Infor MP2 6.1

Reporting

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Hello Friends!

MP2 has a whole suite of built-in reports based on all of the core MP2 applications. It also provides you with fairly flexible options for configuring them to meet your needs. That means setting up filters, changing the selected columns, and specifying groups and sort orders, etc.

In this document, I'm going to show you how to configure reports, save and retrieve them, and print/export them. I'll also show you how to do direct table exports and point out options for custom reports and KPIs (to the extent that MP2 allows).

Cheers!

-Jesse Warby, PMP

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The Report Configuration Dialog Tabs

All reports are available under the *Reports* menu. You'll notice that each submenu lines up with one of the core MP2 modules and contains several distinct reports relating to that module.

Whichever report you select, you will be brought to the Report Configuration dialog, which looks like this (this example is the 'Inventory Standard' report).
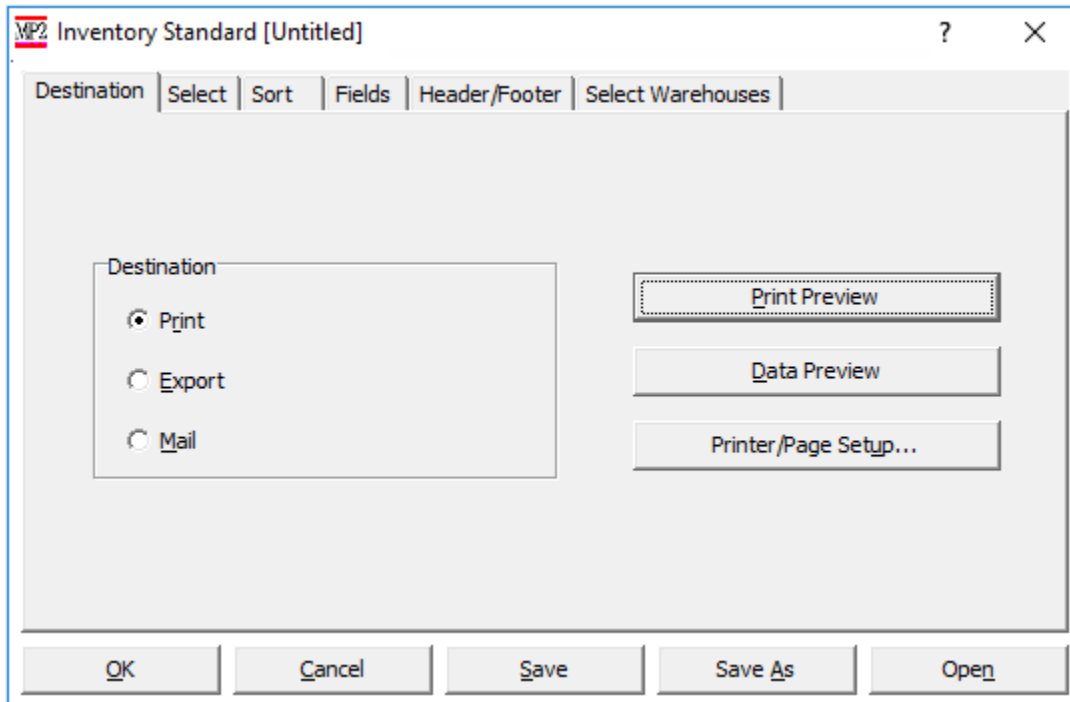
This dialog is where you make changes to the report and then execute it. I'm going to explain all the available configuration options, starting with the second tab ("Select") and moving to the right, then returning to the *Destination* tab to show you how to view, print, export, and save it.

As part of this walk-through, we're also going build an example report. For that, we're going start with the *Inventory Standard* report and customize it to show which items have not been counted according to their defined ABC category's count periodicity.

If you're not familiar with ABC analysis, it is an inventory methodology which ranks items by YTD consumption and last purchase price, then groups them into three categories ('A', 'B', and 'C') based on pre-determined thresholds and specifies a different count periodicity for each group. In a typical scenario, we might set group 'A' to encompass the top 30% of ranked items and be physically counted every three months. group 'B' would take the next 30% and be counted every 6 months, and group 'C' would keep the bottom 40% and be counted only once per year. The goal is to count the high-value, frequently used items more often than the cheaper, less-frequently used items.

