Infor CloudSuite Business Analytics MT Cloud User Guide

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About this guide

This guide describes how to use CloudSuite BI in a multi-tenant cloud environment.

Intended audience

This guide is intended for IT professionals and system administrators who are responsible for installing and configuring Infor CloudSuite Business Analytics content.

Chapter 1 Prerequisites

1

Related Applications

To use Infor CloudSuite Business Analytics content, you must have these applications deployed for MT cloud:

- Infor CloudSuite Business
- Infor Xi Platform including Infor ION, Infor Ming.le™
- Infor Business Vault Enterprise Edition
- In-Context BI for CloudSuite
- Infor CloudSuite Business Analytics
- BI Application Manager

Chapter 2 BI Setting and Staging Schedule

2

Use the **BI Setting** form to set parameters within Infor CloudSuite Business 9.01.

1 Launch CloudSuite Business.

2 Open the **BI Setting** form.

Specify a Currency Code from the currency code drop down list, which is the currency for BI reporting.

3 In the grid on the form, change the database or server information if necessary**.**

4 Click **Update** to save the setting.

Note: We recommend that you delete the default sites information and then reload to ensure that the BI scripts regenerate successfully.

Note: You must set up the currency rate before you set up BI parameters, otherwise errors may occur during data loading.

Note: After removing and re-adding your site, you must clear out the database and server columns on the BI Setting form. If you do not, you could have trouble running publications either immediately or at a later time.

Using BI Staging Schedule to schedule

The **BI Staging Schedule** form is used to set a schedule for the background task which is used to trigger a stored procedure to pull data via full views and save the data into the staging tables. You can also use this form to run background tasks.

Note: We suggest that you run the task in Business Vault instead of running it in the BI Staging Schedule form. If there is a publication error in Business Vault, you can run the task in the BI Staging Schedule form and check the detail error information in the **Background Task History** form.

Chapter 3 Loading Data on Business Vault

3

Activating a publication target

1 In Infor Business Vault , select **Analytic Modeling > Publication Targets**. The Publication Targets page is displayed with a list of all publication targets.

2 Select one or more publication targets with an inactive status.

3 Click the **Activate** arrow button. The target status changes from **Inactive** to **Active.**

Selecting a publication target

1 In Infor Business Vault, select **Analytic Modeling > Publications.**

2 Click **drill-down** to edit a publication definition. The publication definition specifies the cubes and dimensions to publish.

3 Select a **Target**. The target is the target database connection.

4 Click **Save.**

5 Repeat the steps to select a target for each publication definition.

Publish specified publication cubes and dimensions

Once you create your publications, you can process data loading by publishing them.

1 In Infor Business Vault, select **Analytic Modeling > Publications**

2 Select a Publication.

3 Click **Publish**.

Verify loading result on Publication Monitor

Once you create your publications, you can process data loading by publishing them.

1 In Infor Business Vault, select **Monitoring > Publications Monitor**

2 Check the Status

- Runnable
- Running
- On Hold
- Completed
- Canceled
- Completed With Errors

3 Look for the details.

Creating a publication schedule

1 In Infor Business Vault, select **Analytic Modeling > Publication Schedule**s.

2 To create a publication schedule, click **New**.

3 Specify this information:

Name

Specify a unique name for the publication schedule.

Publication

Select the publication definition on which to base the schedule.

Start Date (UTC)

Specify a start date in UTC format.

End Date (UTC)

Optionally, specify an end date in UTC format.

Specify one definition version option:

- To run each publication with the latest versions of cube, dimension, and hierarchy definitions, select **Publish with current cube and dimension definitions**. This option uses the current versions each time the process runs on the schedule.
- To run the first publication with the current definitions, select **Republish with saved versions of cube and dimension definitions** (applicable for schedule recurrences). Each subsequent publication processes re-uses the definitions that were used the previous time the publication schedule ran.

To create an intraday schedule:

a Specify **Intraday** in the **Recurrence pattern** field.

b Click **New**.

c Specify the **Hour** and **Minute** in UTC format. These are the times for the publication process to run.

d Continue to click **New** to add each scheduled start time throughout the day. To remove start times from the schedule, select one or more start times and, click **Delete.**

To create a daily schedule:

a Specify **Daily** in the **Recurrence pattern** field.

b Specify **Time (UTC)**.

c To publish on specific days of the week, select the **Days** option, and select the specific days of the week.

d To specify the number of days between publication processes, select the **Days Interval** option. Specify the interval in the **Every number of days** field.

To create a weekly schedule:

a Specify **Weekly** in the **Recurrence pattern** field.

b Specify **Time (UTC)**.

c To specify the weekly interval, specify the **Every number of weeks** field. Select each day of the week to run the schedule.

To create a monthly schedule:

a Specify **Monthly** in the **Recurrence pattern** field.

b Specify **Time (UTC)**.

c To select a specific day of every selected number of months, select the **Specific day of the month** option. Specify the day number and the number of months between each recurrence.

d Alternatively, select the **relative day of the month** option. Specify the relative day of the month, the weekday, and the number of months between each recurrence.

4 Click **Save**.

5 Click **Bac**k to return to the Publication Schedules list.

6 Select the schedule and click **Activate** to start the process on the scheduled times. If the schedule status value is **Inactive,** the publication will not run on the scheduled start time.

Chapter 4 Security and permissions

4

A set of application roles for each domain is included with Analytics. These roles are bundled in user groups which can be assigned to the Windows, IFS, or basic users of your organization.

See the *BI Guide for Security and Roles.*

Application roles

Application roles help improve the usability of the role-based BI security. These roles can be used to restrict a user's access to reports and dashboards.

Business Analytics includes these user-defined application roles:

- Report Designer
- Report Viewer
- SI_CEO
- SI_CFO
- SI_Finance
- SI_HR
- SI_Logistics
- SI_Production
- SI_Sales
- SI_Service

Note: The application roles have corresponding User Groups on the Repository Level, which are named identically.

If you require additional restrictions that are not covered by existing application roles, you can create additional application roles in Infor BI Repository Administration.

See Appendix C for more details.

Assigning a preconfigured permission set

You can assign a user group, which acts like a container for application roles, to a user. With this role, the user can access a dashboard and see the widgets.

1. Open the **BI Application Manager**.
2. Select the Dashboards tab.
3. Expand User and Permission Management.
4. Select Users and User Groups:.
5. Register IFS CE Users and User Groups.
6. Assign Application Roles.
7. Application = Business Analytics.
8. Select the application role(s).
9. Save.

Chapter 5 View Business Analytics dashboards and reports

5

After data loading, access Business Analytics to view dashboards and reports.

Create Self-Service report

1 Open **Business Analytics**.

2 Select the BI Self-Service Tab.

3 Select OLAP Widgets.

4 Chart Type

- Bar Charts
- Column Charts
- Comparison Charts
- Donut and Pie Charts
- Line Charts
- Miscellaneous Charts
- Table

1 Select your data source, categories, series, filters

2 Finish the report.

Chapter 6 DataLink

6

Infor BI Q&A is the Excel plugin which connects to Cloud Suite Industrial.

Business Vault Q&A provides Datalink and reports for Financial, Sales, CRM, and Service.

Create Self-Service Relational reports

1 Open **Business Analytics**.

2 Select BI Self-Service tab.

3 Select Relational Widgets.

4 Chart Type

- Bar Charts
- Column Charts
- Comparison Against Target
- Donut and Pie Charts
- Line Charts
- Miscellaneous Charts
- Table

5 Select Report Type

- Summary
- Detail

6 Select Product (Infor CloudSuite BI).

7 Select Table, Object, Selection.

8 Select table elements(Columns).

9 Set Category/Measure.

10 Click Next.

11 Name the report and finish.

Infor CloudSuite BI Reporting and Analysis Overview on Client

Request FarmProfile/Authorized Application Credentials and deploy Infor BI Query and Analysis

During installation of the BI Q&A Application, you are prompted for the connection type – select “Infor Cloud”. You are then prompted for a configuration file. It will try and validate it and if successful then your installation will be configured automatically to use the ION API to this instance.

1. Request the FarmProfile/Authorized Application Credentials from tenant administration.
2. Download the latest Infor BI Query and Analysis Plug In Patch.
3. Install Infor BI Query and Analysis Plug In Patch.
   a. Select Setup Type to Infor Cloud during installation.
   b. Then select the files obtained in step 1.

Note: See the *Infor Business Intelligence Installation Guide* for more information on how to install the Q&A components.

Access Infor CloudSuite BI Reporting and Analysis Overview

Open the template Q&A reports file Infor CloudSuite BI Reporting and Analysis Overview.xlsm

Report Menu

There are 16 template reports:

