearbox)
RD	Color code that stands for red
00437	Item sequence number

To define a mask to generate this type of identification code, complete the following steps:

1 Define a mask code

In the **Masks (tcibd4102m000)** session, define a mask code and description. Enter an asterisk (*) as separator.

2 Define the mask segments

In the **Mask Segments (tcibd4503m000)** session, select the defined mask and add the following segments:

Segment Number	Segment Type	Segment Value
10	Alphanumeric	DAF NL
20	Translation Table	Year
30	Option	Gearbox type
40	Translation Table	Color
50	Sequence	1

Note that if you select the **Translation Table** segment type, you must define a translation table. Define translation tables as described in step 3 and step 4 before you continue in the **Mask Segment (tcibd4103s000)** session.

3 Define the translation tables

Define the following translation tables in the **Translation Tables (tcibd4504m000)** session:

Translation Table	Segment Type	Value Type
YEAR	Date	Year (4-digit)
COLOR	Option	Color

4 Define the converted values

In the **Translation Tables (tcibd4504m000)** session, from the *appropriate* menu, start the **Values by Translation Table (tcibd4106m000)** session to define the converted values of each translation table. The first table you must define is the YEAR translation table:

Value Type	Segment Value	Translated Value
Year (4-digit)	1990	A
-	1991	B
-	1992	C
-	1993	D

The second table is the COLOR translation table:

Value Type	Segment Value	Translated Value
Color	Black	BK
-	Blue	BU

Value Type	Segment Value	Translated Value
-	Red	RD
-	Green	GN
-	Yellow	YW

COLOR translation table

Chapter 3: Warehousing

Serialized items in Warehousing

In Warehousing, you can use serial numbers to track serialized items through receipts, transfers, storage, or issues, the latter of which is mandatory. You can also track serialized items back to their source. The source of a serialized item is, for example, the purchase order or the production order that caused the receipt of the serialized item, or the sales order or the work order that caused the issue of the serialized item.

The need to track items by means of serial numbers arises from the items' cost. The more expensive the item, the more closely you want to monitor the item during its life cycle.

In general, expensive items are produced and handled in relatively low quantities, whereas the goods flow of less expensive items involves higher quantities. In LN, this concept is modeled in the low volume and the high volume scenarios that provide various options to register and track serialized items.

Low volume scenario

This scenario is used for expensive items produced and handled in relatively small quantities that require intensive tracking throughout the warehouse flow.

During receipt in the warehouse, for each serialized item an individual receipt line is created and, either manually or automatically, a serial number is allocated. The low volume scenario is allocated to the item if the Serials in Inventory check box in the **Item - Warehousing (whwmd4600m000)** session is selected. See To register serial numbers in the low volume scenario.

Upon receipt, each item/serial number combination is individually stored in inventory and, consequently, financial transactions are initiated for each individual serialized item. For each inventory transaction, such as a receipt, transfer, or an issue, the inventory records of the serialized items are updated.

When issued from the warehouse, for each serialized item LN creates an individual outbound advice line and, if applicable, a shipment line, and allocates a serial number.

As a result of receiving a serialized item and registering the serial number, you can track the serialized items in the sessions involved in warehouse transactions and storage, such as:

- **Item, Lot and Serial 360 (whltc3600m100)**
- **Receipt Lines (whinh3112s000)**
- **Outbound Advice (whinh4525m000)**
- **Item - Serials and Warehouses (whltc5100m000)**
- **Shipment Lines (whinh4131m000)**
- **Picking List (whinh4525m100)**

Serialized item status

For easier handling of low volume serialized items, **serial statuses** are added. The serial item status is displayed in various sessions, such as the following:

- **Item - Serials and Warehouses (whltc5100m000)**
- **Outbound Order Lines (whinh2120m000)**
- **Item - Serials - Receipts (whltc5511m000)**
- **Order - Serials (whltc5512m000)**
- **Serial Tracking - Overview (whltc5515m000)**
- **Cycle Counting Order Line Stock Point Details (whinh5106m000)**
- **Adjustment Order Line Stock Point Details (whinh5126m000)**

Note: The Serial Status field in the **Outbound Order Lines (whinh2120m000)** session enables users to issue serialized items with a new status.

High volume scenario

The high volume scenario is used for relatively inexpensive items produced and handled in large quantities that do not require tracking through each stage of the warehouse flow. You can specify the stages for which registration of serial numbers is required. This helps you obtain an overview of the whereabouts of serialized items through the required warehousing processes and enables you to skip scrutinizing serials where you do not need it.

In this scenario, serialized items are not individually stored in inventory. Consequently, no inventory records exist that show updates on inventory transactions. Unlike the low volume scenario, in the high volume scenario LN does not create receipt lines, inbound or outbound advice lines, inspection lines, and/or shipment lines for individual items.

Using the serial registration parameters, for each item-by-warehouse you can specify whether registration of serial numbers is required for one or more of the following stages:

- Receipts into the warehouse

For example, to track the receipt of purchased serialized items that can be used as components for the production of end items, or the receipt of manufactured serialized items that are received into the finished goods warehouse, users must register serial numbers on the receipt lines, BOM lines, or ASN lines of the items they are receiving. See *To register serial numbers in the high volume scenario*.

If you receive serialized items, receipt lines are created in the same way as they would be for non-serialized items. For each receipt line, you must register serial numbers for the items.

- Warehousing inspections

If warehousing inspections are included in your warehouse flow, the serialized items that you entered in the **Receipt Line Stock Point Details (whinh3123m000)** session are also displayed in the **Warehouse Inspections Overview (whinh3122m000)** session. In addition, you can specify the serialized items that must be rejected or destroyed in the **Receipt Line Stock Point Details (whinh3123m000)** session.

- Issues from the warehouse

In LN, warehouse issues are initiated from various sources. For issues originating from service orders, work orders, or production orders, see the descriptions under the Production and Service and Maintenance headings of this list.

- For warehouse issues of all other types, you must register serial numbers in the **Shipment Line Stock Point Details (whinh4133m000)** or the **Outbound Advice Lots and Serials (whinh4126m000)** session for the items that you issue.

If you use *cross-docking* to send a purchased component directly to a work center, the item does not pass through the warehouse's inbound or outbound procedure. To make sure that you can still register serial numbers, set the **Create Shipment** field in the **Default Order Types by Origin (whinh0120m000)** session to **Cross-docking Lot/Serial** for the relevant combination of warehouse and work center. See *Create Shipment*.

- Cycle counting/Inventory adjustment

If cycle counts result in inventory variances of serialized items, in the **Cycle Counting Order Line Stock Point Details (whinh5106m000)** session, you can register serial numbers to adjust the variances.

- Production

For serialized manufactured end items, you must register serial numbers in the **Serial End Item - As-Built Headers (timfc0110m000)** session. In this session, you can register serial numbers during various moments of the production process. These moments are determined parameter settings in the **Production Order Parameters (tisfc0100s000)** session in Manufacturing.