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'Select' Tab

The *Select* tab is where you set up filters to limit the records that will be returned. This is the most complicated tab, and the one that we're going to spend the most time on.

We'll start with a simple filter to return only items in the 'A' class. We'll do this by selecting the field name (in this case, "ABC Class"), then the operator ("is equal to"), and finally the value. With this information, MP2 builds a simple filter.

Now let's say that you want to return only items in this class that were counted according to their defined count periodicity (we'll say that category 'A' items should be counted every three months). You'll do this by adding a second condition. Just click the *Next* button and provide input for the same three fields. Make sure to select the *'And'* option to tell MP2 that both, not either, of the two conditions must be true for a record to be returned.

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Let's take it further. Let's say that you want to return all items from *any* category that have *not* been counted according to their count periodicity. To do this you'll need a whole bunch of conditions. Make sure to get all the "ands and "ors" in the right places.

You're getting there, but there's still something wrong. With all these conditions, you haven't defined the order of operations, or precedence. You need to group each pair of conditions and have them evaluated individually first, then together. To do that, highlight he first condition by clicking on it. Then hold the 'shift' key down while clicking on the second condition. Now both lines should be highlighted. Finally, click the 'Add ()' button. Parenthesis will appear around the first two lines. Now do the same for lines 3, 4 and 5, 6.

Let's do one last thing. Let's say that you have a whole bunch of retired inventory that belongs to account code '7000'. Because you aren't required to track these items, you want to exclude them from your report. By now, you should have no problem adding the new condition. But you need to make sure that this condition is evaluated after and separately from all the other ones. To do that, click on the first row to highlight it. Now press and hold 'shift' while clicking on line 6 to highlight the entire block of conditions, and click the 'Add()' button again.
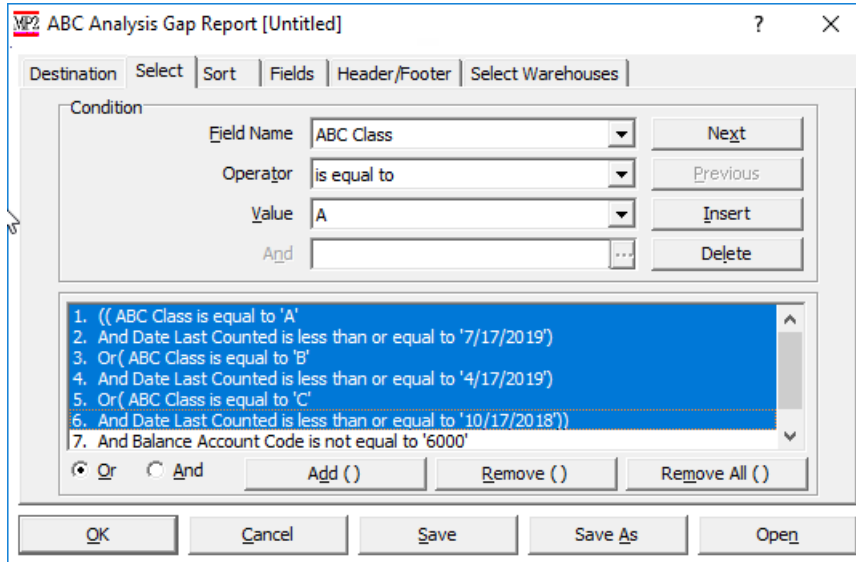
Now you have a filter that gives you all non-counted items except those that belong to account code '7000'.

Let's move on.

'Sort' Tab

Here, you'll tell MP2 what order to return records in, and how to group them.

Perhaps you want a separate group for each warehouse, and sub-groups for each ABC Class. Within each sub-group, you want items to be listed by item number, in ascending order. This screen shows how you would accomplish this.

'Fields' Tab

By default, MP2 includes far more fields than you probably need on your report. You'll want to eliminate many of them, and perhaps add a few that MP2 excluded by default.

On the left side of this tab, you can see a list of all the columns that are selected to be included in the report. On the right side, you can see those that are available but not selected. You can move columns from one side to the other by selecting them and then clicking the single arrow button in the direction you want to move them. Note that you can select more than one column at a time by pressing and holding the 'ctrl' button on your keyboard while you select multiple fields.

Back to our example. Click on 'Inventory Type' to select it. Then press and hold the 'ctrl' button while you select other columns. When you're done selecting (you don't have to do them all at once), click the right single arrow to remove the selected column(s). Repeat as necessary.