Chart of Accounts

Account Balances

Ledger Transaction Listing

Trial Balance

Debtors Inquiry

Profit and Loss

Balance Sheet

Quarterly P&L

Ledger Extension Analysis

Estimate Order Line By Status

Customer Order Line By Status

Sales Value Analysis

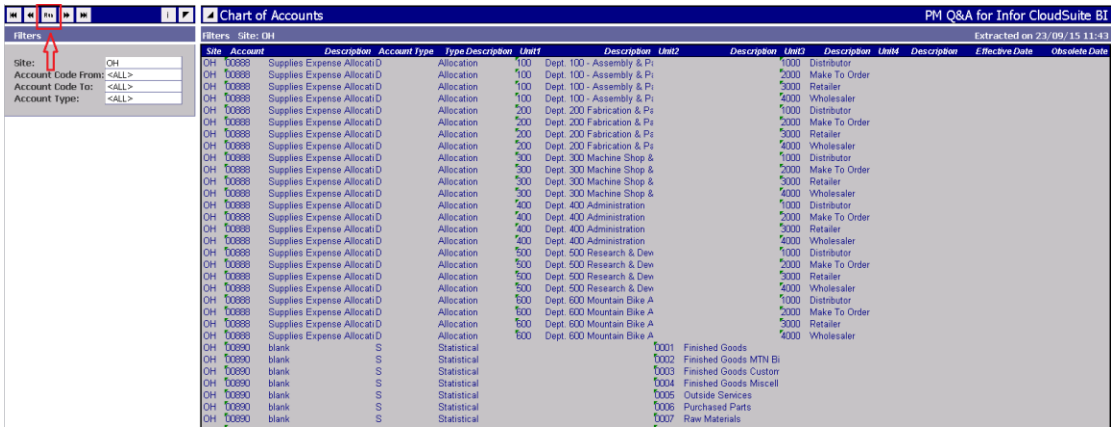
Incident Escalation Tasks

Service Order Status

Incident Time Analysis

Service Contract Billing Status

Chart of Accounts Report



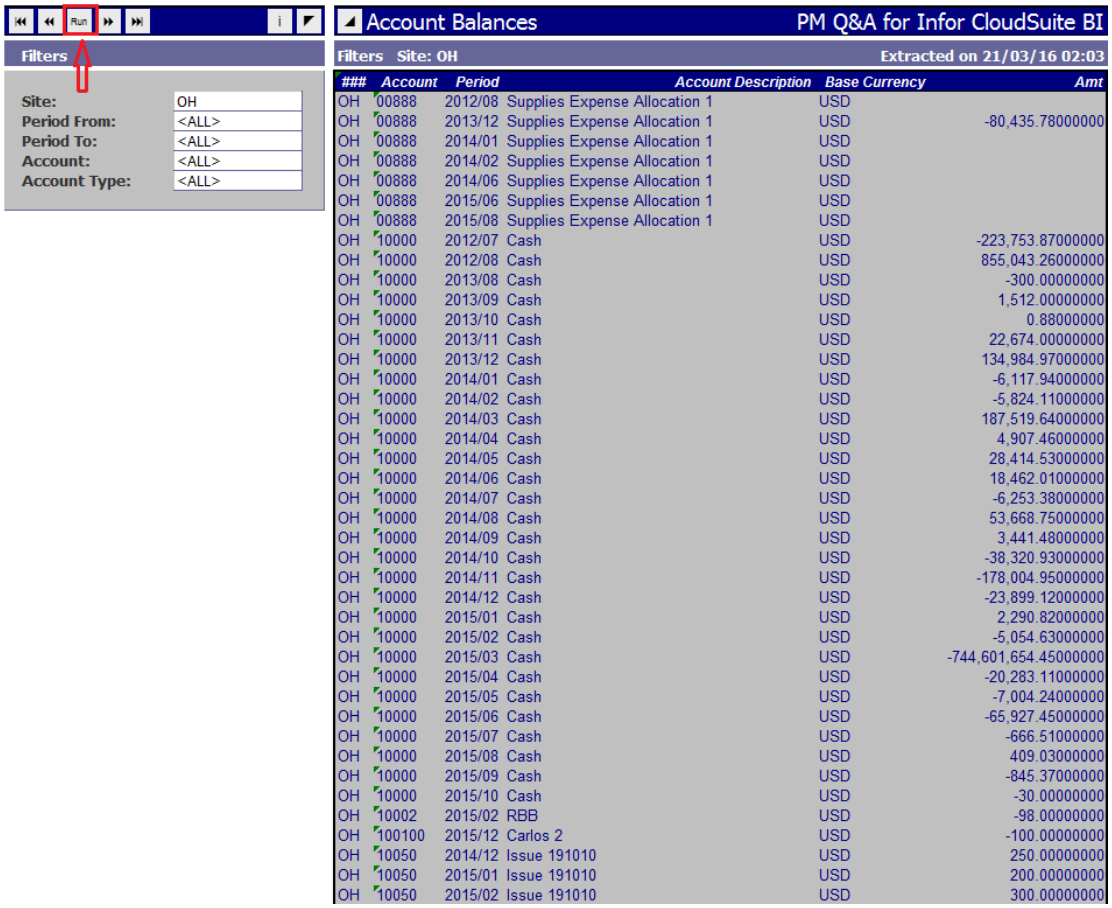
1 Specify Site, Account Code Range, and Account Type.

2 Run the report. The Chart of Accounts table is displayed.

Account Balance Report

1 Specify Site, Period Range, Account, and Account Type.

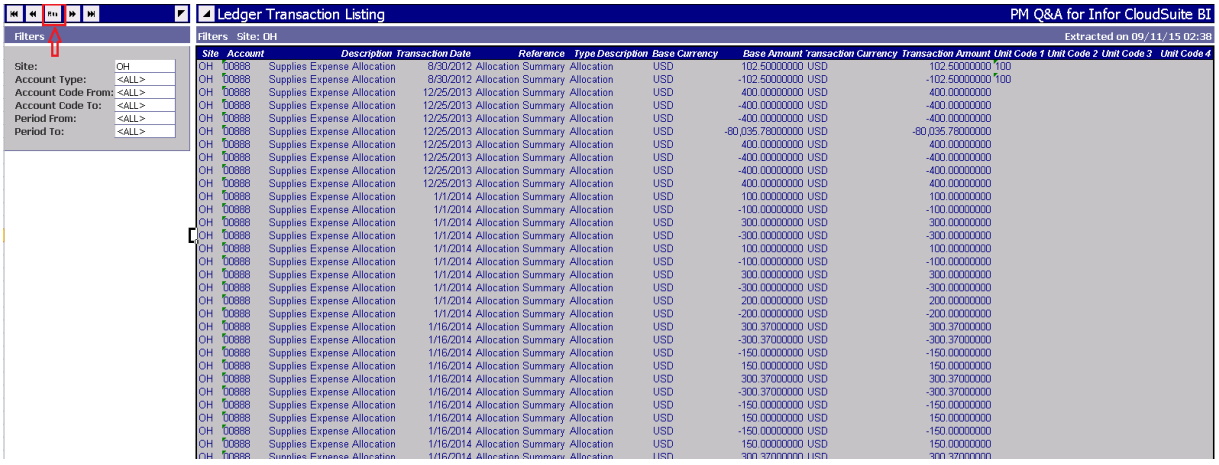
2 Run the report. The Period Total table is displayed.



Ledger Transaction Listing

1 Specify Site, Account Type, Account Code Range, and Period Range.

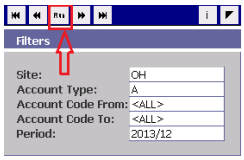
2 Run the report. The Ledgers table is displayed.



Trial Balance

1 Specify Site, Account Type, Account Code Range, and Period.

2 Run the report. BI views (BI_Dim_Trial_Balance_Mst_View) are displayed.



Trial Balance — PM Q&A for Infor CloudSuite BI

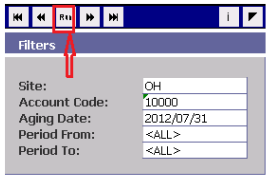
Filters Site: OH / Account Type: A / Period: 2013/12 — Extracted on 09/11/15 02:42

Account	Description	Opening Balance	Debit Amount	Credit Amount	Balance Debit	Balance Credit	Closing Balance
10000	Cash	655,056.27000000	134,984.97000000		134,984.97000000		790,041.24000000
10100	Petty Cash	-100.00000000		290.00000000		290.00000000	-390.00000000
11000	Accounts Receivable	250,566.77200000	21,533.43000000	89,973.64000000		68,440.21000000	182,126.56200000
11001	Accounts Receivable In Process	12.20000000	4,760.00000000	4,760.00000000			12.20000000
11100	Allowance for Bad Debts	990,000.00000000	69.67000000	65.00000000	4.67000000		990,004.67000000
11500	Employee Loan Receivables	-225.00000000	108.82000000	11.06000000	97.76000000		-127.24000000
11700	Unrealized Gain		49.00000000		49.00000000		49.00000000
12120	Project Control - Material			164.18000000		164.18000000	-164.18000000
12130	Project Control - Labor			25.00000000		25.00000000	-25.00000000
12150	Project Control - Overhead			186.97000000		186.97000000	-186.97000000
12270	Wip - Service Material1			101.63000000		101.63000000	-101.63000000
12272	Wip - Service Labor			49.00000000		49.00000000	-49.00000000
12274	Wip - Service Fovhd			202.97000000		202.97000000	-202.97000000
12600	Tool and Fixture Inventory			1,203.35000000		1,203.35000000	-1,203.35000000
12700	Inventory Material	-399,638.18000000	10.00000000	3.00000000	7.00000000		-399,631.18000000
15400	Vehicles			10.73000000		10.73000000	-10.73000000
16100	Accumulated Depreciation - Building			47.00000000		47.00000000	-47.00000000
16400	Accumulated Depreciation - Vehicles	-1,900.00000000	10.73000000	10.73000000			-1,900.00000000
62100	Chargeback Late	93.00000000	20.00000000		20.00000000		113.00000000
68000	Chargeback deposit account			20.00000000		20.00000000	-20.00000000
Total		1,493,865.06200000	161,546.62000000	97,124.26000000	135,163.40000000	70,741.04000000	1,558,287.42200000

Debtors Inquiry

1 Specify Site, Account Code, Aging Date, and Period Range.

2 Run the report. The Ledgers table is displayed.



Debtors Inquiry — PM Q&A for Infor CloudSuite BI

Filters Site: OH / Account Code: 10000 / Aging Date: 2012/07/31 — Extracted on 09/11/15 02:53

Account Code	10000	Payment Terms	T	Aged Balances	
Name	Cash	Credit Limit		0 to 14 Days	104,711.07
		Contact		15 to 30 Days	-328,464.94
		Phone		31 to 60 Days	
		Fax		61 to 120 Days	
				121 Days +	

Transaction

Date	Period	Reference	Description	Base Currency	Transaction Amount	Base Amount
2012/01/05	2012/01			USD	100.00000000	100.00000000
2012/01/05	2012/01			USD	-100.00000000	-100.00000000
2012/07/13	2012/07	PR 10/18/9Feb 4 2015 12:25AM		USD	-328,464.94000000	-328,464.94000000
2012/07/25	2012/07	ARP 34755101		USD	152,522.37000000	152,522.37000000
2012/07/26	2012/07	APP 1		USD	-6,059.34000000	-6,059.34000000
2012/07/26	2012/07	APP 2		USD	-15,636.00000000	-15,636.00000000
2012/07/26	2012/07	APP 3		USD	-48,425.28000000	-48,425.28000000
2012/07/26	2012/07	APP 4		USD	-47,265.19000000	-47,265.19000000
2012/07/26	2012/07	APP 6		USD	-4,392.50000000	-4,392.50000000
2012/07/26	2012/07	APP 8		USD	-1,436.87000000	-1,436.87000000
2012/07/26	2012/07	APP 10		USD	-5,564.54000000	-5,564.54000000
2012/07/26	2012/07	APP 13		USD	-1,658.88000000	-1,658.88000000
2012/07/29	2012/07	ARP 14789		USD	31,243.00000000	31,243.00000000
2012/07/29	2012/07	ARP 982111		USD	3,827.40000000	3,827.40000000
2012/07/31	2012/07	ARP 985001		USD	47,556.90000000	47,556.90000000
2012/08/10	2012/08	ARP 5554733		USD	153,900.00000000	153,900.00000000
2012/08/10	2012/08	PR 11/15/96		USD	-338,991.87000000	-338,991.87000000
2012/08/11	2012/08	ARP 14576		USD	109,200.00000000	109,200.00000000
2012/08/16	2012/08	ARP 76543		USD	372,522.00000000	372,522.00000000
2012/08/17	2012/08	ARP 6896		USD	380,345.06000000	380,345.06000000
2012/08/25	2012/08	APP 1		USD	-16,187.50000000	-16,187.50000000

