



Performance Measurement Run Instructions

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About this document

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Chapter 1

Introduction to Infor LX

1

Overview of Infor LX

This topic contains information that pertains to all applications of the Infor LX product. This information enables you to perform the following tasks:

- Navigate through menus and screens
- Specify information in the fields on the screens
- Use the screen actions
- Access the online help text
- Become familiar with terms used throughout Infor LX

Navigation

The features described in the following paragraphs help you navigate within and between Infor LX screens and programs quickly and easily.

Menus

Use Infor LX menus to choose individual programs to process or view information. You can call individual applications directly from any menu.

Dates

Infor LX includes full support for dates up to and beyond the year 2000. Although most date fields display six characters, Infor LX stores the date as eight characters to include century information. Use Company Name and Date Format, SYS820, in the System Parameters Generation program, SYS800, to configure century dates and specify dates beyond 1999.

Attention key and quick access icon

The character-based user interface uses the attention key to directly access other programs, menus, and applications. On an Infor LX screen, press the Esc key.

The Webtop user interface uses the Quick Access icon to directly access programs. On an Infor LX screen, click the Quick Access icon.

You must have security authorization to use these features.

Look-up features

On the character-based user interface, a plus sign (+) indicates a prompt-capable field. Use F4 to display a look-up screen.

On the Webtop user interface, an arrow indicates a prompt-capable field. Click the arrow to display a look-up screen.

Most screens called from inquiry programs allow you to search for alphanumeric strings.

Remembered keys

Infor LX remembers certain key values, such as item number, salesperson, or container, in your workstation memory as you process information in certain programs. You can assign one of the following values to each field:

- 0. Infor LX automatically retrieves this value from remember key memory. Infor LX updates this value on a continual basis.
- 1. Infor LX automatically retrieves the value you specify in Display Remembered Keys, SYS080. It does not update the value from any other program.
- 2. Infor LX does not retrieve or update remembered key fields.

Use the Display Remembered Keys program, SYS080, to set up remembered keys.

Standard online help features

Many Infor LX programs display generic help text. Use F1 from within a field on the character-based user interface. Click the Show/Hide Help icon on the Webtop user interface. This generic help text includes help for standard line actions, standard screen actions, which are also called function keys or F keys, the run time parameter, and some screens types.

The information in the generic help text for line actions and screen actions in this document is not included in the help text for individual Infor LX programs and screens. If a line action or screen action other than those defined in the generic help text occurs in a program, the help text for that program describes the specific action.

Additional generic help text is stored in the SSARUNHT document for users of the character-based UI. You can print this document and the individual application run instructions, SSARUN01, SSARUN02, and so on, from the DOC menu on the IBM(R) iSeries(TM) in the character-based user interface.

Generic help text for line actions

Line actions

The following line actions are valid in numerous screens. They have the functions described in the following sections.

1=Create

Specify Create on the prompt line and a value in at least one key field to add new information to the file. The system displays maintenance screens on which you can specify the new data. The system prints the new data on the audit report.

Note: You cannot specify Create next to existing data.

1=Select

On a prompt screen, specify 1 to return the selected data to the original screen.

2=Revise

Specify Revise to change the information for a line. Specify 2 and a value in at least one key field or specify 2 next to a line. The audit report lists the change. If you specify Revise next to a line with inactive information, the system reactivates the information.

3=Copy

Specify Copy to copy existing information. You can specify 3 and a value for at least one key field or you can specify 3 next to a line. The system displays a maintenance screen on which you can specify new data and change existing data.

4=Delete

Specify Delete to deactivate the information on a line. You can specify 4 and a value in the key fields or you can specify 4 next to the line to delete. Use Revise to reactivate deleted information.

5=Display

Specify Display to view information. You can specify 5 and a value in the key fields or you can specify 5 next to a line.

6=Print

Specify Print to print information on the audit trail. You can specify 6 and a value in the key fields or you can specify 6 next to a line.

