

# Custom Templates and Card Files

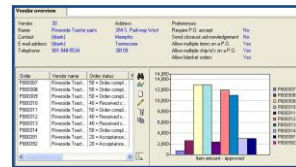
## Faster and Easier Record Entry

## Better Data Organization with Card Files

Rod Fortson – Sr. XA Consultant

[Rod.fortson@cistech.net](mailto:Rod.fortson@cistech.net)

October 25, 2011





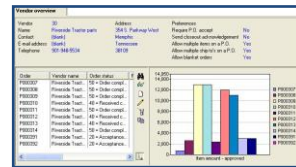
# What is an XA Template?

- ❖ A template is used to design a “create” prompt for new records.
- ❖ **Templates can bring default values into specific fields when adding new records.**
- ❖ You can have multiple versions of the template in any object/file if needed.
- ❖ **In R7 and R9 there are:**
  - Create templates
  - Change templates
  - Copy templates.

Preset Values and default data in an XA Biz Object

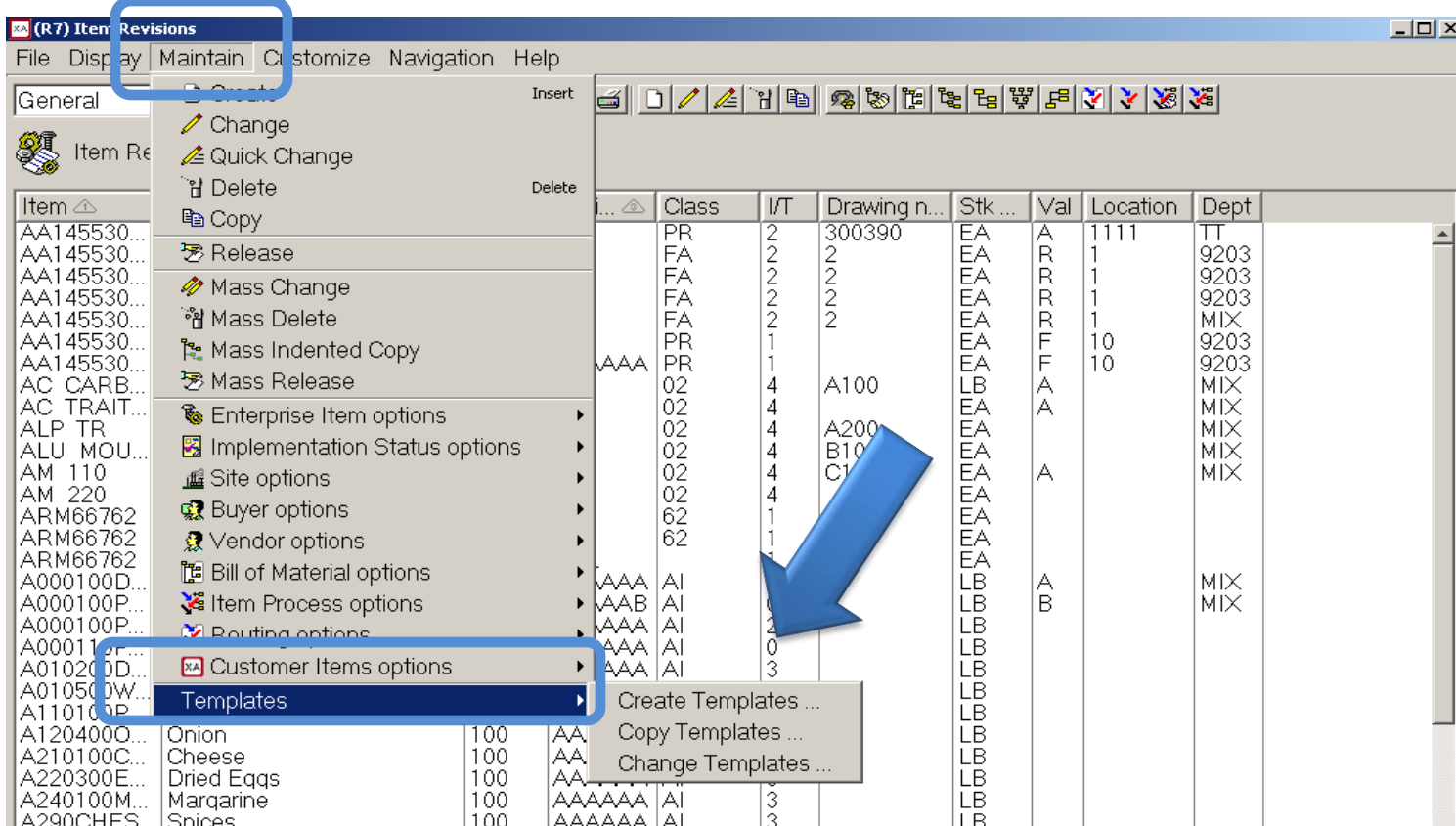
# Template Purposes

- ❖ To speed up data entry & file maintenance
- ❖ To set specific values in your Object without intervention from the User
- ❖ To set the most common value normally used in a field in an Object
- ❖ To make sure you have a 'valid value' being entered during file maintenance



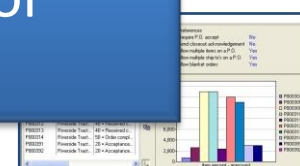
# What is a template?

❖ Templates are located under the “Maintain” menu option.