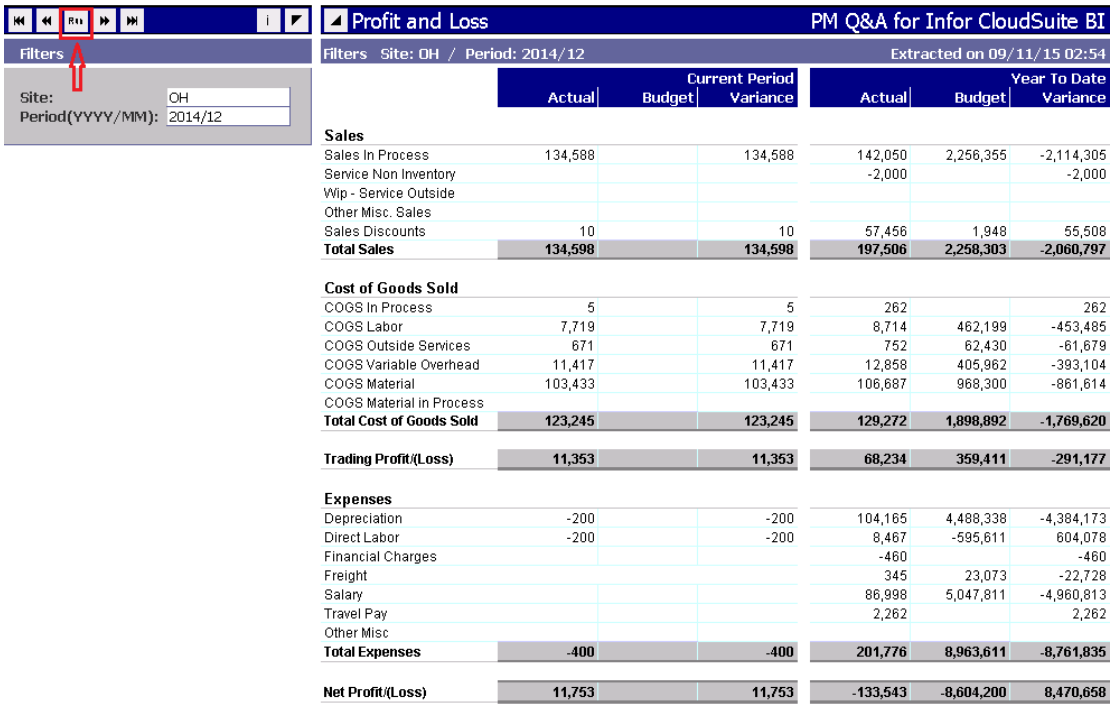
Profit and Loss

1 Specify Site and Period.

2 Define your account number range for each Account on the right side.

3 Run the report. The BI view (BI_Fact_Financial_Income_Analysis_Full_QA_View) is displayed.

Sales		
Sales In Process	43200	44300
Service Non Inventory	40003	40003
Wip - Service Outside	40030	40030
Other Misc. Sales	49111	49111
Sales Discounts	40400	40499
Total Sales		
Cost of Goods Sold		
COGS In Process	43310	43320
COGS Labor	43212	43212
COGS Outside Services	43218	43218
COGS Variable Overhead	43216	43216
COGS Material	43210	43210
COGS Material in Process	44440	44440
Total Cost of Goods Sold		
Trading Profit/(Loss)		
Expenses		
Depreciation	52000	53999
Direct Labor	53100	53100
Financial Charges	50500	50500
Freight	50200	50200
Salary	53000	53000
Travel Pay	54800	54800
Other Misc	49113	49113



	Current Period			Year To Date		
	Actual	Budget	Variance	Actual	Budget	Variance
Sales						
Sales In Process	134,588		134,588	142,050	2,256,355	-2,114,305
Service Non Inventory				-2,000		-2,000
Wip - Service Outside						
Other Misc. Sales						
Sales Discounts	10		10	57,456	1,948	55,508
Total Sales	**134,598**		**134,598**	**197,506**	**2,258,303**	**-2,060,797**
Cost of Goods Sold						
COGS In Process	5		5	262		262
COGS Labor	7,719		7,719	8,714	462,199	-453,485
COGS Outside Services	671		671	752	62,430	-61,679
COGS Variable Overhead	11,417		11,417	12,858	405,962	-393,104
COGS Material	103,433		103,433	106,687	968,300	-861,614
COGS Material in Process						
Total Cost of Goods Sold	**123,245**		**123,245**	**129,272**	**1,898,892**	**-1,769,620**
Trading Profit/(Loss)	**11,353**		**11,353**	**68,234**	**359,411**	**-291,177**
Expenses						
Depreciation	-200		-200	104,165	4,488,338	-4,384,173
Direct Labor	-200		-200	8,467	-595,611	604,078
Financial Charges				-460		-460
Freight				345	23,073	-22,728
Salary				86,998	5,047,811	-4,960,813
Travel Pay				2,262		2,262
Other Misc						
Total Expenses	**-400**		**-400**	**201,776**	**8,963,611**	**-8,761,835**
Net Profit/(Loss)	**11,753**		**11,753**	**-133,543**	**-8,604,200**	**8,470,658**

Year to Date is calculated from the begin date to the specified Period entered.

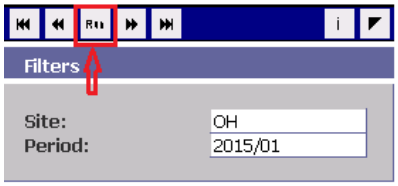
Balance Sheet

1 Select Site and Period.

2 Define your account number range for each Account on the right side.

Fixed Assets		
Assets	43200	44300
Depreciation	40003	40003
Total Fixed Assets		
Current Assets		
Cash on Short Term Deposit	10000	10000
Cash on Hand	11600	11600
Currency Accounts	11000	11000
Inventory	12110	12110
Debtors	11100	11100
Client Accounts	90000	90000
Total Current Assets		
Net Assets		
Current Liabilities		
Creditors	11222	11222
Accrual	12600	12600
Bad Debt Provision	50500	50500
Bank Overdraft	50200	50200
Taxation	53000	53000
Total Current Liabilities		
Share Capital		
Share Capital	52000	53999
Profit or (Loss) for the Year	53100	53100
Retained Earnings	50500	50500
Net Profit/(Loss)		

1 Run the report. The Ledgers table is displayed.



Balance Sheet — PM Q&A for Infor CloudSuite BI

Filters Site: OH / Period: 2015/01 — Extracted on 09/11/15 03:19

	Period Balance		Last Year Balance	
	Current	Prior Period	Same Period	Year End
Fixed Assets				
Assets		134,578		138,251
Depreciation		2,000		
Total Fixed Assets		**136,578**		**138,251**
Current Assets				
Cash on Short Term Deposi	1,220	-24,301	-6,897	45,981
Cash on Hand			6,710	21,462
Currency Accounts	12,996	17,163	366	85,842
Inventory				
Debtors		2	200	202
Client Accounts		200		200
Total Current Assets	**14,216**	**-6,936**	**379**	**153,686**
Net Assets	**14,216**	**129,642**	**379**	**291,937**
Current Liabilities				
Creditors				11
Accrual				
Bad Debt Provision		490		
Bank Overdraft		-275		
Taxation				86,998
Total Current Liabilities		**215**		**87,009**
Share Capital				
Share Capital	-17	-200		104,165
Profit or (Loss) for the Year	-17	-200		8,467
Retained Earnings		490		
Net Profit/(Loss)	**-35**	**90**		**112,632**

Quarterly P&L

1 Define your account number range on the right side.

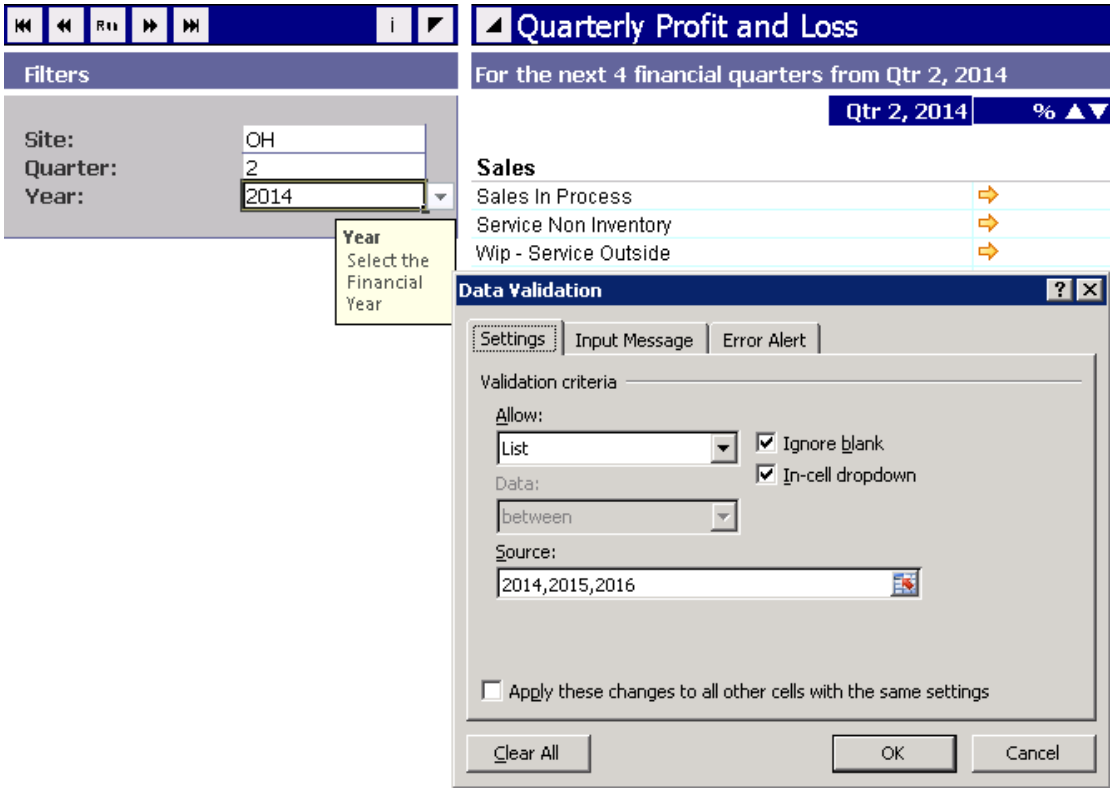
Sales		
Sales In Process	43200	44300
Service Non Inventory	40003	40003
Wip - Service Outside	40030	40030
Other Misc. Sales	49111	49111
Sales Discounts	40400	40499
Total Sales		
Cost of Goods Sold		
COGS In Process	43310	43320
COGS Labor	43212	43212
COGS Outside Services	43218	43218
COGS Variable Overhead	43216	43216
COGS Material	43210	43210
COGS Material in Process	44440	44440
Total Cost of Goods Sold		
Trading Profit/(Loss)		
Expenses		
Depreciation	52000	53999
Direct Labor	53100	53100
Financial Charges	50500	50500
Freight	50200	50200
Salary	53000	53000
Travel Pay	54800	54800
Other Misc	49113	49113

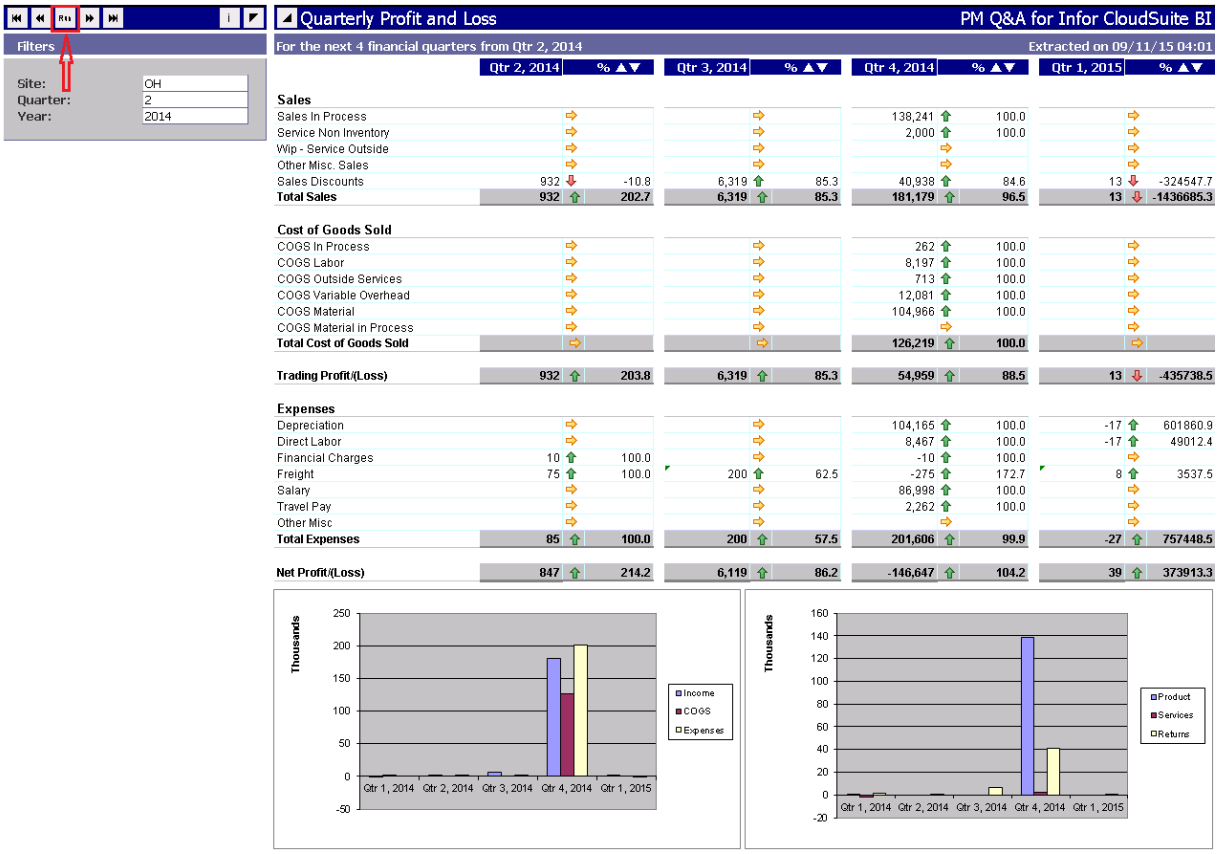
1 Define your Quarter details on the right side.