If you need to bring a column back, just select it (on the right side, this time) and click the single left-arrow. You can also change the order of columns by moving them up and down, using the vertical arrow buttons on the left.

Beware of the double arrow buttons. They will move *all* of the fields from one side to the other. Clicking these by mistake can be frustrating.

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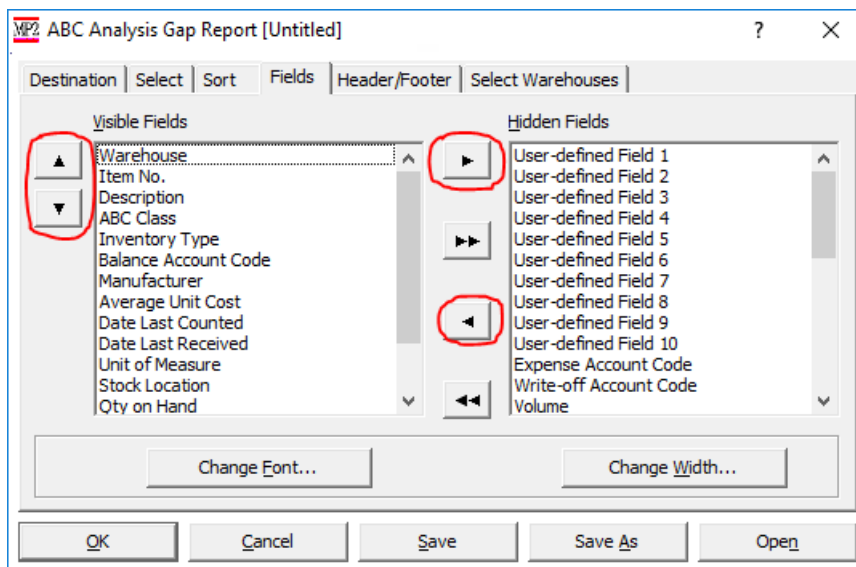
'Header/Footer' Tab

There's not a whole lot to explain here. Just provide any header/footer text you'd like (or leave blank).
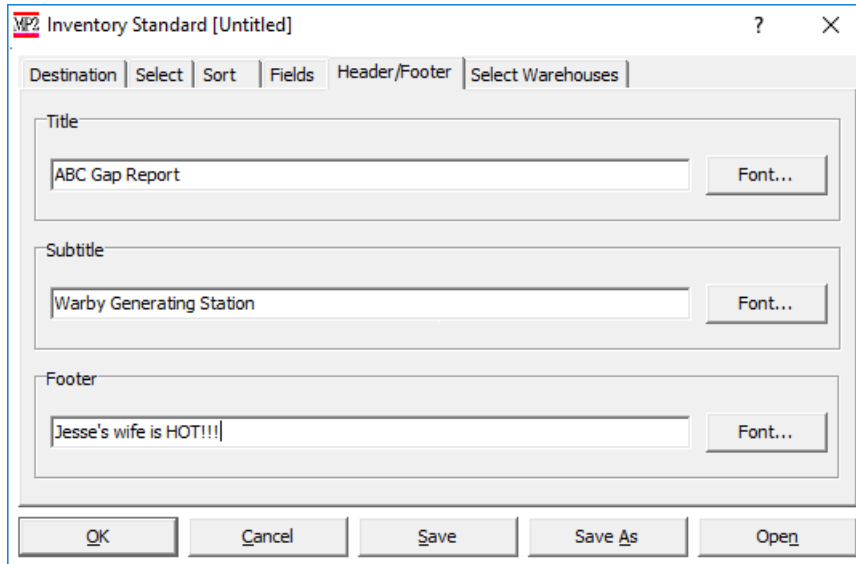
'Select Warehouses' Tab

On the *Select Warehouses* tab, specify which warehouse(s) should be included by selecting them and using the arrow buttons to move them between the 'Available' and 'Selected' categories. To select all warehouses, just click the double right arrow button.

