



Infor PLM for Discrete Setting up a Company Configuration

Release 2022.x

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About this guide

This document describes the steps that you must take to create new companies after the LN/PLM installation or Cloud Provisioning.

This document is intended for use by individuals who oversee creating new companies.

To use this manual, you must be familiar with:

- The structure of packages, modules, and sessions in LN/PLM.
- The way in which the multicompany concepts are implemented in LN/PLM.

Related documents

- *User Guide for Multicompany Structures (U9504)*
- *User Guide for Multicompany Table Sharing (U9505)*
- *User Guide for Enterprise Structures*

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Chapter 1: Introduction

The creation of a company for PLM for Discrete, aligns with the setup of a company for LN. However, for PLM running in stand-alone mode, the setup requires only some of the requirements described in the manual “Infor LN User Guide for Setting Up a Company”.

This chapter describes:

- Prerequisites for the creation of a company
- Multicompany structure types
- Principles of data sharing
- Steps for setting up a company

Prerequisites for company creation

Before you can create companies, you must:

Activity	Cloud Provisioned	On Premise
Complete the LN/PLM installation, as described in the <i>ERP/PLM Enterprise Installation Guide</i> , that applies to the type of server and database that you use.	Not applicable	Not applicable
Design the company structure. If you create a multicompany structure, you must determine the company numbers and the tables that the companies share, and you must design the enterprise-structure.	Applicable, in a stand-alone PLM environment, you consider a simple single-company structure suffices	Applicable, in a stand-alone PLM environment, you consider a simple single-company structure suffices

This document does not detail the why a specific company structure must be selected, there are other documents ‘specifically multi company structures’ which must be used to establish that with the solution architect for your environment.

Initial Companies

During the software installation, company 0000 is created, the same is the case for the Cloud Provisioned environment.

You must create the operational companies in company 0000. If you log on as a user that is authorized for Tools, you can automatically work in company 0000 as soon as you start a Tools session.

The cloud deployment team provides this access to the users based on the contract. In the on-premise situation, this is defined by the installation user.

Initial PLM Users

During the software installation, a PLM super user (PLMADMIN) is to be created with system-administration privileges for the PLM database. You can use this user to create the operational PLM environment. The setup of additional users is covered in the installation manual for PLM/LN.

To create the operational companies on an PLM system, you must log on as an PLM super user.

A PLM super user has the authorization required to create new companies.

Note: Do not log on as the root user (Unix/Linux) or baan user (Windows) when creating companies or setting up other PLM functionality. The root user has specific permissions on UNIX level that cause problems when you convert the changes to runtime in the Enterprise Server (Tools). This also applies to the baan user on Windows level.

Initial DEM Modeler Password

If you use the DEM Modeler to model the enterprise structure, you must specify the Modeler password to start some of the DEM Modeler sessions. After the software installation, the default Modeler password is DEM. You can use the Change Password for Enterprise Modeler Authorizations (tgbrg1160m000) session to change the Modeler password.

Chapter 2: Multicompany structure types

An PLM / LN implementation usually consists of multiple companies that form a multicompany structure. Depending on your business requirements and on the technical possibilities, you can set up the following combinations of logistic and financial companies in a multicompany structure:

- Single logistic/single finance company structure
- Single logistic/multifinance company structure
- Multilogistic/single finance company structure
- A multilogistic/multifinance company structure.

For details on multicompany structures, see the User's Guide for Multicompany Structures (U9504 US).

A PLM implementation with integration to CSI/SyteLine or any other ERP, does not require the definition of a company structure. It is expected that PLM operations in a defined company number.

Defining the enterprise structure

You must define these structural elements of your organization:

- Companies (logistic and financial)
- Enterprise units
- Sites
- Departments
- Warehouses

Note: Sites are available if the **Sites** parameter is set to **Active** in the Implemented Software Components (tccom0100s000) session. If this parameter is not activated, you can skip the steps about defining sites in this document.

For more information about enterprise units, sites, departments, and warehouses, see the *User Guide for Enterprise Structures*.

Creating a multicompany structure (only relevant in combination with LN)

If you create a multicompany structure, you must work in one company to:

- Create the other companies and their databases.
- Define which companies share part of their data by logical table linking.
- Define the enterprise structure model.

In each of the companies, you must:

- Specify the basic company data, as described in *Specifying basic financial data*.
- Specify the master data, as described in *Specifying Master Data*.

Creating a single-company structure

If you create a single-company structure, you need only carry out each step in this manual once. The company must be of type Both, which means that the company is both a logistic as well as a financial company.

Data Sharing

The basic data and the master data must be present in every logistic and financial company. In a multicompany structure, the companies can share much of the data. You must specify the shared data only once. You can enter the shared data in any of the companies that share the data.

If a company shares specific data with a company for which you have already entered the data, the data is already present when you start the corresponding session.

For information on data-sharing techniques, see the *User's Guide for Multicompany Table Sharing (U9505 US)*.

In the next chapter, the master data required to start working in your PLM Company, is described. For those that are working in a Cloud Suite, this data is stored in the master data company and you can copy the data to any wanted company with the process for copying company data.

The copying of company data is a standard skill for any ICS or Infor Partner Implementation consultant.

The description of the steps provides you with an overview about what is needed and the issues that can occur if not followed.

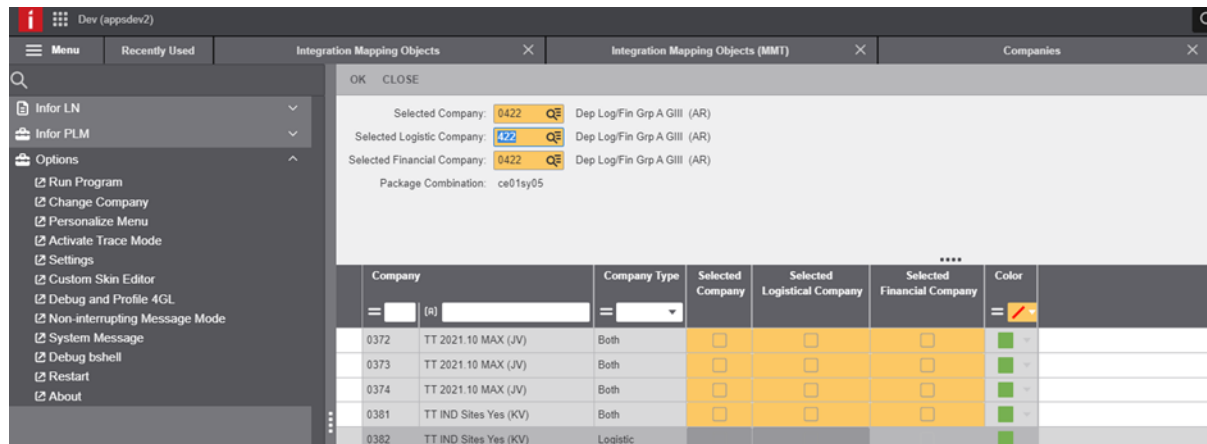
Activity	Description	Note
Create a Company Number in Tools		
Create tables for this company		

Activity	Description	Note
Change to your working company		
Load the suggested Master Data		
Steps to setup the company	<ol style="list-style-type: none"> 1 Run initialize process 2 Set the COM Parameters 3 Define the companies address 4 Specify the basic information about the first company 5 Select the packages and module that the company uses 	General setup
Define Item Group Defaults	<ol style="list-style-type: none"> 1 Define item groups 2 Define item groupings as required 3 Define item group defaults 	Specific setup to allow definition of PLM Items down the line.
PLM Master Data	<p>Additional configuration and settings for PLM</p> <ol style="list-style-type: none"> 1 The PLM Administrator 2 Area 3 Vaults 4 PLM Projects 5 PLM Users 	Specific setup for the organization of data and authorizations.
Additional PLM Master Data Configuration	<p>Masks Definition</p> <p>Roles and Authorizations</p>	Specific setup for the creation of PLM Objects

Company Setup

Creating a company number

Company numbers are defined in Enterprise Server (also called Tools).



Suggested Master Data to be Loaded First

The matrix below provides a suggested sequence and to the minimal common master data to load for an effective/efficient definition of your new PLM company. If you are working in a combine PLM/LN space, this step is normally done by the LN Administrator or implementation team.

In a multi-tenant cloud environment the data discussed in the paragraph should be loaded from the golden company. The golden company (1100) contains master data and configurational settings for a controlled and fast deployment of the environment.