2013-4	Qtr 4, 2013	2013-3	2014-1	2014-2	2014-1	2013/10	2013/12
2014-1	Qtr 1, 2014	2013-4	2014-2	2014-3	2014-4	2014/01	2014/03
2014-2	Qtr 2, 2014	2014-1	2014-3	2014-4	2015-1	2014/04	2014/06
2014-3	Qtr 3, 2014	2014-2	2014-4	2015-1	2015-2	2014/07	2014/09
2014-4	Qtr 4, 2014	2014-3	2015-1	2015-2	2015-3	2014/10	2014/12
2015-1	Qtr 1, 2015	2014-4	2015-2	2015-3	2015-4	2015/01	2015/03
2015-2	Qtr 2, 2015	2015-1	2015-3	2015-4	2016-1	2015/04	2015/06
2015-3	Qtr 3, 2015	2015-2	2015-4	2016-1	2016-2	2015/07	2015/09
2015-4	Qtr 4, 2015	2015-3	2016-1	2016-2	2016-3	2015/10	2015/12
2016-1	Qtr 1, 2016	2015-4	2016-2	2016-3	2016-4	2016/01	2016/03
2016-2	Qtr 2, 2016	2016-1	2016-3	2016-4	2017-1	2016/04	2016/06

2 Define the Data Source for Year.

3 Select Site, Quarter and Year

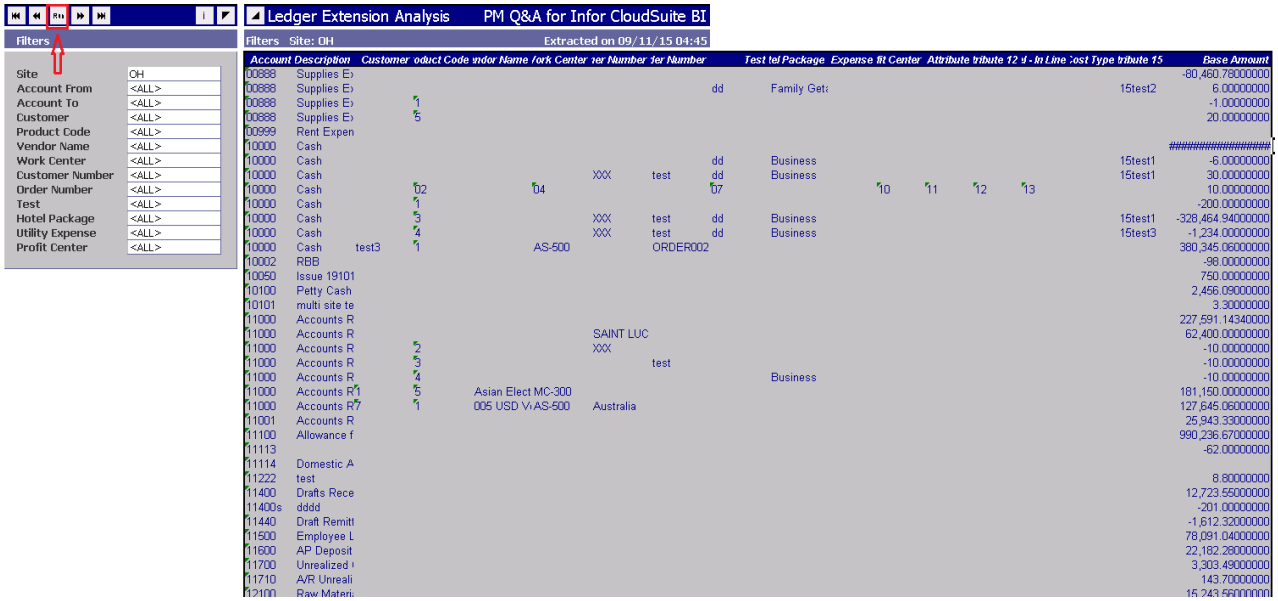

Filters
Site:
OH
Quarter:
2
Year:
2014
Year
Select the Financial Year
Quarterly Profit and Loss
For the next 4 financial quarters from Qtr 2, 2014
Qtr 2, 2014
%
Sales
Sales In Process
Service Non Inventory
Wip - Service Outside
Data Validation
Settings
Input Message
Error Alert
Validation criteria
Allow:
List
Ignore blank
In-cell dropdown
Data:
between
Source:
2014,2015,2016
Apply these changes to all other cells with the same settings
Clear All
OK
Cancel



Ledger Extension Analysis - Existed

1 Specify Site, Account Range, and 10 Ledger Dimensions (Dynamic) defined on Ledger rows.

2 Run the report. The Ledgers table with 15 extended ledger dimensions is displayed.



Estimate Order Line By Status

1 Specify Site, Order No range, Customer range, Order Date range, and Status.

2 Run the report. Order lines by order number, customer, and date are displayed. The report filter line uses Excel formulas to display the selection criteria and the extraction time.

Estimate Order Line by Status — PM Q&A for Infor CloudSuite BI

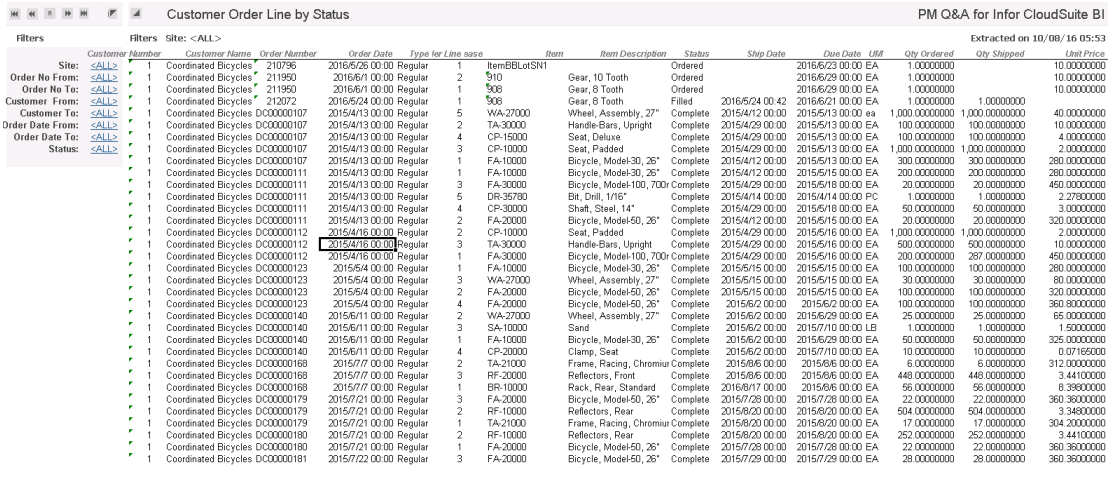
Filters — Site: <ALL> — Extracted on 10/08/16 05:53

