

#### The New Face of MAPICS

# Mining for Data in PowerLink

#### The Power Of the 'Right Click' in PowerLink

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## Introduction



- Throughout PowerLink (and Browser) 'right clicking' on a record will allow you to:
  - Retrieve information without having to open another object
  - Maintain a record or associated record
  - Format a view or subset
  - Collect information about the list
  - Set Preferences
- Utilizing the right click to 'mine' for data can be a real time saver and get you to the information you need





- This session will explore:
  - The relationships between Mapics files
  - Some of the records/files where the right click can be used to retrieve data
  - Maintenance functions available for the record
  - Customizing the column in the view
  - Records where the right click can be used to invoke PowerLink settings
  - Compare function between 2 records/orders



# **Application Cards**



- Each object on an application card allows you to right click to set preferences
- Preferences include:
  - Default view and subset for a list
  - Default card file and active card
  - Default templates for create, change and copy
  - Files to broadcast
- Setting a default subset on large files (i.e. transaction history) will open the file quicker



#### Main Browser



I	(78) Infor E	RP XA Powe	r-Link					
File	Customize	Navigation H	elp					
De	fault	~						
	Warehouses	Warehouse Locations	Items	Item Warehouses	Item Locations	Discrete	Inventory Transaction History	Preferences Inventory count Inve Groups



#### Main Browser



(78) Inventory	r Transaction History Preferences	×
<u>G</u> eneral W	Vorkspace List Card File Broadcast	_
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Initial subset	(public preference) 🔽 🏊	
Initial sort	(public preference)	
Open action	(public preference)	
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Continue	Cancel Help	
		-





- Files where the right click/Display can be used:
  - Customers to display customer orders or CO history
  - Vendors to display PO's
  - Planners to display MRP recommendations
  - Item Warehouses to display locations, MO's, PO's and CO's
  - Item Revision to display bills of material and routings



### Manufacturing Orders



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M014010	3003	Drive, 6.4gb	Display ▶	or Manufacturing Order details
M014000	3003	Drive, 6.4gb		
M013990	3003	Drive, 6.4gb	Maintain 🕨	🔭 Manufacturing Order Overview
M013980	3002	Drive, 4.3gb	A	V Attachments
M013970	3002	Drive, 4.3gb	A	
M013960	3002	Drive, 4.3gb	A	Maintenance History
M013950	3001	Drive, 3.2gb	A –	
M013940	3001	Drive, 3.2gb	A	🚴 M.O. Components
M013930	3001	Drive, 3.2gb	A	M.O. Operations
M013920	3000	Drive, 2.1gb	A	C M.O. Operations
M013910	3000	Drive, 2.1gb	A	😹 M.O. Miscellaneous Charges
M013900	3000	Drive, 2.1gb	A	Discrete Allocations
M013890	2002	Monitor, 17" Vga	A	
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M013870	2002	Monitor, 17" Vga	A	Sources of Demand
M013860	2002	Monitor, 17" Vga	A	E Sources of Demand
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M013840	2002	Monitor, 17" Vga	A	Component M.O.s
M013830	2002	Monitor, 17" Vga	A	
M013820	2002	Monitor, 17" Vga	A	R Splits
M013810	2002	Monitor, 17" Vga	A _	
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M013790	2002	Monitor, 17" Vga	A	
M013780	2001	Monitor, 15" Vga	A	The Current Facility options
M013770	2001	Monitor, 15" Vga	A	🚯 Enterprise Item options 🔹 🕨
M013760	2001	Monitor, 15" Vga	A	
M013750	2001	Monitor, 15" Vga	A	🔊 Item Revision options
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M013710	2001	Monitor, 15" Vga	A	🙀 Planner options 🔹 🕨
M013700	2001	Monitor, 15" Vga	A	2006. ·
M013690	2001	Monitor, 15" Vga	A	🔁 C.O. Line Item options 🔹 🕨
M013680	2001	Monitor, 15" Vga	A	🔁 C.O. Line Item Release options 🔹 🖡
M013670	2000	Monitor, 14'' Vga	A	
M013660	2000	Monitor, 14'' Vga	A	💦 Manufacturing Demand options 🔹 🕨
M013650	2000	Monitor, 14'' Vga	A	💦 Manufacturing Demand: Top-Level options 🕨
M013640	2000	Monitor, 14" Vga	A L	
M013630	2000	Monitor, 14" Vaa	A	2 Released, no activity



