

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



Œ	(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



C (78) Inventory Transaction History Preferences									
<u>G</u> eneral W	Workspace List Card File Broadcast	_							
Initial view	(public preference)								
Initial subset	(public preference) 🔽 🏊								
Initial sort	(public preference)								
Open action	(public preference)								
<alt> open action</alt>	(public preference)								
<ctrl> open action</ctrl>	(public preference)								
Continue	Cancel Help								
		-							
1									





- 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



	1000	1.0, 100 mile, 000 top	100	ea nereasea, ne aonny
M014010	3003	Drive, 6.4gb	Display	for Manufacturing Order details
M014000	3003	Drive, 6.4gb	Display	
M013990	3003	Drive, 6.4gb	Maintain 🕨	💦 Manufacturing Order Overview
M013980	3002	Drive, 4.3gb	A	4ttachmente
M013970	3002	Drive, 4.3gb	A	- Autochinerius
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	
M013920	3000	Drive, 2.1gb	A	C M.O. Operations
M013910	3000	Drive, 2.1gb	A	₩.O. Miscellaneous Charges
M013900	3000	Drive, 2.1gb	A	
M013890	2002	Monitor, 17" Vga	A	Discrete Allocations
M013880	2002	Monitor, 17" Vga	A	🗱 Inventory Transaction History
M013870	2002	Monitor, 17" Vga	A	
M013860	2002	Monitor, 17" Vga	A	Real Sources of Demand
M013850	2002	Monitor, 17" Vga	A	🐔 Labor Activity Transactions
M013840	2002	Monitor, 17" Vga	A	
M013830	2002	Monitor, 17" Vga	A	Component M.O.s
M013820	2002	Monitor, 17" Vga	A	🕅 Splits
M013810	2002	Monitor, 17" Vga	A _	
M013800	2002	Monitor, 17" Vga	A	A Current Operation options
M013790	2002	Monitor, 17" Vga	A	
M013780	2001	Monitor, 15" Vga	A	Transformation Current Facility options
M013770	2001	Monitor, 15" Vga	A	B Entermise Item ontions
M013760	2001	Monitor, 15" Vga	A	
M013750	2001	Monitor, 15" Vga	A	🚯 Item Revision options 🔹 🕨
M013740	2001	Monitor, 15" Vga	A	Item Warehouse options
M013730	2001	Monitor, 15" Vga	A	
M013720	2001	Monitor, 15" Vga	A	👧 Warehouse options 🔹 🕨
M013710	2001	Monitor, 15" Vga	A	Planer estima
M013700	2001	Monitor, 15" Vga	A	
M013690	2001	Monitor, 15" Vga	A	C.O. Line Item options
M013680	2001	Monitor, 15" Vga	A	
M013670	2000	Monitor, 14" Vga	A	e -
M013660	2000	Monitor, 14" Vga	A	💦 Manufacturing Demand options 🔹 🕨
M013650	2000	Monitor, 14" Vga	A	Manufacturing Demands Tan Laurd anti-
M013640	2000	Monitor, 14" Vga	A	N3 Manuracturing Demand: Top-Level options ▶
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



