Infor SyteLine
User Guide for In-Context BI

8/18/14

Important Notices

Trademark Acknowledgements

Publication Information

Release: Infor SyteLine 9.00

Publication date: August 18, 2014

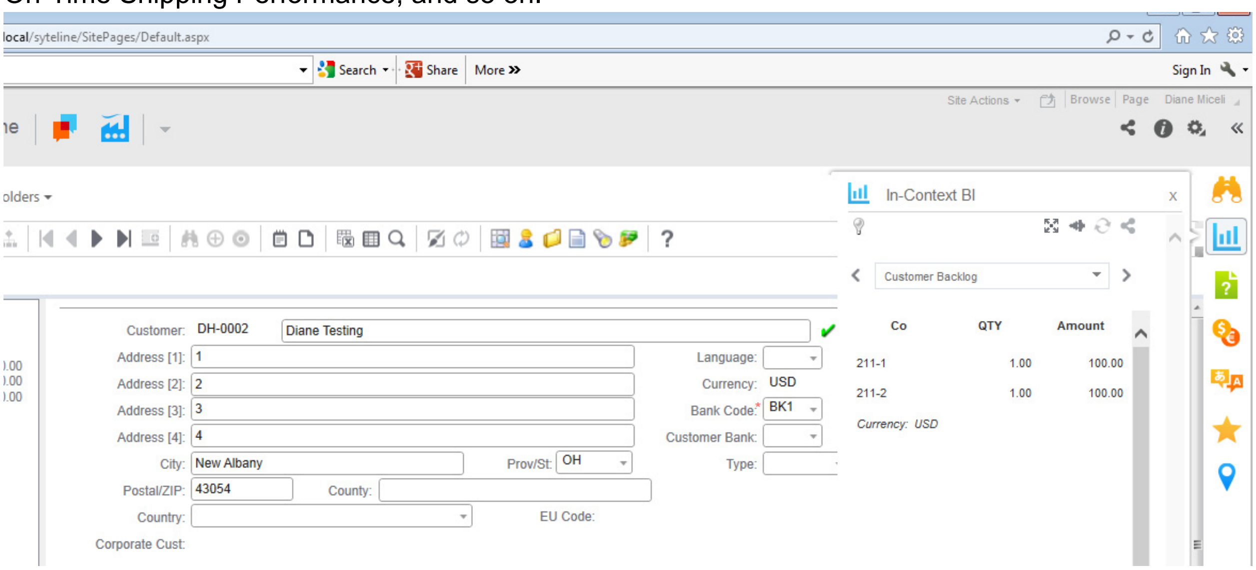
Document code: OPTIONAL: document code

Contents

Chapter 1: Overview

1

When you run Infor SyteLine in Infor Ming.le™, you can use the BI context application to view business critical metrics and reports in an adjacent pane while certain SyteLine forms are displayed. For example, when you are viewing a customer record on the **Customers** form, you can see metrics specific to that customer, such as Invoices by Month, Margin Dollars per Period, Customer Backlog, On-Time Shipping Performance, and so on.



This guide describes each of the available metrics and reports. It also tells how to use BI to enable or disable the metrics for each form.

Note: An updated version of this guide may be available in the product documentation area of Infor Xtreme.

Related Documents

Use the *Infor Ming.le Installation and Configuration Guide* and the *Infor Ming.le Administrator Guide* to install and configure BI to work with SyteLine in Infor Ming.le.

Refer to the *Infor Ming.le User Guide* to learn how to use Infor Ming.le.

Refer to the SyteLine online help for information about using SyteLine.

Chapter 2: About the Metrics and Reports

2

Displaying Metrics and Reports from the Forms

Metrics and reports are displayed in Infor Ming.le BI if both of these are true:

- Metrics and reports have been defined for the currently displayed SyteLine form. See the list of forms for which metrics and reports are defined, starting on page 8. If no metrics or reports are available for a form, the context application displays a message that no reports are available.
- Your system administrator has configured Infor Ming.le to include BI for use with SyteLine.

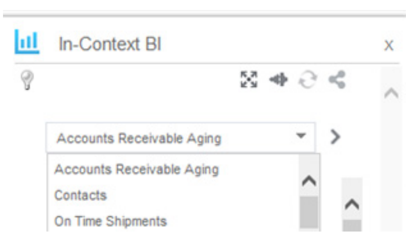
You can disable and re-enable the metrics and reports for a particular form from the BI toolbar.

Using In-Context BI

The BI “bar chart” icon is found in the top right corner of the Infor Ming.le window. A red dot next to the icon indicates new context, which usually occurs when you select a new record or form.

Click the BI icon to open it.

The toolbar area of the context application looks like this:



- **Right, Left and drop-down list arrows:** Allows you to move to another in-context metric or report for this form.
- **Lightbulb:** If the context application is disconnected, this bulb is highlighted to indicate that BI information is available for the form.
- **Expand Report:** Opens the report in a larger window.
- **Connected/Disconnected:** Indicates the state of the context application. You can disconnect the context application if you do not want the information to refresh every time you move to a new record or form. Refreshing can affect the speed with which new records or forms display.