Customer Number	Customer Name	Order Number	Order Date	Order Line	Item	Item Description	Status	Due Date	UM	Qty Ordered	Unit Price
1	Coordinated Bicycles	210920	2016/6/2 00:00	1	910	Gear, 10 Tooth	Quoted	2016/6/30 00:00	EA	10.00000000	
1	Coordinated Bicycles	DE00000002	2015/4/6 00:00	2	BK-27000-0005	Bicycle, Customized, 27"	Quoted	2015/5/5 00:00	EA	1.00000000	800.00000000
1	Coordinated Bicycles	DE00000002	2015/4/6 00:00	4	MB-10000	Bicycle, Model-180, Mountain, Black/Whit	Quoted	2015/5/5 00:00	EA	1.00000000	238.00000000
1	Coordinated Bicycles	DE00000002	2015/4/6 00:00	1	FA-10000	Bicycle, Model-30, 26"	Quoted	2015/5/5 00:00	EA	1.00000000	555.22284920
1	Coordinated Bicycles	DE00000002	2015/4/6 00:00	3	CP-10000	Seat, Padded	Quoted	2015/5/5 00:00	EA	1.00000000	12.25000000
1	Coordinated Bicycles	DE00000010	2016/1/6 00:00	1	FA-20000	Bicycle, Model-50, 26"	Quoted	2015/12/24 00:00	EA	50.00000000	340.56000000
1	Coordinated Bicycles	DE00000010	2016/1/6 00:00	2	FA-30000	Bicycle, Model-100, 700mm, Eurocycle	Quoted	2015/12/24 00:00	EA	34.00000000	744.91322681
1	Coordinated Bicycles	DE00000021	2016/5/23 00:00	1	Forklift	Configurable Forklift	Working	2016/6/20 00:00	EA	5.00000000	
1	Coordinated Bicycles	DE00000021	2016/5/23 00:00	2	Forklift	Configurable Forklift	Working	2016/6/20 00:00	EA	5.00000000	32,653.00000000
1	Coordinated Bicycles	DE00000031	2016/5/23 14:52	2	CP-20000	Clamp, Seat	Planned	2016/6/20 14:52	EA	1.00000000	0.17000000
1	Coordinated Bicycles	DE00000031	2016/5/23 14:52	1	BMX-12000	Bicycle, BMX, Blue	Planned	2016/6/20 14:52	EA	1.00000000	650.00000000
1	Coordinated Bicycles	DE00000031	2016/5/23 14:52	3	MTN-10000	Bicycle, Model-300, Mountain, Config	Planned	2016/6/20 14:52	EA	1.00000000	580.00000000
1	Coordinated Bicycles	DE00000031	2016/5/23 14:52	4	MTN-10000	Bicycle, Model-300, Mountain, Config	Planned	2016/6/20 14:52	EA	1.00000000	580.00000000
1	Coordinated Bicycles	DE00000093	2016/5/30 01:32	1	908	Gear, 8 Tooth	Planned	2016/6/27 01:32	EA	3.00000000	
1	Coordinated Bicycles	DE00000109	2016/6/2 00:00	2	FA-20000	Bicycle, Model-50, 26"	Planned	2016/6/9 00:00	EA	10.00000000	400.40000000
1	Coordinated Bicycles	DE00000109	2016/6/2 00:00	1	FA-10000	Bicycle, Model-30, 26"	Planned	2016/6/9 00:00	EA	10.00000000	324.00000000
1	Coordinated Bicycles	EE00000002	2015/4/6 00:00	1	FA-10000	Bicycle, Model-30, 26"	Quoted	2015/5/5 00:00	EA	1.00000000	555.22284920
1	Coordinated Bicycles	EE00000002	2015/4/6 00:00	2	BK-27000-0005	Bicycle, Customized, 27"	Quoted	2015/5/5 00:00	EA	1.00000000	800.00000000
1	Coordinated Bicycles	EE00000002	2015/4/6 00:00	4	MB-10000	Bicycle, Model-180, Mountain, Black/Whit	Quoted	2015/5/5 00:00	EA	1.00000000	238.00000000
1	Coordinated Bicycles	EE00000002	2015/4/6 00:00	3	CP-10000	Seat, Padded	Quoted	2015/5/5 00:00	EA	1.00000000	12.25000000
1	Coordinated Bicycles	EE00000009	2015/12/3 00:00	1	RF-20000	Reflectors, Front	Quoted	2015/11/5 00:00	EA	392.00000000	3.44100000
1	Coordinated Bicycles	EE00000009	2015/12/3 00:00	2	FA-10000	Bicycle, Model-30, 26"	Quoted	2015/11/5 00:00	EA	34.00000000	372.00000000
1	Coordinated Bicycles	EE00000009	2015/12/3 00:00	3	FA-20000	Bicycle, Model-50, 26"	Quoted	2015/11/6 00:00	EA	30.00000000	368.28000000
1	Coordinated Bicycles	EE00000010	2016/1/6 00:00	1	FA-20000	Bicycle, Model-50, 26"	Quoted	2015/12/24 00:00	EA	50.00000000	340.56000000
1	Coordinated Bicycles	EE00000010	2016/1/6 00:00	2	FA-30000	Bicycle, Model-100, 700mm, Eurocycle	Quoted	2015/12/24 00:00	EA	34.00000000	744.91322681
1	Coordinated Bicycles	EE00000021	2016/7/6 00:00	1	FA-10000	Bicycle, Model-30, 26"	Working	2016/7/12 00:00	EA	1.00000000	324.00000000
1	Coordinated Bicycles	LE00000002	2015/4/6 00:00	1	FA-10000	Bicycle, Model-30, 26"	Quoted	2015/5/5 00:00	EA	1.00000000	555.22284920
1	Coordinated Bicycles	LE00000002	2015/4/6 00:00	4	MB-10000	Bicycle, Model-180, Mountain, Black/Whit	Quoted	2015/5/5 00:00	EA	1.00000000	238.00000000
1	Coordinated Bicycles	LE00000002	2015/4/6 00:00	2	BK-27000-0005	Bicycle, Customized, 27"	Quoted	2015/5/5 00:00	EA	1.00000000	800.00000000
1	Coordinated Bicycles	LE00000002	2015/4/6 00:00	3	CP-10000	Seat, Padded	Quoted	2015/5/5 00:00	EA	1.00000000	12.25000000
1	Coordinated Bicycles	LE00000010	2016/1/6 00:00	2	FA-30000	Bicycle, Model-100, 700mm, Eurocycle	Quoted	2015/12/24 00:00	EA	34.00000000	744.91322681
1	Coordinated Bicycles	LE00000010	2016/1/6 00:00	1	FA-20000	Bicycle, Model-50, 26"	Quoted	2015/12/24 00:00	EA	50.00000000	340.56000000
2	Price Brothers Dept Store	DE00000006	2015/6/4 00:00	1	BK-27000-0007	Bicycle, Customized, 27"	Quoted	2015/9/3 00:00	EA	10.00000000	600.00000000
2	Price Brothers Dept Store	DE00000019	2016/4/22 00:00	2	MB-11000	Bicycle, Model-200, Mountain, Silver	Working	2016/10/13 00:00	EA	45.00000000	168.50440000
2	Price Brothers Dept Store	DE00000019	2016/4/22 00:00	1	FA-20000	Bicycle, Model-50, 26"	Working	2016/10/13 00:00	EA	45.00000000	372.24000000
2	Price Brothers Dept Store	DE00000019	2016/4/22 00:00	3	FA-10000	Bicycle, Model-30, 26"	Working	2016/10/13 00:00	EA	50.00000000	376.00000000
2	Price Brothers Dept Store	DE00000019	2016/4/22 00:00	4	CP-15000	Seat, Deluxe	Working	2016/10/13 00:00	EA	11.00000000	10.60000000
2	Price Brothers Dept Store	DE00000097	2016/5/31 16:22	5	FA-10000	Bicycle, Model-30, 26"	Planned	2016/6/7 16:22	EA	4.00000000	379.00000000
2	Price Brothers Dept Store	DE00000097	2016/5/31 16:22	6	FA-10000	Bicycle, Model-30, 26"	Planned	2016/6/7 16:22	EA	4.00000000	378.00000000
2	Price Brothers Dept Store	DE00000097	2016/5/31 16:22	9	MB-12000	Bicycle, Model-200, Mountain, Blue	Planned	2016/6/7 16:22	EA	3.00000000	207.43000000

Customer Order Line By Status

1 Specify Site, Order No range, Customer range, Order Date range. and Status.

2 Run the report. Order lines by order number, customer, and date are displayed. The report filter line uses Excel formulas to display the selection criteria and the extraction time.



Customer Order Line by Status — PM Q&A for Infor CloudSuite BI

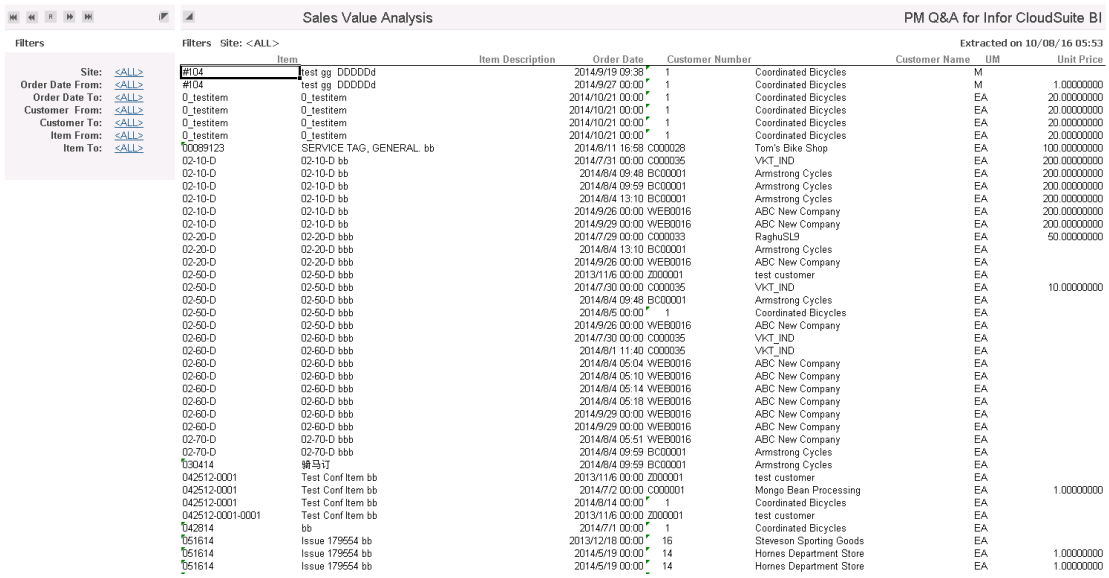
Filters — Site: <ALL> — Extracted on 10/08/16 05:53