Name	Seq	Seq Notes	Notes
Languages	Tcmcs0146m000 Table: tcmcs046	1	In Cloud copy this table from your golden company 1100 and delete what is not required, if you load manually observe the ISO coding convention.
Units	Tcmcs0101m000 Table: tcmcs001	2	In Cloud copy this table from your golden company 1100 and delete what is not required, if you load manually observe the ISO coding convention.

Name	Seq	Seq Notes	Notes
Unit Sets	Tcmcs0106m000 Table: tcmcs006	3	You need at least a one unit set, these are later be linked to the item group defaults. The golden company data set can be used here as well.
Units by Unit Set	Tcmcs0112m000 Table: tcmcs012	4	For PLM for Discrete, you mainly need the unit of 'Each' however you can define other units of measurement to be linked to PLM Items later on. The golden company data set can be used here as well.
Country	Tcmcs0510m000 Table: tcmcs010	5	In Cloud copy this table from your golden company 1100 and delete what is not required, if you load manually observe the ISO coding convention for 2-Alpha/3-Alpha.
Currencies	Tcmcs0102m000 Table: tcmcs002	6	In Cloud copy this table from your golden company 1100 and delete what is not required, if you load manually observe the ISO coding convention.
Time Zone Codes	Tcemm1100m000 Table: tcemm100	7	In Cloud copy this table from your golden company 1100 and delete what is not required, the time zone codes are used in addresses.
State/Provinces	Tcmcs1143m000 Table: tcmcs143	8	In Cloud copy this table from your golden company 1100 and delete what is not required, the states/provinces are used in addresses.

Name	Seq	Seq Notes	Notes
ZIP Codes/Postal Codes (Optional)	Tccom4536m000 Table: tcmcs136	9	<p>Dependent on how you implement you may want to pre-define commonly used ZIP Codes.</p> <p>Suggestion would be to at least define the ZIP-Code(s) needed for the company addresses you need to set-up the company.</p> <p>ZIP Codes are also defined in the golden company.</p>
Cities by Country (Optional)	Tccom4539m000 Table: tcmcs139	10	<p>Dependent on how you implement you may want to pre-define commonly used Cities.</p> <p>Suggestion would be to at least define the Cities needed for the company addresses you need to set-up the company.</p>
Address Formats	tccom4535m000 Table: tcmcs135	11	<p>For instructions on how to define address formats and addresses, refer to the online Help.</p> <p>In Cloud copy this table from your golden company 1100 and delete what is not required.</p>
Number Groups	Tcmcs0151m000 Table: tcmcs051	12	<p>Define number groups for at least Addresses, Business Partners and contacts (Business Partners are used for both Suppliers as well as Customers).</p> <p>Default number groups are defined in the golden company as well.</p>

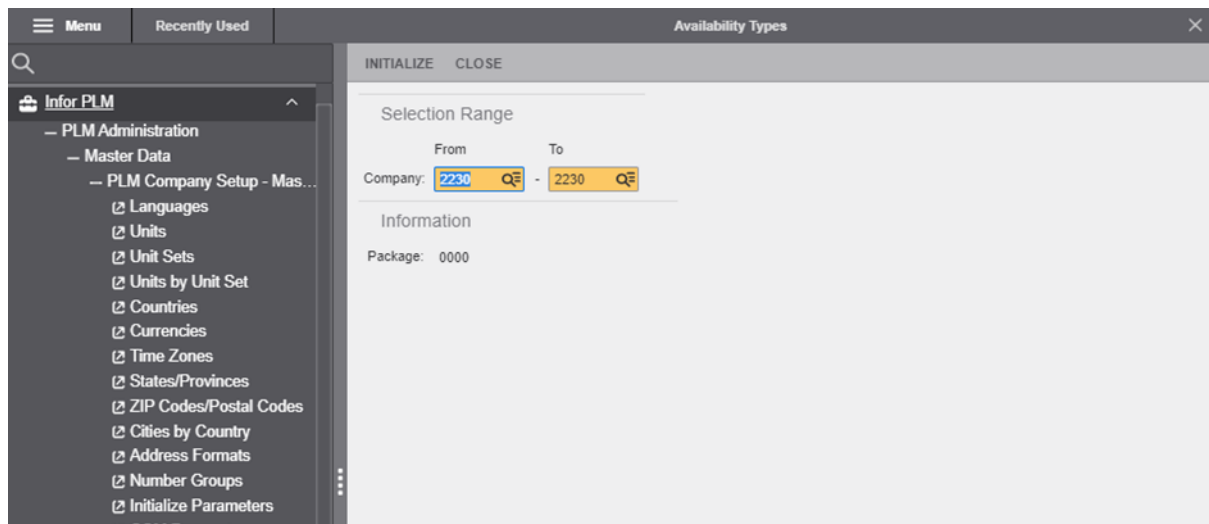
Name	Seq	Seq Notes	Notes
First free numbers for number groups	Tcmcs0651m000 Table: tcmcs050	12b	After defining the number groups, please drill into defined the series based on the series length, this is the prefix used to auto-number the relevant records. First free numbers are defined in the golden company as well.
Base Work Week	Tcccp0105m000 Table: tcccp005	13	Details to the workweek can be defined later if required. (//PLM Administration / Master Data / Calendars / Master Data)
Availability Types	Tcccp0101m000 Table: tcccp001	14	Additional availability types can defined later if required. (//PLM Administration / Master Data / Calendars / Master Data)

Steps to setup the PLM Company Data

The steps discussed in this paragraph align with you PLM Menu option of 'PLM Administration / Master Data / PLM Company Setup'.

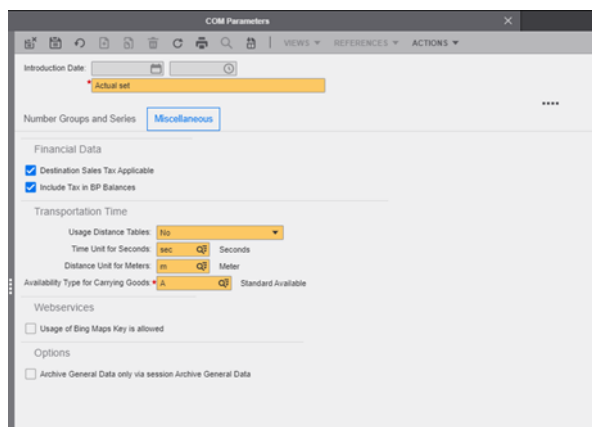
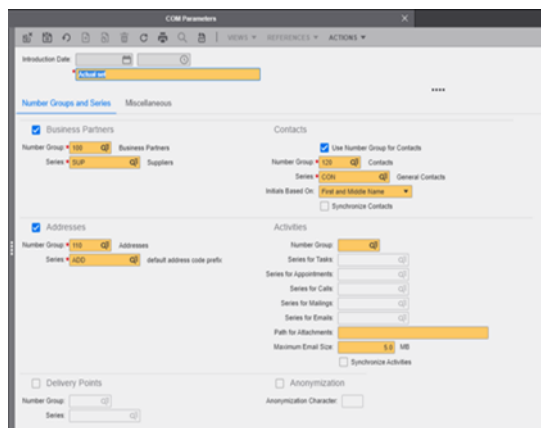
In the new company, perform with these steps:

- 1 Run the Initialize Parameters (tcmcs0295m000) session:



The application checks whether all tables required by the packages that the company uses are present and enters initial records with default values into the tables.

- 2 Start session COM Parameters(tccom5000m000). Specify whether PLM must use number groups for business partners, addresses, and contacts, and select the number groups.
 - Specify the type of check for bank account numbers.
 - Specify whether destination sales tax is applicable.



The **Miscellaneous** tab requires units for time, distance, and availability, all of these have been setup as part of the master data definition.

- 3 Define the default company's address using the Addresses (tccom4530m000) session.

The top screenshot shows a table titled 'General Company Data' with columns: Address Code, Name, Country, State, City Description, ZIP Code/Postal Code, Search Key, and Telephone. The first row is highlighted with a blue selection bar.

Address Code	Name	Country	State	City Description	ZIP Code/Postal Code	Search Key	Telephone
ADD000001	Infor PLM HQ	USA	NY	New York	10011	INFOR PLM HQ	+1

The bottom screenshot shows the 'Addresses' form. The 'General' tab is selected. The form contains fields for: Name (Infor PLM HQ), Country (USA), State/Province (NY), City (NEW YORK), Street (6th Avenue), House Number (641), P.O. Box Number, Building, Floor, Unit, Economic Zone Type, Time Zone (EST), and Geographical Location (GPS Latitude and Longitude). A 'GPS COORDINATES' button is visible.

