



Infor LN User Guide for Statistics

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About this document

This document describes the process to set up and use statistics in Sales and Procurement. Statistics provide an insight into the intake, turnover, and cancellation of orders and schedules.

Assumed knowledge

Although you need no detailed knowledge of the LN software to read this guide, general knowledge of the Infor LN functionality will help you understand this guide.

References

Use this guide as the primary reference for statistics. Use the current editions of these related references to research information that is not covered in this guide:

- *User Guide for Sales Orders U9845 US*
- *User Guide for Purchase Orders U9824 US*
- *User Guide for Purchase and Sales Schedules U9541 US*

How to read this document

This document is assembled from online Help topics. Text in italics followed by a page number represents a hyperlink to another section in this document.

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Chapter 1

Overview and procedure

1

Statistics

You can use Statistics to gain insight into the intake, turnover, and cancellation of orders and schedules. Statistics controls the activities that are required to define the desired format and layout for transferring historical data or actual data to statistical information. You can create user-defined statistical reports and displays to view this information, which facilitates data analysis.

You can also use Statistics to enter budgets. Budgets are used to compare the actual sales or purchases (statistics) with the estimated sales or purchases.

To use statistics in a company:

Step 1: Specify master data for statistics

Select these check boxes:

1. **Purchase/Sales Statistics (STA)** in the Implemented Software Components (tccom0100s000) session.
2. **Maintain Statistics** in the Purchase User Profiles (tdpur0143m000) session of Procurement.
3. **Maintain Statistics** in the Sales User Profiles (tdsls0139m000) session of Sales.

If no user profile (sales) or user profiles (purchase) is specified, a user is authorized to maintain the statistics.

Step 2: Specify levels for statistics

When updating the statistics, the sales, purchase and commission/rebate history is read and compressed to data in statistics. The level of compression depends on the statistical levels, as selected in the Statistics Parameters (tdsta0100m000) session.

Before you can select the statistical levels in the parameters, you must first specify the levels in the Statistics Level (tdsta0601m000) session. In this session, you must specify the levels on which you want to create/update the statistics for the level types **Purchase**, **Purchase Actual**, **Sales**, and **Sales Actual**. In the Statistics Level Attributes (tdsta0102m000) session, you can specify the level attributes (fields) that must be included in the statistical reports and overviews for the level types.

The **Sales** and **Purchase** levels determine which attributes are used for compressing the history data. Therefore, these statistical levels also determine the sort attributes you can select for the sort (see step 4). For example, if a sort is specified for both sales and purchase, you can select sales attributes and purchase attributes, such as sold-to BP (sales) and buy-from BP (purchase). However, the sales field must be present in the **Sales** level, and the purchase field must be present in the **Purchase** level before you can select it as a sort attribute.

The **Sales Actual** and **Purchase Actual** levels determine which history fields are overwritten by actual data if the **Actual Data** check box is selected when you update the statistics (see step 7). In this case, the attributes (fields) that are linked to these levels are not retrieved from the history data, but from the actual data for the item or the business partner.

If an attribute is not linked to a level, the statistics cannot be maintained or updated for that attribute. Data related to this attribute will be excluded from displays and reports.

Step 3: Specify parameters for statistics

After the statistical levels are specified, you can link the levels to the relevant parameter, such as **Sales Intake Level**, **Purchase Turnover Level**, and **Sales Actual Level** in the Statistics Parameters (tdsta0100m000) session. You must also specify the dates based on which the statistics are updated for the levels.

In the Statistics Parameters (tdsta0100m000) session, you can also specify the following:

- How parent business partner data is updated when statistical data is updated.
- How the gross profit percentage is calculated and displayed in statistics.
- The various periods of a year, including the period number, start date, and end date that are used in statistics.
- Whether detailed discounts must be recorded for purchase discounts, sales discounts, rebates, and commissions.
- Standard item codes to store and retrieve statistical data.

Step 4: Specify and activate sorts for statistics

In the Statistic Sorts (tdsta1600m000) session, specify sort codes, which are used to build a particular report or overview. You must indicate the type of statistical information (intake, turnover, cancellation) that must be kept for the sort and indicate whether budgets are allowed for the sort.

From this session, you can maintain the Statistics Sort Sequences (tdsta1101m000) session. In this session, you can select the sort attributes (fields) that are used to sort data in statistical reports and overviews.

With sort attributes, you can:

- Identify specific sequences for a selection of the level attributes, as specified in the Statistics Level (tdsta0601m000) session and as selected in the Statistics Parameters (tdsta0100m000) session.
- Fine-tune the level attributes, which can be regarded as a pre-selection from the database, for each individual statistics overview that you intend to build.

After specifying a sort, you must activate it before you can use it for a report or an overview. You can activate a sort directly in the Statistic Sorts (tdsta1600m000) session, or in the (De-)Activate Sorts (tdsta1200m000) session.