- **Refresh:** Refreshes the information in this metric or report. This is useful if you updated information on the current form or if the context application is disconnected. If the context application is connected, when you select a new record, the information refreshes automatically.
- **Share:** The Share window is displayed. Some information about the report, a link to view the report, and search tags are listed. You can edit this information if needed. Set the privacy level of the post and optionally, add any attachments. Click **Post** to display the content on your Infor Ming.le feed pages. It is visible to other Infor Ming.le users according to the privacy settings on the Share form.

For more information on using context applications, see the *Infor Ming.le User Guide.*

Metric and Report Descriptions

This section describes the metrics and reports that are available for each form, in alphabetical order.

Customer Orders Quick Entry

When this form is displayed, BI displays these metrics and reports:

Name	Description	For Current
Accounts Receivable Aging	Grid that displays accounts receivable information. Includes the length of time the amounts have been outstanding. Categorizes receivables as current, 30 days, 60 days, 90 days, 120 days and over.	customer (Ship To is always 0)
Actual Item Availability	Grid that displays site, warehouse and item availability. Item Availability is calculated as On Hand - Alloc Order - Alloc Prod - Alloc Transfer.	item
Actual vs Planned Shipments	Column chart that displays the actual orders shipped vs. the planned orders shipped for the current date. Actual, shown in red, means the ship date is equal to the current date. Planned, shown in green, means the due date is equal to the current date.	customer and Ship To
Booking PTD	Bar graph that shows the extended price of what was booked for the current period and previous 3 periods.	customer and Ship To
Contacts	Grid that displays contact name phone and e-mail for the Order contact, Ship To contact, and Bill To contact.	customer and Ship To
Customer Backlog	Grid that displays all open orders, with a status of Ordered, that have not been shipped. For each open order line, the report displays the amount of the item to be shipped and the net price.	customer, Ship To, and item
Invoices by Month	Bar graph that displays total invoice amounts by month for the last 12 months.	customer

Name	Description	For Current
On Time Shipments	Column chart that shows percent late vs. percent on time for the last 4 accounting periods, starting with the current period. The formula used to arrive at the Y-axis data is [number of lines with due date in the time period where line due date >= date shipped / number of lines with due date in time period]. Red indicates late; green indicates on time.	customer and Ship To
Price Breaks	Grid that shows break quantity and price, set up on the Customer Contract Prices form.	customer and item
Related Items	Grid that shows the item number and description for items that are related, as defined on the Related Items tab of the Items form.	item
Sales History with Margin Dollars	Grid that shows what has been sold to the customer over the last year, taking into account discounts that were applied. For each order, the net price, cost and margin are displayed.	customer and Ship To

Customer Orders

When this form is displayed, BI displays these metrics and reports:

Name	Description	For Current
Booking PTD	Bar chart that shows the extended price of what was booked for the current period and previous 3 periods.	customer and Ship To

Customers

When this form is displayed, BI displays these metrics and reports:

Name	Description	For Current
Accounts Receivable Aging	Grid that displays accounts receivable information. Includes the length of time the amounts have been outstanding. Categorizes receivables as current, 30 days, 60 days, 90 days, 120 days and over.	Bill To customer only
Actual vs Planned Shipments	Column chart that displays the actual orders shipped vs. the planned orders shipped for the current date. Actual, shown in red, means the ship date is equal to the current date. Planned, shown in green, means the due date is equal to the current date.	Bill To and all Ship To customers
Contacts	Grid that displays contact name phone and e-mail for the Bill To and Ship To contacts.	Bill To and all Ship To customers

Name	Description	For Current
Customer Backlog	Grid that displays all open orders, with a status of Ordered, that have not been shipped. For each open order line, the report displays the amount of the item to be shipped and the net price.	Bill To and all Ship To customers
Invoices by Month	Bar graph that displays total invoice amounts by month for the last 12 months.	Bill To customer only
On Time Shipments	Column chart that shows percent late vs. percent on time for the last 4 accounting periods, starting with the current period. The formula used to arrive at the Y-axis data is [number of lines with due date in the time period where line due date >= date shipped / number of lines with due date in time period]. Red indicates late; green indicates on time.	Bill To and all Ship To customers
Sales History with Margin Dollars	Grid that shows what has been sold to the customer over the last year, taking into account discounts that were applied. For each order, the net price, cost and margin are displayed.	Bill To and all Ship To customers

Items

When this form is displayed, BI displays these metrics and reports:

Name	Description	For Current
Inventory Across Sites	Grid that shows, for each site and warehouse, the quantity available. The unit of measure is displayed below the grid. This value should match the Qty Available on the Item Availability form.	item
Inventory Value by Warehouse	Grid that shows, for each warehouse, the value (in domestic currency).	item
Item on Hand	Grid that shows the quantity on hand at all warehouses, broken out by location.	item
Manufactured YTD	Grid that shows the manufactured YTD. Manufactured YTD is defined as Job Finish transactions for the calendar year.	item
On Time Receipts	Pie chart that shows the purchase orders that were received on time.	item
On Time Shipments	Column chart that shows percent late vs. percent on time for the last 4 accounting periods, starting with the current period. The formula used to arrive at the Y-axis data is [number of lines with due date in the time period where line due date >= date shipped / number of lines with due date in time period]. Red indicates late; green indicates on time.	item