For instructions on how to define address formats and addresses, refer to the online Help.

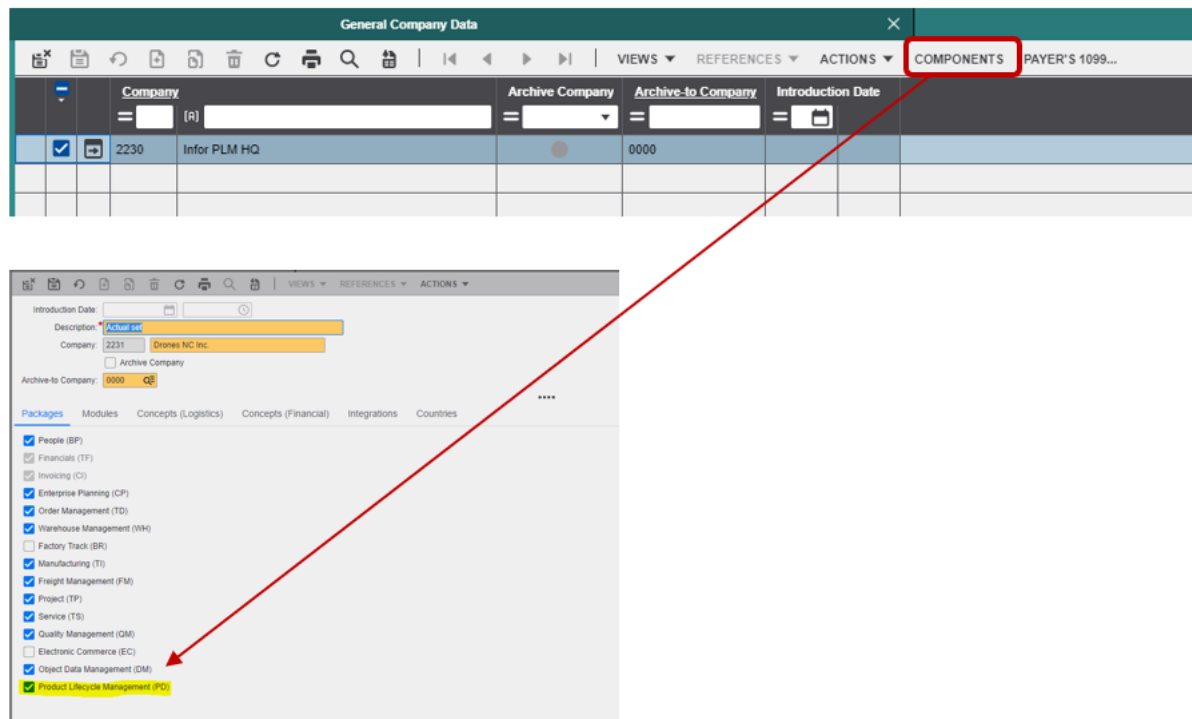
To link a time zone to the address, you can zoom to the Time Zones (tccom1100m000) session.

- 4 Specify the basic information about the first company in the Define General Company Data(tccom0502m000) session.

Specify this data:

- The company number that you previously defined in the Companies (ttaa1100m000) session. The descriptive company name. You can specify the same name that you specified previously in the Companies (ttaa1100m000) session.
- The company's default address. You can zoom to the Addresses (tccom4530m000) session and retrieve the address made in previous step or click **New** to define the company's address.
- If an optional address data is not yet available, you can zoom to the corresponding session and click **New** to define the data. Alternatively, you can leave the field empty and run the session again to enter the information at a later stage.
- The company's country of residence. You can zoom (when use keyboard = <Ctrl>B) to the Countries (tcmcs0510m000) session.
- The company's default language. You can zoom to the Languages (tcmcs0146m000) session.

- 5 Select the packages and modules that the company uses in the Implemented Software Components (tccom0500m000) session. Click **Components** in the toolbar for the selected company.



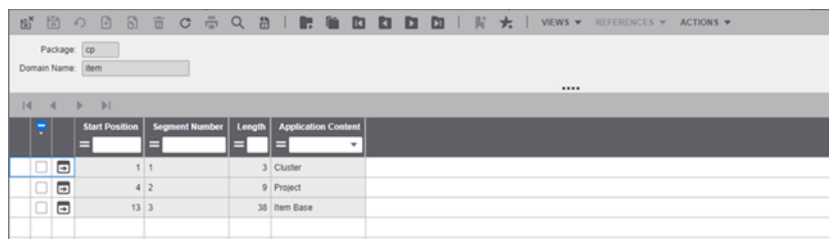
In the 'Implemented Software Components', select the options 'People (BP)' and 'Product Life Cycle Management' as a minimum for a PLM stand-alone environment. For a combined PLM/LN environment this are defined by the implementation team based on the implementation scope.

The company's default address, country of residence, and default language are used in various sessions and on various reports throughout the PLM Application.

Note:

- Each company's data is one record in the Implemented Software Components (Companies)(tccom000) table.
- All companies of a multicompany structure must share the Implemented Software Components (Companies) (tccom000) table so that the company numbers are known in every company.
- For more information about data sharing, refer to User's Guide for Multicompany Table Sharing (U9505 US).

- 6 Set up the item code segmentation for the item codes. The default code for cpitem is 3-9-38 (as shown below) and for 'tcitem' is 9-38.



Start Position	Segment Number	Length	Application Content
1	1	9	Project
10	2	38	Item Base

- a Select 'new view'.
- b Enter 'cp' (as package).
- c Enter 'item' (as domain name).
- d Insert the 3 records for cp-item.
- e Repeat process to tc-item.

Item Default Data

For the creation of PLM items and thus PLM Item Structures 'item group defaults' are used. To create item group and its defaults, you must at least have an item group and unit.

Note: The golden company (1100) does contain item groups and item default data. However, this is mostly used as a source to copy from because these groups are very generically defined.

Item groups


Use the Item Groups (tcmcs0123m000) session to define the ERP Item groups. For these groups, defaults are defined in the next step.

Item Group		Currency		Costs to be specified	Specify Cost Optionally
(A)	(A)	(A)	(A)	=	=
<input type="checkbox"/>	100	purchased parts	USD	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	110	purchased components	USD	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	200	components	USD	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	300	assemblies	USD	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	310	custom assemblies	USD	<input type="checkbox"/>	<input type="checkbox"/>

Item Defaults

Use the Item Defaults (tcmcs0102m000) session to define the ERP Item defaults. To define these, a minimal data set requires the unit sets and units defined.

Item Defaults				
	Item Type	Item Group	List Type	
	=	(R)	=	
<input checked="" type="checkbox"/>	Product	100	Not Applicable	
<input type="checkbox"/>	Product	110	Not Applicable	
<input type="checkbox"/>	Product	200	Not Applicable	
<input type="checkbox"/>	Product	300	Not Applicable	
<input type="checkbox"/>	Product	310	Not Applicable	

When creating an Item Default <by using 'New'  icon> the screens as shown below are opening up (3 tabs), select the:

- Order system
- Unit Set (example '1')
- The 'Inventory Unit'
- Is the product 'Customizable'
- Is the product 'Lot Controlled' (as default)
- Is the product 'Serialized' (default)
- On the other tabs there are many more grouping options, these are optional.

PLM Master Data

This section describes the steps to create the Master Data that is required to start working with the PLM application.

All the components required for PLM are created in a new LN – pd package.

Packages			
	Package	Description	
	(R) pd	(R)	
<input type="checkbox"/>	pd	Product Lifecycle Management	

PLMADMIN User

By default, PLMADMIN user is created in the company. The PLM Administrative users (PLMADMIN and WF_DAEMON) are available in the golden company. You can load these manual as per instruction below or copy them from the golden company to your operational/test/train company number.

As a first step, **Logon Code** must be assigned for this user. After the **Logon Code** is assigned, all the required Master data can be created by the PLMADMIN User.

You can use the Employee (bpmdm0501m000) session to assign the **Logon Code** to the PLMADMIN user.