- For component items, you must register serial numbers in the **Outbound Advice Lots and Serials (whinh4126m000)** session during the issue of the components from the warehouse to the job shop, or in the **Serial End Item - As-Built Components (timfc0111m000)** session before or after the release of the production order for the end item. This depends on settings in the **Item - Warehousing (whwmd4600m000)** session. See *To set up serialized items*.

- Service and maintenance

After you release a *service order*, LN issues the serialized component items required to carry out the repair or maintenance activities described on the service order by means of outbound order lines of the **Service** origin.

Settings in the **Item - Warehousing (whwmd4600m000)** session determine whether you must register the serial numbers for the serialized component items in the **Outbound Advice Lots and Serials (whinh4126m000)** session or in the **Service Order Actual Material Costs (tssoc2121m000)** session. For further information, see *To set up serialized items*.

- After you plan a *work order*, LN issues the serialized item that you want to repair or maintain to the repair shop by means of outbound order lines of the **Maintenance Work** origin.

Settings in the **Item - Warehousing (whwmd4600m000)** session determine whether you must register the serial numbers in the **Outbound Advice Lots and Serials (whinh4126m000)** session or the **Work Orders (tswcs2100m000)** session.

- Next, after you release the *work order*, LN issues the serialized component items required to carry out the repair or maintenance activities described on the work order by means of outbound order lines of the **Maintenance Work** origin.

Settings in the **Item - Warehousing (whwmd4600m000)** session determine whether you must register serial numbers for components in the **Outbound Advice Lots and Serials (whinh4126m000)** session or the **Work Order Material Resources (tswcs4110m000)** session. See *To set up serialized items*.

Tracking originating orders for serialized items

Warehousing also provides the option to track the orders that initiated the receipt, transfer, or issue of serialized items, such as production orders, purchase orders, or sales orders. This option is available for both

the low volume scenario and the high volume scenario. For further information on serial tracking options, see Serial Tracking.

Performance aspects

Using serialized items and lot controlled items results in data growth, which may affect system performance. See Using lots and serials.

To register serial numbers in the low volume scenario

In the *low volume scenario*, registering serial numbers means that you allocate a serial number to the serialized item listed on a warehouse receipt.

To register serial numbers for purchased serialized items that you receive in the warehouse, you can take one of these steps in the **Receipt Lines (whinh3112s000)** session:

- Manually enter a serial number in the **Serial Number** field.
- In the **Serial Number** field, zoom to the **Item - Serials and Warehouses (whltc5100m000)** session to select a serial number.
- Click **Generate Serials** on the toolbar of the **Receipt Lines (whinh3112s000)** session to generate a serial number.
- Click **Generate Serials** on the toolbar of the **Receipt Line Stock Point Details (whinh3123m000)** session to generate a serial number.

If the **Consolidate Stock Points in one Receipt Line** check box is selected in the **Inventory Handling Parameters (whinh0100m000)** session, the **Generate Serials** command is used to generate all serial numbers for the receipt line.

As a result, the serial numbers are entered in the **Serialized Items (tcibd4501m000)** session and the **Item - Serials and Warehouses (whltc5100m000)** session. After you confirm the receipt, the serial numbers are linked to the item on the receipt line and stored in inventory. You can then view the item/serial number combinations in the **Item - Serials and Warehouses (whltc5100m000)** session and the **Serialized Items (tcibd4501m000)** session.

For manufactured serialized items that you receive in the warehouse, the serial number entered in Manufacturing is automatically filled on the receipt line. If you confirm and put away the receipt line, the item and the serial number is stored in inventory. To register serial numbers in Manufacturing for serialized items that you produce, See Serialized items in Manufacturing.

For customer items received for repair or overhaul, the serial number is entered by the customer on the **Maintenance Sales** order.

For issues from the warehouse, you are not required to register serial numbers, because LN allocates serial numbers from inventory based on the *first in, first out* or *last in, first out* outbound methods and updates the inventory accordingly.

However, on the *picking list* and/or the *outbound advice*, you can change the serial number that LN allocated. To change the serial number on the outbound advice or the picking list is useful if, for example, the serial

number generated by LN refers to an item located at the bottom of the stack. In such cases, you can replace this number by a serial number that refers to an item at the top of the stack that is easier to pick.

To register serial numbers in the high volume scenario

In the *high volume scenario*, serial numbers are registered for serialized items during a warehouse transaction such as a receipt or an issue, or during production or maintenance of an item.

The serial registration parameters of the **Item - Warehousing (whwmd4600m000)** session determine the types of warehouse transaction for which registration of lot or serial numbers is required.

To register serial numbers, you generate or manually enter new serial numbers or link existing serial numbers to the serialized items.

It depends on the stage of the warehouse or production flow that you are in whether existing serial numbers are available. For example, when producing new serialized items, you must generate serial numbers. The generated serial numbers are allocated to the items on the production order and stored in Common, but not in Warehousing. When some of these items are issued for sale, you link the serial numbers to the issued items on the outbound advice or the shipment lines.

If you generate serial numbers, the required number of serial numbers is generated according to a user-defined *mask*. See To set up serialized items. If you manually enter a serial number, the serial number is not entered according to the mask format.

If applicable according to the serial registration parameters, you can generate or link serial numbers in the following sessions:

Warehousing

- **Receipt Lines (whinh3112s000)**
- **Receipt Line Stock Point Details (whinh3123m000)**
To access this session, select the relevant receipt line in the **Warehouse Receipt (whinh3512m000)** session and on the *appropriate menu* menu, select **Stock Point Details**.
- **Receipt Line BOM (whinh3118m000)**
To access this session, select the relevant receipt line in the **Warehouse Receipt (whinh3512m000)** session. Go to the *appropriate menu* --> Open --> **BOM Lines**.
- **Receipt Line BOM Lots and Serials (whinh3119m000)**
To access this session, on the *appropriate menu* of the **Receipt Line BOM (whinh3118m000)** session, select **Lots and Serials**.
- **Shipment Notice Line Stock Point Details (whinh3105m000)**
To access this session, on the *appropriate menu* of the **Shipment Notice Lines (whinh3101m000)** session, select **ASN Line Stock Point Details**.

Outbound

- **Outbound Advice Lots and Serials (whinh4126m000)**
To access this session, select the relevant advice line in the **Outbound Advice (whinh4525m000)** session and on the *appropriate menu*, click **Lots and Serials**.
- **Shipment Line Stock Point Details (whinh4133m000)**

To access this session, select the relevant shipment line in the **Shipment Lines (whinh4131m000)** session and select Stock Point Details.

