Infor CloudSuite Business Workbenches User Guide

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Workbenches

About the Workbench Suite

The Workbench Suite includes these five main parts:

- Workbenches
- Navigation Forms
- Critical Numbers
- DataViews
- DataSearch

In order to access the forms in the Workbench Suite, you must be a licensed SyteLineWB user.

Use the Workbench Suite for easy communication between employers and employees. Employees can use the forms in the Workbench Suite to answer these questions:

- How am I doing?
- What should I be doing?
- How do I do it?

Workbenches

The Workbench Suite includes eleven standard workbenches. These are either manager workbenches or regular workbenches.

Navigation Forms

The navigation forms are 17 flow charts in the Workbench Suite. Employees can use them to learn how specific processes work. You can click on a step in a navigation form to launch a related form.

Critical Numbers

The Workbench Suite includes around 100 standard critical numbers. Critical numbers are key performance indicators, or KPIs, that employees can use to track their progress and success. You can add critical numbers to forms as controls or gauges, and create new critical numbers. You can drill down into critical numbers to see specific details, and create snapshots to obtain the history of a critical number.

Critical numbers use a goal, alert, and actual value system to quickly show users their success through color-coding.

DataViews

DataViews work similarly to an Excel spreadsheet. Use DataViews to view and sort information. DataViews can be one of three types: predefined, form, or drilldown. DataView layouts are a very helpful tool in the Workbench Suite; save multiple layouts to review, track, and sort information for one DataView.

You can print DataViews and export them to Excel or XPS files.

DataSearch

Use DataSearch to search for information stored anywhere in the application. The search results are listed numerically or alphabetically by data source. For example, you could search for all instances of the text string "Young" across all data sources. The results list every data source in the system where "Young" is found, for example in customers, orders, items, vendors, purchase orders, and so on. You can expand the data source to see a list of every occurrence within that data source.

About Workbenches

The workbenches combine navigation forms, critical numbers, and DataViews to present information. Manager workbenches are accessible by managers, and regular workbenches are available to all users. The regular workbenches use the DataView style to present information.

Manager Workbenches

With workbenches, managers can create reports quickly based on real-time performance.

The top section of each manager workbench includes buttons to launch navigation forms, critical numbers, and top ten lists. The lower section of each manager workbench is a DataView.

Navigation Forms

Use the navigation forms to learn about the processes related to the workbench you are viewing.

Critical Numbers

The critical numbers are specific to the information presented on each workbench. To better understand a critical number calculation, right-click on the gauge and select **Setup** to read the calculation definition on the **Critical Numbers Setup** form. To change the critical number that is displayed, right-click on the gauge and select **Critical Number**, then select a different number. To alter the type of gauge, right-click on the one you want to change and select **Display Type**.

Top Ten Lists

Each manager workbench includes a top ten list of pertinent information. These lists enable a manager to view data without writing queries or running reports. Use the radio buttons to populate the list with different information.

DataViews

Each manager workbench uses DataViews to show information. The DataView section provides a means to filter, group, and summarize data into a format for easier data analysis. As with the top ten lists, use the radio buttons to repopulate the DataView. You can print DataViews, export them to PDF, or export to Excel. For more information on DataViews, see About DataViews.

Setting Up Critical Number Parameters

Use the fields on the **Critical Number Parameters** form to set up parameters and values that are generic to all critical numbers, and global settings:

1 On the General tab, specify this information:

   Set Color

   Specify the colors to use for Alert, Warning, and Goal critical numbers.

   Alert, Warning and Goal Symbols

   For each type of critical number, select a character to be displayed on any e-mails generated from the system.

   Load Batch Size

   Specify the maximum number of records to be pulled at once from the database when the system retrieves data for Critical Number Drilldowns and DataViews.

   Style

   Select a style to use for DataViews. Styles are defined on the DataView Style Setup form.

   Installation Information

   This field displays the date and time that the forms and application database installations were performed for the product.

2 On the Global tab, specify user definable settings that are used for multiple critical numbers. If the numbers are specific to a critical number, we recommend that you put those on the individual critical number to which they are related.

Creating Custom Calculated Columns

You can create columns and summaries inside of static DataViews, dynamic DataViews, and Critical Number Drilldowns that are based on formulas / expressions of other data that is already shown in the grid.

To add a custom column:

1 Run a DataView that contains Data Results

2 Go to the "Display > Custom Columns" option on the toolbar

3 Type the Name of the new column (i.e. this is will be used as the column label)

4 Specify what kind of data the new column will hold

5 Choose the "Add" button; this will add your column to the Collection Tree and launch the Formula Builder form

6 Within Formula Builder, choose existing Collection Properties and Functions to define the value the new column will hold.