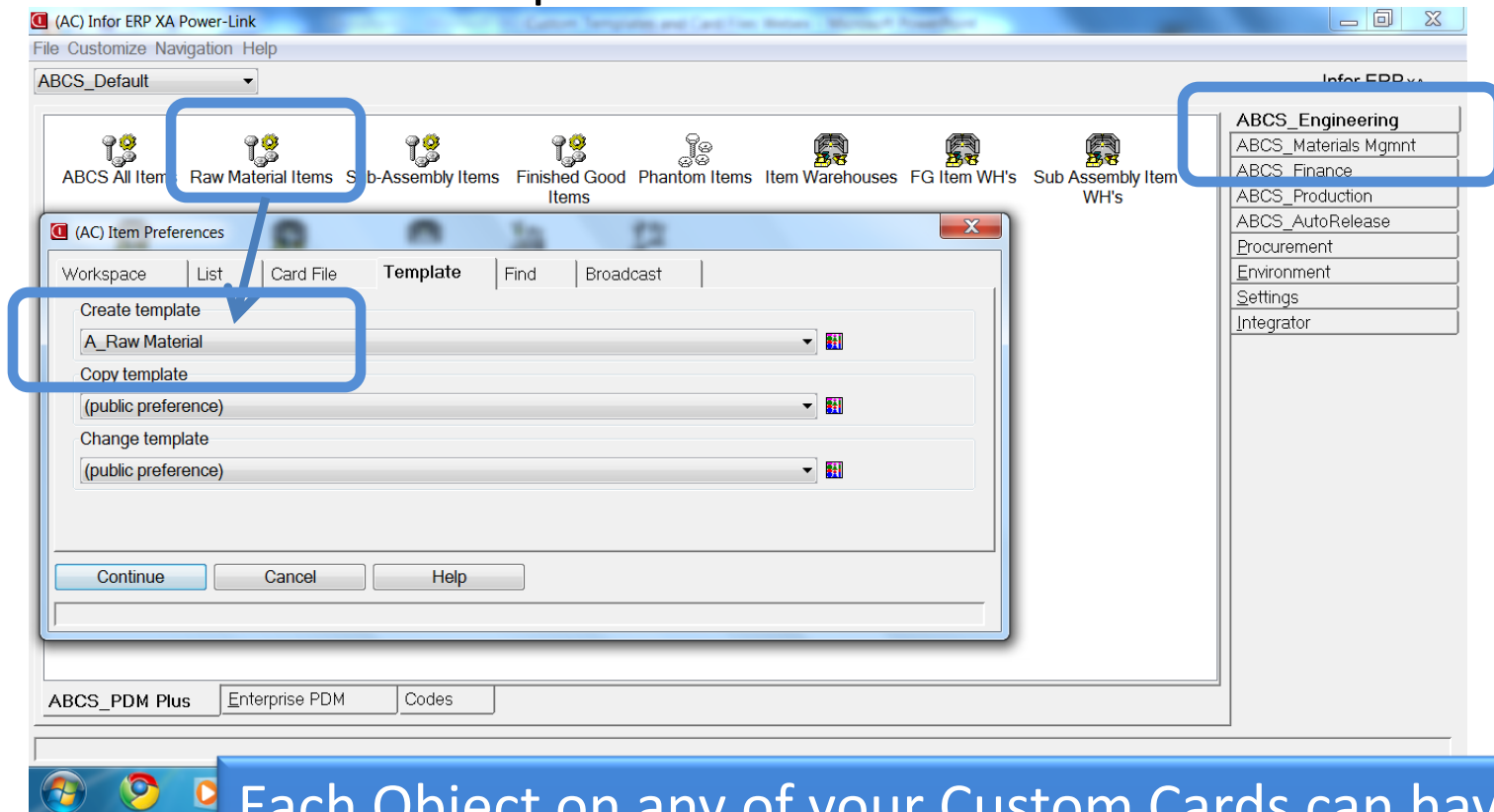
Item	Class	I/T	Drawing n...	Stk ...	Val	Location	Dept
AA145530...	PR	2	300390	EA	A	1111	TT
AA145530...	FA	2	2	EA	R	1	9203
AA145530...	FA	2	2	EA	R	1	9203
AA145530...	FA	2	2	EA	R	1	9203
AA145530...	FA	2	2	EA	R	1	MIX
AA145530...	PR	1		EA	F	10	9203
AA145530...	PR	1		EA	F	10	9203
AAA 02	02	4	A100	LB	A		MIX
02	02	4		EA	A		MIX
02	02	4	A200	EA			MIX
02	02	4	B10	EA			MIX
02	02	4	C1	EA	A		MIX
02	02	4		EA			
62	62	1		EA			
62	62	1		EA			
AAA AI	AAA AI			LB	A		MIX
AAA AI	AAA AI			LB	B		MIX
AAA AI	AAA AI			LB			
AAA AI	AAA AI			LB			
AAA AI	AAA AI	3		LB			
A1204000...	Onion	100	AA	LB			
A210100C...	Cheese	100	AA	LB			
A220300E...	Dried Eggs	100	AA	LB			
A240100M...	Margarine	100	AAAAAA	AI			
A290CHES...	Spices	100	AAAAAA	AI			

Each Business Object allowing File Maintenance will have a place for you to establish Templates . Maybe you need a template for creating only Raw Materials in the Item Revision File



# What is a template?

- ❖ You can tie the template to your custom card file; use different card files with different templates when needed.



Each Object on any of your Custom Cards can have specific Template Preferences – in this example – the create template would default Raw and Purchased defaults into the Item Revision fields.

# What is a Template?

- ❖ You can set default values for 'Return here to create another' and 'Preview before create'.
- ❖ There are also settings, per field, for:
  - ❖ Position Cursor
  - ❖ Retain Value
  - ❖ Default Value

(AA) Template definition

Item type: Character (1A)

Usage: Provide default value only

Default value:  Specific  Preference  Related  
3 = Raw material

Prompt options:  
 Retain previous value  
 Position cursor  
0 Number of indents

Label: Item type  
Content: Alias  
Default visual control: Drop down list

Continue Cancel Help







# Selecting the fields for your Data Entry Template



(R7) Edit Item Revision Create Template

**Item Revision Create Template**

Name: Manufactured component    Domain: Public    Security: (none)

Options:  
Card file: Manufactured component    Initial card: (system default)  
 Return here to create another     Preview before create

Available attributes:

- Description
- Account number
- Allowable days early
- Alpha factor
- Alternate item
- APC item (derived)
- Batch/lot control
- Bill of lading commodity code
- Buyer

All    By Object

Selected attributes:

	Description	Label	Default...	Prompt	Cursor	Retain	Indents
✓	Site	Site		Yes	No	Yes	0
✓	Item	Item		Yes	Yes	Yes	0
✓	Revision	Revision		Yes	No	Yes	0
✓	Description	Description		Yes	No	No	0
✓	Item type	Item type	Assembly	Yes	No	No	0
	Inventory code	Inventory code	Inventory	No	No	Yes	0
	Sales tax indicator	Sales tax indi...	US Non...	No	No	Yes	0
	Receipt required	Receipt requir...	Yes	No	No	Yes	0

Save    Save as ...    Apply    Cancel    Help

The fields you can select to place on your Create, Change or Copy Template

As you add fields, you can set the values, options, and prompting settings as described earlier.