Adjustment or Cycle Counting

- **Cycle Counting Order Line Stock Point Details (whinh5106m000)**
To access this session, select the relevant order line in the **Cycle Counting Order Lines (whinh5101m000)** session and on the *appropriate* menu, click **Stock Point Details**.
- **Adjustment Order Line Stock Point Details (whinh5126m000)**
To access this session, select the relevant order line in the **Adjustment Order Lines (whinh5121m000)** session and on the *appropriate* menu, click **Stock Point Details**.

Handling units

- **Handling Unit Stock Point Details (whwmd5136m000)**
To access this session, click **Stock Point Details** on the toolbar of the **Handling Unit Tree**, the **Handling Units (whwmd5130m000)** session, the **Handling Units (whwmd5630m000)** session, or the **Compose Handling Units (whwmd5130m100)** session.

Manufacturing

- **Serial End Item - As-Built Headers (timfc0110m000)**
- **Serial End Item - As-Built Components (timfc0111m000)**

Service

- **Work Orders (tswcs2100m000)**
- **Work Order Material Resources (tswcs4110m000)**
- **Service Order Actual Material Costs (tssoc2121m000)**

In the following sessions, you can only link serial numbers:

- **Shipment Lines (whinh4131m000)**
- **Outbound Advice (whinh4525m000)**
- **Adjustment Order Line Stock Point Details (whinh5126m000)**

Overview of the high volume serial registration parameters

The table shows the results of each combination of values that you can select in the following fields of the **Item - Warehousing (whwmd4600m000)** session:

- **Serial Number Entry During Receipt**
- **Serial Number Entry During Transfer**
- **Register Serial Issue During As Built**
- **Register Serial Issue in Service**

Value combination	Receipt	Transfer	Service	As - Built	Result
A	Yes	Selected	No	No	1, 2, 3, 4, 5

Value combination	Receipt	Transfer	Service	As - Built	Result
B	Yes	Cleared	No	No	1, 3, 4, 5
C	Yes	Selected	Yes	No	1, 2, 4, 5
D	Yes	Cleared	Yes	No	1, 4, 5
E	Yes	Selected	No	Yes	1, 2, 3, 5
F	Yes	Cleared	No	Yes	1, 3, 5
G	Yes	Selected	Yes	Yes	1, 2, 5
H	Yes	Cleared	Yes	Yes	1, 5
I	No	Selected	No	No	2, 3, 4, 5
J	No	Cleared	No	No	3, 4, 5
K	No	Selected	Yes	No	2, 4, 5
L	No	Cleared	Yes	No	4, 5
M	No	Selected	No	Yes	2, 3, 5
N	No	Cleared	No	Yes	3, 5
O	No	Selected	Yes	Yes	2, 5
P	No	Cleared	Yes	Yes	5

Re-sult	Description
1	Serial numbers present in the Receipt Line Stock Point Details (whinh3123m000) session.
2	Serial numbers present in the Shipment Line Stock Point Details (whinh4133m000) session and the Outbound Advice Lots and Serials (whinh4126m000) session for issues of f the Transfer origin.
3	Serial numbers present in the Shipment Line Stock Point Details (whinh4133m000) session and the Outbound Advice Lots and Serials (whinh4126m000) session for issues of f the following origins: <ul style="list-style-type: none"> • Service • Service (Manual) • Maintenance Work • Maintenance Work (Manual)
4	Serial numbers present in the Shipment Line Stock Point Details (whinh4133m000) session and the Outbound Advice Lots and Serials (whinh4126m000) session for issues of f the following origins: <ul style="list-style-type: none"> • JSC Production • JSC Production (Manual)

Re-sult	Description
5	Serial numbers present in the Shipment Line Stock Point Details (whinh4133m000) session and the Outbound Advice Lots and Serials (whinh4126m000) session for issues of all (other) origins.

High volume lot and serial registration parameters

In the *high volume scenario*, serial numbers are registered for serialized items during a warehouse transaction such as a receipt or an issue, or during production or maintenance of an item.

Serial registration parameters

In the **Item - Warehousing (whwmd4500m000)** or the **Item - Warehousing (whwmd4600m000)** session, these parameters are available to enable the registration of serial numbers:

- Serial Number Entry for Direct Delivery
- Serial Number Entry During Receipt
- Serial Number Entry During Transfer
- Register Serial Issue During As Built
- Register Serial Issue in Service
- Lot and Serial Registration Templates

If serial registration is enabled, the registration is mandatory.

In the **Warehousing Order Types (whinh0110m000)** session, select the Generate Serials Automatically check box if you want serial numbers to be automatically generated for warehouse receipts and transfers.

The **Register Serial Issue During As Built**, **Register Serial Issue in Service**, and the **Register Lot Issue During As Built** parameter overrule the lot and serial registration templates that you define. See Lot and serial registration templates and How to define lot and serial registration templates.

If you selected **yes** for the Register Serial Issue During As Built and/or the Register Serial Issue in Service fields, you must register serial numbers for warehouse issues of origins other than **JSC Production**. For an overview of what these settings accomplish, see Overview of the high volume serial registration parameters.

Serial number registration is mandatory for warehouse issues unless otherwise specified by these parameters:

- Register Serial Issue During As Built
- Register Serial Issue in Service
- Lot and Serial Registration Template

Lot registration parameters

In the **Item - Warehousing (whwmd4500m000)** or the **Item - Warehousing (whwmd4600m000)** session, these parameters are available to enable the registration of lot numbers:

- Lot Entry for Direct Delivery

- Lot Entry During Receipt
- Lot Entry During Transfer
- Register Lot Issue During As Built
- Register Lot Issue in Service & Maintenance

If lot registration is enabled, the registration is mandatory.

You must always register lot codes for issues from the warehouse (except issues related to *transfer orders*).

LN falls back to these parameter settings if no relevant lot and serial registration template is available. See Lot registration in the high volume scenario.

Maintaining high volume lot and serial registration parameters

When initially setting up master data for an item, *high volume* lot and serial registration parameters are specified in these sessions:

- **Items - Warehousing Defaults (whwmd4101s000)**
- **Item - Warehousing (whwmd4500m000)**
- **Item - Warehousing (whwmd4600m000)**

After the initial setup, the registration options in these sessions are read-only if any of these conditions apply:

- Inventory is present in the **Stock Point Inventory (whinr1540m000)** session.
- Lots and serial numbers are present in these sessions:
 - **Shipment Notice Lines (whinh3101m000)**
 - **Warehouse Receipt Lines (whinh3512m100)**, and the receipt lines that contain the lots or serials are unconfirmed.
 - **Inbound Order Lines in Transit (whinh2110m200)**, and the inbound order lines that contain the lots or serials are not yet received in the destination warehouse.

If the *high volume* lot and serial registration parameters are read-only in the sessions mentioned previously, the registration parameters are maintained in the **Change Item Lot and Serial Registration (whwmd4200m000)** session.