Customer Number	Customer Name	Order Number	Order Date	Type	Line	Base	Item	Item Description	Status	Ship Date	Due Date	UM	Qty Ordered	Qty Shipped	Unit Price
1	Coordinated Bicycles	210795	2016/5/26 00:00	Regular	1		ItemBBLotSN1		Ordered		2016/6/23 00:00	EA	1.00000000		10.00000000
1	Coordinated Bicycles	211950	2016/6/1 00:00	Regular	2		910	Gear, 10 Tooth	Ordered		2016/6/29 00:00	EA	1.00000000		10.00000000
1	Coordinated Bicycles	211950	2016/6/1 00:00	Regular	1		908	Gear, 8 Tooth	Ordered		2016/6/29 00:00	EA	1.00000000		10.00000000
1	Coordinated Bicycles	212072	2016/5/24 00:00	Regular	1		908	Gear, 8 Tooth	Filled	2016/5/24 00:42	2016/6/21 00:00	EA	1.00000000	1.00000000	
1	Coordinated Bicycles	DC00000107	2015/4/13 00:00	Regular	5		WA-27000	Wheel, Assembly, 27"	Complete	2015/4/12 00:00	2015/5/13 00:00	ea	1,000.00000000	1,000.00000000	40.00000000
1	Coordinated Bicycles	DC00000107	2015/4/13 00:00	Regular	2		TA-30000	Handle-Bars, Upright	Complete	2015/4/29 00:00	2015/5/13 00:00	EA	100.00000000	100.00000000	10.00000000
1	Coordinated Bicycles	DC00000107	2015/4/13 00:00	Regular	4		CP-15000	Seat, Deluxe	Complete	2015/4/29 00:00	2015/5/13 00:00	EA	100.00000000	100.00000000	4.00000000
1	Coordinated Bicycles	DC00000107	2015/4/13 00:00	Regular	3		CP-10000	Seat, Padded	Complete	2015/4/29 00:00	2015/5/13 00:00	EA	1,000.00000000	1,000.00000000	2.00000000
1	Coordinated Bicycles	DC00000107	2015/4/13 00:00	Regular	1		FA-10000	Bicycle, Model-30, 26"	Complete	2015/4/12 00:00	2015/5/13 00:00	EA	300.00000000	300.00000000	280.00000000
1	Coordinated Bicycles	DC00000111	2015/4/13 00:00	Regular	1		FA-10000	Bicycle, Model-30, 26"	Complete	2015/4/12 00:00	2015/5/15 00:00	EA	200.00000000	200.00000000	280.00000000
1	Coordinated Bicycles	DC00000111	2015/4/13 00:00	Regular	3		FA-30000	Bicycle, Model-100, 700r	Complete	2015/4/29 00:00	2015/5/18 00:00	EA	20.00000000	20.00000000	450.00000000
1	Coordinated Bicycles	DC00000111	2015/4/13 00:00	Regular	5		DR-35780	Bit, Drill, 1/16"	Complete	2015/4/14 00:00	2015/4/14 00:00	PC	1.00000000	1.00000000	2.27800000
1	Coordinated Bicycles	DC00000111	2015/4/13 00:00	Regular	4		CP-30000	Shaft, Steel, 14"	Complete	2015/4/29 00:00	2015/5/18 00:00	EA	50.00000000	50.00000000	3.00000000
1	Coordinated Bicycles	DC00000111	2015/4/13 00:00	Regular	2		FA-20000	Bicycle, Model-50, 26"	Complete	2015/4/12 00:00	2015/5/15 00:00	EA	20.00000000	20.00000000	320.00000000
1	Coordinated Bicycles	DC00000112	2015/4/16 00:00	Regular	2		CP-10000	Seat, Padded	Complete	2015/4/29 00:00	2015/5/16 00:00	EA	1,000.00000000	1,000.00000000	2.00000000
1	Coordinated Bicycles	DC00000112	2015/4/16 00:00	Regular	3		TA-30000	Handle-Bars, Upright	Complete	2015/4/29 00:00	2015/5/16 00:00	EA	500.00000000	500.00000000	10.00000000
1	Coordinated Bicycles	DC00000112	2015/4/16 00:00	Regular	1		FA-30000	Bicycle, Model-100, 700r	Complete	2015/4/29 00:00	2015/5/16 00:00	EA	200.00000000	287.00000000	450.00000000
1	Coordinated Bicycles	DC00000123	2015/5/4 00:00	Regular	1		FA-10000	Bicycle, Model-30, 26"	Complete	2015/5/15 00:00	2015/5/15 00:00	EA	100.00000000	100.00000000	280.00000000
1	Coordinated Bicycles	DC00000123	2015/5/4 00:00	Regular	3		WA-27000	Wheel, Assembly, 27"	Complete	2015/5/15 00:00	2015/5/15 00:00	EA	30.00000000	30.00000000	80.00000000
1	Coordinated Bicycles	DC00000123	2015/5/4 00:00	Regular	2		FA-20000	Bicycle, Model-50, 26"	Complete	2015/5/15 00:00	2015/5/15 00:00	EA	100.00000000	100.00000000	320.00000000
1	Coordinated Bicycles	DC00000123	2015/5/4 00:00	Regular	4		FA-20000	Bicycle, Model-50, 26"	Complete	2015/4/12 00:00	2015/5/15 00:00	EA	100.00000000	100.00000000	360.80000000
1	Coordinated Bicycles	DC00000140	2015/6/11 00:00	Regular	2		WA-27000	Wheel, Assembly, 27"	Complete	2015/6/2 00:00	2015/6/29 00:00	EA	25.00000000	25.00000000	65.00000000
1	Coordinated Bicycles	DC00000140	2015/6/11 00:00	Regular	3		SA-10000	Sand	Complete	2015/6/2 00:00	2015/7/10 00:00	LB	1.00000000	1.00000000	1.50000000
1	Coordinated Bicycles	DC00000140	2015/6/11 00:00	Regular	1		FA-10000	Bicycle, Model-30, 26"	Complete	2015/6/2 00:00	2015/6/29 00:00	EA	50.00000000	50.00000000	325.00000000
1	Coordinated Bicycles	DC00000140	2015/6/11 00:00	Regular	4		CP-20000	Clamp, Seat	Complete	2015/6/2 00:00	2015/7/10 00:00	EA	10.00000000	10.00000000	0.07165000
1	Coordinated Bicycles	DC00000168	2015/7/7 00:00	Regular	2		TA-21000	Frame, Racing, Chromiu	Complete	2015/8/6 00:00	2015/8/6 00:00	EA	6.00000000	6.00000000	312.00000000
1	Coordinated Bicycles	DC00000168	2015/7/7 00:00	Regular	3		RF-20000	Reflectors, Front	Complete	2015/8/6 00:00	2015/8/6 00:00	EA	448.00000000	448.00000000	3.44100000
1	Coordinated Bicycles	DC00000168	2015/7/7 00:00	Regular	1		RR-10000	Rack, Rear, Standard	Complete	2016/8/17 00:00	2015/8/6 00:00	EA	56.00000000	56.00000000	8.39800000
1	Coordinated Bicycles	DC00000179	2015/7/21 00:00	Regular	3		FA-20000	Bicycle, Model-50, 26"	Complete	2015/7/28 00:00	2015/7/28 00:00	EA	22.00000000	22.00000000	360.36000000
1	Coordinated Bicycles	DC00000179	2015/7/21 00:00	Regular	2		RF-10000	Reflectors, Rear	Complete	2015/8/20 00:00	2015/8/20 00:00	EA	504.00000000	504.00000000	3.34800000
1	Coordinated Bicycles	DC00000179	2015/7/21 00:00	Regular	1		TA-21000	Frame, Racing, Chromiu	Complete	2015/8/20 00:00	2015/8/20 00:00	EA	17.00000000	17.00000000	304.20000000
1	Coordinated Bicycles	DC00000180	2015/7/21 00:00	Regular	2		RF-10000	Reflectors, Rear	Complete	2015/8/20 00:00	2015/8/20 00:00	EA	252.00000000	252.00000000	3.44100000
1	Coordinated Bicycles	DC00000180	2015/7/21 00:00	Regular	1		FA-20000	Bicycle, Model-50, 26"	Complete	2015/7/28 00:00	2015/7/28 00:00	EA	22.00000000	22.00000000	360.36000000
1	Coordinated Bicycles	DC00000181	2015/7/22 00:00	Regular	3		FA-20000	Bicycle, Model-50, 26"	Complete	2015/7/29 00:00	2015/7/29 00:00	EA	28.00000000	28.00000000	360.36000000

Unit Price Sales Value Analysis

1 Specify Site, Order Date range, Customer range, and Item range.

2 Run the report. Customer order lines by order date and items are displayed. The report filter line uses Excel formulas to display the selection criteria and the extraction time. The report summarizes sales values for both regular and blanket orders.



Sales Value Analysis — PM Q&A for Infor CloudSuite BI

Filters

Site:	<ALL>
Order Date From:	<ALL>
Order Date To:	<ALL>
Customer From:	<ALL>
Customer To:	<ALL>
Item From:	<ALL>
Item To:	<ALL>

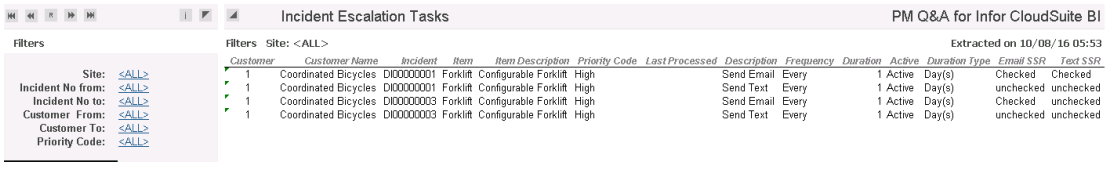
Filters Site: <ALL> — Extracted on 10/08/16 05:53

Item	Item Description	Order Date	Customer Number	Customer Name	UM	Unit Price
#104	test gg DDDDDd	2014/9/19 09:38	1	Coordinated Bicycles	M	
#104	test gg DDDDDd	2014/9/27 00:00	1	Coordinated Bicycles	M	1.00000000
0_testitem	0_testitem	2014/10/21 00:00	1	Coordinated Bicycles	EA	20.00000000
0_testitem	0_testitem	2014/10/21 00:00	1	Coordinated Bicycles	EA	20.00000000
0_testitem	0_testitem	2014/10/21 00:00	1	Coordinated Bicycles	EA	20.00000000
0_testitem	0_testitem	2014/10/21 00:00	1	Coordinated Bicycles	EA	20.00000000
00089123	SERVICE TAG, GENERAL bb	2014/6/11 16:58	C000028	Tom's Bike Shop	EA	100.00000000
02-10-D	02-10-D bb	2014/7/31 00:00	C000035	VKT_IND	EA	200.00000000
02-10-D	02-10-D bb	2014/6/4 09:48	BC00001	Armstrong Cycles	EA	200.00000000
02-10-D	02-10-D bb	2014/6/4 09:59	BC00001	Armstrong Cycles	EA	200.00000000
02-10-D	02-10-D bb	2014/6/4 13:10	BC00001	Armstrong Cycles	EA	200.00000000
02-10-D	02-10-D bb	2014/9/26 00:00	WEB0016	ABC New Company	EA	200.00000000
02-10-D	02-10-D bb	2014/9/29 00:00	WEB0016	ABC New Company	EA	200.00000000
02-20-D	02-20-D bbb	2014/7/29 00:00	C000033	RaghuSL9	EA	50.00000000
02-20-D	02-20-D bbb	2014/6/4 13:10	BC00001	Armstrong Cycles	EA	
02-20-D	02-20-D bbb	2014/9/26 00:00	WEB0016	ABC New Company	EA	
02-50-D	02-50-D bbb	2013/11/6 00:00	Z000001	test customer	EA	
02-50-D	02-50-D bbb	2014/7/30 00:00	C000035	VKT_IND	EA	10.00000000
02-50-D	02-50-D bbb	2014/6/4 09:48	BC00001	Armstrong Cycles	EA	
02-50-D	02-50-D bbb	2014/6/5 00:00	1	Coordinated Bicycles	EA	
02-50-D	02-50-D bbb	2014/9/26 00:00	WEB0016	ABC New Company	EA	
02-60-D	02-60-D bbb	2014/7/30 00:00	C000035	VKT_IND	EA	
02-60-D	02-60-D bbb	2014/8/1 11:40	C000035	VKT_IND	EA	
02-60-D	02-60-D bbb	2014/6/4 05:04	WEB0016	ABC New Company	EA	
02-60-D	02-60-D bbb	2014/6/4 05:10	WEB0016	ABC New Company	EA	
02-60-D	02-60-D bbb	2014/6/4 05:14	WEB0016	ABC New Company	EA	
02-60-D	02-60-D bbb	2014/6/4 05:18	WEB0016	ABC New Company	EA	
02-60-D	02-60-D bbb	2014/9/29 00:00	WEB0016	ABC New Company	EA	
02-60-D	02-60-D bbb	2014/9/29 00:00	WEB0016	ABC New Company	EA	
02-70-D	02-70-D bbb	2014/6/4 05:51	WEB0016	ABC New Company	EA	
02-70-D	02-70-D bbb	2014/6/4 09:59	BC00001	Armstrong Cycles	EA	
030414	標示17	2014/6/4 09:59	BC00001	Armstrong Cycles	EA	
042512-0001	Test Conf Item bb	2013/11/6 00:00	Z000001	test customer	EA	
042512-0001	Test Conf Item bb	2014/7/2 00:00	C000001	Mongo Bean Processing	EA	1.00000000
042512-0001	Test Conf Item bb	2014/8/14 00:00	1	Coordinated Bicycles	EA	
042512-0001-0001	Test Conf Item bb	2013/11/6 00:00	Z000001	test customer	EA	
042814	bb	2014/7/1 00:00	1	Coordinated Bicycles	EA	
051614	Issue 179554 bb	2013/12/18 00:00	16	Steveson Sporting Goods	EA	
051614	Issue 179554 bb	2014/5/19 00:00	14	Hornes Department Store	EA	1.00000000
051614	Issue 179554 bb	2014/5/19 00:00	14	Hornes Department Store	EA	1.00000000

Incident Escalation Tasks

1 Specify Site, Incident No range, Customer range, and Priority Code.

2 Run the report. Escalation tasks by incident number, customer, and priority are displayed. The report filter line uses Excel formulas to display the selection criteria and the extraction time.