# Creating a template



- **USAGE**

**(R7) Template definition** [X]

**Planner** Numeric (99,999)

Usage

Provide default value only [v]  
Prompt for value only  
Provide default value only  
Prompt for value and provide default value

11002

Prompt options

Retain previous value  
 Position cursor

0 [v] Number of indents

Label Planner  
Content Value [v]  
Default visual control Entry field [v]

Continue Cancel Help







**(R7) Edit Item Revision Create Template**

**Item Revision Create Template**

Name: Purchased component    Domain: Public    Security: (none)

Options:  
 Card file: Purchased component    Initial card: (system default)  
 Return here to create another     Preview before create

Available attributes:

- Description
- Account number
- Allowable days early
- Alpha factor
- Alternate item
- APC item (derived)
- Batch/lot control
- Bill of lading commodity code

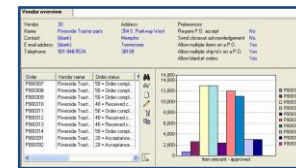
All    By Object

Selected attributes:

	Description	Label	Default value	Prompt	Cursor
<input checked="" type="checkbox"/>	Site	Site		Yes	No
<input checked="" type="checkbox"/>	Item	Item		Yes	No
<input checked="" type="checkbox"/>	Revision	Revision		Yes	No
<input checked="" type="checkbox"/>	Description	Description		Yes	No
<input checked="" type="checkbox"/>	Item type	Item type	Purchased	No	No
<input checked="" type="checkbox"/>	Inventory code	Inventory code	Inventory	No	No
<input checked="" type="checkbox"/>	Inspect on receipt	Inspect on receipt		Yes	No

Save    Save as ...    Apply    Cancel    Help

**Pick the fields you want to use in your Template, and in this case default values for Purchased Inventory.**







# Create Templates for Workspaces

(YY) Infor ERP XA Power-Link

File Customize Navigation Help

ABCS\_Default

Infor ERP xa

Navigation icons for various modules:

- ABCS All Items
- Raw Material Items** (highlighted with a blue box)
- Sub Assembly Items
- Finished Good Items
- Phantom Items
- Item Warehouses
- FG Item WH's
- Sub Assembly Item WH's
- Raw Material Item WH's
- Phantom Item WH's
- Warehouses
- Production Facilities
- Routing Operations (PDM)

ABCS\_Engineering

- ABCS\_Materials Mgmt
- Production
- Finance
- Procurement
- Environment
- Integrator

(YY) Raw Material Items

File Display Maintain Customize Navigation Help

ABCS\_Gene... \*ABCS\_Raw...

Raw Material Items

Item	Description	Inv Code	Stk UM	I/T	Class	IAC
ABB382637390-00	Pad Assy	1	EA	4		
ABB382638130-01	Lever Lh	1	EA	4		
ABB382638131-00	Lever Lh	1	EA	4		
ABB382638190-00	Lever Return Spr...	1	EA	4		
ABB382638620-01	Park Bracket Lh	1	EA	4		
ABB382638621-00	Park Bracket Lh	1	EA	4		
ABB382647390-00	Pad Assy	1	EA	4		
ABB382648130-01	Lever Rh	1	EA	4		
ABB382648131-00	Lever Rh	1	EA	4		
ABB382648190-00	Lever Return Spr...	1	EA	4		
ABB382648620-01	Park Bracket Rh	1	EA	4		

(YY) Create Raw Material Items

Template

ABCS\_Raw Material

Item

Description

Nature

Stocking UM

Return here to create another

Preview before create

Create

Cancel

Help

Windows taskbar with icons for Start, Internet Explorer, Firefox, File Explorer, and Infor ERP XA.

11:01 AM  
8/30/2011

System tray area showing a 'Vendor overview' window with a table and a bar chart.

Vendor	Quantity	Value
Vendor 1	1000	10000
Vendor 2	2000	20000
Vendor 3	3000	30000
Vendor 4	4000	40000
Vendor 5	5000	50000



### Item Warehouse Create Template

Name:  Domain:  Security:

Options

Card file:  Initial card:

Return here to create another  Preview before create

Available attributes

Description	Name	Length	Data type
Authorized time fence	atimi1 (Item Planning)	3.0	Numeric
Average ending inventory	avebib	15.2	Numeric
Average sales per period	avslib	15.2	Numeric
Backflush method	bfflib	1.0	Numeric
Beginning inventory	bqinib	10.3	Numeric
Build resource profiles	rsbf1 (Item Planning)	1	Boolean
Carry forward code	cfwcib	1	Boolean
Combine requirements	cmrci1 (Item Planning)	1.0	Numeric

All  By Object

Set your Item Entry Defaults – for say a Mfg Item

Selected attributes

	Description	Label	Default value	Prompt	Cursor	Retain
<input checked="" type="checkbox"/>	Item	Item		Yes	No	Yes
<input checked="" type="checkbox"/>	Warehouse	Warehouse	1	Yes	No	No
	Planner	Planner	11002	No	No	Yes
	Lead time code	Lead time code	Manufacture	No	No	Yes
	Plan customer orders	Plan customer orders	Yes, after MRP start date	No	No	Yes
	Order policy code	Order policy code	Time periods of supply	No	No	Yes
	Lead time manufacturi...	Lead time manufac...	2.0	No	No	Yes

Save Save as ... Apply Cancel Help

Whs	Description
CAN	Canton
INT	In Transit Warehouse
1	Hi-tech Company - Main Whse
2	Hi-tech France

- Item Characteristics
- Stocking this item**
- Engineering
- Item Processes
- Location Control
- Costing Parameters
- Current Costs
- Current Cost Dates
- Standard Costs
- Standard Cost Dates
- Purchasing
- Vendor Performance
- Sales
- Shipping
- User Fields
- Inspection

**(R7) Create Item Warehouse**

Template: Mfg. Parts

Item: 1000

Warehouse: 11

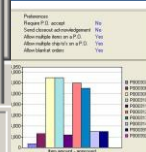
Return here to create another

Preview before create

Create Cancel Help

**Using MFG Parts Item Warehouse template:**

- planning fields are populated correctly
- document control creates the item warehouse by selecting the CREATE icon on right and clicking CREATE button on create prompt (3 clicks).
- Planning and/or purchasing can add vendor lead time, etc.