8=Position To

Specify Position To to move a line to the top of the list. You can specify 8 and a value in the key fields or you can specify 8 next to a line. The system repositions the list to begin with the requested line or, if the line does not exist, to the line that is next in sequence.

After you use the Position To feature, you can page down or you can use the Position To action with a different value, but you cannot page up. You can return to the top of the list if you specify Position To but do not specify a value in the key fields on the prompt line. On a prompt screen, display details matching the information you specified.

10=Search

On the top line of a prompt screen, use 10 and known field data to locate specific information.

Additional line actions

If a program contains additional line actions, see the line actions help text in that specific program for descriptions of those line actions.

Generic help text for screen actions

Many screen actions, also called F keys, perform the same function for every program or screen in Infor LX. Definitions for these screen actions follow.

Enter

Proceed to the next screen of a maintenance program. On the final screen, press Enter to update the file and return to the first screen of the program for additional maintenance activity.

Enter

Validate data in a screen. This function of Enter generally occurs in transaction programs that have an F6=Accept screen action, which saves the data on the screen.

Enter

Send the output from a report or listing program to an output queue for processing.

F1=Help

Display help text. This screen action applies to the character-based user interface only.

F3=Exit

Exit a program and do not record, update, or print the information you specified on the program screens.

F4=Prompt

Display a pop-up screen that lists existing values for the field. A plus (+) character denotes a prompt-capable field in the character-based user interface. In the Webtop user interface, the prompt-capable field has a small arrow that points to the right .

F5=Refresh

On a list screen, redisplay the screen to check the status of an executed function.

On a maintenance screen, redisplay the original values on the screen.

F6=Accept

Accept your changes and exit the program.

F7=Backward

Display previous lines, that is, those alphanumerically closer to A or those with earlier dates.

F8=Forward

Display additional lines, that is, those alphanumerically closer to Z or 9, or those with later dates.

F11=Fold

Display a folded view of the screen that contains additional information. Use F11 again to return the screen to its previous format.

F12=Cancel

Return to the previous screen and do not save values you specified on this screen. If you use F12 to return to a selection screen in a maintenance program, you cancel changes you made to any screens in the program.

F23=More Actions

Display additional line actions. If a screen has many screen actions, you may need to press F24 to see that there is an F23 action, which indicates that additional line actions are available.

F24=More Keys

Display additional function keys.

Generic help text for standard screens

Several categories of screens have identical functionality, though the content differs. These types of screens are explained in the following sections.

Generic help text for list screens

Many Infor LX programs contain screens with lists of information to specify for maintenance or inquiry. You have two options to specify the information to process on a list screen:

- Use the Act field and the key fields that appear at the top of the list.
- Specify a line action in the Act field of the line with the information you want to process.

After you make your entries, press Enter to perform the line action.

Generic help text for filter screens

Some Infor LX programs feature a filter screen, which you can access with F13. The filter screen enables you to filter the data to display. For example, if you use F13 in Warehouse Master Maintenance, INV110, you can display all records by warehouse or active records by warehouse or active records by description. Some filter screens provide sort or sequence options.

Generic help text for the run time parameter

Run Time Parameter (1,0):

Specify interactive to process the data in real time or batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Infor LX menus

This section describes the menus in Infor LX.

ERPLX main menu

The ERPLX Main Menu is the first of five master menus. You can access the four major Infor LX application groups from this menu:

- Configurable Enterprise Financials, CEF
- Multi-Mode Manufacturing, MMM
- Supply Chain Management, SCM
- Cross-Product Applications, XPA

Specify the abbreviated application group fast path code to access the master menu for the desired application group.

Configurable enterprise financials menu

Use the Configurable Enterprise Financials menu, CEF, to access Infor LX financial applications. Specify the application fast path code to access the desired application menu.