PODIO
 PODIO

C (78) Manufacturing Orders										
File Disp	File Display Maintain Customize Navigation Help									
General	~	(temporary) - O	rder s 💌 🏘 💽 ốơ 🦹	3 🔛 🖉	í 🗋 🖌	/ 👍 🖻 🔗 🕺	💐 🖏 🥌 🖉	Ø 🖪 🚯 🕅	3 N & B	% @
% •	lanufacturing Or	ders								
Site	Order 👽	ltem	Description	Revision	Whs	Status	Order quant	ty Due	Planner	Co
100 200 200 200	M014010 M013150 M013140 M013080	3003 2000 2000 2000	Drive, 6.4gb Monitor, 14" Vga Monitor, 14" Vga Monitor, 14" Vga	A A A	1 2 2 2	Started Started Started Started	104.00 1,000.00 464.00 500.00	0 08/16/2010 0 07/23/2010 0 05/18/1998 0 07/09/2010	900 200 200 200	10,6 c
200 110 XPS	M013050 M012830 M012790	2000 9296-022MHA X600	Monitor, 14" Vga Door, Frt/prp/mach/shield/ Stapler, Model 600	Ä	2 110 XWH	Started Started Started	783.00 10.00 1,000.00	0 07/12/2010 0 08/05/2007 0 07/30/2007	200 11002 11003	1,5
100 XPS XPS 100	M012580 M012540 M012530 M012460	2000 X661 X661 A000100DOU	Royal Coals Plate, Tap Chrome Plated Plate, Tap Chrome Plated Advanced Dwe Dough	А	1 XWH XWH A1	Started Started Started Started	1.00 100.00 100.00 775.80	0 07/07/2006 0 05/29/2006 0 05/29/2006 0 03/23/2006	900 11003 11003 11002	
100 100 100	M012450 M012060 M011890	A41164-00022 5002 1003	Mrs T's Potato/cheese Pier Pc, 266 Mhz, Desktop Pc, 300 Mhz, Desktop	2 A A	A1 1	Started Started	1,600.00 100.00	0 03/29/2006	ion details	1 -1 71,6
110 110 400	M005810 M005800 M005700	9296-021MHA 9296-020MH M100	Door, Frt/prp/mld/mach/shi Door, Frt/prp/mld/barney, S Antacid Mint 12oz Liquid	Maint	ain I 🖁	Manufacturing Order of Manufacturing Order of Attachments	etalis Iverview	Maintenan	ce History	
100 000 000	M005420 M004680 MXX9000 MXX6000	1000 XMC2000 XMS1000	Pc, 166 Mhz, Desktop Missile Case	A	1 d 700 3	Maintenance History		🥵 Item Ware	houses f Material	-1
000 000 000	MXX5000 MXX4000 MXX3000	XMS1000 XNC332 XPUR	Missile Nose Cone Purchases		700 700 700	M.O. Operations M.O. Miscellaneous Ch	ames	Es Single Lev	el Bill of Material	-8 -8 -36,4
000 100	MXX2000 MU61120	XPUR 2000	Purchases Royal Coals	A	700	 Discrete Allocations Inventory Transaction I 	History	F ^E Single Lev	el Where-Used	-91,1
						Sources of Demand	tions	😿 Item Proce	esses ess Overview	
					ř	😍 Component M.O.s 😍 Splits		tem Revis	ion Base Prices nguage Description	ns
					4	Surrent Operation optio	ons I	Production	Components Receipts	
					ĩ	Enterprise Item options	·	හුළු Compare		
					l de la companya de l	Item Revision options Item Warehouse option	15	I Compare t	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



🖸 (78) Manufacturing Order - M012790		
File Display Maintain Customize Navigation Help		
Default 💽 😹 🖾 🗌) 🖊 👍 🖻 🕺 🎘 👌 🦝	. 🕳 🖉 🗄 🚯 🕅 🖏 🐻 1
M012790 Item: X600 Stapler, Model 600 Whs: XV	NH Revision:	
Companyon Companyon description	Con Std augotitu Act	AA <u>G</u> eneral
Component Component description wins 13	quantity Act	Status
X610 Top. Plastic Molded XWH	1,000.000 0	Compon <u>ents</u>
X616 Pad, Rubber Base XWH X620 Base Subassembly	1,000.000 0	
X630 Insert, Mechanical Assembly Display >	66° M.O. Component details	
X650 Box, Screenprinted Size 6 Maintain >	🤛 Attachments	
	👜 Maintenance History	
	Discrete Allegations	
		Manufactured Item
	Inventory Transaction History	
Casting	Sources of Demand	
	🂱 M.O. Component P.O.s	
	M.O. Component Requisitions	
	🎘 Manufacturing Order options 🕨	
	A.O. Operation options	
	🐻 Enterprise Item options 🔹 🕨	
	🕵 Item Revision options 🔹 🕨	
	🙊 Item Warehouse options 🔹 🕨	
	🙊 Warehouse options 🔹 🕨	



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



C (78) Manufacturing Orders										
File Display Main	ain Customize Na	vigation Help								
General	(temporary) - (Drder s 💌 🚧 矋 66° 🏌	3 🔛 🖉	i D	/ /= 🖻	8 😣 🛛	🐁 🕭 🦝 🖉	y 🔝 🚯 🔀	🕈 👚 🗞 🕏	> 🧠 🙊 🎗
Manufacturing Orders										
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IOD M011890 110 M005810 110 M005800 400 M005400 100 M005420 100 M004680 000 MXX9000 000 MXX9000 000 MXX5000 000 MXX4000 000 MXX3000 100 MU61120	1003 9296-021MHA 9296-020MH M100 1000 XMC2000 XMS1000 XMS1000 XMS1000 XMS322 XPUR XPUR 2000	PC, 30U Minz, Desktop Door, Frt/prp/mld/mach/shi Door, Frt/prp/mld/barney, S Antacid Mint 12oz Liquid Antacid Mint 12oz Liquid Pc, 166 Mhz, Desktop Missile Case Missile Nose Cone Purchases Purchases Royal Coals	A	110 110 A A01 1 700 700 700 700 700 700 700 1	Started Started Started Started Started Started Started Started Started Started Started Started	Displa Content Initial prese Column sta Scheme Presenta	y value in mixed case entation width 2 stistics (r (tion Quick cf	lias 1 Ione) Same as view) Iange	 <	71,688 0 -18 0 0 -150 -1,200 -890 -890 -36,480 -91,108 0