# Good template usage – MO's/PO's/CO's



## Order-based Production Management – new MO

(R7) Edit Manufacturing Order Create Template

**Manufacturing Order Create Template**

Name: MO Entry    Domain: Public    Security: (none)

Options: Card file (system default)    Initial card (system default)

Return here to create another     Preview before create

Available attributes

Description	Name	Length	Data type
Actual start date	asdtmy	7	Date
Batch/lot	lbnomy	10	Character
Customer demand (derived)	csdmmmy	80	Character
Department	dptnmy	4	Character
Drawing number	eqnomy	15	Character
Item description	fidsmy	30	Character
Item stock location	filmy	7	Character

All    By Object

Selected attributes

	Description	Label	Default value	Prompt	Cursor	Retain
<input checked="" type="checkbox"/>	Order	Order		Yes	No	Yes
<input checked="" type="checkbox"/>	Item warehouse	Warehouse	1	Yes	No	No
<input checked="" type="checkbox"/>	Item	Item		Yes	No	Yes
<input checked="" type="checkbox"/>	Item revision	Item revision		Yes	No	Yes
<input checked="" type="checkbox"/>	Total order quantity ...	Total order quantity		Yes	No	Yes
<input checked="" type="checkbox"/>	Due date	Due date		Yes	No	Yes

Attributes    Options

Save    Save as ...    Apply    Cancel    Help

(R7) Edit Manufacturing Order Create Template

**Manufacturing Order Create Template**

Name: MO Entry    Domain: Public    Security: (none)

Options: Card file (system default)    Initial card (system default)

Return here to create another     Preview before create

Available attributes

Description	Name	Length	Data type
Actual start date	asdtmy	7	Date
Batch/lot	lbnomy	10	Character
Customer demand (derived)	csdmmmy	80	Character
Department	dptnmy	4	Character

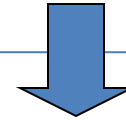
All    By Object

Selected attributes

	Label	Default...	Prompt
<input checked="" type="checkbox"/>	Include primary BOM	Yes	Yes
<input checked="" type="checkbox"/>	Include primary routing	Yes	Yes
<input type="checkbox"/>	Create M.O.s for configured components	No	No
<input type="checkbox"/>	Print shop packet at M.O. release	No	No

Attributes    **Options**

Save    Save as ...    Apply    Cancel    Help



**(R7) Create Manufacturing Order**

Template  
Default

Order M012880

Warehouse

Item

Item revision (current)

Standard in quantity 0.000

Total order quantity 0.000

Scheduled start date / /

Due date / /

Options

- Include primary BOM
- Include primary routing
- Create M.O.s for configured components
- Print shop packet at M.O. release

Return here to create another

Preview before create

Create Cancel Help

**(R7) Create Manufacturing Order**

Template  
MO Entry

Order M012880

Warehouse

Item

Item revision (current)

Total order quantity 0.000

Due date / /

Options

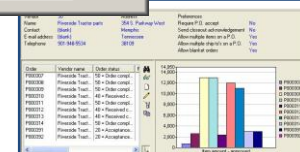
- Include primary BOM
- Include primary routing

Return here to create another

Preview before create

Create Cancel Help

**Simplified entry for MO Create**





# Good template usage



## • Procurement Management – PO header and items

**(R7) Edit Purchase Order Create Template**

**Purchase Order Create Template**

Name: Default    Domain: Public    Security: (none)

Options:  
Card file: (system default)    Initial card: (system default)  
 Return here to create another     Preview before create

Available attributes

Description	Name	Length
Alternate currency	acurpm	3
Apportionment	apptpm	10
Bill-to abbreviation	bnmad1	10
Bill-to address 1	b135d1	35
Bill-to address 2	b235d1	35
Bill-to address 3	b335d1	35
Bill-to address 4 (City)	b435d1	35

All    By Object

Selected attributes

Description	Label	Default value	Prompt	Cursor	Retain
Order	Order		Yes	No	Yes
Buyer	Buyer		Yes	No	Yes
Vendor	Vendor		Yes	No	Yes
Warehouse	Warehouse		Yes	No	Yes
Ship-to ID	Ship-to ID	999	No	No	Yes
Bill-to ID	Bill-to ID	998	No	No	Yes
Priority	Priority	Unassigned	No	No	Yes

Save    Save as ...    Apply    Cancel    Help

**(R7) Create Purchase Order**

Template: Default

Order: P000424

Buyer: [ ]

Vendor: [ ]

Warehouse: [ ]

Return here to create another  
 Preview before create

Create    Cancel    Help



# Good template usage



- Procurement Management – PO header and items

**(R7) Edit Purchase Order Create Template**

**Purchase Order Create Template**

Name: MRO PO template    Domain: Public    Security: (none)

Options:  
Card file: (system default)    Initial card: (system default)  
 Return here to create another     Preview before create

Available attributes:

Description	Name
Alternate currency	acurpm
Apportionment	apptpm
Bill-to abbreviation	bnmad1
Bill-to address 1	b135d1
Bill-to address 2	b235d1
Bill-to address 3	b335d1
Bill-to address 4 (City)	b435d1

All    By Object

Selected attributes:

Description	Label	Default value	Prompt	Cursor
Order	Order		Yes	No
Buyer	Buyer		Yes	No
Vendor	Vendor		Yes	No
Warehouse	Warehouse	1	Yes	No
Ship-to ID	Ship-to ID	100	Yes	No
Bill-to ID	Bill-to ID	998	No	No
Priority	Priority	Unassigned	No	No

Save    Save as ...    Apply    Cancel    Help

**(R7) Create Purchase Order**

Template: MRO PO template

Order: P000424

Buyer: [ ]

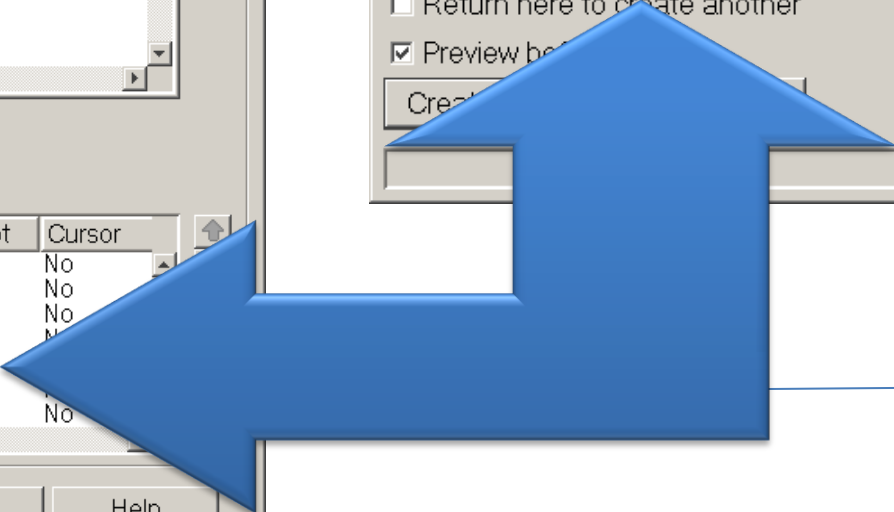
Vendor: [ ]

Warehouse: 1

Ship-to ID: 100

Return here to create another  
 Preview before create

Create





# Good template usage



- Procurement Management – PO and items

(R7) Edit Purchase Order Item Create Template

**Purchase Order Item Create Template**

Name: Orthopedics (circled in red) Domain: Public Security: (none)

Options: Card file: (system default) Initial card: (system default)  
 Return here to create another  Preview before create