'Destination' Tab

Now that you're done setting up your report, go back to the first tab to actually execute it. You can select *Print* or *Export*, or you can click the *Print Preview* button.
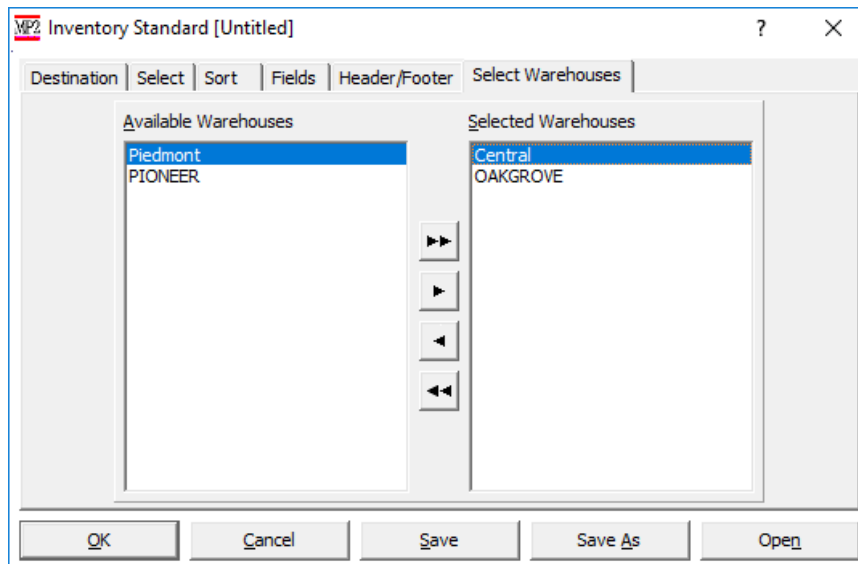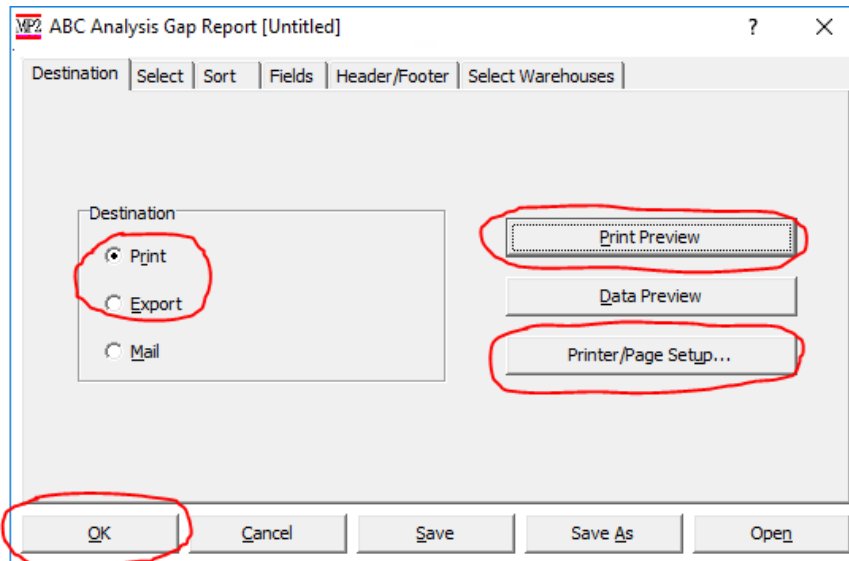

Selecting *Print* and clicking *OK* will automatically send the report to your default printer without giving you a chance to change the printer settings. To change the printer settings, you'll need to click the *Printer/Page Setup* button.

If you select *Export* and then click *OK*, you'll be prompted to specify a file name, location, and format. The two best options for format are either 'Ascii comma delimited.csv' or 'Microsoft Excel 5.0/95 Workbook (.xls)'. Either of these can be opened in Excel. (Because these are old drivers, you might get warnings about "unsafe files" when you open them, but don't worry – they're perfectly safe.)