Name	Description	For Current
Purchased YTD	Grid that shows, by warehouse, how much of this item has been purchased this year to date. This value should match the Purchased YTD on the Item/Warehouse form.	item
YTD Job Usage	Shows the quantity and unit of measure that has been issued to jobs for the calendar year to date.	item
Safety Stock Quantity	Grid that shows the safety stock currently maintained at each warehouse. Safety stock protects you from stock outages that result from unexpected customer demand or vendor shipment delays.	item
Sold YTD	Grid that shows, by warehouse, how much of this item has been sold this year to date. This value should match the Sold YTD on the Item/Warehouse form.	item
Transferred In YTD	Grid that shows, by warehouse, how much of this item has been transferred into each warehouse this year to date. This value should match the Transferred In YTD on the Item/Warehouse form.	item
Transferred Out YTD	Grid that shows, by warehouse, how much of this item has been transferred out of each warehouse this year to date. This value should match the Transferred Out YTD on the Item/Warehouse form.	item

Job Orders

When this form is displayed, BI displays these metrics and reports:

Name	Description	For Current
Labor - Planned vs. Actual	Column chart that shows planned vs. actual job labor costs, calculated in domestic currency.	job number and suffix
Material - Planned vs. Actual	Column chart that shows planned vs. actual job material costs, calculated in domestic currency.	job number and suffix
Operation Percent Complete	Grid that shows the operation and the percentage complete for that operation.	job number and suffix
Planned vs. Actual Total Costs	Column chart that shows planned vs. actual total costs, calculated in domestic currency. Total cost equals labor + material costs only.	job number and suffix

Purchase Orders Quick Entry

When this form is displayed, BI displays these metrics and reports:

Name	Description	For Current
AP Aging	Grid that displays accounts payable information. Includes the length of time the amounts have been outstanding. Age is determined by invoice date or due date, depending upon the Aging Basis specified in the A/P Parameters form. Payables are categorized as current, 30 days, 60 days, 90 days, 120 days and over.	vendor
Item on Hand	Grid that shows the quantity on hand at all warehouses, broken out by location.	vendor and item
On Time Receipts	Pie chart that displays the purchase orders that were received on time.	vendor
Past Due POs	Grid that displays, for each past due purchase order, the due date, purchase order/line/release, and extended costs.	vendor
Period To Date Paid	Bar graph that shows the amount paid in the current accounting period plus the 3 previous accounting periods, if applicable. The distribution date of the payment is used to determine if it falls within a certain accounting period.	vendor
PO Funds Committed	Grid that shows the vendor name and the committed amount for all purchase orders.	vendor
Price Breaks	Grid that shows break quantity and price, set up on the Vendor Contract Prices form. This uses the latest effective date that is earlier than the current date.	vendor and item
Purchase Order History	Grid that shows the cost of your purchase orders for the last 12 months. It does not include POs with a status of Planned.	vendor and item
Vendor Backlog	Grid that shows each open purchase order, the quantity ordered, and the extended price.	vendor

Projects

When this form is displayed, BI displays these metrics and reports:

Name	Description	For Current
Accumulated Cost	Stacked column chart that displays the cost to complete (top) and accumulated cost (bottom).	project
Cost Analysis by Project	Pie chart that summarizes actual cost, forecast cost and planned cost for all project cost codes.	project

Name	Description	For Current
Cost Code Analysis by Project	Grid that displays the cost code and the actual, forecast and budget cost for each cost code.	project
Invoiced	Column chart that displays the amount invoiced, in domestic currency.	project
Open vs. Completed Jobs	Bar chart that compares the number of open (red) jobs to the number of completed (green) jobs.	project

Vendors

When this form is displayed, BI displays these metrics and reports:

Name	Description	For Current
AP Aging	Grid that displays accounts payable information. Includes the length of time the amounts have been outstanding. Age is determined by invoice date or due date, depending upon the Aging Basis specified in the A/P Parameters form. Payables are categorized as current, 30 days, 60 days, 90 days, 120 days and over.	vendor
On Time Receipts	Pie chart that displays the purchase orders that were received on time.	vendor
Past Due POs	Grid that displays, for each past due purchase order, the due date, purchase order/line/release, and extended costs.	vendor
Period To Date Paid	Bar graph that shows the amount paid in the current accounting period plus the 3 previous accounting periods, if applicable. The distribution date of the payment is used to determine if it falls within a certain accounting period.	vendor
PO Funds Committed	Grid that shows the vendor name and the committed amount for all purchase orders.	vendor
Purchase Order History	Grid that shows the cost of your purchase orders for the last 12 months. It does not include POs with a status of Planned.	vendor and item
Vendor Backlog	Grid that shows each open purchase order, the quantity ordered, and the extended price.	vendor

Index