If you disable a high-volume lot or serial registration parameter for an item and click **Process** in the **Change Item Lot and Serial Registration (whwmd4200m000)** session, the related inbound or outbound lots or serial numbers for the item are deleted in these sessions:

- **Shipment Notice Line Stock Point Details (whinh3105m000)**
- **Shipment Line Stock Point Details (whinh4133m000)**
- **Inspection Lines (whinh2131m000)**
- **Quarantine Inventory Disposition (whwmd2172m000)**
- **Receipt Line Stock Point Details (whinh3123m000)**

If you enable a high-volume lot or serial registration parameter, no new lots or serial numbers are generated. See To register serial numbers in the high volume scenario and Lot registration in the high volume scenario on how to register *high volume* serial numbers or lots.

Note: Lot and serial registration parameters specified in the **Item - Warehousing (whwmd4600m000)**, **Item - Warehousing (whwmd4500m000)**, or the **Change Item Lot and Serial Registration (whwmd4200m000)** session are updated in the **Item - Warehousing by Site (whwmd4104m000)** session. This is because lot and serial registration parameters are mandatory warehouse – item parameters on company level. See *Warehousing User Guide for Multisite*.

Default values for serialized items

For serialized items, the lot code that is linked to the item with the current serial number is taken as the default value in the **Lot** field of the current session.

For serials that are not stored in inventory, lot codes are linked to item/serial number combinations in the **Serial Numbers (tcibd4101s000)** session. For serials that are stored in inventory, lot codes are linked to item/serial number combinations in the **Item - Serials and Warehouses (whltc5100m000)** session.

If an E-item revision exists for the lot, this revision is defaulted in the **E-Item Revision** field of the current session. If an effectivity unit exists for the lot, this unit is defaulted in the **Effectivity Unit** field of the current session.

Lot and serial registration templates

Lot and serial registration templates are used to specify the order origins and transaction types for which serial and/or lot registration must take place. This applies to lot and serial numbers not stored in inventory.

For example, you can specify that for a particular item, serial registration must be performed for **Maintenance Sales** orders when the item is received for repair, but that serial registration is not required when the same item is received on a **Purchase** order.

While performing an *inventory transaction* for an item on a particular order, LN checks whether a lot and serial registration template exists for the order origin and the transaction type. If yes, lot and/or serial registration must be carried out according to the template. If not, lot and/or serial registration must be carried out according to the applicable parameter from the following list:

- **Serial Number Entry During Receipt**
- **Serial Number Entry During Transfer**
- **Lot Entry During Receipt**
- **Lot Entry During Transfer**

If the following parameters are set, however, they overrule the lot and serial registration template:


- **Register Serial Issue During As Built**
- **Register Serial Issue in Service**
- **Register Lot Issue During As Built**

The parameters from the lists are available in the **Item - Warehousing (whwmd4600m000)** session.

How to define lot and serial registration templates

Lot and serial registration templates are used to specify the order origins and transaction types for which serial and/or lot registration must take place.

To define lot and serial registration templates, proceed as follows:

- 1 In the **Lot and Serial Registration Templates (whwmd4102m000)** session, enter an identification code and a description for the lot and serial registration template.
- 2 Highlight the identification code and description you entered in the previous step and on the *appropriate* menu, select **Lot and Serial Registration by Order Origin**. As a result, the **Lot and Serial Registration by Order Origin (whwmd4103m000)** starts. The highlighted registration template identification code and description is displayed in the header section.
- 3 In the **Lot and Serial Registration by Order Origin (whwmd4103m000)**, click .
- 4 In the **Order Origin** field, select the origin of the orders for which lot and/or serial registration must take place.
- 5 In the **Transaction Type** field, select the *inventory transaction type* for which lot and/or serial registration must take place.
- 6 Select the **Lot Registration** check box if lot registration must take place for the selected order origin and transaction type.
- 7 Select the **Serial Registration** check box if serial registration must take place for the selected order origin and transaction type.
- 8 Save the settings made in the previous steps.
- 9 If required, repeat the previous steps to specify other order origin and transaction type combinations for which lot and/or serial registration must take place.

Important: You can also use lot and serial registration templates to exclude order origins and transaction types from lot and/or serial registration. If a general lot and/or serial registration parameter is set in the **Item - Warehousing (whwmd4600m000)** session and you do not want lot or serial registration to take place for a particular order origin and transaction type, select the order origin and the transaction type as described in steps 4 and 5, and clear the **Lot Registration** and/or **Serial Registration** check boxes.

To maintain serial numbers for inventory adjustment order lines

For adjustment order lines, serial numbers are maintained for serialized items in the high volume scenario and the low volume scenario. Serial number maintenance for adjustment order lines is not mandatory for serialized items in the high volume scenario.


The procedure to maintain serial numbers for serialized items in the high volume scenario is different from the procedure to maintain serial numbers for serialized items in the low volume scenario.

Low volume scenario

In this scenario, variances for serialized items are maintained in the **Adjustment Order Line Stock Point Details (whinh5126m000)** session. The serial numbers are maintained in inventory.

On the *appropriate* menu of the Lines tab of the **Adjustment Order (whinh5120m100)** session or the **Adjustment Order Lines (whinh5121m000)** session, select **Stock Point Details** to start the **Adjustment Order Line Stock Point Details (whinh5126m000)** session.

Actual inventory is higher than stockpoint inventory This means, that the inventory that was counted is higher than the inventory registered in LN. In this situation, you must add serial numbers and set the inventory adjusted and the variance to 1 for each serial number to make up for the difference. For example, if the stockpoint inventory is 23 and you counted 25 items, you must add serial numbers for the two additional items and for each serial number, you must set the adjustment and the variance to 1. For this purpose, proceed as follows:

- 1 In the toolbar, click .
- 2 In the **Serial Number** field, enter the serial number.
- 3 In the **Inventory Adjusted (Inventory Unit)** field, enter 1 to indicate that the serial number must be added (and that the item inventory must be increased by one). As a result, the value in the **Variance (Inventory Unit)** field is defaulted to 1. This is the correct value, it indicates the difference between the counted inventory and the inventory registered in LN.
- 4 If required, repeat steps 1. - 3. to add more serial numbers.

Actual inventory is lower than stockpoint inventory This means, that the inventory that was counted is lower than the inventory registered in LN. In this situation, you must leave the inventory adjusted to 0 and enter a negative variance for the missing serial numbers to correct the difference. For example, if the stockpoint inventory is 23 and you counted 21 items, you must set the adjustment to 0 and the variance to -1 for each of the missing items. For this purpose, proceed as follows:

- 1 On the *appropriate* menu, select **Insert all Stock Point Serials**. As a result, the serial numbers stored in the stock point as specified on the adjustment order line are displayed.
- 2 In the **Inventory Adjusted (Inventory Unit)** field for each of the serial numbers of the items that are missing, enter 0 to indicate that the serial number must not be added and the item inventory calculated by LN must be decreased.
- 3 In the **Variance (Inventory Unit)** field for each of the serial numbers of the items that are missing, enter -1 to indicate that the serial number must be removed and the item inventory must be decreased by one.