Multi-mode manufacturing master menu

Use the Multi-Mode Manufacturing master menu, MMM, to access Infor LX manufacturing applications. Specify the application fast path code to access the desired Infor LX application menu.

Supply chain management master menu

Use the Supply Chain Management master menu, SCM, to access Infor LX supply chain management applications. Specify the application fast path code to access the desired Infor LX application menu.

Cross-product application menu

Use the Cross Product Application menu, XPA, to access, analyze, and transmit information within Infor LX. Specify the application fast path code to access the desired Infor LX application menu.

Commonly used terms in Infor LX

Reference only

Reference only indicates that the system uses the information for the given field only for reference and does not use it for processing.

Extreme values by default

Some fields display extreme values by default. The system uses an alphanumeric or numeric extreme in these fields if you do not override the value. Use these default values, which are usually specified as ranges, to include all information in the range. The defaults values or any other values specified to designate a range do not have to be valid values in a database file.

(Y/blank)

If the screen displays (Y/blank) for a field, specify Y or Yes for a particular action to take place. Otherwise, leave the field blank. The screen displays (Y/N) if the field requires a Y or an N.

Ranges

Ranges refer to fields you can use to limit an inquiry or report or to display specific data. If there are multiple range fields in a program, you can tailor your inquiry or report to produce only the data you need.

Infor LX sorts the information alphanumerically. Therefore, the value in the *From* field must be a lower alphanumeric value than the value in the *To* field.

Infor LX usually inserts extreme values as defaults in the lower and upper fields. See the description for Extreme values by default. The entries you make in range fields do not have to be valid values in a database file.

Review the following suggestions to limit the information:

Specify the first value to include on the inquiry or report in the *From* field. Leave the *To* field blank to include all information to the end of the file. For example, you can print a report that starts with the customer number you specify in the *From* field and stops at the end of the Customer Master file.

Specify the last value to include on the inquiry or report in the *To* field. Leave the *From* field blank to start at the beginning of the file. For example, you can perform an inquiry that starts with the beginning of the Customer Master file and ends with the customer number you specify in the *To* field.

Specify the same value in both the *From* and *To* fields. For example, you can limit a display to one customer.

To include a group of items, specify a value in the *From* field and another value in the *To* field. For example, you can perform an inquiry that starts with the first of the month and ends with the last day of the month.

Alphanumeric

Alphanumeric refers to text that contains letters, letters and numbers together, and numbers arranged uniformly with special characters, such as dates in MM/DD/YY format. Infor LX sorts reports and inquiries in ascending alphanumeric order, unless indicated otherwise. Ascending order arranges items from the lowest value to the highest value. Alphanumeric text is sorted in ascending order according to the following rules:

- Special characters, such as \$, %, - (hyphen), comma, and period, come before all others
- Lowercase letters come before uppercase letters
- Uppercase letters come before numbers
- Numbers, that is, 0 through 9, come last

A/R, A/P

The documentation uses the abbreviations A/R and A/P to denote the terms accounts receivable and accounts payable, respectively. The abbreviations distinguish the terms from the corresponding program indicators of ACR, and ACP, which precede program numbers, for example, ACR500 and ACP150.

General instructions

This document is divided into the following sections:

- **How-to index**
This section is an alphabetical list of application functions. Next to each function is the number of the program to use.
- **Application overview**
This section provides a general description of the functions and highlights of the application.
- **Application flow**
This section describes the sequence in which to run the programs, and the functions of this application.
- **Menus**
This section displays all the menus associated with the application. The program numbers are in parentheses to the right of the program name.
- **Performance measurement values**
This section contains details about each of the predefined performance measures, including the formulas used to compute those values.

How-to Index

The following list provides a quick reference to the processes that you can perform in this application and the programs that you use for each process. The list also includes programs in related applications.