Available attributes:

Description	Name
Apportionment	aptppt
Blanket item	blkfpt
Charge	charpt
Charge type	chqtpt
Contract	cnnbpt
Cost code	coscpt

All By Object

Selected attributes:

Description	Label	Default value	Prompt
Order	Order		Yes
Line	Line		Yes
Warehouse	Warehouse		Yes
Account num...	Account number	5207	No
Item	Item		Yes
Extended de...	Extended description 1		Yes

Attributes Options

Save Save as ... Apply Cancel Help

(R7) Edit Purchase Order Item Create Template

**Purchase Order Item Create Template**

Name: Implants (circled in red) Domain: Public Security: (none)

Options: Card file: (system default) Initial card: (system default)  
 Return here to create another  Preview before create

Available attributes:

Description	Name
Apportionment	aptppt
Blanket item	blkfpt
Charge	charpt
Charge type	chqtpt
Contract	cnnbpt
Cost code	coscpt

All By Object

Selected attributes:

Description	Label	Default value	Prompt
Order	Order		Yes
Line	Line		Yes
Warehouse	Warehouse		Yes
Account num...	Account number	4108	No
Item	Item		Yes
Extended de...	Extended description 1		Yes

Attributes Options

Save Save as ... Apply Cancel Help







# Card Files & Cards



(YY) Infor ERP XA Power-Link

File Customize Navigation Help

Default

**Card File**

Warehouses Warehouse Locations Items Item Warehouses Item Locations Discrete Allocations Inventory Transaction History Inventory Count Groups Inventory Statuses Transaction Reasons

**CARDS**

Infor ERP XA

- Materials
  - Production
  - Engineering
  - Finance
  - Procurement
  - Environment
  - Integrator

Inventory Shipping Receiving

12:19 PM 9/1/2011

A Card File is a group of Object or Data Cards – this Card File shows the Standard XA Cards on the “Default” Card File.

Doc#	Vendor name	Order date	10/1/2011
PE0001	Florida Trans	10/1/2011	10,000
PE0002	Florida Trans	10/1/2011	10,000
PE0003	Florida Trans	10/1/2011	10,000
PE0004	Florida Trans	10/1/2011	10,000
PE0005	Florida Trans	10/1/2011	10,000
PE0006	Florida Trans	10/1/2011	10,000
PE0007	Florida Trans	10/1/2011	10,000
PE0008	Florida Trans	10/1/2011	10,000
PE0009	Florida Trans	10/1/2011	10,000
PE0010	Florida Trans	10/1/2011	10,000
PE0011	Florida Trans	10/1/2011	10,000
PE0012	Florida Trans	10/1/2011	10,000
PE0013	Florida Trans	10/1/2011	10,000
PE0014	Florida Trans	10/1/2011	10,000
PE0015	Florida Trans	10/1/2011	10,000
PE0016	Florida Trans	10/1/2011	10,000
PE0017	Florida Trans	10/1/2011	10,000
PE0018	Florida Trans	10/1/2011	10,000
PE0019	Florida Trans	10/1/2011	10,000
PE0020	Florida Trans	10/1/2011	10,000





# Create Templates for Workspaces

(YY) Infor ERP XA Power-Link

File Customize Navigation Help

ABCS\_Default

Infor ERP xa

Navigation icons for various modules:

- ABCS All Items
- Raw Material Items** (highlighted with a blue box)
- Sub Assembly Items
- Finished Good Items
- Phantom Items
- Item Warehouses
- FG Item WH's
- Sub Assembly Item WH's
- Raw Material Item WH's
- Phantom Item WH's
- Warehouses
- Production Facilities
- Routing Operations (PDM)

ABCS\_Engineering

ABCS\_Materials Mgmt

Production

Finance

Procurement

Environment

Integrator

(YY) Raw Material Items

File Display Maintain Customize Navigation Help

ABCS\_Gene... \*ABCS\_Raw...

Raw Material Items

Item	Description	Inv Code	Stk UM	I/T	Class	IAC
ABB382637390-00	Pad Assy	1	EA	4		
ABB382638130-01	Lever Lh	1	EA	4		
ABB382638131-00	Lever Lh	1	EA	4		
ABB382638190-00	Lever Return Spr...	1	EA	4		
ABB382638620-01	Park Bracket Lh	1	EA	4		
ABB382638621-00	Park Bracket Lh	1	EA	4		
ABB382647390-00	Pad Assy	1	EA	4		
ABB382648130-01	Lever Rh	1	EA	4		
ABB382648131-00	Lever Rh	1	EA	4		
ABB382648190-00	Lever Return Spr...	1	EA	4		
ABB382648620-01	Park Bracket Rh	1	EA	4		

(YY) Create Raw Material Items

Template

ABCS\_Raw Material

Item

Description

Nature

2051

Stocking UM

EACH

Return here to create another

Preview before create

Create

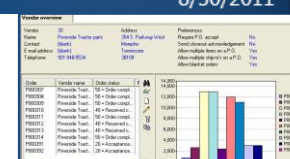
Cancel

Help

ABCS\_PDM Plus

Enterpr

11:01 AM  
8/30/2011





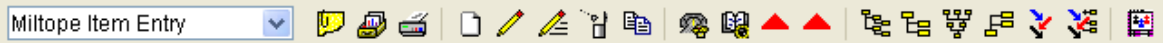


# What is a card file? Custom card file



(AA) Change Item - M362-202 .053 Hollow Emi Gasket

File Display Maintain Customize User Navigation Help



M362-202 .053 Hollow Emi Gasket

Description: .053 Hollow Emi Gasket

Drawing number: [ ]

Stocking UM: FT = Feet

Item type: 4 = Purchased

Item class: E98 = COMMON - TSC-750/MSD DOMI

Vendor: 1

Buyer: 37

Inventory code: 1 = Inventory

Inspect on receipt:  Yes  No

Serial number required:  Yes  No

Extended description 1: EFF SHIELDING/ 46-1015-0064

Extended description 2: CHOMERICS/ 10-04-21120-S6305

Account number: 1062

Receipt required:  Yes  No

Kit document print option:  Yes  No

Create user: PEAGERTON  
Create date: 04/05/2002  
Change user: PEAGERTON  
Change date: 08/25/2011

Eng Vendor Item

Vendor Name	Vendor Item Number	Primary Vendor Flag	RO
CHOMERICS I...	10-04-21120-S6305	No	No
EFFECTIVE S...	46-1015-0064	No	No

Miltope Item Entry.

Even better – a single Compound Card for Raw Material Maintenance.....