The screenshot shows the 'Employees' session interface. On the left, a list of employees includes 'PLM Administrator' and 'Srinivasulu Vadakattu'. The main area displays the details for 'PLM Administrator'. The 'General' tab is active, showing fields for 'Search Key', 'Language' (ENG), 'Logon Code' (highlighted with a red box), 'Cost Component', and 'Calendar'. The 'Employment' section shows 'Department', 'Manager', 'Labor Rate', and 'Time Unit for Rates'. The 'Name' section shows 'Given Name' (PLM), 'Middle Name', 'Family Name' (Administrator), and 'Title'.

By default, the PLMADMIN user is also created in the pdadm100 table, with General Administrator Privileges as shown below:

The screenshot shows the 'pdadm100' table user details for 'PLM Administrator'. The 'General' tab is active, showing fields for 'User Name', 'Default Role' (General Administrator, highlighted with a red box), 'Security Access Level' (Unrestricted), 'Language' (ENG), 'Current Vault', 'Area', 'Replacement User Name', and 'Active' status (checked).

You can use the Users (pdadm1500m000) session to navigate to the details session:

After the PLMADMIN user is assigned a logon code, you can continue with creating the master data in PLM or load the master available in another company or from the KB's.

Added comments in v11

KB 2223708 has a master data set for PLM and the instruction to load this data for the 2021.10 release.

View [KB 2223708](#) - PLM for Discrete Master Data for 2021.10 Release (infor.com)

KB2223711 has a master data set for PLM and the instruction to load this data for the 2021.10 release. KB 2223708 is a pre-requisite for 2223711.

View [KB 2223711](#) - PLM for Discrete Master Data for 2021.11 Release (infor.com)

The master KB for this is “KB 2224293-PLM for Discrete Master Data”, so additional updates will be communicated through that KB.

View [KB 2224293](#).

Areas

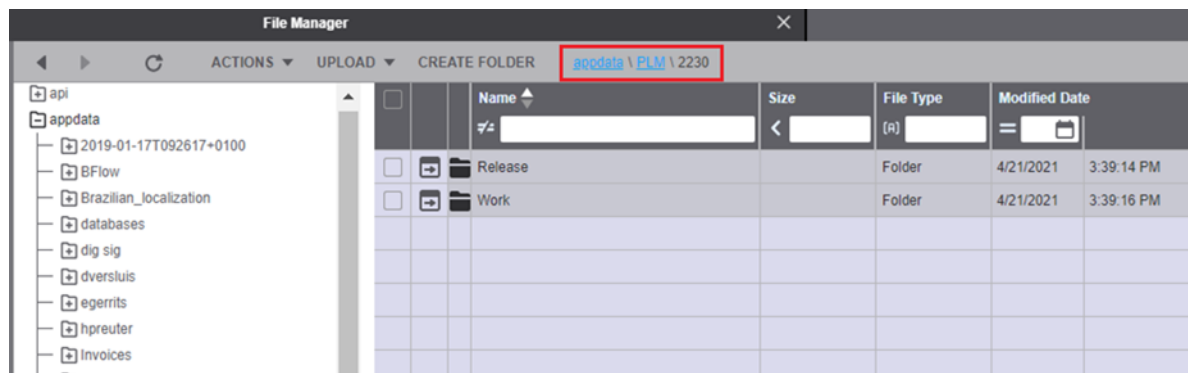
You must create the Areas in the PLM System. Areas are the logical representation of Folders in which the files are stored in PLM.

There are 2 types of Areas :

- Work: Files with the UNDEFINED status are stored in this folder.
- Release: Files with the RELEASED status are stored in this folder.

Folder for Areas

Using the File Manager, you must create two folders in the server as shown below:



It is recommended that PLM Areas are used specific to PLM Files and not be used for file operations of other applications of Infor.

The above example is from the file manager in tools. It is strongly recommended that either a local vault (on your local network) or an S3 Vault (in Amazon) is used as vault area.

Areas are defined in the Areas (pdadm1111m000) session:

Areas			
	Area	Description	Area Type
	[R]	[R]	=
<input type="checkbox"/>	Release	Release Area	Release
<input type="checkbox"/>	Work	Work Area	Work

Vaults

Vaults are the servers in which the Work and Release Folders are created. Vault is server which stores the PLM Files in the specific folder.

Vaults are defined in the Vaults (pdadm1510m000) session.

The details session is displayed when you click **New**.

Vault: Main		PLM Main Vault		<input checked="" type="checkbox"/> Is Main Vault	SET AS MAIN VAULT
Vault Type: LN Server		S3 Bucket:			
<input type="checkbox"/> Accessible From Server					
Sync Task Field: s001					
Last Sync Date Time:					
Vault					
Vault Server:					
User Name:					
Password:					
CAD Viewer					
CAD Viewer Server:		http://inhyvwplmonprem.82/Home/Index?req_data=%1			
User Name:					
Password:					

Areas By Vault		File Sync Conditions			
	Area	Description	Path		
	[R]	[R]	[R]		
<input type="checkbox"/>	Release	Release Area	PLM\2230\Release		
<input type="checkbox"/>	Work	Work Area	PLM\2230\Work		

Vault: The name of the Vault. Specify Main.

Is Main Vault: Indicates the Main Vault.

Vault Type: Indicates the type of the vault being defined. Possible values:

- **LN Server:** The PLM Folders are in Application Server and are created using File Manager.
- **On Prem:** Vault server is the remote windows server which is within the network of the customer.
- **S3:** In MT environment, S3 Bucket contains the PLM Folders. This is the recommended Vault for the Cloud version of PLM.

Vault Server: Indicates actual name of the server. '-' indicates current application server. If the server is a remote server, correct port must be specified.

CAD Viewer Server: The server in which CAD Viewer is running

Sync Task Field & Last sync Date & Time: These are for Multi Vault Sync functionality.

Note: If PLM is running in Cloud, the Vault must be in S3 only.

PLM Projects

In Infor PLM for Discrete, all the data is organized within the projects. Design data such as documents and items are associated with specific projects, and users involved in the project are authorized as project users. Each user in a Project is assigned a Role and this Role controls the authorizations of the user in that Project.

PLM Projects are created using PLM Projects (pdadm3500m000) session.

Create a new PLM Project by clicking '+' and the details session is displayed.

The screenshot shows the 'PLM Projects' form with the following fields and values:

- Project:** MASTER (dropdown), Master Project (text input)
- Project Manager:** PLMADMIN (dropdown), PLM Administrator (text input)
- Customer:** (empty dropdown)
- Section:** (empty text input)
- Release Area:** Release (dropdown), Release Area (text input)
- Scheduling:**
 - Start Date:** 4/20/2021 (calendar icon), 9:10:33 AM (clock icon)
 - End Date:** 12/31/2021 (calendar icon), 9:10:42 AM (clock icon)
 - Duration:** 0 (text input), **Time Unit:** Hour (dropdown)
- References:**
 - Company:** (empty dropdown)
 - Currency:** USD (dropdown), US Dollar (text input)

Project: The name of the Project.

Project Manager: The user who is the Manager for this project.

Release Area: This indicates folder to which files are moved when they are RELEASED. This value must be specified.

You can also authorize other projects to objects of the current project using the Authorized Projects satellite session in PLM Projects (pdadm3600m000).

Users are assigned to the project on the **Users** tab and each user can have a specific Role for the Project.

The screenshot displays the Infor PLM software interface. The top section shows project configuration fields: Project (MASTER), Project Manager (PLMADMIN), Customer, Section, and Release Area (Release). Below this, the 'Scheduling' section includes Start Date (4/20/2021), End Date (12/31/2021), Duration (0), and Time Unit (Hour). The 'References' section includes Company and Currency (USD). The bottom section, titled 'Authorized Projects', shows a list of users with their roles. The 'Users' tab is active, displaying a table with columns for User Name, Project Role, and a search icon.

User Name	Project Role
GPIETERS	General Administrator
KPEDDIBH	General Administrator
PLMADMIN	General Administrator
SVADAKAT	Design Engineer

Defining PLM Users

To define PLM Users:

- 1 Start the Users (pdadm1500m000) session.
- 2 Click **New**. The details session is displayed.
- 3 Zoom and select the user from the Employees (tccom0501m000) session. Only the available Employees can be PLM Users.

After the user is selected and saved, you can set the default Role for the user along with the Vault and the Area.

After the PLM User is created, you must assign the user to the required PLM Projects along with the Role in the Project. This is done using the PLM Projects (pdadm3500m000) session

User must also be assigned to a Default Project using the User Preferences (pdadm0102m200) session.