7 Choose "OK" to save your changes; or "Cancel" to undo without saving.

8 The new custom calculated column will be added as the last column in the grid; adjust and save the layout as desired.

Using the Snapshot Generation Utility

Follow these steps to generate a critical number snapshot:

1 Open the **Critical Numbers** form.

2 Select a critical number from the tree menu.

3 On the Snapshots tab, click **Snapshot Generation** to launch the **Snapshot Generation** utility.

4 Select an **As of** date to determine when the calculation of the critical number begins.

5 Optionally, select **Append to Current Day** to add the snapshot to an existing list of critical numbers. If you do not select this check box, the new snapshot replaces any existing snapshots.

6 Click **Process** to run the generation.

Using the Customer Service Manager Workbench

The **Customer Service Manager Workbench** is designed for a manager to monitor customer service and make improvements.

By default, the **Customer Service Manager Workbench** monitors these critical numbers:

- Late Incidents

- Percent Sales Orders Filled On Time
- Late Sales Order Lines
- Average Sales Order Turnaround Days
- Outstanding A/R Balance
- Total Sales

Buttons

Use these buttons to open other forms:

- **Expedite an Order:** Click this button to define the steps taken to expedite an order.
- **Override Credit Limits:** Click this button to define the steps taken to override a credit limit or credit hold.
- **Alter Service Billing Method:** Click this button to define the steps taken to alter a service billing method.
- **Escalate An Incident Button:** Click this button to define the steps taken to configure incident escalation.

Critical Numbers

The standard **Customer Service Manager Workbench** provides four system-level critical numbers. To better understand a critical number calculation, right-click on the gauge and click **Setup**. Read the calculation definition on the **Critical Numbers Setup** form for the number in question.

To change the critical number that is displayed, right-click on the gauge and click **Critical Number**, then select a different number.

To alter the type of gauge, right-click the one you want to change and click **Display Type**.

Options

Select from these options:

- **Revenue Generating:** Select this radio button to rank customers using the value of sales made year-to-date.
- **Outstanding A/R:** Lists customers with unpaid balances.
- **Late Orders:** Groups the number of late customer order lines by customer.
- **Late Incidents:** Generates a count of incidents where the current date is greater than the due date, grouped by customer.
- **Incidents Created This Period:** Generates a count of incidents where the incident date falls within the current period, grouped by customer.
- **Open Incidents:** Generates a count of incidents without a closed status, grouped by customer.
- **Contracts Up for Renewal:** Generates a count of contracts due to be billed in the next 60 days, grouped by customer.
- **Overdue Contracts:** Group the value of unpaid contracts by customer.

- **Late SROs:** Generate a count of service order lines that are not closed, and the due date of the line is earlier than the current date.

Customers Grid

Use the standard toolbar to manipulate the customer data; Filter-in-Place is supported.

The columns in the grid are standard customer fields. To maintain the fields, right-click **Details** in the Customer Number column. Use the online help of the **Customers** form to learn more about each field.

NOTE: User extended tables (UETs) are supported within the Customers grid.

A/R Balance

This customer-specific critical number shows the receivable balance for the customer selected.

Total Sales

This customer-specific critical number shows the total sales generated year-to-date for the customer selected.

NOTE: Use the horizontal slider bar between the Customers grid and the data details to adjust viewing. Move the slider down to increase the number of rows visible in the Customers grid. After filtering the customer data, review the results if all rows are presented on the screen without needing to scroll up and down. After you have selected the customer against which you want to view detailed data, move the slider bar up to increase the space allotted to show more rows in the data detail view.

Additional Options

Select from these additional options on the form:

- **Customer Orders:** View all customer orders for the current customer selected (includes all ship-to sites).
- **RMAs:** Show all ordered RMAs for the current customer selected (includes all ship-to sites).
- **Proj**ects: Show all ordered projects for the current customer selected (includes all ship-to sites).
- **Customer A/R History:** Show account history associated to the selected customer.
- **CRM Opportunities:** Show an opportunity associated to the selected customer.
- **Contracts:** Show contracts associated to the selected customer.
- **Incidents:** Show incidents associated to the selected customer.
- **SROs:** Show a service order associated to the selected customer.

Using the Inventory Manager Workbench

The **Inventory Manager Workbench** is designed for a manager to monitor inventory planning, general stockroom activities, transfer order management, order fulfillment, and physical inventory control.