When the adjustment order is processed, LN adjusts the inventory as specified.

High volume scenario

In the high volume scenario, variances for serialized items are maintained in the **Adjustment Order (whinh5120m100)** session. In the **Adjustment Order Line Stock Point Details (whinh5126m000)** session, you can add or remove serial numbers corresponding to the variances. Note that maintaining serial numbers for inventory adjustments of serialized items in the high volume scenario is not mandatory.

After entering the variances for the item in the **Adjustment Order Lines (whinh5121m000)** session, select **Stock Point Details** to start the **Adjustment Order Line Stock Point Details (whinh5126m000)** session.

- Actual inventory is higher than stockpoint inventory
The procedure to add serial numbers and set the variance and the adjustment to 1 for each serial number is identical to the procedure for this situation in the low volume scenario, except that you can also enter the stock point inventory. In the low volume scenario the stock point inventory will always be defaulted by the system..
- Actual inventory is lower than stockpoint inventory

The procedure to remove serials by entering a variance of -1 and an adjustment of 0 is identical to the procedure for for this situation in the low volume scenario, except for step 1.

In step 1., on the *appropriate* menu, select **Link Serial(s)**. From the list that appears, select the serial numbers that you want to remove. As a result, the selected serial numbers are displayed in the **Adjustment Order Line Stock Point Details (whinh5126m000)** session.

When the adjustment order is processed, LN adjusts the inventory as specified.

Chapter 4: Manufacturing

Serialized items in Manufacturing

You can use serial numbers to track and trace the items in inventory, production orders, purchase orders, sales orders, service, and so on. You can determine, for example, to which production order a specific end item belongs, which components are used and where the components originate.

To set up serialized items

If you want to use serial numbers in LN, you must set up data first. For information, refer to To set up serialized items.

For serialization in Manufacturing, you must also set a number of parameters in the **Production Order Parameters (tisfc0100s000)** session:

- Generate Serial Numbers
- Only Serialized and Lot-controlled Items in As-built Components
- As-Built Status Handling.

As-built structure

The as-built structure is an important concept for serialized (end) items in Manufacturing. The as-built structure reflects the configuration of a product. Two additional concepts are important:

- As-built header
The as-built header contains the individual serialized end items for a specific production order or assembly order.
- As-built component
From a specific serialized item in the as-built header, you can zoom to the as-built components, that is, the components that are used in the configuration. The components can be serialized or non-serialized. Dependent on the setting of the Only Serialized and Lot-controlled Items in As-built Components field in the **Production Order Parameters (tisfc0100s000)** session, all components can be viewed, or only the serialized and lot controlled components.

You can use the as-built structure and the serial numbers in the structure for several purposes:

- For information purposes, for example, how the product is assembled, and which components are used. If you want to use the serial numbers for configuration-information purposes only, you can choose to clear the Serial Tracking check box in the **Item - Warehousing (whwmd4600m000)** session. In this way, the data is not stored for tracking and tracing.

- As a basis for a product structure (*physical breakdown*), which you can use in Service for service and maintenance purposes. For more information, refer to To create a physical breakdown from an as-built structure and To maintain physical breakdowns. If service engineers use the as-built structure, having anonymous items displayed in the as-built structure can be useful. In that case, you must clear the Only Serialized and Lot-controlled Items in As-built Components check box in the **Production Order Parameters (tisfc0100s000)** session.
- To update tracking sessions in Warehousing so that you can track and trace the serialized items that you used in production to purchase orders, sales orders, and so on. You must select the Serial Tracking check box in the **Item - Warehousing (whwmd4600m000)** details session to use serial numbers for tracking purposes.

Serial numbers

Operators in the job shop usually enter the serial numbers in the as-built structure. To enter the numbers, you can, enter or scan bar codes. You can also choose to generate the serial numbers for end items in the as-built header. In that case, you must define a *mask*. The moment that serial numbers in the header are generated depends on the setting of the Generate Serial Numbers field in the **Production Order Parameters (tisfc0100s000)** session. This parameter is important because this enables you to determine yourself on which moment in the production process you can assign serial numbers to the items in a production order.

You can view and maintain the as-built header in the Serial End Item - As-Built Headers (timfc0110m000) session, and the as-built components in the Serial End Item - As-Built Components (timfc0111m000) session. For more information, refer to To maintain as-built headers and as-built components

Masks for serialized items

To generate serial numbers, you must use *masks*. You can define masks at these levels:

- Item - site
You can define a mask for a specific item and site in the Mask by Item/Item Group/Site (tcibd4505m100) session.
- Item group - site
You can define a mask for a specific item group and site in the Mask by Item/Item Group/Site (tcibd4505m100) session.
- Item
You can define a mask for a specific item in the Mask by Item/Item Group/Site (tcibd4505m100) session or, if the multisite concepts are inactive, in the Mask by Item/Item Group (tcibd4505m000) session.
- Item group
You can define a mask for a specific item group in the Mask by Item/Item Group/Site (tcibd4505m100) session or, if the multisite concepts are inactive, in the Mask by Item/Item Group (tcibd4505m000) session.
- Company level
You can define a mask for a specific company in the Item Base Data Parameters (tcibd9199m000) session.

When serial numbers are generated, LN searches for a mask in this order:

- 1 Item by site.
- 2 Item group by site.
- 3 Item
- 4 Item group

5 Company

If no mask is defined, no as-built structure is generated, and you must manually specify serial numbers, for example, by typing or scanning. Without a mask, the **Generate Serial Numbers** parameter in the **Production Order Parameters (tisfc0100s000)** session is no longer applicable.

See also Defining a mask.

To use serial numbers during the production order process

Serial number handling in Manufacturing is embedded in the production order process. The As-Built Status Handling field in the **Production Order Parameters (tisfc0100s000)** session determines how serialized items in Manufacturing are handled:

- **Automatic** If the **As-Built Status Handling** field is set to **Automatic**, the actions a user performs on the production order result in status changes of the serialized end item. For example, if a number of items on a production order is reported as completed or rejected, the status of the same number of items in the as-built header automatically changes to **Manual**.
- **Manual**
If the **As-Built Status Handling** field is set to **Manual**, you must first update the status of the items in the as-built header before you can complete, or reject the items on the last operation of a production order, or on the production order itself. For example, if you have completed two serialized items, and you have rejected one, you must first change the status of two items in the as-built header to **Assigned**. Only then can you report these quantities as completed and rejected on the production order.

For more information, refer to Working with serialized items in Manufacturing .