If the sort is set up for a budget, the sort need not be active to use it for a report or an overview. In addition, if you deactivate such a sort, the budget data is not deleted for the sort.

Step 5: Specify budgets

Optionally, a company can create budgets to compare with actual results, or to use them as a basis for planning in Enterprise Planning.

You can use the Budgets (tdsta2603m000) session to enter, maintain, and delete budgets for an active sort, year, and period. However, this is not a mandatory step in the procedure.

Before you create a new budget, you must first select a sort code. This choice will narrow down the data you can use in your budget. You can use the sort attributes as displayed in the Statistic Sorts (tdsta1600m000) session.

From this session, you can do the following:

- Maintain the Absolute Figures (tdsta2100m000) session, in which you can create or display detailed numbers for the budget in absolute figures.
- Maintain the Budget Percentages (tdsta2104m000) session, in which you can create or display detailed numbers for the budget in terms of percentages.

If the **Detailed Discount Specification** check box is selected in the Statistics Parameters (tdsta0100m000) session, from the Absolute Figures (tdsta2100m000) session or the Budget Percentages (tdsta2104m000) session, you can start the Sort Budget Data by Discount Type (tdsta2105m000) session to specify detailed discounts for sales and purchase discounts, rebates, or commissions.

Step 6: Specify a layout for statistics

Before you can print or display statistical data, you must link a sort code to a layout code and you must specify the layout for the data fields in the Statistics Layout (tdsta1610m000) session.

From this session, you can do the following:

- Maintain the Statistics Layout Column (tdsta1114m000) session. In this session, you can enter and view the column content, which defines the body of the report and what exactly is detailed in the report. If no column content is defined for the layout code, you cannot print or display statistical results.
- Maintain the Statistics Layout Content (tdsta1111m000) session. In this session, you can define the type of report that is printed: different types of statistics on one line, or a fixed type of statistics for each line.
- Maintain the Statistics Layout Selection (tdsta1112m000) session. In this session, you can select the data that is used and taken into account in the report calculation.
- Maintain the Statistics Layout Print/Page (tdsta1113m000) session. In this session, you can select the data that is actually printed on the report.

Step 7: Update statistics

Use the Update Statistics (tdsta2250m000) session to create or update the statistical files based on the history or the actual data.

If you decide to do a full update, the statistics are fully updated. Except for the budget data, all current statistical data is cleared and new statistics are created based on the current (history) data. You can also update the statistics based on new (history) data that was not taken into account before when updating the statistics.

Step 8: Display/Print statistics

Use the Sort Data by Layout (tdsta1615m000) session to display the statistical results for a combination of layout code and sort code.

From this session, you can do the following:

- View the data for the sort attributes (fields) that are linked to a combination of layout code and sort code in the Sort Attribute Data (tdsta1501m000) session.
- View the statistical results for a combination of layout code and sort code in absolute figures in the Figures by Layout / Sort (tdsta2500m000) session. The figures that are displayed depend on the statistics type.
- View the statistical results for a combination of layout code and sort code in absolute figures in the Figures by Layout / Sort (tdsta2500m000) session, only for the columns you entered on the Columns tab of the Statistics Layout (tdsta1610m000) session.
- Display the statistical results graphically.

Step 9: Print statistics

Use the Print Statistics (tdsta2400m000) session to print the statistical results.

From this session, you can do the following:

- View and maintain the data that is used and taken into account in the report calculation in the Statistics Layout Selection (tdsta1112m000) session.
- View and maintain the data that is printed on the report in the Statistics Layout Print/Page (tdsta1113m000) session.

Step 10: Archive and delete statistics

You can use the Archive/Delete Statistics (tdsta2250m100) session to transfer the statistics to an archiving file and/or to delete the statistics.

You can display the archived statistics and budgets under the company number as specified in the **Archiving Company** field of the Statistics Parameters (tdsta0100m000) session.

Appendix A

Glossary

A

budget

A plan that includes the budgeted quantities and/or amounts by period for the sorts selected; the budgeted or expected sales or purchase figures.

layout code

An identifying code and description of the layout properties of a report, such as paper size, font, range of data, column headings, and data.

level attribute

A data field whose information is updated and set aside for statistics overviews. It can be regarded as a pre-selection of statistics information, which can be fine-tuned later by means of sorts.

sort code

An identifying code and description of a set of data fields grouped in a sequence. These data fields are used in statistics reports and displays. When a report or display is generated, the fields are filled with data from the database and displayed in the report or display according to the sequence defined in the sort code.

user profile (sales)

The default data that is recorded by the user and influences the creation of sales quotations, sales contracts, sales orders, and sales schedules. This data determines the method of order entry, default values during order input, and so on.

user profiles (purchase)

The default data that is recorded by the user and influences the creation of purchase requisitions, requests-for-quotation, purchase contracts, purchase orders, purchase schedules, purchase releases, call-offs, and approval rules. This data determines the method of order entry, default values during order input, and so on.

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