By default, the **Inventory Manager Workbench** utilizes these critical numbers:

- Inventory Value
- Items Below Saftey Stock
- Value of Items in Cycle Count
- Current Inventory Turns Ratio
- Inventory Issued (YTD)
- Inventory Received (YTD)

Buttons

Use these buttons to open other forms:

- **Inventory Planning**: Click this button to launch a navigation form that guides the user through two different types of order planning processes: site-based and warehouse-based.
- **Stockroom Activities**: Click this button to launch a navigation form that lists the stockroom activities that may be performed.
- **Transfer Order Receiving**: Click this button to launch a navigation form that defines the transfer order receipt process, and provides a link to the **Combined Transfer Order Ship/Receive** form for companies that do not separate the duties.
- **Transfer Order Shipping**: Click this button to launch a navigation form that defines the transfer order shipment process, and provides a link to the **Combined Transfer Order Ship/Receive** form for companies that do not separate the duties.
- **SRO Material Fulfillment**: Click this button to launch a navigation form that defines the various options for the material fulfillment process.
- **Perform Cycle Count**: Click this button to launch a navigation form that defines the process involved in cycle counting.

Critical Numbers

The standard **Inventory Manager Workbench** provides four system-level critical numbers. To better understand a critical number calculation, right-click on the gauge and select **Setup** to read the calculation definition on the **Critical Numbers Setup** form for the number in question.

To change the critical number that is displayed, right-click on the gauge and select **Critical Number**, then select a different number.

To alter the type of gauge, right-click on the one you want to change and select **Display Type**.

Options

Select from these options:

- **Obsolete/Slow Moving**: Select this radio button to show a list of items marked as obsolete or slow moving, ordered by the value.
- **Oldest LIFO/FIFO**: Select this radio button to compare the transaction date to the current system date, and list the items with the most aged stacks.
- **Items with Expiring Lots**: Select this radio button to list the lots that contain quantities and have passed expiration dates.

Items Grid

This grid drives the bottom half of the form. Use the standard toolset toolbar to manipulate the item data; Filter-in-Place functionality is supported.

The columns in the grid are standard item fields. To maintain the fields, right-click in the Item Number column and select **Details**. Use the online help of the **Items** form to learn more about each field.

NOTE: User extended tables (UETs) are supported within the item grid.

Inventory Issue YTD

This item-specific critical number sums the cost of the inventory that left inventory.

Inventory Receipts YTD

This item-specific critical number sums the cost of the inventory that came into inventory.

NOTE: Use the horizontal slider bar between the Items grid and the data details to adjust viewing. Move the slider down to increase the number of rows visible in the Items grid. After filtering the item data, review the results if all rows are presented on the screen without needing to scroll up and down. After you have selected the item against which you want to view detailed data, move the slider bar up to increase the space allotted to show more rows in the data detail view.

Additional Options

Select from these additional options on the form:

- **Location Detail**: Select this radio button to show location information for each warehouse of the selected item.
- **Lot Detail**: Select this radio button to show lot information for each warehouse, for lot-tracked items.
- **Unit Detail**: Select this radio button to show information for units in inventory for the selected item, for serial-tracked items.
- **Shipments**: Select this radio button to list service orders, sales orders, or transfer orders due for completion on the current date.
- **Receipts**: Select this radio button to list purchase orders or transfer orders due to be received on the current date.
- **Reservations**: Select this radio button to show reservations for the currently selected item.
- **SPA Inventory**: Select this radio button to list the stacks of transactional detail, for SPA items.
- **Transaction History** Select this radio button to show material transactions for the selected item.

Using the Service Manager Workbench

The **Service Manager Workbench** is designed for a manager to monitor sales team quotes, billing preparation and review, customer satisfaction, expense approval, and general resources.

By default, the **Service Manager Workbench** utilizes these critical numbers:

- Mean Time to Repair
- Percent Margin
- Number of SROs to be Quoted
- Average Elapsed Time to Repair
- SROs Awaiting Parts
- Labor Utilization
- Percent Margin

Buttons

Use these buttons to open other forms:

- **Perform Billing**: Click this button to launch a navigation form that outlines the steps that are common when preparing an SRO for billing.
- **Resource Management**: Click this button to launch a navigation form that lists the general resource maintenance tasks.
- **Adjust Service Pricing**: Click this button to launch a navigation form that shows a diagram of where pricing is pulled from for service work performed.
- **Expense Approval**: Click this button to launch a navigation form that defines the expense approval and denial process.
- **Collect Credit Card Payment/Pay with Credit Card**: If the credit card interface has been licensed and installed, this button is displayed. Click this button to launch a form that collects credit card information for authorization and payment.

Critical Numbers

The standard **Service Manager Workbench** provides six system-level critical numbers. To better understand a critical number calculation, right-click on the gauge and select **Setup** to read the calculation definition on the **Critical Numbers Setup** form for the number in question.