The Print Preview Dialog

Now we'll talk about the Print Preview dialog. This should look pretty familiar, but I'll just point out a few things.
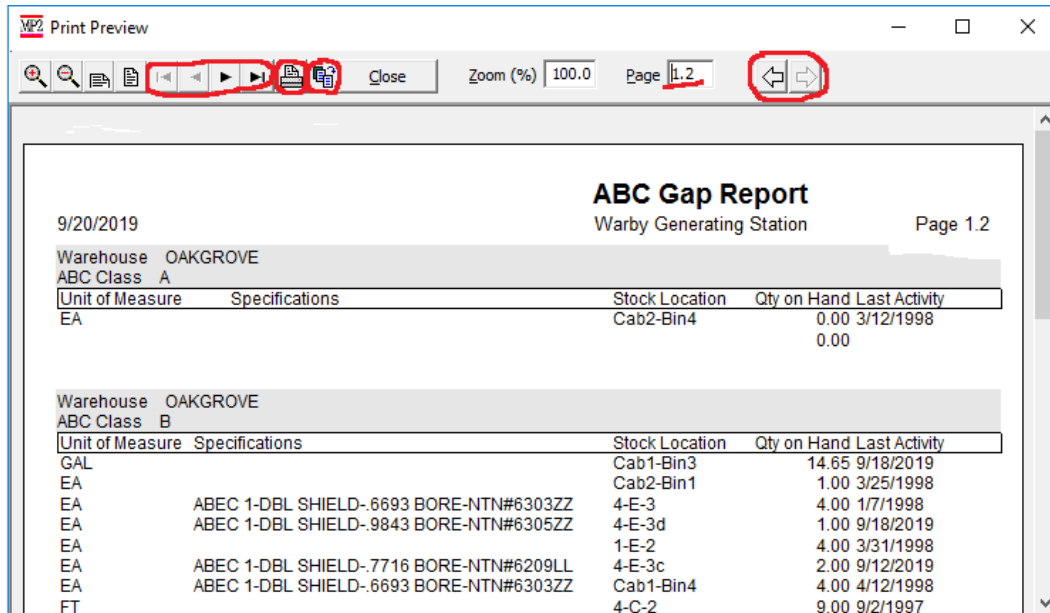
First, consider that reports with many columns might be wide, as well as long. That's why you see two different sets of arrows. Then ones on the right move side-to-side, w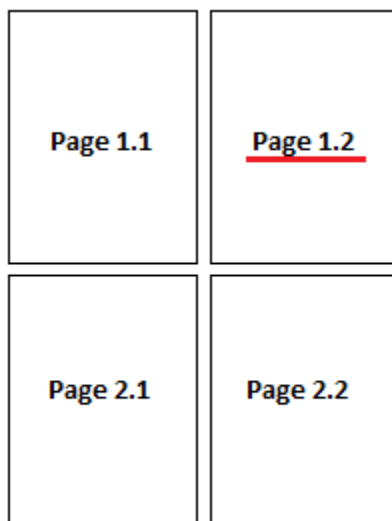hereas the ones on the left move up and down. The 'Page' field also reflects this. In the example above, we're looking at the first *vertical* page, but the second horizontal page.

To print from here, just click on the *Print* button, or close the *Print Preview* window to return to the report configuration to make changes.

There's also a button called 'Print to Fit'. If you click on it, MP2 will squish all the columns together enough that they'll fit on a single vertical page. Note that this won't actually change the report configuration, so don't be scared to try it just to see what happens. If you close the *Print Preview* window and re-open it again, all the columns will go back to the way they were.

What if you're report is three pages wide, but only one column is on the third horizontal page. There's probably some extra white space you could remove to get all the columns to fit within two horizontal pages and avoid wasting all that paper on a single column. To reduce column widths, go back to the report configuration dialog, go to the *Fields* tab, and click the *Change Width* button. From there, you can click and drag to reduce fields that are unnecessarily wide. Then go back to the *Print Preview* window again to see if your changes were enough to reduce the number of pages.
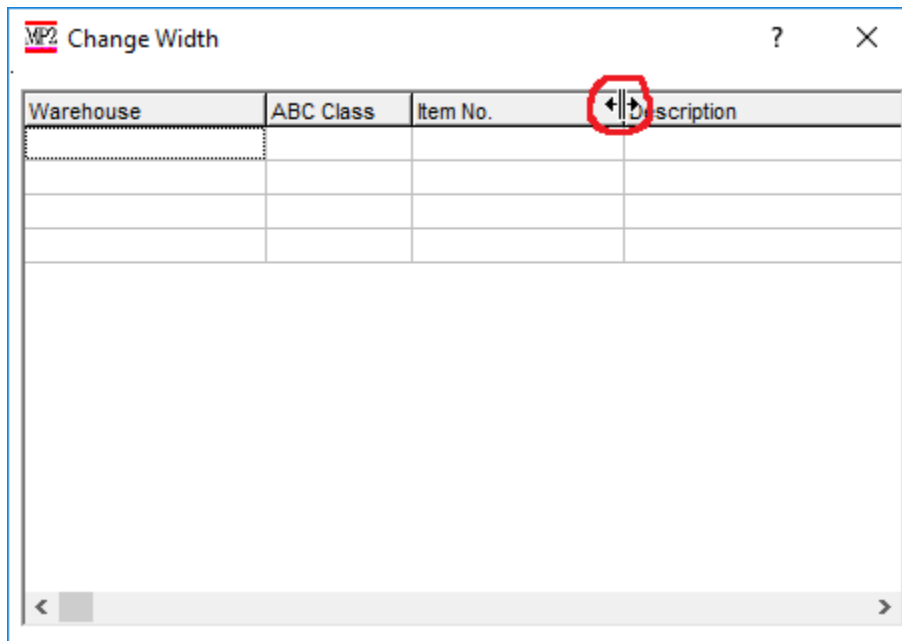
Saving Report Configurations