Update

Cancel

Help

# Maximize Space – Eliminate Cards



(R7) Change Item Revision - XPS, X600, File Display Maintain Customize Navigation Help

Finished goods X600 Stapler, Model 600 Site: XPS Team X Production Site Rev:

	Current Costs	Standard Costs
Unit cost	269.60669688	269.60669688
Cost status code	Lower-level costs inconsistent with item type	Lower-level costs inconsistent with item type
Cost Breakdown:		
Total material	4.64472405	4.64472405
Total outside operations	0.00000000	0.00000000
Total setup labor	0.00000000	0.00000000
Total run labor	52.61000006	52.61000006
Total manufacturing overhead	133.80750021	133.80750021

Item Characteristics

Engineering

**All cost**

Standard Costs

Sales

Indented Bill of Material

Routings

Graph-M/L/O

Graph-M/L/O Bar

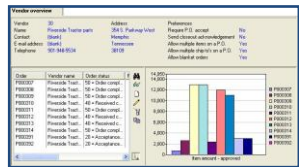
Graph-Overhead costs

Costs & Graph

Std & Current | **Current Costs** | Current Graph | Standard Costs | Curr and Std

Update | Cancel | Help

Windows taskbar showing Start button, Sent Items - Mic..., Windows Explorer, PowerLink URL..., Custom Templat..., Internet Explorer..., 5 javaw, and system tray with time 8:30 AM.



# Card File – Organization of Data & Cards



ADPIT1 - Remote Desktop Connection  
(MM) Change Item Revision - NJ, SDFC,  
Display Maintain Customize User Navigation Help  
Default  
FC DEFECTIVE - CREDIT Site: NJ Arrow Production Rev: Alt

Description: DEFECTIVE - CREDIT  
Item type: 9 = User option  
Inventory code: Miscellaneous  
Item class: \$DFC = Defective Current Year  
Value class: C  
Department:   
Item accounting class: 0 = NON INVENTORY  
Stocking UM: EA = EACH  
Default inventory status:   
Carrying rate: .000  
Country of origin: US = United States  
Item bitmap or icon: \$DFC  
MRO item:   
Effective from date: 01/01/1940  
Effective to date: / /  
Released: No  
Released to PDM: Yes

**Physical Characteristics**  
Stocking UM: EA = EACH  
Unit weight: 0.000  
Weight UM: (blank)  
Supplementary weight: 0.0000  
Supplementary weight UM: (blank)  
Unit volume: 0.000  
Volume UM: (blank)  
Specific gravity: 0.0000  
Height: 0.000  
Length: 0.000  
Width: 0.000  
Inside diameter: 0.000  
Outside diameter: 0.000  
Dimensional UM: (blank)  
Shape code:

**Engineering Characteristics**  
Implementation status: (ALL)  
Configured item: Not configured  
Drawing number:   
Type: (none)  
Assemblies where-used: 0  
Low level code: 0

**Replication**  
Replication destination:

**General**  
Engineering  
Procurement  
Inventory  
Sales  
Costs  
Translations  
Item Categories  
Item Characteristics

**R9 Card File and Cards are superior !**

- ◆ Equates to multiple menu screens in green screen. For example the 12 Green Screens of Item Master Information.
- ◆ Card file organizes all information in a specific record of data – or Objects/Files in groups. R9 Data Organization is FAR SUPERIOR TO 7.7 and 7.8 !

# Creating a Card

The screenshot shows the MAPICS software interface. The main window is titled '(AA) Change Item - C50-1220 Ic'. The 'Cards' menu is open, showing options like 'workspaces', 'Cards ...', 'Cards Files ...', 'Receive', and 'Preferences ...'. A blue arrow points from the 'Cards ...' option to the 'Item Cards' dialog box. The 'Item Cards' dialog box has a list of card types: Description (new), All Warehouses, Attachments, Base Prices, Costing Parameters, Current Cost, Current Cost Dates, Current Costs, Eng. Weight, Engineering, History, and Include inactive indented bill of ... The 'Description (new)' item is highlighted. A blue circle highlights the 'Add' icon (a document with a plus sign) in the dialog box's toolbar. A blue arrow points from this icon to the 'Select card type to create' dialog box. The 'Select card type to create' dialog box has radio buttons for: Attribute card (selected), Compound card, Graph card, List card, Overview card, and Tabbed card. There are 'Continue' and 'Cancel' buttons at the bottom.

## CARD TYPES TO CREATE

Select card type to create

- Attribute card
- Compound card
- Graph card
- List card
- Overview card
- Tabbed card

Continue Cancel

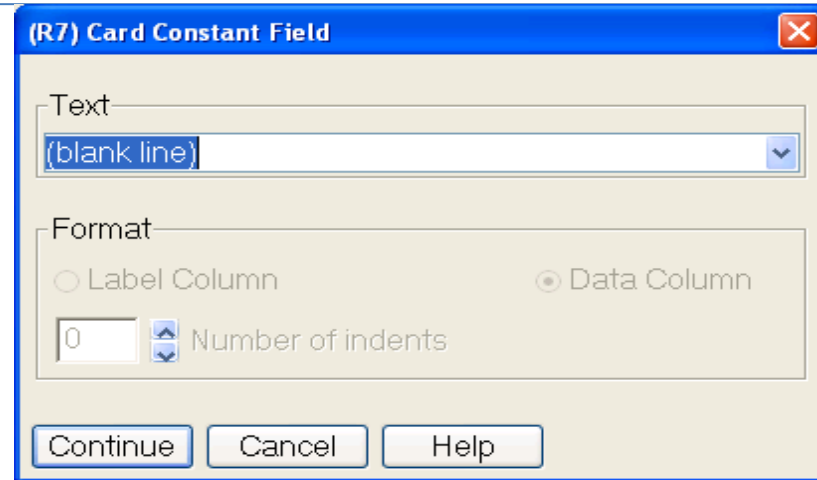
Item Characteristics	
Engineering	
Location Control	
Costing Parameters	
Current Costs	
Standard Cost Dates	
Purchasing	
Performance	
Bill of Material	





# Customizing Attribute Cards

- When customizing an attribute card, you can insert:
  - Blank lines
  - Headings over the field description
  - Headings over the data
  