Additional PLM Master Data Configurations

Mask Definition

Mask is an object that defines the rules to set a value for identifying an attribute in PLM. This is mostly used for the attributes that are part of the object key and require a unique value.

Infor PLM for Discrete enables you to generate unique identification keys automatically for objects. The keys are initialized and incremented by masks either by using the mask or by manual entry, the use of masks makes the process of creation of PLM object more efficient and consistent.

If you assign a mask as the default mask for an object ID, this mask generates values for the same object ID over all projects for which no specific mask has been assigned.

Once a mask has been defined for a particular object ID, whenever you add a new object of that type, the current key value, such as DOC-01, is assigned to the ID. Each time an ID value is specified based on the key, the key is incremented according to the mask increment rule definition, for example, DOC-02, DOC-03.

To define 'Masks', access the Masks (pdadm6501m000) session.

Click **New Group** and specify **pdadm100** in the **Table** field and **key** in the **Field** field.

Mask	Order Number	Length	Alternate Mask	Preferred
[A]	=	=	[A]	=

You can now create the Mask for Item.

Click **New** to open the details session. Specify the mask name in the **Mask** field and the **Length**. Click **Save**.

If the field has multiple Mask Definitions, you can use the **SET AS PREFERRED** option to set a preference for a Mask. The preferred Mask is used if the No condition specifically meets the criteria.

By default, a new Segment is created on the **Segments** tab.

The screenshot displays the configuration interface for a mask and sequence. The top section is for mask configuration, and the bottom section is for sequence configuration.

Mask Configuration:

- Mask: ITEM
- Table: pdpdm100
- Length: 10
- Initial Value: (empty)
- Pattern: ITEM-?????
- Minimum Value: ITEM-00001
- Field: lkey
- Order Number: 0
- Alternate Mask: (empty)
- Increment Rule: ITEM-[0-9]
- Maximum Value: ITEM-99999

Sequence Configuration:

Segment Number	Segment Type	Field Name	Segment Value	Pattern
9999	Sequence		[0-9]	

To add a prefix for this number sequence (for example, DEMO-), you must create a new sequence as below and click **Save**.

The screenshot displays the configuration interface for a new sequence.

Sequence Configuration:

- Mask: ITEM
- Segment Number: 10
- Segment Type: Constant
- Field Name: (empty)
- Segment Value: DEMO-
- Pattern: (empty)
- Increment Rule: (empty)
- Minimum Value: (empty)
- Maximum Value: (empty)

A new sequence is created, and you can check the Mask Generation by clicking **Test**.

The screenshot shows the 'Mask' configuration interface for the 'ITEM' mask. The 'Table' is set to 'pdpdm100' and the 'Field' is 'ikey'. The 'Length' is 10. The 'Pattern' is 'DEMO-?????'. The 'Minimum Value' is 'DEMO-00001' and the 'Maximum Value' is 'DEMO-99999'. The 'Increment Rule' is 'DEMO-{0-9}'. The 'Order Number' is 0. The 'Zero Padding' checkbox is checked. The 'Preferred' checkbox is checked. The 'Initial Value' is empty. The 'Alternate Mask' is empty. The 'TEST' button is highlighted. Below the mask configuration, there is a table with columns: Segment Number, Segment Type, Field Name, Segment Value, Pattern, and Inc. The table has two rows: one for Segment Number 10, Segment Type Constant, Field Name (R), Segment Value DEMO-, Pattern (R), and Inc (R); and another for Segment Number 9999, Segment Type Sequence, Field Name (R), Segment Value [0-9], Pattern (R), and Inc (R).

Segment Number	Segment Type	Field Name	Segment Value	Pattern	Inc
10	Constant	(R)	DEMO-	(R)	(R)
9999	Sequence	(R)	[0-9]	(R)	(R)

You can also define conditions for the Mask.

For example, to activate this Mask only if the Item is created by the PLMADMIN user, you can define a condition as:

The screenshot shows the 'Condition' configuration interface for the Mask. The 'Mask' is 'ITEM'. The 'Condition Number' is 10. The 'And/Or' dropdown is set to 'AND'. The 'Key Name' is 'pdpdm100.crby' and the 'Value' is 'PLMADMIN'. The 'Operator' is '='. The 'Created By' checkbox is checked. Below the condition configuration, there is a table with columns: Mask, Condition Number, And/Or, Key Name, Operator, Value, and Description. The table has two rows: one for Mask 'ITEM', Condition Number 10, And/Or 'AND', Key Name 'pdpdm100.crby', Operator '=', Value 'PLMADMIN', and Description 'Created By'; and another for Mask 'ITEM', Condition Number 20, And/Or 'AND', Key Name 'pdpdm100.dsca', Operator '=', Value 'PLM', and Description 'Description'.

Mask	Condition Number	And/Or	Key Name	Operator	Value	Description
ITEM	10	AND	pdpdm100.crby	=	PLMADMIN	Created By
ITEM	20	AND	pdpdm100.dsca	=	PLM	Description

Now you can define two conditions for this Mask.

This Mask is used when the created by is 'PLMADMIN' and the description contains 'PLM'.

Note: The below Item Key generated. This is created by PLMADMIN and description has 'PLM'.

Masks are defined for Documents Key and Document Revision as below.

Document Key

Segment Number	Segment Type	Field Name	Segment Value	Pattern	Increment
10	Constant		DOC-		
9999	Sequence		[0-9]		

Document Revision

Mask: DOC REVISION
 Table: pdpdm200 Documents
 Length: 4
 Preferred
 Initial Value:
 Pattern: 0001
 Minimum Value: 0001
 Field: revl Revision
 Order Number: 0
 Alternate Mask:
 Increment Rule: [0-9]
 Maximum Value: 9999
 TEST
 TEST (MAJOR)
 RESET

Segments Conditions PLM Projects

Segment Number	Segment Type	Field Name	Segment Value	Pattern	Increment Rule	Minimum Value	Maximum Value
9999	Sequence			????	[0-9]	0001	9999

File Key

Mask: FILE
 Table: pdpdm500 Files
 Length: 12
 Preferred
 Initial Value:
 Pattern: FILE-??????
 Minimum Value: FILE-0000001
 Field: flay File
 Order Number: 0
 Zero Padding
 Alternate Mask:
 Increment Rule: FILE-[0-9]
 Maximum Value: FILE-9999999
 TEST
 TEST (MAJOR)
 RESET

Segments Conditions PLM Projects

Segment Number	Segment Type	Field Name	Segment Value	Pattern	Increment Rule	Minimum Value	Maximum Value
10	Constant		FILE-				
9999	Sequence			[0-9]		0	0

File Version

Mask: FILE VERSION
 Table: pdpdm500 Files
 Length: 4
 Preferred
 Initial Value:
 Pattern: 0001
 Minimum Value: 0001
 Field: vrsn Version
 Order Number: 0
 Alternate Mask:
 Increment Rule: [0-9]
 Maximum Value: 9999
 TEST
 TEST (MAJOR)
 RESET

Segments Conditions PLM Projects

Segment Number	Segment Type	Field Name	Segment Value	Pattern	Increment Rule	Minimum Value	Maximum Value
10	Sequence			????	[0-9]	0001	9999

By Default, Masks are provided to following (see table below):

Object	Table	Attribute with Mask Definition
ITEM	pdpdm100	ikey
ITEM REVISION	pdpdm100	revi
DOCUMENT	pdpdm200	dkey
DOC REVISION	pdpdm200	revi
FOLDER	pdpdm300	fkey
FOLDER REVISION	pdpdm300	revi
FILE	pdpdm500	fkey
HARDCOPY	pdpdm210	hkey
FILE VERSION	pdpdm500	vrsn
BPDEMO	pdwfl100	eoid
CATEGORY	pdadm500	catg
ITEM DEFAULTS	pdadm552	tpl
DOCUMENT DEFAULTS	pdadm554	tpl
FILE DEFAULTS	pdadm556	tpl
BOM DEFAULTS	pdadm553	tpl
FOLDER DEFAULTS	pdadm555	tpl
MATERIAL DEFAULTS	pdadm557	tpl
MATERIAL REVI	pdpdm400	revi
MATERIALS	pdpdm400	mkey
BP DEFAULTS	pdpdm558	tpl
BP ASSOCIATE	pdwfl111	asid
WORKFLOW ROUTE	pdwfl200	rout
ROUTE STEP	pdwfl203	step
ROUTE LINE	pdwfl204	inst
EO COMMENT	pdwfl114	cmid
EO ROUTE LINE	pdwfl121	inst
EO ROUTE STEP	pdwfl122	step
IMPACT ANALYSIS	pderp014	anid
IMPACT CONFIG	pderp011	conf
MARKUP KEY	pdpdm510	mkid
MARKUP VERSION	pdpdm510	mver

Object	Table	Attribute with Mask Definition
MODIFICATION ID	pdpdm600	moid
SEARCH QUERY	pdcom002	sqry

Roles and Authorizations

One of the important tasks of the Administrator is to create and define roles, and then associate these with the relevant users and relevant projects. When a user is linked to a project, that user's role in the project must also be specified. The various PLM actions are linked to roles. Permissions and access to objects must be specified during the definition of the role.