- 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





(78)	(78) Manufacturing Orders										
File Dis	play Maintain	Customize Nav	igation Help								
General 🔽 (temporary) - Order s 🔽 🚧 🌇 60' 🎇 🔛 🥔 🚄 🗅 🦯 🚈 🗈 🕺 🗞 🚴 🗞 🦝 🐼 🔝 🕵 院 🗞 🕱											
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200	M013140	2000	Monitor, 14" Vga	A	2	Started			JUDSEL CIT	98	:
200	M013080	2000	Monitor, 14" Vga	A	2	Started			500.000	07/09/2010	:
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(
XPS	M012790	X600	Stapler, Model 600		XWH	Started			1,000.000	07/30/2007	11(
100	M012580	2000	Royal Coals	A	1	Started			1.000	07/07/2006	1
XPS	M012540	X661	Plate, Tap Chrome Plated		XWH	Started			100.000	05/29/2006	11(
XPS	M012530	X661	Plate, Tap Chrome Plated		XWH	Started			100.000	05/29/2006	11(
100	M012460	A000100DOU	Advanced Dwe Dough	AAAAA	A1	Started			775.800	03/23/2006	11(
100	M012450	A41164-00022	Mrs T's Potato/cheese Pier	2	A1	Started			1,600.000	03/29/2006	11(





- All subset options are available for the field
 - Equality
 - Inequality
 - Containment
 - Lists
 - Range





(78) Subset definition			
Order status			Character (2A)
Relational operator	Operand type		
Containment	 Constant value 	<mark>◯ Lis</mark> t	
Inequality Equality	Field value	○ Range	
 Equal 	Value		
O Not equal			~
	Prompt for value		
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



	(78) Manufactur i Display Maintain	<mark>ing Orders</mark> Customize Nat	vigation Help									
	neral 💽	 (temporary) - (Order s 💌 🚧 📉 😚	R 🖻 🖉 📹	í D 🥖 准 🖻 ⊗ 🎗	8 8 8 5 🖬 🖓 🖩 🖗 18	S 🖹 🗞 🕫	Ş 🙊 🕵 幕	科 🎖 🕅			
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	e Order 🐨	Item	Description	Revision \	Whs Status	Order quantity Due	Planner	Cost var	Last unit cost			
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Start 🖉 🐼 🕲 🔌 🔽 (78) Infor ERP 🖸 (78) Manufact 🖸 (78) Item War												
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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 Revisions				(78) Item Wareh	ouses - 1001 PC	, 200 MHZ, DESKTOP Site: 1	100 PC Production	Rev: A
File Display Maintain Cust	omize Navigation Help			File Display Ma	intain Custom	nize Navigation Help		
General 🗸 -Site	✓ ₩ 💽 & 😅 □ /	₽a 🧠 🕲 🖪 🗞 😜 🤅	' F= 🕺 🗡 🕉	Inventory St	*(all records	s) 🔽 👭 🖪 60' 🧠 🔛 🖉 e	🍯 🗅 🦊 准 `Y 🖻 🙀	i 🗖 🕅 😓 🚔 🗞 🖳 🖬 🕅 🖉 /
Item Revisions			t	1001 PC,	200 MHZ, DES	SKTOP Site: 100 PC Pro	oduction Rev: A	
Item 🗠	Description	Site 🖄 Revision 🕾	Item Class	Whs 🖄 Lead tir code	ne	Description	On-hand	Total Allocated
1001 1001 1002 1002-12 1003 1004	PC, 200 MHZ, DESKTOP PC, 200 MHZ, DESKTOP PC, 200 MHZ, DESKTOP PC, 266 MHZ, DESKTOP PC, 266 MHZ, DESKTOP PC, 266 MHZ, DESKTOP PC, 566 MHZ, DESKTOP # 129	100 A 100 B 100 C 100 A 100 A 100 A 100 A 100 A 100 A	03 03 01 03 03 03 03 03 03 •	JG M 1 M 2 P 510 M		Pc, 200 Mhz, Desktop Pc, 200 Mhz, Desktop Pc, 200 Mhz, Desktop Pc, 200 Mhz, Desktop	160 1,163 1,800 0	0 299 0 0
							3,123	299
			Res	tore Workbench				
(78) Item Revision - 100, 1001,	Α		Mini	mize Workbench				
File Display Maintain Custo	mize Navigation Help		Clos	e Workbench		PC, 200 MHZ, DESKTOP Site:		Rev: A
Indented Bill of Material 🗸	P 🖉 🖆 🗋 🖊 🦄 🛍 🖄 🖾 🕅	루 효 명 🕅 🖇 🎕 焼	Can	cel	aintain Custor	mize Navigation Help		
3001 PC, 200 MHZ, DE	SKTOP Site: 100 PC Production F	Rev: A	Help)	*(all records)	M IS 60 10 20 ≤≤) 🥖 🦽 🖥 🛍	
	S-number	Indented Bill o	f Material	1001 PC,	200 MHZ, DES	SKTOP Site: 100 PC Pr	oduction Rev: A	
Details: Engineering	(none) V 🕾 Refresh			Oper TBC	Description		Facility Desc's	Setup hours Crew
Identification	DESKTOP Rev: A Alt:			1000 C 1400 M 1800 M 1900 M 2000 Image: Constraint of the second	Inspect Com Assembly Final Inpsect Package RE-INSPEC	ponents tion T	9000 Yes 1000 No 9000 No 8000 No 9000 No 9000 No	1.00 1 0.00 1 0.00 1 0.00 1 0.00 1 0.00 1 0.00 1
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Compare