- Column breaks allow for displays on both the right and left side of the card



(R7) Card Constant Field

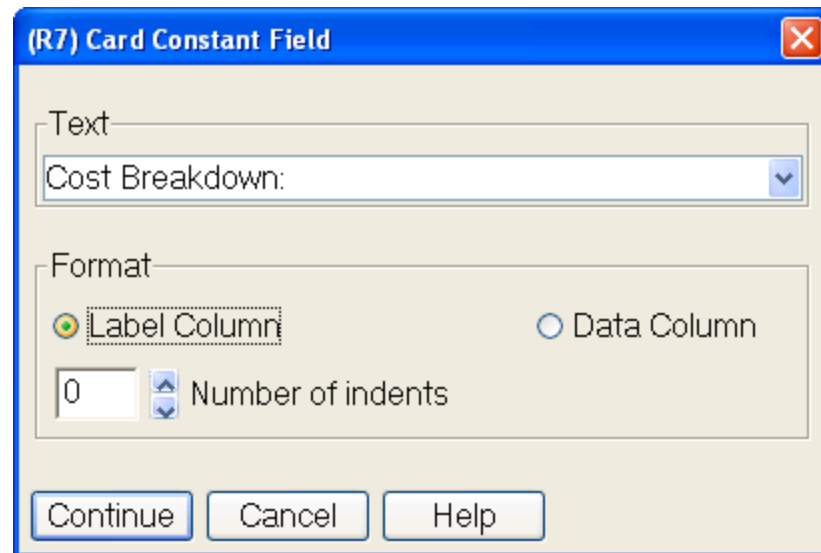
Text  
(blank line)

Format

Label Column  Data Column

0 Number of indents

Continue Cancel Help



(R7) Card Constant Field

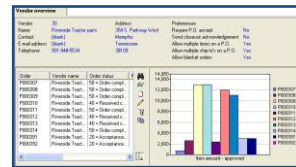
Text  
Cost Breakdown:

Format

Label Column  Data Column

0 Number of indents

Continue Cancel Help



# What is an attribute card?



Webex Cost Card Files

CONTROLLER P/S Controller Power Supply

Description	Controller Power Supply
Item type	Assembly
Inventory code	Inventory
Item class	(blank)
Value class	(blank)
Department	4191
Item accounting class	(blank)
Default stock location	(blank)
Stocking UM	EA = Each
Carrying rate	.000
Country of origin	(blank)
Item bitmap or icon	CONTROLLER P/S

**Item Characteristics**

- Costing Parameters
- Current Costs
- Current Cost Dates
- Standard Costs
- Standard Cost Dates

**Just Cost Fields...or all Cost Fields on a single card !**

Update Cancel Help

2:47 PM 10/24/2011





# What is a two-column card?



(YY) Change FG Item WH's - Warehouse: CL1 Item: ABB382647000-01

File Display Maintain Customize Navigation Help

ABCs\_Mfg Item WH

ABB382647000-01 Pf Rear Ipb Assy Rh CL1 Pbr Columbia Planning

Order policy code:	G = Time periods of supply	No of Forecast Perds:	0
Reschedule Frozen Zone:	0	Days / forecast Perd:	0
Days supply per order:	0	Forecast code:	0
Shrinkage factor:	.000	Combine Req'mnts:	Do not
Minimum quantity:	0.000	Plan Exp Cust Orders:	No
Maximum Qty:	0.000	Plan Cust Orders:	4 = No
Multiple Qty:	0.000	Per'd Interval Code:	Print ful
Fixed Order Qty:	0.000	Mstr Lvl Print Cd:	Always
Order point:	0.000	Max Nmbr of Lines/Item:	1 page
Mfg Auto Rel Code:	0	Multi-source code:	(none)
Smoothing code:	No smoothing	Incl Inv Balance:	<input checked="" type="radio"/> Yes
Smoothing start date:	//	Demand Time Fence:	0
Min Days to Reschedule:	0	Resource Nmbr:	
Master Lvl Item Code:	Multiple source master level item	Constrained part:	<input type="radio"/> Yes
Master Lvl Item Code:	Do not propagate forecast	Planned by:	MRP
Safety stock:	0.000		
Forecast Qty/Perd:	0		

Update Cancel Help

(YY) Edit Item Warehouse Card

Item Warehouse Card

Name: ABCs\_MRP Data Domain: Public Security: (none)

Card properties  
Tab label: (same as name)

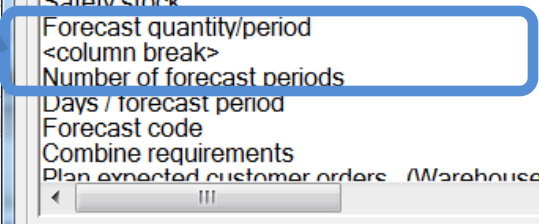
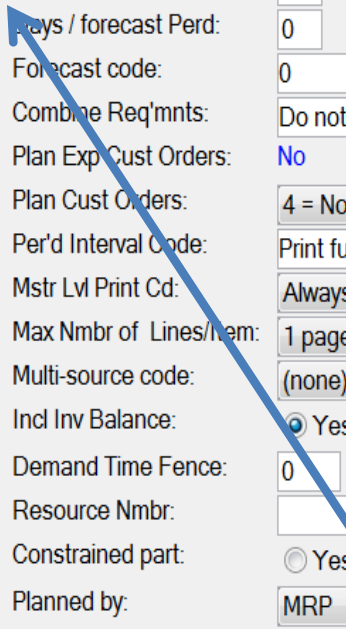
Available attributes

- Description
- Abbreviation
- Account number
- Active record code
- Activity since last plan - planning (calculated)
- Address 1

Selected attributes

- Description
- Safety stock
- Forecast quantity/period
- <column break>
- Number of forecast periods
- Days / forecast period
- Forecast code
- Combine requirements
- Plan expected customer orders (Warehouse)

Save Save as ... Apply Cancel



# What is an overview card?



**(R7) Customer Order - 1, 1, 10941**

File Display Maintain Customize Navigation Help

Overview card

1 Customer: 920001 Columbus Trailer Sales Order: CO 10941

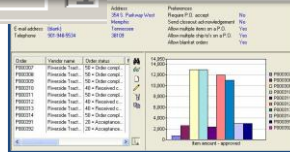
**Overview**

Details: Customer Order Overview Details

Identification	Details
Sold-to: Columbus Trailer Sales Ship-to: *default - Columbus Trailer Sales	10 = Entered Amount: 5,600,000.00 O...
<b>HOLDS</b>	
<b>COMMENTS</b>	
800 Thank you	
<b>COMMISSIONS</b>	
Salesrep: 150 BILL	Commission: 0.00% Participation: 100.00%
<b>LINE ITEMS</b>	
Whs: FDM FDM-TRLR-FLAT FDM-53 Foot Flatbed Trailer-To 200.000 EA	10 = Open Base: 0.000 Net sales: 3,600...
<b>RELEASES</b>	
1 Promise: 09/30/2007 Req: 09/30/2007 Mfg due: 09/27/2007	20 = Open Ordered: 200.000 EA Shipp...
<b>HOLDS</b>	
<b>SHIPPED ITEMS</b>	