- Adjust tolerance days - PRF100
- Change user-defined measures - PRF100
- Change user-defined ratios - PRF100
- Change budget name - PRF100

- Close PRF period - PRF900
- Inquire PRF data - PRF300
- Load actuals to B budget - PRF930
- Load B to A budget - PRF920
- Maintain measurement budgets - PRF120
- Maintain measurement actuals - PRF130
- Maintain PRF periods - PRF140
- Maintain PRF product parameters - PRF100
- Print PRF bar graphs - PRF200
- Print PRF product parameters - PRF110
- Print PRF reports - PRF200
- Transfer actual data to budget B - PRF930
- Transfer budget data - PRF920

Application overview

This topic covers the functionality of the Performance Measurement application.

Predefined measures

The Performance Measurement application offers 20 pre-defined measurements or ratios that let you gauge the efficiency of various business activities. For example, measurements exist for on-time vendor delivery by item type, manufacturing performance, and routing efficiency. Other measurements gauge your production efficiency for critical areas of your business that range from when you first receive raw material to your shipping performance of the finished goods.

User-defined ratios and measures

You can establish up to three user-defined transaction type ratios and three user-defined measurements. The transaction type ratios compute a simple numeric, amount, or quantity ratio of any one transaction type total to any other transaction type total. The system computes the total transaction values for each transaction type over a given period and performs the ratio calculation.

The user-defined measurements are values that you manually input and maintain. No system calculations will generate the values for these fields; these fields are solely user-entered literals, and are not operable in any user-defined calculations. The system displays these measurements through the inquiry and report programs. Your business must assign descriptions for each of the ratios and measurements. These descriptions appear on various maintenance, inquiry, and report menus.

Budget maintenance

Performance Measurement offers two user-defined budgets for each measurement: Budget A and Budget B. These budgets are manually maintained and typically represent This Year Budget and Last Year Actual.

For some measurements, you must specify a planner code or an item type code to identify the budget. These codes enable the budget to be planner-code or item-type specific. The system also allows you to set up separate budgets for each warehouse.

Actual measurements and budget transfer

In addition to budgets, the system maintains actual measurements based on current manufacturing activity. You can generate these measurements at any time and update them during end-of-month processing in Period End Close, PRF900.

You can use Load B to A Budgets, PRF920, to transfer budget data and Load Actuals to B Budget, PRF930, to transfer actual data to the B Budget. You cannot transfer actual data directly to the A Budget. Typically, Budget A is defined as This Year and Budget B is defined as Last Year. This facilitates the Performance Inquiry, PRF300, and Performance Reports, PRF200, options.

Use the following procedure at year end to properly load Budget A and Budget B.

- Run Load Actuals to B Budget, PRF930, to load Actuals to Budget B. The system deletes old Budget B data.
- Run Load B to A Budgets, PRF920, to load Budget B to Budget A. The system deletes old Budget A data.
- Run PRF Budget Maintenance, PRF120, to modify Budget A data as required.

Performance measurement periods

The final set up step you must perform before you generate performance measurement values is to define your performance measurement periods. These are typically the same as the general ledger or financial calendar periods; however, the performance measurement periods are separate and distinct from the general ledger periods. The system uses these periods to separate performance measurement data so it can calculate values over a specific time period. These periods may be related to the general ledger periods, but only by nature. That is, there may be the same number of performance measurement periods as there are general ledger periods, but there is no software link between the two.

Viewing measurement values

You can use performance measurement data to produce either a table of values or a bar graph. Each option offers a side-by-side comparison of actual to budget values, by period.

Application flow

This topic covers maintenance programs, reports and inquiries, and close programs in the Performance Measurement application.

Maintenance programs

Run the following programs in sequence:

- Run Performance Measurement Parameters, PRF100, to define the performance measurement settings as well as the user-defined measurements and ratios. PRF Parameter List, PRF110, lists these parameters.
- Run Period Master Maintenance, PRF140, to define the performance measurement periods by warehouse.
- Run Budget Maintenance, PRF120, to directly load Budget A and Budget B.
- Run Actuals Maintenance, PRF130, to directly load actual values. You must load user-defined measurement actuals. The system never calculates these actuals.