If you want to handle serialized items in the most detailed way, you must use the Production Warehouse Orders (timfc0101m000) session. This session is especially useful to issue, return, and cancel serialized components for a specific end item.

To maintain as-built headers and as-built components

This topic describes how to actually assign serial numbers to (end) items in Manufacturing.

The sessions that you use to assign serial numbers are in the Manufacturing Control module. Carry out the following steps:

- 1 When you are working on a production order, use the Serial End Item - As-Built Headers (timfc0110m000) session to view the generated serial numbers of end items, or to assign serial numbers to end items yourself. If the order quantity of a production order is five products, a line for every product (five lines in total) is generated in the **Serial End Item - As-Built Headers (timfc0110m000)** session. The Generate Serial Numbers parameter determines the exact moment that serial numbers are generated for the end products.
- 2 If you select an item in the **Serial End Item - As-Built Headers (timfc0110m000)** session, and click **As-Built Components** from the *appropriate* menu, the Serial End Item - As-Built Components (timfc0111m000) session is started. In this session, the (serialized) components of the serialized end item are displayed, and you can link serial numbers to serialized component items. If a specific end item requires three pieces of a specific serialized component, and one piece of another serialized component,

four component lines are created for the end item in which you must enter a serial number. You are creating a so-called as-built structure to establish which specific components (identified by serial numbers) are used in specific end items (also identified by serial numbers).

- 3 After you have assigned serial numbers to components in the **Serial End Item - As-Built Components (timfc0111m000)** session, you can check whether the as-built structure is complete. All serialized components must be provided with a serial number otherwise you cannot copy the as-built structure to an as-maintained structure in Service. To check the as-built structure for missing serial numbers, select the end item in the **Serial End Item - As-Built Headers (timfc0110m000)** session and click **Validate** from the *appropriate* menu.

Working with serialized items in Manufacturing

During production, operators in the job shop can link, manually or automatically, serial numbers to *end items* in a production order and to specific components. This handling of serial numbers in Manufacturing is embedded in the production order process. When handling *serialized items*, the status of the serialized items is changed.

For example, when serial numbers are assigned to items, the status changes to **Assigned**. In addition, the status of the serialized item also expresses other handling of the serialized items, such as rejection, sending to the warehouse, and receiving in the warehouse.

You can view and maintain the status of the serialized items in the **Serial Status** field in the Serial End Item - As-Built Headers (timfc0110m000) session.

Created

The initial status of the serialized end item, after the serial numbers are generated.

The serial numbers are generated by based on the value of the Generate Serial Numbers field in the **Production Order Parameters (tisfc0100s000)** session. When the field is set to **Manually** you can generate serial numbers at any point in the process.

Assigned

The product is finished. A serial number is linked to the serialized item, and the serialized item is ready to be transferred to Warehousing.

Sent to Warehouse

The serialized item is reported as complete and sent but not yet received in the warehouse. The inbound procedure must still be carried out.

Received in Warehouse

The serialized item is received in the warehouse. The inbound procedure is carried out.

Recalled from Warehouse

The serialized item is in the warehouse but must be returned to the job shop.

Returned from Warehouse

The serialized item was in a warehouse in Warehousing but is now returned to Job Shop Control. The outbound procedure must still be carried out.

Transferred to As-Maintained

The serialized item is transferred to Service.

Rejected/Scrapped

The serialized item is rejected in the production order. The serialized item cannot be transferred to as-maintained in Service, and cannot be used in another production order. Rework using a rework order is still possible.

Note: Newly created as-builts cannot have this status.

Rejected

The serialized item is rejected in the production order. An item with this status is sent to quarantine or scrapped.

Quarantined

The serialized item is rejected in the production order and is sent to a quarantine warehouse or designated quarantine location.

Scrapped

The serialized item is rejected in the production order and is not eligible for rework.

Assigning serial numbers

You can handle serialized items in Manufacturing manually or automatically, which is determined in the **Production Order Parameters (tisfc0100s000)** session by the As-Built Status Handling field.

If the **As-Built Status Handling** field is set to **Automatic**, the actions a user carries out on the production order automatically result in status changes of the serialized end items. If a number of serialized items on a production order is reported as completed or rejected, the status of those items in the as-built header changes automatically to **Assigned**.

- Advantages if the **As-Built Status Handling** field is **Automatic**
You can handle the serialized items for Manufacturing directly in the session in which you report your operation or production order as completed (the Report Operations Completed (tisfc0130m000) session, or the Report Orders Completed (tisfc0520m000) session). Consequently, you do not need to start an extra session (the Serial End Item - As-Built Headers (timfc0110m000) session) to handle serialized items. You can easily use a scanning device. The scanned numbers are directly entered in the session in which you report the operations or the production order as completed.
- Disadvantage if the **As-Built Status Handling** field is set to **Automatic**
If you want to report as completed a number of serialized items with specific serial numbers, you must report these items as completed one by one in the **Report Operations Completed (tisfc0130m000)** session, or the **Report Orders Completed (tisfc0520m000)** session.

Example

A production order has an order quantity of five serialized end items.

One of the five items is finished. As usual, you report the item as completed in the **Report Operations Completed (tisfc0130m000)** details session (on the last operation), or in the **Report Orders Completed (tisfc0520m000)** details session.

You must enter the serial number of the item in the **Serial Number** field. The serial status of that item in the **Serial End Item - As-Built Headers (timfc0110m000)** session changes from **Created** to **Assigned**.

If the **As-Built Status Handling** field in the **Production Order Parameters (tisfc0100s000)** session is set to **Manual**, you must first update the status of the items in the as-built header (**Serial End Item - As-Built Headers (timfc0110m000)** session) before you can complete or reject the items on the last operation of a production order.

The advantage if the **As-Built Status Handling** field is set to **Manual**:

- You can maintain and handle several specific serial items simultaneously in the **Serial End Item - As-Built Headers (timfc0110m000)** session. For example, you can reject a number of specific serialized items, or you can set the status to **Assigned** for a number of specific serialized items.

The disadvantage if the **As-Built Status Handling** field is set to **Manual**:

- You always need two sessions to handle serialized items: First you must change the status of serialized items in the **Serial End Item - As-Built Headers (timfc0110m000)** session. After that, you must report the items completed or rejected in the **Report Operations Completed (tisfc0130m000)** session, or the **Report Orders Completed (tisfc0520m000)** session.

Example

Suppose that you have finished two items (serial numbers 10400003 and 10400004) out of a production order quantity of three. Usually, you must directly report those two items as completed in the **Report Operations Completed (tisfc0130m000)** details session (on the last operation), or in the **Report Orders Completed (tisfc0520m000)** details session. However, if the **As-Built Status Handling** field in the **Production Order Parameters (tisfc0100s000)** session is set to **Manual**, you must first change the serial status of items 10400003 and 10400004 in the **Serial End Item - As-Built Headers (timfc0110m000)** session from **Created** to **Assigned**. Only then can you report the two items as completed.