During PLM Implementation it is recommended to review the predefined roles and ensure that the permissions are defined according to the requirement of the organization. If more roles are required, it is important to select an existing role that is as close as possible to the required role and use it as a base template for the new role.

The Roles (pdadm4601m00) session can be used to define new Roles, update existing Roles for correct Authorizations, and delete unwanted Roles.

The screenshot displays the 'Roles' configuration window. The top section lists roles with columns for 'Role', 'Description', and 'Based on Role'. The 'Design Engineer' role is selected. Below this, the 'Actions by Objects' section shows a list of actions with columns for 'Action', 'Action Allowed', and 'Action Override'. The 'CHECKOUT' action is selected, and its permissions are configured.

Role	Description	Based on Role
<input checked="" type="checkbox"/> Design Engineer	Design Engineer Role	
<input type="checkbox"/> General Administrator	General Administrator Role	
<input type="checkbox"/> None	None	
<input type="checkbox"/> Observer	Observer Role	
<input type="checkbox"/> Project Administrator	Project Administration Role	
<input type="checkbox"/> Project Manager	Project Manager Role	

Action	Action Allowed	Action Override
<input type="checkbox"/> AUTHORIZE_TO_PROJECT	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> CHANGE_OWNING_PROJECT	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> CHECK_REVISIONS	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> CHECKIN	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> CHECKOUT	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> CHECKOUT_MAJOR	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> COPY_PASTE_DUPLICATE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> COPY_STRUCTURE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> CREATE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> CREATE_MULTI	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> DELETE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> DELETE_REVISIONS	<input type="checkbox"/>	<input type="checkbox"/>

1 record(s) selected | pdadm4601m000

By default, these Roles are available:

- General Administrator
- Design Engineer
- Project Administrator
- Project Manager
- Observer
- None

Before creating a new role, it is important to identify an existing role that is as similar as possible to the new role. You can specify this existing role as a “Based on Role” and it is copied to the new role.

Role:

Description:

Based on Role: Design Engineer Role

'Roles' (pdadm4601m00):

To create a new role, click + and in the below screen Enter the Role and Description and select the 'Based on Role'. Click **Save**.

After the Role is created, the required changes can be done by selecting the appropriate object and modifying the 'Actions by Objects' values. Existing Roles are also modified similarly.

Unwanted Roles can be deleted using the Delete command. Only the Roles which are not assigned to any user can be deleted.

Category Management

The Category Management provides users with an efficient way to search for objects by adding categories and category attributes to these objects.

Classification is available for items and documents. Classification allows designed parts, standard parts, and documents to be grouped by common attributes and retrieved for reuse, using the attributes and the values.

The classification mechanism controls a tree of categories and subcategories for the Item, Document Object types.

Note: Ensure that a Mask is defined for Category ID before creating a Category Tree and attributes:

Segment Number	Segment Type	Field Name	Segment Value	Pattern	Increment Rule
9999	Sequence		[0-9]		

Define the Category Tree and Attributes using the Classification Management (pdadm5600m000) session. Select the Item Classification Node and click + to start creating the Category Tree. Category is auto generated based on Mask. Category Name can be specified as required.

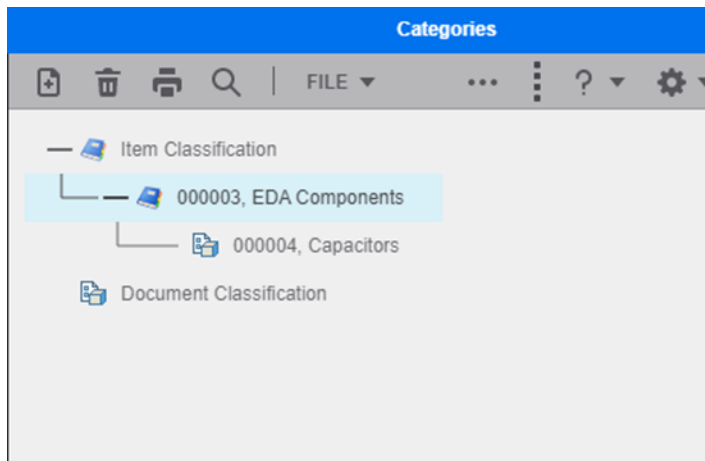
CreateCategory

OK CANCEL

Category:

Category Name:

When you click **OK**, a new category Capacitors is added as shown:



More categories can be added based on the requirement.

Now for each category, the attributes are added in the Grid on the right side.

Consider the example below:

Categories							
		Category		Attribute Name	Description	Attribute Type	Mandatory
		(R)		(R)	(R)	=	=
<input type="checkbox"/>	P	000003		Manufacturer	Manufacturer	String	<input type="checkbox"/>
<input type="checkbox"/>	P	000003		Package	Package	String	<input type="checkbox"/>
<input type="checkbox"/>	P	000003		Symbol	Symbol	String	<input type="checkbox"/>
<input type="checkbox"/>		000004		Normal Voltage	Normal Voltage	Number	<input type="checkbox"/>
<input type="checkbox"/>		000004		Tolerance	Tolerance	Number	<input checked="" type="checkbox"/>

Two Categories are created for Item, EDA Components and Capacitors. Capacitors is the child category of EDA Components.

All the attributes created at the parent level are inherited by all the child attributes.

The Manufacturer, Package and Symbol attributes are inherited by Capacitors. These are indicated by 'P' in the first column of the Grid.

Capacitors can have own attributes. For example, Normal Voltage and Tolerance.

After the categories and attributes are defined, these can be used while creating Items or updating the existing Items. Refer to User Guide / Online help for complete functionality.

Document Category Tree and Attributes can be created similarly.

Defaults Management

The default templates are used to define the default data for the object which help to save the user time and ensure the consistency across the system.

For example, default data can be defined for an Item using the PLM Item Defaults (pdadm5152m000) session.

Users can set the default values that are defaulted in the defaults templates tab in the session My PLM Preferences (pdadm0102m100) session when a new Item is created.

The defined defaults and the setting as preference is used by the system whenever a new PLM-Item is created.

During the creation of a new Item, Default template is selected using the **Zoom** option.

The values that are populated based on the Default template can be changed as per the user requirement. After the Item is saved, the Template field is removed from the session.

The default Templates can be defined for the Objects as shown in the table below using the sessions.

Object	Session Name	Session Code
Item	Item Defaults	pdadm5152m000

Object	Session Name	Session Code
Item BOM	BOM Defaults	pdadm5153m000
Document	Document Defaults	pdadm5154m000
Folder	Folder Defaults	pdadm5155m000
File	File Defaults	pdadm5156m000
Business Process	Business Process Defaults	pdadm5158m000

Note: Administrators must create the Defaults as required.

Preferences & Integrations

Preferences are set to control the way the PLM and CAD Connectors work. Administrators can set the Preference Authorizations based on the Organizational need.

Each preference in PLM can have one of the authorizations, Admin or User.

Admin Authorization: The value for this preference is same across the organization for all users and only Administrators can update these values. Users can only view and use these values.

User Authorization: The value for this preference can be specific to each user and a user can maintain the values as per the requirement.

As part of new company, default authorizations are provided. As per the organization needs, Administrators can change the authorization using the Preferences Metadata (pdadm0101m000) session.

This is applicable to PLM Preferences and CAD Preferences.

For example, the Classification Parameters and Permission set to **Admin**.

Administrators can change this to **User** if required.