# Manufacturing Orders



- 'MO Details' opens the card file for the MO
- MO Transaction History opens transaction history for just the transactions that are associated with the MO
- Component MO's shows the manufacturing orders for sub-assemblies that are allocated to this MO



### **Associated Files**



- Where you see an arrowhead to the right of a file name (
  ) you can drag your mouse over the file then to the right to select information about that file
- You may or may not be able to use broadcast/receive to these associated files



#### **Associated Files**



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00	M013140	2000	Monitor, 14'' Vga	A	2	Started	464.000	05/18/1998	200	
0	M013080	2000	Monitor, 14" Vga	A	2	Started	500.000	07/09/2010	200	
0	M013050	2000	Monitor, 14" Vga	A	2	Started	783.000	07/12/2010	200	
0	M012830	9296-022MHA	Door, Frt/prp/mach/shield/		110	Started	10.000	08/05/2007	11002	
s	M012790	X600	Stapler, Model 600		XWH	Started		07/30/2007	11003	
ŏ	M012580	2000	Royal Coals	A	1	Started		07/07/2006	900	
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						🐍 Item Revision options	×	E Comment	o Released Item	







- Right click on a Planner Number/Display to see
  - Manufacturing Orders
  - Purchase Orders
  - MRP recommendations
  - Planner Item Warehouses
  - Transaction History



### Vendor



- Right click on Vendor/Display to see:
  - Purchase Orders
  - Purchase Order History
  - Scheduled receipts
  - Vendor Item Records
  - MRP Recommendations



# **Production Facilities**



- Right click on a Facility to see:
  - Routing operations
  - MO Operations
  - Repetitive Schedule operations



### **Item Revision**



- Single level or indented BOM
- Single level or indented Where Used
- Routing operations
- Item Processes
- Item Warehouses



# List Card Right Click



- When in a list card, you can right click on a record in the list to display or maintain information about the record
- List cards include:
  - Customer Order Items
  - Purchase Order Items
  - Manufacturing Order components
  - Manufacturing Order operations



### Within a List Card



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Component Component description	quantity quantity quantity	ntity a status
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X616 Pad, Rubber Base X620 Base Subassembly	XWH 1,000.000	0 Operations
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X650 Box, Screenprinted Size 6	Maintain 🕨 💯 Attachments	Dates
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	🚯 Item Revision options	•
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	👧 Warehouse options	Þ



#### Questions?







# Format a List Column (view)



- Whether in a list from an object on the Main Browser or in a list card, you can right click at the column heading to format the view
  - Alias, value or both for pre-defined fields
  - Scheme criteria's to add color, bold, italics, etc.
  - Change the width of the column
  - Modify Quick Change options
  - Column statistics (total, count, average, etc.)
- Use 'Customize' 'Column' to bring up the card file



#### Format a Column in a View



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							Presenta Save	Apply Cancel	Help		





- Right click on a Column Heading
- Select 'Customize' then 'Subset Criteria'
- Using this feature allows you to create a temporary subset for a single selection field:
  - Item
  - Order
  - Status
  - Vendor
  - Customer





<b>@</b> (78)	Manufacturi	ing Orders							
File Dis	splay Maintain	Customize Nav	vigation Help						
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200	M013050	2000	Monitor, 14" Vga	A	2	Started		783.000 07/12/2010	1
110	M012830	9296-022MHA	Door, Frt/prp/mach/shield/		110	Started		10.000 08/05/2007	11(
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- All subset options are available for the field
  - Equality
  - Inequality
  - Containment
  - Lists
  - Range