Continue Help

**Graphical view of entire record. In R7 “Collapse” and “Power-expand” for plus-ing out information.**



# What is a List Card?



(R7) Customer Order - 1, 1, 10944

File Display Maintain Customize Navigation Help

Default

1 Customer: 701 American Computing Order: CO 10944

General Pricing/Billing Sold-to Ship-to Order Shipments  
Comments Order Totals Print Options Contract Accounting  
Commissions Line Items Holds Special Charges Overview

Customer	Order	Item	Description	Whs	Quant...	UM	Promise	Back...	Net sales a...	Line item status
701	CO 10944	1000	PC, 166 MHZ, DESKTOP	1	5.000	EA	10/04/...	*****	16,000.000	Active
701	CO 10944	1100	PROCESSOR, 166 MHZ	1	5.000	EA	10/04/...	*****	2,249.750	Active
701	CO 10944	1050	KIT, ACCESSORIES	1	5.000	EA	10/04/...	*****	250.000	Active
701	CO 10944	NON...	non inventory item	1	5.000	EA	10/04/...	*****	25.000	Active

C.O. Line Items Open Closed

Continue Help

**Lists item details (CO, PO, MO components, operations, etc).  
Use icons on right to maintain or see all details. Sometimes  
there are bottom tabs -**



# What is a Tabbed Card?

Arrival date	Item	Rel	Whs	Scheduled qty	UM	Open qty	Stock qty	Status
10/10/2007	3000	0 1		1,000.000	EA	200.000	800.000	Partial stock
10/11/2007	3001	0 1		50.000	EA	0.000	50.000	Complete

Allows for multiple Tabs on the same card...like multiple List Cards on the same Card



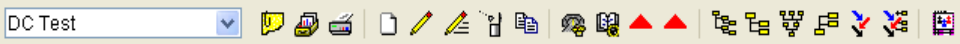


# What is a compound card?



(AA) Item - M362-202 .053 Hollow Emi Gasket

File Display Maintain Customize User Navigation Help



M362-202 .053 Hollow Emi Gasket

Current Cost

Current Cost Maintenance

Current material cost this-level 0.55000000  
Current material cost - date last maintained 10/02/2011

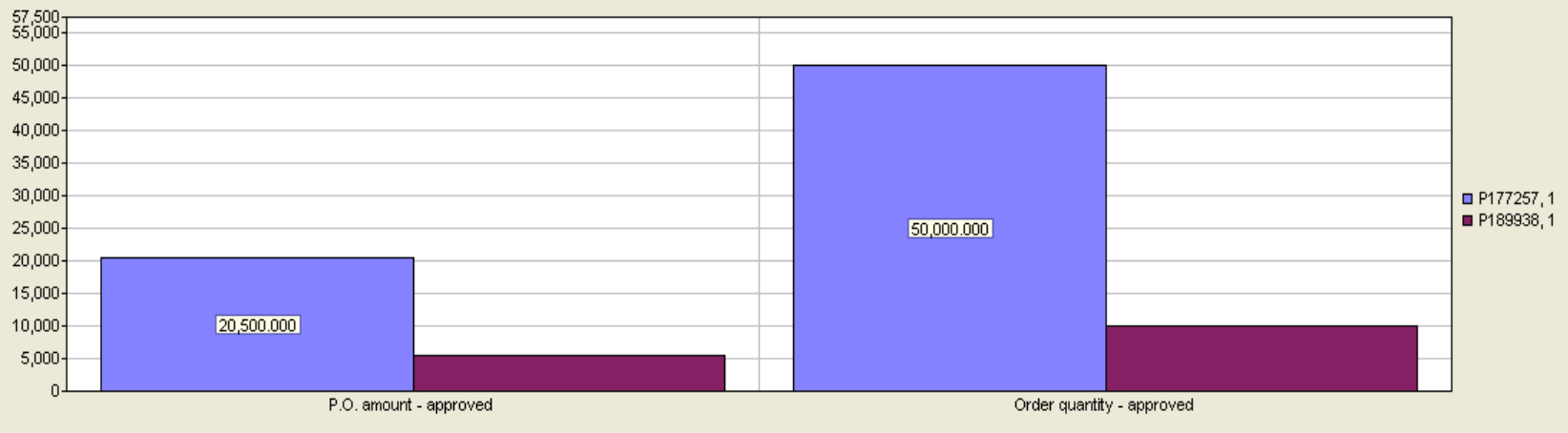
For Item Types 0,1 or 2 with a Lead Time Code of 'P' only

Current other 1 this-level 0.00000000  
Current other 1 TL date last maintained (blank)

Vendor Name	Vendor Item Number	Primary Vendor Flag	ROHS Compliant Flag
CHOMERICS I...	10-04-21120-86305	No	No
EFFECTIVE S...	46-1015-0064	No	No

DC Test-Graph  
DC Test Compound

**Up to 4 Cards on a Compound Card – of any type !**




Continue

Help

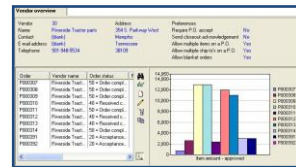




 Take full advantage of setting preferences for all customization (views, subsets, sorts, card files, templates). In R7, use “Favorites” to filter views and subsets and R7 Presentation Schemes for visual data management.




 If procedure is to use templates, **YOU MUST ALWAYS USE THE CORRECT TEMPLATE.**

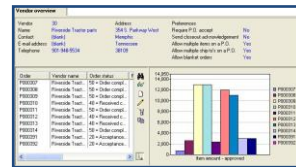
- Defaults set in template will be missed.
- Typically if you have used incorrect template, delete record and recreate using correct one—OR, look at template and change all the settings which should have been selected using the right template





# Ten Commandments of Customization

-  **Place attributes needing entry near top of card and leave general information/defaulted settings near bottom.** For views, place most important info near top in setup (on left on screen).
-  Tie template to custom card file and set checks for “Return here to create another” and for “Preview before create” as needed.
-  Always remember other groups need information from the records we create. Simplify for their inquiry/maintenance needs, too.

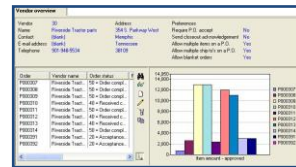


# How Can I Leverage Power Link?

## *CISTECH Quick-start*



- 1 Day of general training on Power Link and Client Customization for your Team.
- ½-1 day with each process group (Procurement, Planning, etc) to tailor Browser Apps to streamline your workflow
- ***Result: at the end of the engagement, users have incorporated Power Link into their daily activities to become more productive. IMMEDIATE PAYBACK AND USER KNOWLEDGE!***



# *Thanks for joining us today!*