Application Name: User Preferences

Category:

		Property Name (R) <input type="text"/>	Permissions = <input type="text"/>
<input type="checkbox"/>		w085 Author must Classify Items	Admin ▼
<input type="checkbox"/>		w086 Author must Classify Documents	Admin ▼
<input type="checkbox"/>		w087 Author must Classify Materials	Admin ▼

As another example, in the below screen, the Permissions of the Inventor Initial Save Options can be reviewed and changed accordingly.

Application Name: Inventor preferences

Category:

		Property Name (R) <input type="text"/>	Permissions = <input type="text"/>
<input type="checkbox"/>		i084 Concatenate Item-ID/File-ID	Admin ▼
<input type="checkbox"/>		i085 Create Documents Only	Admin ▼
<input type="checkbox"/>		i086 Must assign an Item	Admin ▼
<input type="checkbox"/>		i087 Set Object Attribute During Save	User ▼
<input type="checkbox"/>		i088 Specify Manual ID for Items	Admin ▼
<input type="checkbox"/>		i089 Specify Manual ID for Documents	Admin ▼
<input type="checkbox"/>		i090 Save children files into the same project as the root file	User ▼

In the Preferences Metadata (pdadm0101m000) session, you can search the specific Preference and change it accordingly.

Note: This session is used only to set the default permission of the preference.

To set the actual value of the preference, there are 3 types of sessions:

- **All User Preferences:** This type of session is used by Administrators to set/update the preference value which has permission type Admin.
- **User Preferences:** This type of session is used by Administrators to update the values of the User preferences for any user. For example, Administrator can change the path of edit location for u1, u2 and

u3 users. These are preferences which have User Permission, that is, the Administrator can modify preferences of any user.

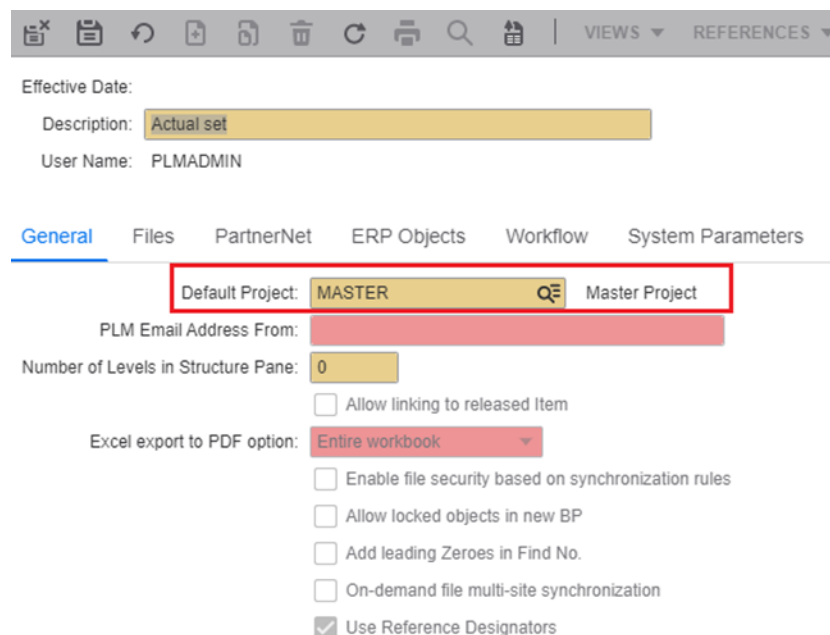
- **My Preferences:** Using this type of session, a user can update the values of the preferences which has User permissions. These preferences are specific to the user.

A specific session for each CAD Connector is provided for updating and reviewing CAD Connector Preferences. This table lists the preferences sessions:

Application	All User Preferences	User Preferences	My Preferences
PLM	pdadm0102m300	pdadm0102m200	pdadm0102m100
Toolkit	pdcad0101m200	pdcad0101m300	pdcad0101m100
AutoCAD	pdcad0102m100	pdcad0102m200	pdcad0102m000
Catia	pdcad0103m100	pdcad0103m300	pdcad0103m000
Inventor	pdcad0105m100	pdcad0105m200	pdcad0105m000
MS Office	pdcad0107m100	pdcad0107m200	pdcad0107m000
Creo	pdcad0108m100	pdcad0108m200	pdcad0108m000
Solid Edge	pdcad0109m100	pdcad0109m200	pdcad0109m000
Solid Works	pdcad0110m100	pdcad0110m200	pdcad0110m000
UG	pdcad0111m200	pdcad0111m300	pdcad0111m000

Each user must be assigned to a Default Project in the preferences before the user can start working with the application.

The user can set the Default Project using the My Preferences as shown here:



Effective Date:

Description: Actual set

User Name: PLMADMIN

General Files PartnerNet ERP Objects Workflow System Parameters

Default Project: MASTER Master Project

PLM Email Address From:

Number of Levels in Structure Pane: 0

Excel export to PDF option: Entire workbook

☐ Allow linking to released Item

☐ Enable file security based on synchronization rules

☐ Allow locked objects in new BP

☐ Add leading Zeroes in Find No.

☐ On-demand file multi-site synchronization

☒ Use Reference Designators

Administrator can also set the Default Project for a user using the User Preferences.

Implemented CAD Connectors (pdadm0108m000)

In the Implemented CAD Connectors (pdadm0108m000) session, the CAD Connectors that are active in the implementation can be 'switched on'. Consequently, only the relevant menu options and sessions are displayed. This approach de-clutters the user experience by only displaying the relevant connector session.

As part of the setup, you must indicate in this session the connectors you are using. This relates mainly to Mechanical CAD, as Electrical CAD has a higher degree of configurability and is not captured by these standard settings.

ERP Integration

This section describes the process to set up a company for Integration with LN, and also other BOD based integrations.

Currently the scope is:

- 1 Integration to LN ERP (DLL Based)
- 2 Integration to ERP BOD Based
- 3 Integration to ERP BDE Based
- 4 Integration to Company which is in same package combination as pd Package.

The example used is an integration from PLM to an LN Environment in the same CloudSuite. As result of being in the same CloudSuite the standard integration type is DLL.

ERP Companies (pderp0101m000)

ERP Companies							
	Company	ERP Application	Integration Type	Active	Description	Multi-Site	
	(R)	=	=		(R)	=	
<input type="checkbox"/>	0422	LN ERP	ION		Company 0422 (LN 10.8) LN On Prem / Classic Edition		
<input type="checkbox"/>	0467	LN ERP	ION		Company 0467 (LN 10.7) LN CE / Classic Edition		
<input type="checkbox"/>	2563	LN ERP	BDE		Company 2563 (LN 10.7) LN On Prem / Classic Edition		
<input type="checkbox"/>	6741	LN ERP	LN		Company 6741 (LN 10.8) LN On Prem / Multi-Site Edition		
<input type="checkbox"/>	6741.test	LN ERP	LN		Company 6741 (LN 10.8) LN On Prem / Multi-Site Edition		
<input type="checkbox"/>	test	LN ERP	ION BODs Integration				

Use this session to configure the target company in LN, to which Items & BOM from PLM are exchanged with the domain of logistics.

Click **New** and specify these details for the Target Company:

Company: 6741
 Description: Industrial - NL (RH)
 ERP Application: LN ERP
 Integration Type: LN Integration DLLs
☒ Active
☒ Multi-Site
 Tenant:
 ERP Accounting Entity ID:
 ERP Connection Name:
 ERP Logical ID:
 PLM Connection Name:
 PLM Logical ID:
 Query Type: Undefined
 Webservice URL:

- **Company:** The company to which the data is being sent from PLM.
- **ERP Application:** Indicates the target ERP. For example, LN or Syteline.
- **Integration Type:** Indicates the technology used for Integration. For example, Integration DLLs, BODs, BDE or XMLs.
- **Multi-Site:** Indicates if the target company is multi-Site.
- **Active:** Indicates if this company can be used for Integration.

ERP Sites (pderp0102m000)

After you define companies, sites must be defined for a company.

Note: The multisite functionality is specific to Infor LN CE 10.7 and later and you can use this functionality only if the **Sites** field is set to **Active** in the Implemented Software Components (tccom0100s000) session.

In Infor LN logistical company, multiple sites can exist. CSI/SyteLine also uses 'Site' but in the definition of PLM that aligns to a 'Company'.

Create a new Record for the company which is defined as Multi-Site.