Reports and inquiries

To view the calculated performance measurements, you can use either Performance Inquiry, PRF300, to view the values online, or Performance Reports, PRF200, to generate a hard copy of the results. PRF300 offers two report formats: bar graph and value table. Each format provides a side-by-side comparison of actual to budget values.

Close programs

Use the Period End Close program, PRF900, to generate performance measurement values for any open period. The program generates values at the warehouse/period/year level. After the program calculates these values, you can modify the values in PRF Actuals Maintenance, PRF130.

After you close the entire year, you can load budget B to budget A in PRF920 and then load the actuals to budget B in PRF930.

Menu PRF: performance measurement menu

From this menu, specify the appropriate menu option number to select a specific menu option. The names and ID numbers of the performance measurement programs appear on the Performance Measurement menu (PRF) in the order to perform the tasks, from start to finish. After you perform the preliminary setup steps, you do not need to return to those programs again except to change that data.

To access the menu for another application, specify the three-character sequence that identifies the product, such as CST for the Cost Accounting menu.

Performance measurement values

This topic describes the performance measurement values.

1. PRF Vendor Reject Percentage by Item Type:

This measurement counts the number of vendor reject transactions from the Transaction History file within the period. This measurement then counts the number of purchase order receipt transactions within the period and calculates a percentage of vendor reject transactions to the total number of purchase order receipt transactions. The system records this value to the appropriate performance measurement period. The system also calculates a reject percentage for each item type.

Calculation:

If we establish the following conventions:

A = Number of rejects in period (transactions set up to affect purchase orders through Transaction Effects Maintenance, INV150, and negative quantity), and

B = Number of receipts in period (transactions set up to affect Purchase Orders through Transaction Effects Maintenance, INV150, and positive quantity), then, the system calculates the measurement by the following method:

Vendor reject % = $(A/B) \times 100$

2. PRF Vendor Delivery Percentage by Item Type:

This measurement reads through the Transaction History file for purchase order receipts within the period - transactions for positive quantities that are set up to affect purchase orders. The system compares the transaction date with the requested date to compute the number of days that each transaction took place either before or after the request date. The system then compares this number with the days tolerance (plus/minus) in the Performance Measurement Parameter file to determine whether the purchase order was early or late. The system then calculates the percentage of on-time purchase order receipts to all P.O. receipts for the period and records this value to the appropriate performance measurement period. The system also calculates an on-time percentage for each item type.

3. PRF Component Availability Percentage by Item Type:

This measure reads the Transaction History file for issues to shop orders within the period and calculates the number of shop calendar days between the transaction date and the material need date. This measure then keeps a count of how many single and multiple issues are within the number of tolerance days (plus/minus) that you established in Performance Measurement Parameters, PRF100. Then, the system

computes a percentage of the issues that are within the tolerance limit to the total number of issues, calculates a similar percentage for each item type, and records the values to the appropriate performance measurement period.

This measure does not include negative issues or finished goods in the multiple issue receipts.

4. PRF Inventory Value by Item Type:

This measure reads through the Warehouse Inventory file and calculates the quantity of the various items on hand. The system adds the opening balance to all receipts and adjustments and then subtracts the issues from this amount. The system then multiplies the individual on hand quantities by the respective item's cost, adds the individual values, and computes a total inventory value. The system then summarizes the value by item type and records the total inventory value and the value of each item type to the Performance Measurement file. The system uses either the item's actual, standard, or frozen standard cost, depending on the type of cost you specified in PRF Parameter Maintenance, PRF100.

5. PRF Inventory Turns by Item Type:

This measure reads through the Inventory Warehouse file and calculates the quantity of the various items on hand. The system then multiplies the individual on hand quantities by the respective item's cost, adds the individual values, and computes a total inventory value. The system calculates the value for each item type. In addition, the system calculates a total for all types taken together.