Serialized items in the job shop - manual status handling

If the **As-Built Status Handling** field in the **Production Order Parameters (tisfc0100s000)** session is **Manual**, the as-built structure is leading when you deal with serialized items. In other words, you must first change the status of a serialized end item in the **Serial End Item - As-Built Headers (timfc0110m000)** session before you can handle the serialized items in a production order procedure.

Handling of serialized items includes reporting as completed or rejected, and recalling serialized items from the warehouse. To handle or recall serialized items, you can use the following two sessions:

- Report Operations Completed (tisfc0130m000)
- Report Orders Completed (tisfc0520m000)

Using the Report Operations Completed (tisfc0130m000) session

Report items as completed If you want to report one or more items as completed for a specific production order on the last operation of the production order, and the **As-Built Status Handling** field in the **Production Order Parameters (tisfc0100s000)** session is set to **Manual**, take the following steps:

- 1 Start the **Report Operations Completed (tisfc0130m000)** details session.
- 2 Start the **Serial End Item - As-Built Headers (timfc0110m000)** session by clicking **Serial Numbers** in the **Report Operations Completed (tisfc0130m000)** details session.
- 3 Change the status of the serialized items that you want to report as completed from **Created** to **Assigned**.
- 4 Return to the **Report Operations Completed (tisfc0130m000)** details session.
- 5 Click **Default Qty Completed** next to the **Additional Completed** field. The item quantity for which you changed the status to **Assigned** in the **Serial End Item - As-Built Headers (timfc0110m000)** session appears in the **Additional Completed** field. You cannot change that value because it correlates with the number of items you put to **Assigned**. To make changes, you must first go back to the **Serial End Item - As-Built Headers (timfc0110m000)** session.
- 6 Click **Save**, or click **Complete Operation** on the toolbar or on the *appropriate* menu. If you click **Complete Operation**, you can no longer change quantities on the operation, unless you reset the operation status.

Reject items If you want to reject one or more items for a specific production order, and the **As-Built Status Handling** field in the **Production Order Parameters (tisfc0100s000)** session is set to **Manual**, take the following steps:

- 1 Start the **Report Operations Completed (tisfc0130m000)** details session.
- 2 Start the **Serial End Item - As-Built Headers (timfc0110m000)** session by clicking **Serial Numbers** in the **Report Operations Completed (tisfc0130m000)** details session.
- 3 Return to the **Report Operations Completed (tisfc0130m000)** details session.
- 4 Click **Save**, or click **Complete Operation** on the toolbar or on the *appropriate* menu. If you click **Complete Operation** you can no longer change quantities on the operation, unless you reset the operation status.

Using the Report Orders Completed (tisfc0520m000) session

Report items as completed If you want to report one or more items as completed for a specific production order in the **Report Orders Completed (tisfc0520m000)** session, and the **As-Built Status Handling** field in the **Production Order Parameters (tisfc0100s000)** session is set to **Manual**, take the following steps:

- 1 Start the **Report Orders Completed (tisfc0520m000)** details session for a specific order.
- 2 Start the **Serial End Item - As-Built Headers (timfc0110m000)** session. To start this session, click **Serial End Item - As-Built Headers** in the **Report Orders Completed (tisfc0520m000)** details session.
- 3 Change the order status for the items that you want to report as completed from **Created** to **Assigned**.
- 4 Go back to the **Report Orders Completed (tisfc0520m000)** details session.
- 5 Click **Retrieve As-Built Default Quantities** on the toolbar or on the *appropriate* menu. The item quantity for which you changed the status to **Assigned** appears in the **Quantity to Deliver** field.
- 6 Click **Save**. If you select **Production Completed** in the **Order Status** field and then click **Save**, the production order is completed. In that case, you can no longer handle (serialized) items for the production order.

Recall items from the warehouse If you want to recall one or more items from the warehouse for a specific production order, and the **As-Built Status Handling** field in the **Production Order Parameters (tisfc0100s000)** session is set to **Manual**, take the following steps:

- 1 Start the **Report Orders Completed (tisfc0520m000)** details session for a specific order.

- 2 Start the **Serial End Item - As-Built Headers (timfc0110m000)** session. To start this session, click **Serial End Item - As-Built Headers** in the **Report Orders Completed (tisfc0520m000)** details session.
- 3 Change the order status of items that must be recalled from **Received in Warehouse** to **Recalled from Warehouse**. Note that you cannot recall serialized items if one of the other items still has the **Assigned** status.
- 4 Go back to the **Report Orders Completed (tisfc0520m000)** details session.
- 5 Click **Retrieve As-Built Default Quantities** on the toolbar or on the *appropriate* menu. The item quantity for which you changed the status to **Recalled from Warehouse** appears in the **Quantity to Deliver** field as a negative quantity.
- 6 Click **Save**. If you select **Production Completed** in the **Order Status** field and then click **Save**, the production order is completed. In that case, you can no longer handle (serialized) items for the production order.

Order distribution of unit-effective items

Generally, if an item is *unit effective*, you need the Production Order Distribution (tisfc0105m000) session to handle the order quantities. However, for a serialized unit-effective item, you can skip the **Production Order Distribution (tisfc0105m000)** session. To maintain effectivity units for serialized items, you can use the **Serial End Item - As-Built Headers (timfc0110m000)** session.

Note that you can use the **Production Order Distribution (tisfc0105m000)** session to view unit effective items.

Serialized items on the job shop - automatic status handling

If the As-Built Status Handling field in the **Production Order Parameters (tisfc0100s000)** session is set to **Automatic**, work on a production order automatically results in status changes of the involved serialized end items. In other words, if you deal with serialized items in the production order process, the status of the serialized items automatically changes if you perform actions on the items, for example, completing, rejecting, or recalling the items. You can view the status of the serialized items in the **Serial End Item - As-Built Headers (timfc0110m000)** session.

If you work in the following sessions on production orders, the status of serialized items can be affected:

- **Report Operations Completed (tisfc0130m000)**
- **Report Orders Completed (tisfc0520m000)**

Reject items

You can reject serialized items on all operations, not only on the last operation.

If the **As-Built Status Handling** field in the **Production Order Parameters (tisfc0100s000)** session is set to **Automatic**, to reject one or more items for a specific production order, take the following steps.

- 1 Start the **Report Operations Completed (tisfc0130m000)** details session.
- 2 Specify the rejected item or rejected items in one of the following ways:

- Enter the quantity that you want to reject on the operation in the **Quantity Scrapped** field,
- To reject a item, type the serial number in the **Serial Number** field.

3 Click **Save**.

Note:

You can only reject serialized items in the **Report Operations Completed (tisfc0130m000)** details session. You cannot reject serialized items on the production order level, that is, in the **Report Orders Completed (tisfc0520m000)** details session. Only if a production order has no operations can you use the **Report Orders Completed (tisfc0520m000)** details session to reject items.