Incident Escalation Tasks — PM Q&A for Infor CloudSuite BI

Filters

Site:	<ALL>
Incident No from:	<ALL>
Incident No to:	<ALL>
Customer From:	<ALL>
Customer To:	<ALL>
Priority Code:	<ALL>

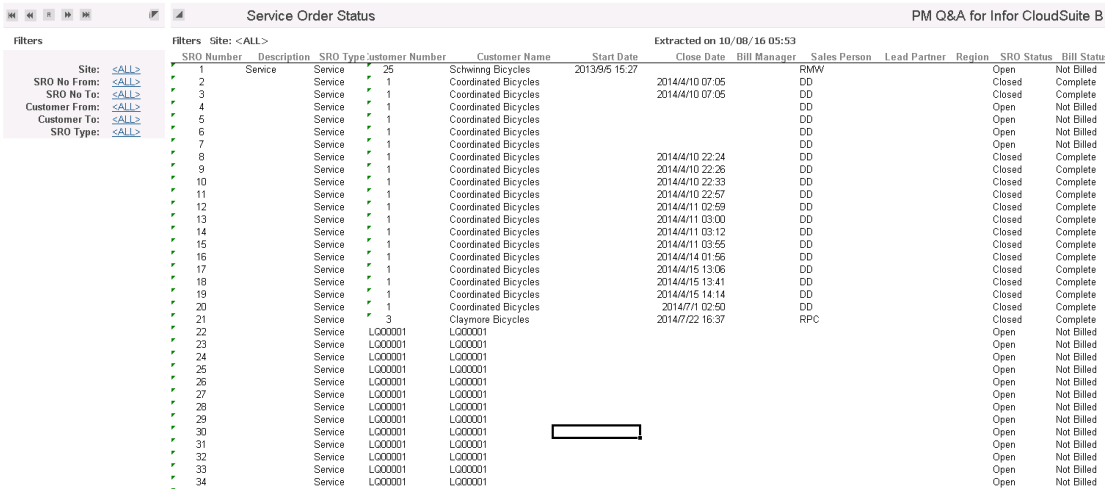
Filters Site: <ALL> — Extracted on 10/08/16 05:53

Customer	Customer Name	Incident	Item	Item Description	Priority Code	Last Processed	Description	Frequency	Duration	Active	Duration Type	Email SSR	Text SSR
1	Coordinated Bicycles	DI00000001	Forklift	Configurable Forklift	High		Send Email	Every	1	Active	Day(s)	Checked	Checked
1	Coordinated Bicycles	DI00000001	Forklift	Configurable Forklift	High		Send Text	Every	1	Active	Day(s)	unchecked	unchecked
1	Coordinated Bicycles	DI00000003	Forklift	Configurable Forklift	High		Send Email	Every	1	Active	Day(s)	Checked	unchecked
1	Coordinated Bicycles	DI00000003	Forklift	Configurable Forklift	High		Send Text	Every	1	Active	Day(s)	unchecked	unchecked

Service Order Status

1 Specify Site, SRO No range, Customer range, and SRO Type.

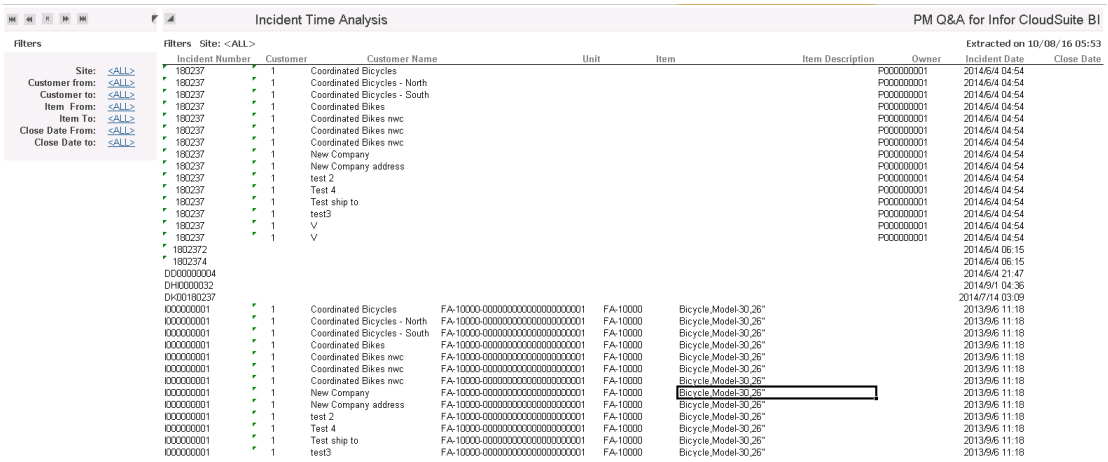
2 Run the report. SRO status information by SRO, SRO Line, Lead Partner, and SRO Type is displayed. The report filter line uses Excel formulas to display the selection criteria and the extraction time.



Incident Time Analysis

1 Specify Site, Customer range, Item range, and Close Date range Type.

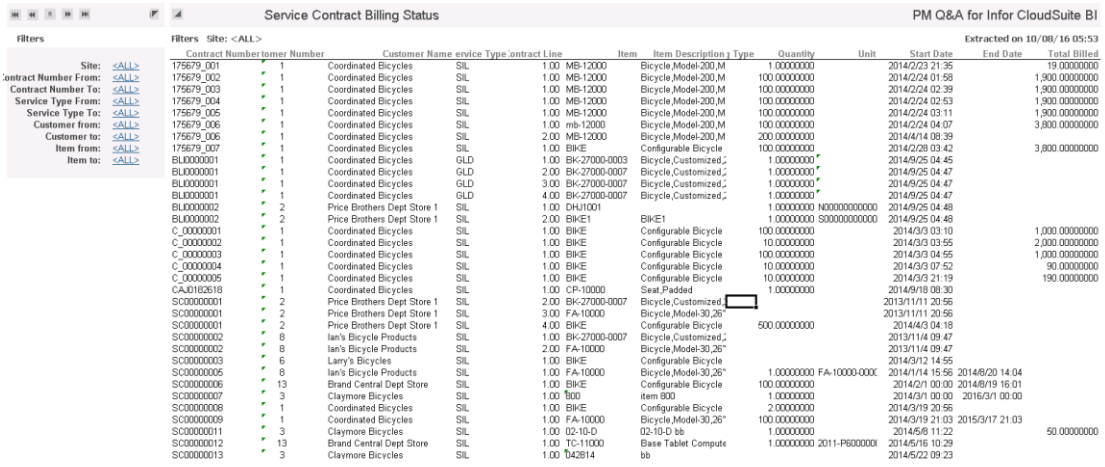
2 Run the report. Incidents by incident customer are displayed. The report filter line uses Excel formulas to display the selection criteria and the extraction time.



Service Contract Billing Status

3 Specify Site, Contract No range, Service Type range, Customer range, and Item range.

4 Run the report. Service Contract Lines by customer are displayed. The report filter line uses Excel formulas to display the selection criteria and the extraction time.



Service Contract Billing Status

PM Q&A for Infor CloudSuite BI

Filters

Site: <ALL>
Contract Number From: <ALL>
Contract Number To: <ALL>
Service Type From: <ALL>
Service Type To: <ALL>
Customer from: <ALL>
Customer to: <ALL>
Item from: <ALL>
Item to: <ALL>

Filters Site: <ALL>

Extracted on 10/08/16 05:53

Contract Number	tomer Number	Customer Name	ervice Type	ontract Line	Item	Item Description 1	Type	Quantity	Unit	Start Date	End Date	Total Billed
175679_001	1	Coordinated Bicycles	SIL	1.00	MB-12000	Bicycle,Model-200,M		1.00000000		2014/2/23 21:35		19.00000000
175679_002	1	Coordinated Bicycles	SIL	1.00	MB-12000	Bicycle,Model-200,M		100.00000000		2014/2/24 01:58		1,900.00000000
175679_003	1	Coordinated Bicycles	SIL	1.00	MB-12000	Bicycle,Model-200,M		100.00000000		2014/2/24 02:39		1,900.00000000
175679_004	1	Coordinated Bicycles	SIL	1.00	MB-12000	Bicycle,Model-200,M		100.00000000		2014/2/24 02:53		1,900.00000000
175679_005	1	Coordinated Bicycles	SIL	1.00	MB-12000	Bicycle,Model-200,M		100.00000000		2014/2/24 03:11		1,900.00000000
175679_006	1	Coordinated Bicycles	SIL	1.00	mb-12000	Bicycle,Model-200,M		100.00000000		2014/2/24 04:07		3,800.00000000
175679_006	1	Coordinated Bicycles	SIL	2.00	MB-12000	Bicycle,Model-200,M		200.00000000		2014/4/14 08:39		
175679_007	1	Coordinated Bicycles	SIL	1.00	BIKE	Configurable Bicycle		100.00000000		2014/2/28 03:42		3,800.00000000
BL0000001	1	Coordinated Bicycles	GLD	1.00	BK-27000-0003	Bicycle,Customized,		1.00000000		2014/9/25 04:45		
BL0000001	1	Coordinated Bicycles	GLD	2.00	BK-27000-0007	Bicycle,Customized,		1.00000000		2014/9/25 04:47		
BL0000001	1	Coordinated Bicycles	GLD	3.00	BK-27000-0007	Bicycle,Customized,		1.00000000		2014/9/25 04:47		
BL0000001	1	Coordinated Bicycles	GLD	4.00	BK-27000-0007	Bicycle,Customized,		1.00000000		2014/9/25 04:47		
BL0000002	2	Price Brothers Dept Store 1	SIL	1.00	DHJT001			1.00000000	N00000000000	2014/9/25 04:48		
BL0000002	2	Price Brothers Dept Store 1	SIL	2.00	BIKE1	BIKE1		1.00000000	S00000000000	2014/9/25 04:48		
C_00000001	1	Coordinated Bicycles	SIL	1.00	BIKE	Configurable Bicycle		100.00000000		2014/3/3 03:10		1,000.00000000
C_00000002	1	Coordinated Bicycles	SIL	1.00	BIKE	Configurable Bicycle		10.00000000		2014/3/3 03:55		2,000.00000000
C_00000003	1	Coordinated Bicycles	SIL	1.00	BIKE	Configurable Bicycle		100.00000000		2014/3/3 04:55		1,000.00000000
C_00000004	1	Coordinated Bicycles	SIL	1.00	BIKE	Configurable Bicycle		10.00000000		2014/3/3 07:52		90.00000000
C_00000005	1	Coordinated Bicycles	SIL	1.00	BIKE	Configurable Bicycle		10.00000000		2014/3/3 21:19		190.00000000
CAJD182618	1	Coordinated Bicycles	SIL	1.00	CP-10000	Seat,Padded		1.00000000		2014/9/18 08:30		
SO00000001	2	Price Brothers Dept Store 1	SIL	2.00	BK-27000-0007	Bicycle,Customized,				2013/11/11 20:56		
SO00000001	2	Price Brothers Dept Store 1	SIL	3.00	FA-10000	Bicycle,Model-30,26"				2013/11/11 20:56		
SO00000001	2	Price Brothers Dept Store 1	SIL	4.00	BIKE	Configurable Bicycle		500.00000000		2014/4/3 04:18		
SO00000002	8	Ian's Bicycle Products	SIL	1.00	BK-27000-0007	Bicycle,Customized,				2013/11/4 09:47		
SO00000002	8	Ian's Bicycle Products	SIL	2.00	FA-10000	Bicycle,Model-30,26"				2013/11/4 09:47		
SO00000003	6	Larry's Bicycles	SIL	1.00	BIKE	Configurable Bicycle				2014/3/12 14:55		
SO00000005	8	Ian's Bicycle Products	SIL	1.00	FA-10000	Bicycle,Model-30,26"		1.00000000	FA-10000-0000	2014/1/14 15:56	2014/8/20 14:04	
SO00000006	13	Brand Central Dept Store	SIL	1.00	BIKE	Configurable Bicycle		100.00000000		2014/2/1 00:00	2014/8/19 16:01	
SO00000007	3	Claymore Bicycles	SIL	1.00	800	item 800		1.00000000		2014/3/1 00:00	2016/3/1 00:00	
SO00000008	1	Coordinated Bicycles	SIL	1.00	BIKE	Configurable Bicycle		2.00000000		2014/3/19 20:56		
SO00000009	1	Coordinated Bicycles	SIL	1.00	FA-10000	Bicycle,Model-30,26"		100.00000000		2014/3/19 21:03	2015/3/17 21:03	
SO00000011	3	Claymore Bicycles	SIL	1.00	02-10-D	02-10-D bb		1.00000000		2014/5/8 11:22		50.00000000
SO00000012	13	Brand Central Dept Store	SIL	1.00	TC-11000	Base Tablet Compute		1.00000000	2011-P6000001	2014/5/16 10:29		
SO00000013	3	Claymore Bicycles	SIL	1.00	042814	bb				2014/5/22 09:23		