You just spent quite a bit of time setting up that report. If you run it often, it would be frustrating to have to repeat all those steps every time, so I'll show you how to save the template for future use.

Back on the *Destination* tab, click the *Save* button. This will allow you to create a '.rpt' file that can be opened at a later time. Just find somewhere to save it (preferably on a network drive somewhere), give it a name, and click *Save*. Next time you want to run the report, you can just click the *Open Report* button on the toolbar and find the '.rpt' file you created. All your settings (filters, sort orders, etc.) will be retrieved and ready.
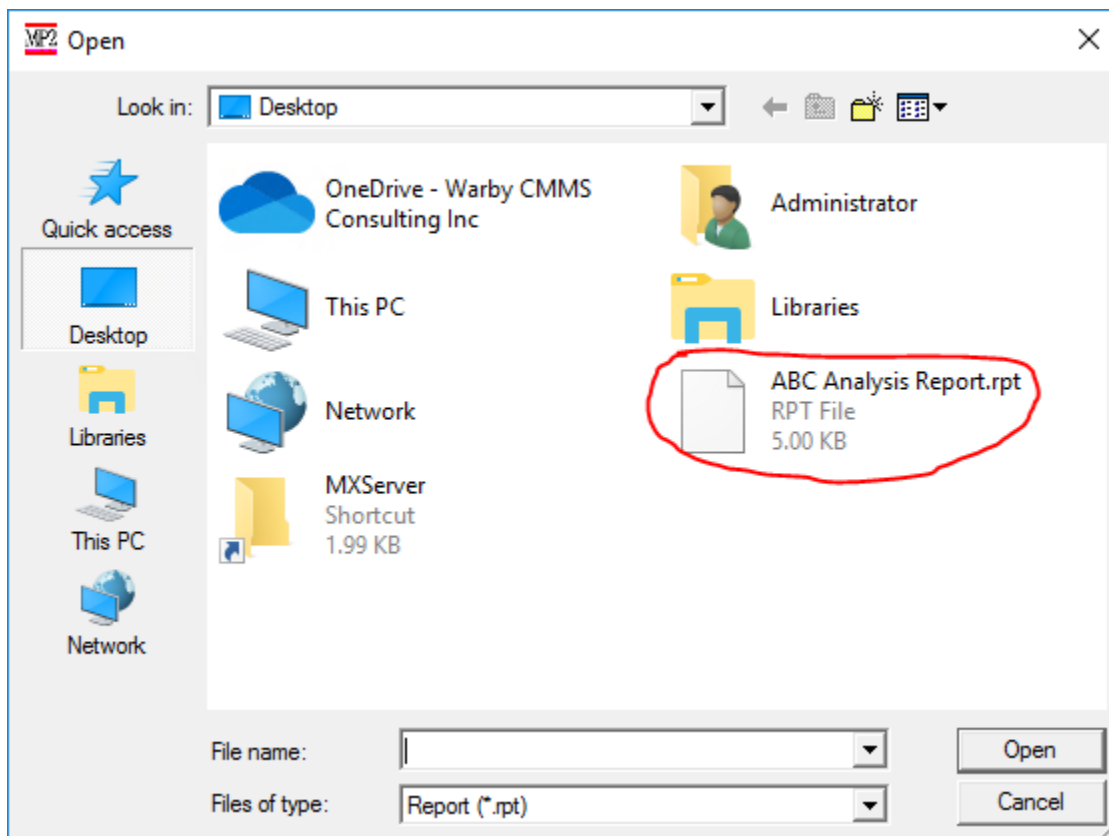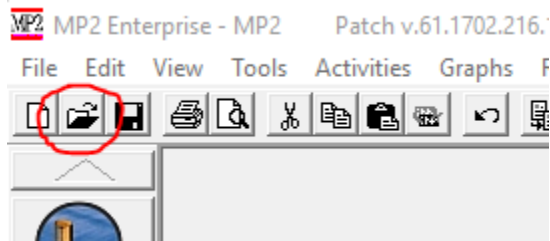
Keep in mind that if your filter(s) rely on date values, like the one in our example, you'll need to update these each time you run it. Also, note that the one thing MP2 does *not* save is selected warehouses. You'll need to do that each time as well. Still, it's a whole lot quicker than building everything from scratch!