The system then reads through the Transaction History file to determine the number and quantity for all issue transactions that are set up to affect issues or multiple issues within the period. The system then multiplies the issued quantities by the respective item's cost and summarizes these totals by item type.

The system uses either actual, standard, or frozen standard costs to determine these values, depending on the type of cost you specified to use in PRF Parameter Maintenance, PRF100.

With these two values, the system then calculates the number of inventory turns; the system multiplies the usage for each item type by the portion of the year and divides by the on-hand value for the item type. The system records these values to the appropriate performance measurement period and records an inventory turn value to the Performance Measurement file for the entire inventory.

Calculation:

Part of year = $365 / (\text{End date} - \text{Beginning period date} + 1)$

Inventory turns = $\text{Total issues} / \text{Total on hand} \times \text{Part of year}$

8. PRF Component Availability Percentage by Planner:

This measurement reads the Transaction History file for issues to shop orders within the period and calculates the number of shop calendar days between the transaction date and the material need date. The system keeps a count of the number of single or multiple issues that are within the number of tolerance days (plus/minus) that you specified in PRF Parameter Maintenance, PRF100. The system summarizes this total by planner code and then computes a percentage of shop order issues within the

tolerance to the total number of shop order issues for each planner. The system records these percentages to the appropriate performance measurement period and also records a percentage for the total number of issues to the Performance Measurement file.

This measure does not include negative issues or finished goods in multiple issue receipts in this calculation.

9. PRF Reschedule Reliability Percentage by Planner:

This measurement reads both the Shop Order file and the Purchase Order file for open orders and requisitions. The system compares the scheduled receipt due date for each of these orders, or requisitions, to the system date to determine if the order is past due. Then, the system calculates a percentage for each planner of the scheduled receipts that are past due to the total number of scheduled receipts and records this percentage to the appropriate performance measurement period. The system also computes and records a percentage for a total of all planners.

10. PRF Lead Time Violation % of Purchase Orders by Planner:

This measure reads through the Purchase Order file and calculates the number of days between the entered date and the due date of the purchase order. Then, the system compares the days difference with the lead time for the item, as recorded in the Item Master file. The system then calculates a percentage of purchase orders with the days difference less than the item's lead time versus the total number of purchase orders for each planner and records this value to the appropriate performance measurement period for each planner. The system also calculates a total for all planners and records the value in the Performance Measurement file.

Calculation:

If we establish the following conventions:

A = Total non-deleted Purchase Orders where the number of days between the release date and the due date is less than the lead time for that item (Item Master file).

B = Total non-deleted Purchase Orders

L.T. Violation Measurement = $(A/B) \times 100$

11. PRF Lead Time Violation % of Shop Orders by Planner:

This measure reads through the Shop Order file and calculates the number of shop order days between the release date and the due date for the shop orders. Then, the system compares the days difference with the lead time for the item, as recorded in the Item Master file. The system then calculates a percentage of shop orders with the days difference less than the item lead time versus the total number of shop orders for each planner and records this value to the appropriate performance measurement period for each planner. The system also calculates a total for all planners and records the value in the Performance Measurement file.

Calculation:

If we establish the following conventions:

A = Total non-deleted Shop Orders where the number of days between the release date and the due date is less than the lead time for that item (Item Master file).

B = Total non-deleted Shop Orders

L.T. Violation Measurement = $(A/B) \times 100$

12. PRF Total Cost by Transaction Effect Code:

This measure reads through the Transaction History file and multiplies the quantity of each transaction in the period by the respective item's cost to determine the total amount of the transactions for that period. The system then summarizes this measurement by transaction code and records the measurement to the appropriate performance measurement period. The system uses either the item's actual, standard, or frozen standard cost, depending on the type you specified to use in PRF Parameter Maintenance, PRF100.