You can enter a serial number in the **Serial Number** field, but you can also determine the item's lot and effectivity unit in respectively the **Lot Code** and the **Effectivity Unit** field.

Report items as completed

If you want to report one or more items as completed for a specific production order on the last operation of the production order, and the **As-Built Status Handling** field in the **Production Order Parameters (tisfc0100s000)** session is set to **Automatic**, take the following steps:

- 1** Start the **Report Operations Completed (tisfc0130m000)** details session.
- 2** Enter the quantity that you want to report as completed on the operation in the **Quantity Completed** field:
 - If you want to report only one serialized item as completed, you can also enter the serial number in the **Serial Number** field.
 - If you want to report more than one end item as completed, you must enter that quantity in the **Quantity Completed** field, but you cannot indicate specific serial numbers.
 - If you want to report a quantity of serialized items as completed for a specific lot or a specific effectivity unit, you can enter the lot number or the effectivity unit in respectively the **Lot Code** field and the **Effectivity Unit** field.
- 3** Click **Save**.
- 4** If you start the **Serial End Item - As-Built Headers (timfc0110m000)** session, you can see that the status of the completed items has changed from **Created** to **Assigned**.
 - If you completed one item, and you indicated the serial number, that specific item has the **Assigned** status.
 - If you completed more than one item, a number of serialized items equal to the completed quantity has got the **Assigned** status. The sequence of the serialized items in the **Serial End Item - As-Built Headers (timfc0110m000)** session determines which serialized items became **Assigned**. Only items with the **Created** status can be changed to **Assigned**. Serialized items with statuses other than **Created** were skipped, and did not become **Assigned**.
 - If you completed serialized items for a specific lot or a specific effectivity unit, only the items with this lot number or effectivity unit have the **Assigned** status.

Using the Report Orders Completed (tisfc0520m000) session

Report items as completedIf you want to report one or more items as completed in the **Report Orders Completed (tisfc0520m000)** details session, and the **As-Built Status Handling** field in the **Production Order Parameters (tisfc0100s000)** session is set to **Automatic**, take the following steps:

- 1** Start the **Report Orders Completed (tisfc0520m000)** details session.

- 2 If you report only one item as completed with a specific serial number, you can enter the serial number in the **Serial Number** field. If you want to report more than one serial number as completed, you must enter that quantity in the **Additional Qty to Deliver** field. You cannot specify the serial numbers.
- 3 If you are not finished yet, and you want to report other quantities as completed later on, click **Save**.
If you do not want to complete a quantity in a later stage, select **Completed** in the **Order Status** field, and then click **Save**, the production order status changes to **Completed**, and you can no longer report other quantities as completed.
- 4 If you start the **Serial End Item - As-Built Headers (timfc0110m000)** session, you can check the statuses of the serialized items.

Recall items from the warehouse If you want to recall one or more items from the warehouse for a specific production order, and the **As-Built Status Handling** field in the **Production Order Parameters (tisfc0100s000)** session is set to **Automatic**, take the following steps:

- 1 Start the **Report Orders Completed (tisfc0520m000)** details session.
- 2 Enter the item quantity that you want to recall as a negative quantity in the **Additional Qty to Deliver** field. Note that you cannot recall serialized items if one of the other items still has the **Assigned** status.
- 3 Click **Save**.
- 4 Check in the **Serial End Item - As-Built Headers (timfc0110m000)** session that the order status of items that were recalled changed from **Received in Warehouse** to **Assigned**.

Order distribution of unit-effective items

Generally, if an item is *unit effective*, you need the Production Order Distribution (tisfc0105m000) session to handle the order quantities. However, for a serialized unit-effective item, you can skip the **Production Order Distribution (tisfc0105m000)** session. To maintain effectivity units for serialized items, you can use the **Serial End Item - As-Built Headers (timfc0110m000)** session.

Note that you can use the **Production Order Distribution (tisfc0105m000)** session to view the quantities for unit effective items.

Chapter 5: Service

To define serialized items

To define a *serialized item* and its *relationships*, perform the following steps:

- 1 Define the item in the **Serialized Items (tscfg2100m000)** session. See the Help of the **Physical Breakdowns (tscfg2110m000)** session.
- 2 Use the **Installation** session to assign the serialized item to an Installation group. (Installation groups are defined in the **Installation Group** session).
- 3 Define the serialized item's relationships in the **Physical Breakdowns (tscfg2110m000)** session.

To use serialized item groups

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

You can use serialized-item groups when you generate service order planning. The skills and serialized item group of a *service employee* can be used as planning constraints when LN selects a *service engineer* to carry out a service order. Example: You can use serialized item groups to select a service engineer on the basis of skill that the service engineer has for a specific serialized item group. The creation of the serialized item group is user defined, but generally relates to a group of similar objects.

To create a physical breakdown from an as-built structure

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

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

Note:

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

To create a physical breakdown from an as-built structure

- 1 Start the **Create Physical Breakdown Structure (tscfg2210m000)** session.
- 2 In the Source field, select As-built Structure.
- 3 Under As-built Structure, enter or select the as-built (top) item and serial number to copy from. The as-built (top) item cannot be *lot* controlled. Make sure that as-built component data is present in the **Serial End Item - As-Built Components (timfc0111m000)** session for the as-built (top) item. The non-serialized items in the as-built component data must be present in the **Items (tcibd0501m000)** session. Otherwise, no physical breakdown is created.
- 4 On the Source tab, in the Link To section, select one of the following in the Target field:
 - **Installation Group**
The top item in the item breakdown is set as the top-serialized item in the physical breakdown. The components in all levels in the item breakdown are exactly copied to the serialized items. The serial number of the serialized item is created according to a *mask*.
 - **Breakdown**
The top item of the item breakdown must exist as a child item in the physical breakdown you enter. The components in all levels in the item breakdown are exactly copied to serialized items. The serial number of the serialized item is created according to a mask.
 - **New Breakdown**
LN creates a new physical breakdown.
- 5 Under Defaults, enter or select the following:
 - The serialized item group to which the newly created serialized items belongs.
 - Service department (optional).
 - Delivery time (optional).
- 6 Select the Process Report check box and the Error Report check box as required.
- 7 Click **Process**.

As-built structure copied to an Installation group

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

As-built structure copied to a breakdown

- The top item of the as-built structure must exist as a child item in the physical breakdown you enter.
- The child items (as-built component data) on all levels in the as-built structure are copied exactly to the physical breakdown.

- The serialized as-built components are copied to the **Serialized Items (tscfg2100m000)** session. The non-serialized as-built components are copied to the **Items - Service (tsmdm2100m000)** session.

As-built structure copied to a new breakdown

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

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