Appendix A – Publishing Validation Options Preference

A

Cube/Dimension Name	Preference		
	Skip validation for warnings	Skip cube validation to check facts for valid dimension values	Skip cube validation to check for numeric measure values
Prepare_Data(Dimension)	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Booking Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Business Performance Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Sales and Product Contribution Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Sales Delivery Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Accounts Receivable Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Financial Income Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Job Efficiency Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Material Scrap Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Vendor Received Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Inventory Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Inventory Periodical Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Service Order Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Service Transaction Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Incident Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)

Campaign Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Sales Opportunity Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Sales Lead Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Sales Forecast Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Compensation and Benefit Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Employee Retention Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Recruitment Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
PP Quote Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
PP Quote Factor Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
OEE Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
FMEA Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Cash Flow Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Sales Planning Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Bank Account Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Account Payable Periodical Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Machine Efficiency Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Sales Controlling Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Sales Pipeline Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Account Receivable Periodical Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)
Sales Process Capacity Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)

Job Scheduling Analysis	Uncheck(Not Skip Validation)	Check(Skip Validation)	Uncheck(Not Skip Validation)

Appendix B – Reports details

B

		Report	Cube
Finance	Finance and AR	Top 10 Customers by Open Invoice	Accounts_Receivable_Analysis
		Business Expense Trend	Financial_Income_Analysis
		Business Revenue Trend	Financial_Income_Analysis
		Balance Chart by Site	Financial_Income_Analysis
		Profit and Loss Statement	Financial_Income_Analysis
		Actual / Budget Amount	Financial_Income_Analysis
		Aging Bucket Analysis	Accounts_Receivable_Analysis
Inventory and Purchasing	Inventory and Vendor Analysis	Cost by Planner Code	Inventory_Periodical_Analysis
		Top 10 Family Codes by Quantity	Inventory_Periodical_Analysis
		Inventory Cost Analysis	Inventory_Periodical_Analysis
		Top 10 Products by Inventory Cost	Inventory_Periodical_Analysis
		Top 10 Warehouses Analysis	Inventory_Periodical_Analysis
		Cost by ABC Code	Inventory_Periodical_Analysis
		Top 10 Products by Received Cost	Vendor_Received_Analysis
		Top 10 Vendors Received	Vendor_Received_Analysis
Manufacturing	Job and Material Analysis	Top 10 Work Centers by Scrap Quantity	Material_Scrap_Analysis
		Top 10 Work Centers by Scrap Cost	Material_Scrap_Analysis
		Scrap Quantity Analysis	Material_Scrap_Analysis
		Job Efficiency Analysis	Job_Efficiency_Analysis
		Scrap Cost by Transaction Type	Material_Scrap_Analysis
		Scrap Cost by Reason Code	Material_Scrap_Analysis
Sales	Sales and Product Contribution Analysis	Sales Margin by Customer Location	Sales_and_Product_Contribution_Analysis
		Sales by Sales Channel	Sales_and_Product_Contribution_Analysis
		Sales Contribution Analysis	Sales_and_Product_Contribution_Analysis
		Sales by Product	Sales_and_Product_Contribution_Analysis
		Top 10 Sales	Sales_and_Product_Contribution_Analysis
		Top 10 Products by Contribution Margin	Sales_and_Product_Contribution_Analysis
		Percentage of Margin by Product	Sales_and_Product_Contribution_Analysis
		Top 10 Customers	Sales_and_Product_Contribution_Analysis
		Percent Sales Margin	Sales_and_Product_Contribution_Analysis

		Quantity Shipped by Customer Location	Sales_and_Product_Contribution_Analysis
	CRM Analysis	Campaign Analysis	Campaign_Analysis
		Lead Response Time by Territory	Sales_Lead_Analysis
		Pipeline Analysis	Sales_Opportunity_Analysis
		Opportunity Value by Close Percent	Sales_Opportunity_Analysis
		Lead Count by Status	Sales_Lead_Analysis
		Sales Forecast Analysis	Sales_Forecast_Analysis
		Top 10 Sales by Estimated Value	Sales_Opportunity_Analysis
	Booking Analysis	Total Sales Bookings	Booking_Analysis
		Bookings per Sales FTE	Booking_Analysis
	Sales Lead Analysis	Percent of Leads Closed	Sales_Lead_Analysis
	Sales Controlling Analysis	SG&A Cost (per $1000 revenue)	Sales_Controlling_Analysis
	Sales Pipeline Analysis	Average Order Value	Sales_Pipeline_Analysis
Service	Service and Incident Analysis	Closed Incident by Region	Incident_Analysis
		SRO Transaction Analysis	Service_Transaction_Analysis
		Service Order Price Analysis	Service_Order_Analysis
		Open Incident Analysis	Incident_Analysis
		Service Order Closed	Service_Order_Analysis
		Top 10 Partners	Service_Order_Analysis
HR	HR Analysis	Employment Count by Age	Employee_Retention_Analysis
		Recruitment Cost by Source	Recruitment_Analysis
		Employee Total Pay by Age	Compensation_and_Benefit_Analysis
		Turnover Rate by Position	Employee_Retention_Analysis
		Employee Compensation Distribution	Compensation_and_Benefit_Analysis
		Top 10 Recruitment Costs by Position	Recruitment_Analysis
PP	PP Analysis	Color Consumption Analysis	PP_Quote_Factors_Analysis
		Price Margin by Site	PP_Quote_Analysis
		Job Count Comparison	PP_Quote_Factors_Analysis
		Top 10 Estimate Jobs	PP_Quote_Factors_Analysis
		Quote Price by Site	PP_Quote_Factors_Analysis
		Top 10 Customers by Print Quote Price	PP_Quote_Analysis
Automotive	Productivity Analysis	RPN Analysis	FMEA_Analysis
		RPN By Operations	FMEA_Analysis
		Top 10 Work Centers by RPN	FMEA_Analysis

		Top 10 Operations by RPN	FMEA_Analysis
		Top 10 Failure Modes	FMEA_Analysis
CEO	Cash Flow	Cash Flow by Fiscal Period	Cash_Flow_Analysis
	Job Efficiency	Production Value per Unit of Labor	Job_Efficiency_Analysis
	Bank Analysis	Bank Account Balances	Bank_Account_Analysis
	Inventory Periodical Analysis	Cost Comparison	Inventory_Periodical_Analysis
	Accounts Balances Analysis	Accounts Payable Balances	Accounts_Payable_Periodical_Analysis
		Accounts Receivable Balances	Accounts_Receivable_Periodical_Analysis
	Machine Efficiency	Machine Efficiency Analysis	Machine_Efficiency_Analysis
	Sales and Product Contribution Analysis	Sales by Customer Analysis	Sales_and_Product_Contribution_Analysis
		Gross Margins by Product Analysis	Sales_and_Product_Contribution_Analysis
		Revenue from Sale of Goods VS Cost of Goods Sold	Sales_and_Product_Contribution_Analysis
		Sales Margin Percentage Analysis	Sales_and_Product_Contribution_Analysis
	Sales Pipeline Analysis	Backlog	Sales_Pipeline_Analysis
		Sales Pipeline vs Backlog	Sales_Pipeline_Analysis
	Sales Controlling Analysis	Revenue Over Time	Sales_Controlling_Analysis
		Cost Over Time	Sales_Controlling_Analysis
CFO	Sales and Product Contribution Analysis	Revenue	Sales_and_Product_Contribution_Analysis
	Accounts Receivable Analysis	AR by Age	Accounts_Receivable_Periodical_Analysis
		Top Customers by AR Age	Accounts_Receivable_Analysis
	Sales Controlling	Sales General and Administration	Sales_Controlling_Analysis
		Gross Profit	Sales_Controlling_Analysis
		COGS	Sales_Controlling_Analysis
Production	Inventory Periodical Analysis	Purchased Item Inventory	Inventory_Periodical_Analysis
		WIP Value(Inventory)	Inventory_Periodical_Analysis
		Manufactured Goods Inventory	Inventory_Periodical_Analysis
		Total Inventory	Inventory_Periodical_Analysis
		Total Inventory Turns	Inventory_Periodical_Analysis
	Job Scheduling Analysis	Top 5 Products by Manufacturing Cycle Time in hours	Job_Scheduling_Analysis
	Machine Efficiency Analysis	Utilization %	Machine_Efficiency_Analysis
		OEE (Overall Equipment Effectiveness)	Machine_Efficiency_Analysis

	Material Scrap Analysis	Scrap and Rework Percentage	Material_Scrap_Analysis
	Job Efficiency Analysis	Labor Utilization	Job_Efficiency_Analysis
	Sales Process Capability Analysis	Average Order Turnaround Days	Sales_Process_Capacity_Analysis
		Complete and On-Time Shipment	Sales_Process_Capacity_Analysis

Appendix C – Permission

C

Role	Description	Default Dashboard	Dashboards under the role	Cube Details
CFO_Role	Used for CFO only	Cash Flow Statement	Cash Flow Statement Cash Flow Planning Sales Planning Finance Analysis Sales Analysis	Accounts_Payable_Analysis, Accounts_Receivable_Analysis, Accounts_Receivable_Periodical_Analysis, Cash_Flow_Analysis, Sales_and_Product_Contribution_Analysis, Sales_Controlling_Analysis, Sales_Planning, Sales_Planning_Allocation
Finance_Role	Used for accountant	Finance and AR Analysis	Finance and AR Analysis	Accounts_Payable_Analysis, Accounts_Receivable_Analysis, Finacial_Income_Analysis
HR_Role	Used for HR officer	HR Analysis	HR Analysis	Compensation_and_Benefit_Analysis, Employee_Retention_Analysis, Recruitment_Analysis
Logistics_Role	Used for logistic officer	Inventory and Vendor Analysis	Inventory and Vendor Analysis	Inventory_Analysis, Inventory_Periodical_Analysis, Vendor_Received_Analysis
Production_Role	Used for production planner/manager	Job and Material Analysis	Job and Material Analysis Quote Analysis Automotive Analysis Production Efficiency Analysis Inventory Analysis	FMEA_Analysis, Inventory_Periodical_Analysis, Job_Efficiency_Analysis, Job_Scheduling_Analysis, Machine_Efficiency_Analysis, Material_Scrap_Analysis, OEE_Analysis, PP_Quote_Analysis, PP_Quote_Factors_Analysis, Sales_Process_Capacity_Analysis

Sales_Role	Used for sales manager	Sales and Product Contribution Analysis	CRM Analysis Sales and Product Contribution Analysis Sales Booking Sales Controlling	Booking_Analysis, Business_Performance_Analysis, Campaign_Analysis, Sales_and_Product_Contribution_Analysis, Sales_Controlling_Analysis, Sales_Delivery_Analysis, Sales_Forecast_Analysis, Sales_Lead_Analysis, Sales_Opportunity_Analysis Sales_Pipeline_Analysis
Service_Role	Used for service department manager	Service and Incident Analysis	Service and Incident Analysis	Incident_Analysis, Service_Order_Analysis, Service_Transaction_Analysis
CEO_Role	Used for CEO only	Cash Analysis	Cash Analysis Production & Demand Capacity Analysis Sales Controlling Analysis	Bank_Account_Analysis, Accounts_Payable_Periodical_Analysis, Accounts_Receivable_Periodical_Analysis, Cash_Flow_Analysis, Inventory_Periodical_Analysis, Job_Efficiency_Analysis, Machine_Efficiency_Analysis, Sales_and_Product_Contribution_Analysis, Sales_Controlling_Analysis, Sales_Pipeline_Analysis