14. Inventory Accuracy %:

Calculation:

If we establish the following conventions:

A = Number of cycle counts within the item type tolerance

B = Number of cycle counts within period (transaction must be set up for cycle counts in Transaction Effect Maintenance, INV150) then, the system calculates the value of this measure by the following equation:

Inventory Accuracy = $(A \times 100)/B$

15. PRF Master Production Schedule Performance Percentage:

This measurement reads the Transaction History file for shop order receipt transactions with positive values. These are transactions that are set up to affect shop orders within the period. The system then accesses the item Master file to determine whether the item is a master production scheduled item.

For MPS items, the system compares the actual receipt date with the shop order due date to get the number of work days between the two. The system compares this number with the number of days tolerance that you specified in PRF Parameter Maintenance, PRF100, to determine if the receipt was either early or late. The system calculates a percentage of on-time receipts to the total number of receipts and records this value to the Performance Measurement file.

This measure does not include negative receipts in the calculation. Furthermore, backflush transactions (multiple issue and receipt) must be finished goods to be included here.

16. PRF Manufacturing Performance Percentage:

This measurement reads through the Transaction History file for shop order receipt transactions with positive values. These are transactions that are set up to affect shop orders within the period. The system then accesses the Item Master file to determine whether the item is a master production scheduled item.

If the item is not an MPS item, the system compares the actual receipt date to the shop order due date and calculates the difference in days. The system then compares the days difference to the number of days tolerance you established in PRF Parameters Maintenance, PRF100, to determine if the receipt was either early or late. The system then calculates a percent of on-time receipts to the total number of receipts and records that value to the Performance Measurement file.

This measure does not include negative receipts in the calculation. Furthermore, backflush transactions (multiple issue and receipt) must be finished goods to be included here.

17. PRF Shipping Performance %:

This measure reads through the Transaction History file and compares the transaction date for all type B transactions to the period end dates to confirm that the transaction occurred during the specified period. Then, the system compares the transaction date with the request date plus or minus the tolerance days to compute the number of days that the actual shipment took place. This comparison determines if the transaction occurred within the target range. If the difference between the two dates is greater than the days tolerance (plus/minus) that you established in PRF Parameters Maintenance, PRF100, the shipment is counted as either early or late, respectively. The system then calculates a percentage of on-time shipments to total shipments for the period and records that value to the Performance Measurement file.

Transaction type B is reserved for shipments. See Transaction Effect Maintenance, INV150, for further details.

18, 19, and 20. PRF User-Defined Performance Ratios

You name, set up, and define each of these ratios to meet the needs of your business. Each of these measures reads the System Parameter file to retrieve the ratio transaction types within the period and reads the Transaction History file to accumulate the transaction totals for the transaction type. The system then computes a ratio of either a number, amount, or quantity, depending on the entries made for each respective ratio.

21. PRF Shipping Amount:

This measure reads through the Transaction History file and compares the invoice dates for all B transactions to the period end dates to determine if the invoice was issued during the specified period. The system keeps a running total of the period's invoice total amount and records the total amount to the Performance Measurement file.

22. PRF Booking Amount:

This measure reads through the Customer Order Line file and compares the order entry date for each line to the period end date to see if the order occurred during the specified period. The system processes lines even if the lines have been shipped.

The system processes regular order lines differently than it processes special lines:

Regular line: quantity X price

Special line: special charge amount

Deleted line: 0

The system keeps a running total of the order amount and records that value to the Performance Measurement file. If you run performance measurement by warehouse, the system includes the special lines in the warehouse specified in the order header, because special lines have no warehouse. The booking amount does not include the order header charge.

23. PRF Backlog Amount:

This measurement reads through the Customer Order Line files and keeps a running total of all open order amounts. The system uses both regular and special lines, but processes these lines differently:

Regular line: quantity X price

Special line: special charge rate

The system records this value to the Performance Measurement file. If you run performance measurement by warehouse, the header warehouse includes the special line, because special lines have no warehouse. Order header charge is not included in bookings amount.