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Adding a Report to your Quick Access Bar

If this is a report that you want to run *very* frequently, you could take it a step further and add it to your *Quick Access* bar.

Just right-click anywhere on the *Quick Access* bar and select *Properties*.

Now click on the *New* button to add a new item.

In the *New Button* dialog, pick a name (keep it short, because the quick access bar is not very wide), select an '.rpt' file, and ensure that the *Saved Report* option is selected. Then click *OK*.

Back on the *Quick Access Bar* properties, you can use the vertical arrow buttons to move the report (or any other items) up and down. I like to group my reports together at the bottom. Now click the *OK* button, and you should see your new report on your quick access bar.

Remember that changes to the *Quick Access* bar are for you only, so don't worry about bother other users with your changes.
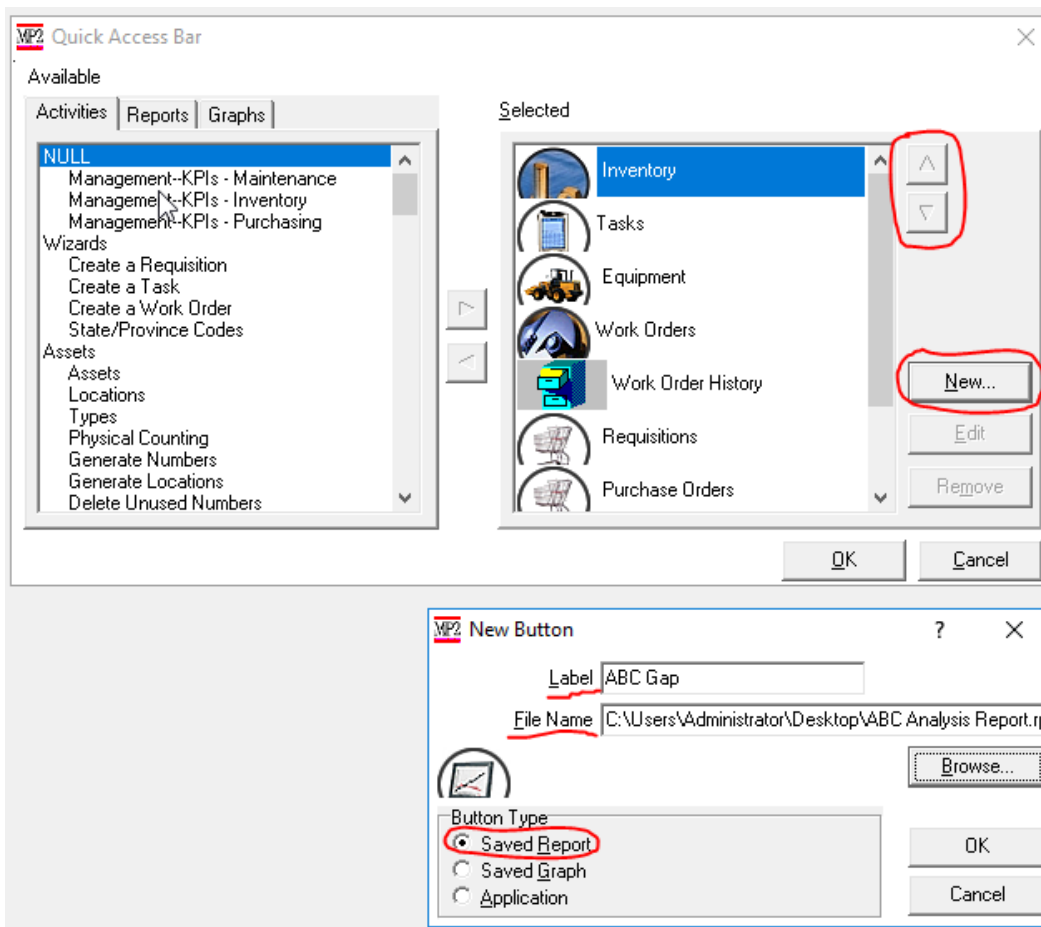
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Table Export