🖸 (78) Item Warehouse Comparison: 1, 1001 / 1, 1002											
Display Maintain Help											
Base: 1001 Pc, 200 Mhz, Desktop 1 Hi-tech Company -	ase: 1001 Pc, 200 Mhz, Desktop 1 Hi-tech Company - Main Whse										
Variant: 1002 Ro. 266 Mbz. Desktop 1. Histoch Company	Main Whee										
Vanant. Touz PC, 200 Minz, Desktop 11 Pirtech Company -	interior company martimee										
Attribute	Base	Variant	Difference								
Activity since last plan - planning (calculated)	-62.000	-69.000	-7.000								
Available inventory - planning (calculated)	1.162.000	1.173.000	11.000								
Average ending inventory	1.115.18	691.32	-423.86								
Average ending inventory - planning (calculated)	1,115,18	691.32	-423.86								
Average sales per period	751.45	865.32	113.87								
Average tumover	8.086	15.020	6.933								
Average unit cost	818.31543894	1.370.22400000	551,90856105								
Beginning inventory	1.160.000	71.000	-1.089.000								
Beginning inventory - planning (calculated)	1,160,000	71.000	-1.089.000								
Carry forward option		1									
Current purchase price (local currency) (calculated)	515.570	508.870	-6.700								
Date of last issue	02/10/2010										
Estimate annual usage	9,017.270	10,383.670	1,366.399								
Item class	Hardware	End Item, PC									
Last count date	09/13/2000	02/10/2010									
Last maintained date	02/10/2010										
Last maintained date - planning (calculated)	02/10/2010										
Last unit cost	0.0000000	1,555.04409214	1,555.04409214								
Lead time average manufacturing	3.9	0.1	-3.8								
Multi-source code	(none)	0									
Profit amount this period	-40,328.41	-14,015.87	26,312.54								
Profit amount this year	8,387,467.53	16,137,609.15	7,750,141.62								
Profit percentage this period	-195.966	-18.248	177.718								
Profit percentage this year	67.278	68.043	0.765								
Quantity allocated (customer orders)	299.000	381.000	82.000								
Quantity allocated (customer orders) - planning (calculated)	299.000	381.000	82.000								
Quantity on-hand	1,100.000	1,104.000	4.000								
Quantity on-hand - planning (calculated)	1,100.000	1,104.000	4.000								
Quantity on-order (production)	6,576.000	7,588.000	1,012.000								
Quantity on-order (purchase)	3.000	0.000	-3.000								
Quantity 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								
Quantity used this year	3,666.000	4,412.000	746.000								



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?