To change the critical number that is displayed, right-click on the gauge and select **Critical Number**, then select a different number.

To alter the type of gauge, right-click on the one you want to change and select **Display Type**.

Options

Select from these options:

- **Most Active Items**: Select this radio button to list the items that most frequently have work performed against them.

- **High Volume Customers**: Select this radio button to list the customers who have done the most business year-to-date, in service.
- **Top Partner Closers**: Select this radio button to list partners who closed the most SROs month-to-date.
- **Top Performing Partners**: Select this radio button to list partners who generated the most revenue month-to-date.

Service Order Grid

The SRO grid drives the bottom half of the form. Use the standard toolset toolbar to manipulate the SRO data; Filter-in-Place functionality is supported.

The columns in the grid are standard SRO fields. To maintain the fields of the SRO, right-click in the SRO number column and select **Details**. Use the online help of the **Service Orders** form to learn more about each field.

NOTE: User extended tables (UETs) are supported within the SRO grid.

Utilization

This service order-specific critical number shows the average percentage of utilization for Service Orders for a given date range.

Margin Percentage

This service order-specific critical number shows the average percentage of margin for Service Orders for a given date range.

NOTE: Use the horizontal slider bar between the Service Orders grid and the data details to adjust viewing. Move the slider down to increase the number of rows visible in the Service Orders grid. After filtering the item data, review the results if all rows are presented on the screen without needing to scroll up and down. After you have selected the SRO against which you want to view detailed data, move the slider bar up to increase the space allotted to show more rows in the data detail view.

Additional Options

Select from these additional options on the form:

- **Line/Oper**: Select this radio button to list operations within their respective lines.
- **Actual Transactions**: Select this radio button to show all actual (posted) transactions for the SRO.
- **Transaction Detail**: Select this radio button to show all transaction information for each SRO/line/operation.
- **Transaction Analysis**: Select this radio button to show estimate, planned, and actual values in a flat structure providing cost, price, and margin-derived columns for analysis.
- **Outstanding Loaners/Exchanges**: Select this radio button to list a service order if it is tied to overdue loaners or exchanges.
- **Invoice History**: Select this radio button to show invoice activity tied to the SRO.

- **Reason/Resolution**: Select this radio button to show reason and resolution records associated to the SRO.
- **Reimbursements**: Select this radio button to show reimbursement transactions for the service order.

Navigation Forms

Use these forms with a process flow, data hierarchy, or option listings.

1   Process Flow: Each form that shows a business flow should have one starting point and one or more ending points. The lines and arrows walk you through each step of the process. When you encounter a decision point, choose which path best fits your need. The other buttons on the form accelerate access to specific forms within the application.

2   Data Hierarchy: Because of the flexibility of the software, a visual hierarchy listing where data is pulled from is beneficial. This type of navigation form starts with the most specific at the top to most generic at the bottom. The most generic are typically parameter default values.

3   Option Listing: Often, more than one method exists to perform an action within the application. This type of navigation form presents all options together, so that you can choose which method works best in different situations.

About User Permissions

Because of the varied nature of critical numbers, security is handled through a combination of base application security permissions and critical number category and user permissions.

Application Permissions

Application permissions are used for the following forms:

- Critical Numbers
- Critical Numbers Setup
- Drilldowns Setup
- Critical Number Categories
- Critical Number Parameters
- Critical Number Users
- Critical Numbers Import/Export
- Email Generation
- Snapshot Generation

Category and Critical Number Permissions

A few options exist that go beyond form permissions, such as drilldown, visibility, and parameters. You can set these up on the **Critical Number Categories** form, **Critical Number Users** form, or **Critical Numbers Setup** form.

Permissions	Question
Drilldown	Can the user drill down?
Run	Can the user see this critical number?
Parameters	Can the user update the parameters?
Users	Can the user maintain specific user permissions?
Recv Drill	Should the user receive drilldown details in their e-mail?
Email	Should the user receive this critical number in their e-mail?

Acquiring Critical Number and Category Permissions

The critical number permissions are determined first by whether the user has a specific record set up on the critical number. If they have a record, the values specified there are used. Otherwise, permissions are determined by the value set up for the critical number category. Refer to the following table for an example of how the category and critical number permissions interact with each other.

- **Yes**: The user has a record set up with the flag checked
- **No**: The user has a record set up with the flag unchecked
- **None**: The user does not have a record set up

Category	Critical Number	Permission?
Yes	Yes	Yes
Yes	No	No
No	Yes	Yes
No	No	No
Yes	None	Yes

No	None	No
None	Yes	Yes
None	No	No
None	None	No

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