(78) Subset definition			
Order status			Character (2A)
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O Not equal			~
	Prompt for value		
Logical operator			
And     Or			
Apply Cancel Help			



### **Statistics**



- Right click on any column heading and choose 'Statistics':
  - Record Count
    - no more copying to Excel to see number of records
    - Available on any column
  - \*Total
  - \*Average
  - \*Minimum
  - \*Maximum
  - \*Only available on numeric columns



### **Column Statistics**



Manufacturing	g Orders											
Order 👽 M014010	Item 3003	Description Drive, 6.4ab	Revision		atus Inted	Order quantity	Due )8/16/2010	Planner 900	Cost var 10.657.75	Last unit cost 211,20000000		
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#### Questions?







# Workbenches



- When a workbench is saved, there is an icon in the lower right corner that displays 4 windows
- Right clicking on that symbol will display a menu
  - to: 🔚 🎆 🕎
    - Minimize Workbench
    - Restore Workbench
    - Close Workbench
- This makes it easy to remove the workbench windows from the desktop or restore them when needed



### Workbenches



(78) Item Revisio						C, 200 MHZ, DESKTOP Site: 1	100 PC Produ	ction Rev	v: A	- <b>•</b> ×
File Display Ma	aintain Customize Navigation Help			· · · ·		nize Navigation Help				
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vailable inventory - planning (calculated)	1,162.000	1,173.000	11.000					
verage ending inventory	1,115.18	691.32	-423.86					
verage ending inventory - planning (calculated)	1,115.18	691.32	-423.86					
verage sales per period	751.45	865.32	113.87					
verage tumover	8.086	15.020	6.933					
verage unit cost	818.31543894	1,370.22400000	551.90856105					
leginning inventory	1,160.000	71.000	-1,089.000					
eginning inventory - planning (calculated)	1,160.000	71.000	-1,089.000					
any forward option		1						
urrent purchase price (local currency) (calculated)	515.570	508.870	-6.700					
Date of last issue	02/10/2010							
stimate annual usage	9,017.270	10,383.670	1,366.399					
em class	Hardware	End Item, PC						
ast count date	09/13/2000	02/10/2010						
ast maintained date	02/10/2010							
ast maintained date - planning (calculated)	02/10/2010							
ast unit cost	0.0000000	1,555.04409214	1,555.04409214					
ead time average manufacturing	3.9	0.1	-3.8					
fulti-source code	(none)	0						
rofit amount this period	-40,328.41	-14,015.87	26,312.54					
rofit amount this year	8,387,467.53	16,137,609.15	7,750,141.62					
rofit percentage this period	-195.966	-18.248	177.718					
rofit percentage this year	67.278	68.043	0.765					
uantity allocated (customer orders)	299.000	381.000	82.000					
uantity allocated (customer orders) - planning (calculated)	299.000	381.000	82.000					
luantity on-hand	1,100.000	1,104.000	4.000					
uantity on-hand - planning (calculated)	1,100.000	1,104.000	4.000					
luantity on-order (production)	6,576.000	7,588.000	1,012.000					
luantity on-order (purchase)	3.000	0.000	-3.000					
luantity received this period	0.000	1,100.000	1,100.000					
Quantity sold since last plan - planning (calculated)	62	69	7					
Quantity sold this period	60.000	67.000	7.000					
Quantity sold this year	3,666.000	4,412.000	746.000					
Quantity used this period	60.000	67.000	7.000					



The New Face of MAPICS



# Summary



- Use the right click throughout PowerLink to:
  - Display information
  - Maintain records
  - Set preferences
  - Compare records
  - Customize a column
  - Create a temporary view



# Summary



- Save time by right clicking instead of exiting the file and opening another object
- Drill down to associated information quickly
- Improve efficiency/save time



### Thank You for Attending!



• Questions?