Company: 6741 Industrial - NL (RH)

Site	Description
NBSITE2	Site NBSITE2
NBSITE3	Site NBSITE3

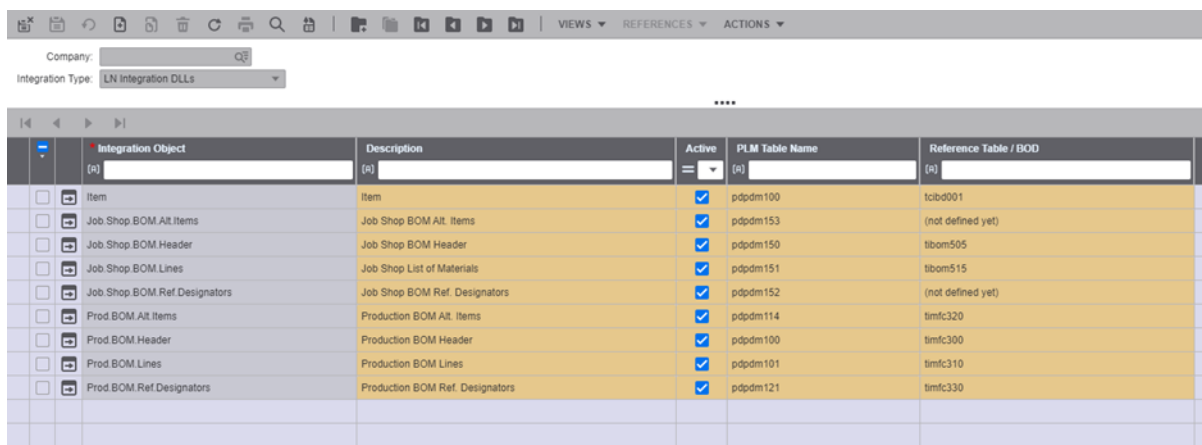
Sites must be created manually which are case sensitive and must match the spelling as defined in Infor LN.

Integration Mapping (pderp0106m000)

Use the Integration Mapping (pderp0106m000) session to define an attribute level mapping and specify the ownership of each attribute of the integration Object.

By default, an integration mapping for direct integration with Infor LN (LN Integration DLL's) is provided which is used to transfer values from PLM to ERP.

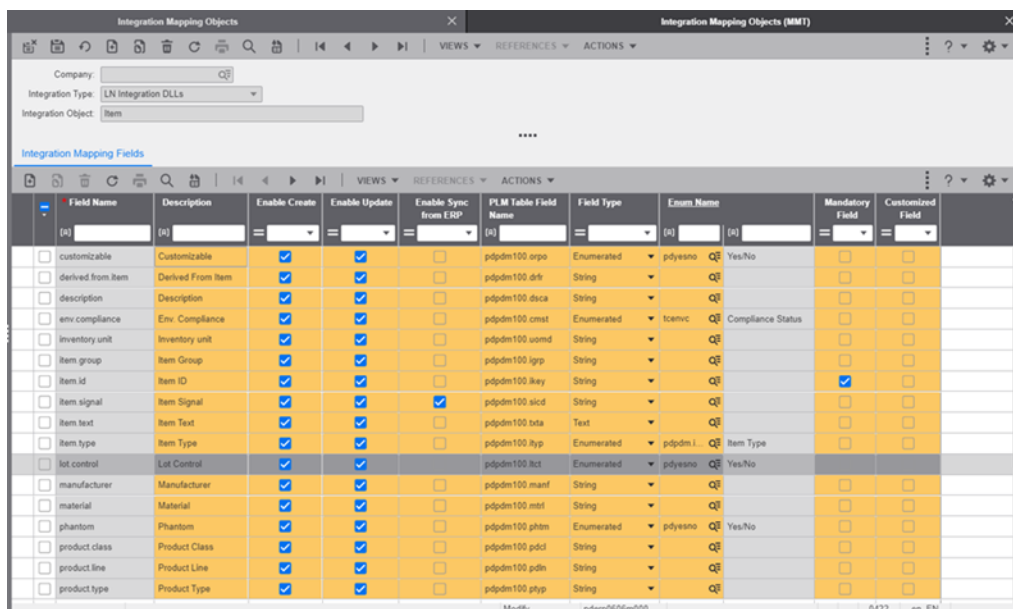
The Integration Lines Mapping (pderp0106m000) session displays the default mapping for all companies.



Integration Object	Description	Active	PLM Table Name	Reference Table / BOO
Item	Item	<input checked="" type="checkbox"/>	pdpm100	icb001
Job Shop BOM Alt Items	Job Shop BOM Alt. Items	<input checked="" type="checkbox"/>	pdpm153	(not defined yet)
Job Shop BOM Header	Job Shop BOM Header	<input checked="" type="checkbox"/>	pdpm150	tbom505
Job Shop BOM Lines	Job Shop List of Materials	<input checked="" type="checkbox"/>	pdpm151	tbom515
Job Shop BOM Ref Designators	Job Shop BOM Ref. Designators	<input checked="" type="checkbox"/>	pdpm152	(not defined yet)
Prod BOM Alt Items	Production BOM Alt. Items	<input checked="" type="checkbox"/>	pdpm114	tmfc320
Prod BOM Header	Production BOM Header	<input checked="" type="checkbox"/>	pdpm100	tmfc300
Prod BOM Lines	Production BOM Lines	<input checked="" type="checkbox"/>	pdpm101	tmfc310
Prod BOM Ref Designators	Production BOM Ref. Designators	<input checked="" type="checkbox"/>	pdpm121	tmfc330

The default Mapping provided does not have an associated company number and is applicable to all companies for which no specific mapping is available.

To view the details of the mapping, open the details of the object. For an Item, mapping is defined as:



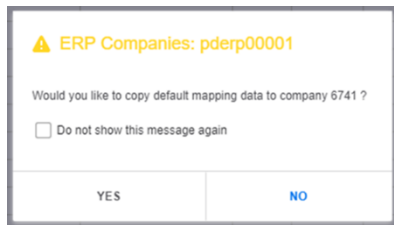
Field Name	Description	Enable Create	Enable Update	Enable Sync from ERP	PLM Table Field Name	Field Type	Enum Name	Mandatory Field	Customized Field
customizable	Customizable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 arpo	Enumerated	pdyesno	<input type="checkbox"/>	<input type="checkbox"/>
derived from item	Derived From Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 drfr	String	QI	<input type="checkbox"/>	<input type="checkbox"/>
description	Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 dsca	String	QI	<input type="checkbox"/>	<input type="checkbox"/>
env compliance	Env. Compliance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 cmst	Enumerated	icenvc	<input type="checkbox"/>	<input type="checkbox"/>
inventory unit	Inventory unit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 usmd	String	QI	<input type="checkbox"/>	<input type="checkbox"/>
item group	Item Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 lgpr	String	QI	<input type="checkbox"/>	<input type="checkbox"/>
item id	Item ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 key	String	QI	<input checked="" type="checkbox"/>	<input type="checkbox"/>
item signal	Item Signal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	pdpm100 acid	String	QI	<input type="checkbox"/>	<input type="checkbox"/>
item text	Item Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 tsia	Text	QI	<input type="checkbox"/>	<input type="checkbox"/>
item type	Item Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 ityp	Enumerated	pdpm1	<input type="checkbox"/>	<input type="checkbox"/>
lot control	Lot Control	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 lct	Enumerated	pdyesno	<input type="checkbox"/>	<input type="checkbox"/>
manufacturer	Manufacturer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 mant	String	QI	<input type="checkbox"/>	<input type="checkbox"/>
material	Material	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 mnt	String	QI	<input type="checkbox"/>	<input type="checkbox"/>
phantom	Phantom	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 phom	Enumerated	pdyesno	<input type="checkbox"/>	<input type="checkbox"/>
product class	Product Class	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 pcd	String	QI	<input type="checkbox"/>	<input type="checkbox"/>
product line	Product Line	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 pdln	String	QI	<input type="checkbox"/>	<input type="checkbox"/>
product type	Product Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdpm100 ptyp	String	QI	<input type="checkbox"/>	<input type="checkbox"/>

When you select an Item for sending to Production, only values of attributes for which the **Owned by PLM** check box is selected, are transferred to LN.

To modify the Default Mapping for a specific Company, you need to generate the Mapping for that company and modify the required attributes accordingly.

To generate the Mapping for a specific company:

- 1 In the ERP Companies (pderp0101m000) session, select a specific company.
- 2 Select **References Integration > Mapping Objects**.
- 3 Click **Yes** when this message is displayed:



Attribute Mapping for that specific company is created and Administrators can change the ownership as per business requirement.