If you want to export data directly from a database table, you can do it using the *Export Tables* tool. You can find this under the *Tools > Utilities* menu. Simply select the table you want, then select which fields to export. You can also use the *Select* and *Sort* tabs to further format the exported data.

This is a good option if you need to get data that isn't available in one of the built-in reports.

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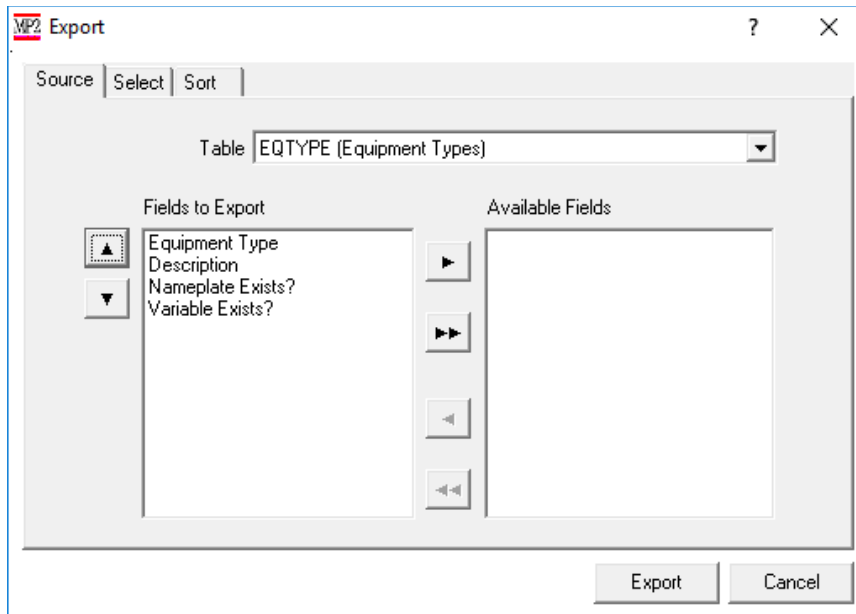
Extending MP2 Report Capabilities

This section isn't so much of a tutorial as it is an opportunity to demonstrate some of the other cool things that your MP2 system administrator can do for you. Maybe something will catch your eye.

Custom Reports

With a few limitations, you can create reports to return just about any information you're interested in. Some of the more common custom report requests include 'Items Received but not Invoiced (RBNI)', 'Inventory Pre-adjustment', 'PO Summary', and 'Inventory Transaction History'. These custom reports show up under the *Reports* menu, where they can be configured, saved, printed, and exported just like any built-in report.

KPI Dashboards and In-line KPIs

MP2 doesn't have the fancy KPI tools of some programs like Maximo or Infor EAM, but it is possible to build what I call "KPI Dashboards". Here is an example of a KPI dashboard for maintenance metrics. You could potentially have multiple dashboards for inventory, purchasing, etc.

Finish date	Beginning WO Count	WOs Issued	WOs Completed	PM WOs Completed	PM WOs Completed (%)	CM WOs Complete
9/30/2018	197	35	31	24	0.77	
10/31/2018	200	117	110	42	0.38	6
11/30/2018	208	45	68	39	0.57	2
12/31/2018	185	46	61	43	0.70	1
1/31/2019	170	96	92	52	0.57	4
2/28/2019	174	57	40	31	0.78	
3/31/2019	191	92	97	52	0.54	4
4/30/2019	194	144	72	46	0.64	2
5/31/2019	258	67	107	66	0.62	4
6/30/2019	217	78	70	46	0.66	2
7/31/2019	226	101	71	47	0.66	2
8/31/2019	254	16	39	23	0.59	1

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Another way to add metrics to MP2 is to create in-line, calculated fields. In this example, the plant has added a calculated field to show the number of work orders created for each equipment record during the past year.

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⇒ *Integration*

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