24. PRF Backorder Amount:

This measure reads through the Warehouse Inventory file to determine the amount of items on hand. The on-hand inventory is consumed by active material allocations and customer line items in request date sequence. When no inventory remains, the system sums the remaining customer order lines at actual prices and records the value to the Performance Measurement file. The system skips order types 5, 6, 7, and 8 because these order types do not affect inventory.

25, 26, and 27. User Defined Performance Measures:

28. PRF Bill of Material Accuracy Percentage:

This measurement reads the Shop Order file for closed shop orders that were not previously processed by PRF. These shop orders cannot be for parent planning bill items. The system then compares the shop order release date to the effective date on the bill of material records and explodes through the

bill of material. The system compares the components on the Material Allocation file to the bill of material items effective on the shop order release date.

This measure ignores a record on the Material Allocation file with a zero issued quantity. If the bill of material contains a component that does not appear on the Material Requirement file, the bill of material is still considered accurate. A bill of material is considered inaccurate only if it does not contain a component that appears on the Material Allocations file. This measure also handles multi-level phantoms with or without inventory.

The measure is calculated by the following equation:

If we establish the following conventions,

A = Total Closed Shop Orders where each component is in the BOM, and

B = Total closed Shop Orders.

then Bill of Material Accuracy = $(A/B) \times 100$.

29. PRF Routing Accuracy Percent:

This measure reads through the Shop Order file for closed shop orders that were not previously processed by PRF. This measure then compares each operation for a shop order in the Shop Order Detail file with the entries on the Shop Floor Routing Master file to see if a matching record exists. The system checks the routing effective dates against the shop order release date to determine if the routing step was in effect at the time of the shop order and then calculates a percentage of the shop orders with matching operation detail records to the total number of closed shop orders.

It is possible to have a routing step and not have an operation on the shop order, but still count the shop order as accurate. The hours posted do not need to match. Shop orders with zero labor hours are not considered.

Calculation:

If we establish the following conventions:

A = Total closed shop orders where each operation with labor is in the item's routing (and which are effective at release date of the shop order), and

B = Total closed shop orders.

then, PRF Routing Accuracy Percent = $(A/B) \times 100$

You can specify which user-defined budget (A and B) to include, or to include both budgets on this report. The system supplies data for the desired budgets to give you a side-by-side comparison of the actual and budget values. If you print a bar graph with this report, the system supplies one graph for each budget that you include on the report. These graphs also provide side-by-side comparisons of actual and budget data.

To include both Budget A and Budget B on the report, leave the default values of Y in these fields. Otherwise, specify N to either, or to both, of these fields to exclude that type of information from the report. These are the only two valid entries for these fields.

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To include both Budget A and Budget B on the report, leave the default values of Y in these fields. Otherwise, specify N to either, or to both, of these fields to exclude that type of information from the report. These are the only two valid entries for these fields.

PRF parameter maintenance, PRF100D1

The performance measurement application lets you determine the types of costs the system uses to calculate the various measures. You select to use actual, standard, or frozen costs in PRF Parameter Maintenance, PRF100. You also establish other performance measurement parameters in this program.

Access: Menu PRF

Establish performance measurement parameters

Use the Performance Measurement Parameters screen, PRF100D1-01, to specify the parameters for performance measurement.

You can use the Transaction Effect Ratio fields to define three separate measurements to store in the system.

To calculate the user defined ratio, the system divides the ratio-of transaction effect value by the ratio-to transaction effect value. You can specify the value in number of transactions (NUM), amount of transactions specified in currency (AMT), or quantity of items in the transactions (QTY).

Field descriptions - PRF100-01

Fields	Description
Last Period Closed (2,0):	This field displays the number of the last period that was closed in Period End Close, PRF900. Because PRF900 automatically updates this entry, the default value is always the number of the previous performance measurement period. To override this entry, specify a number between 1 and 13.
Cost Set? (2,0):	Specify one of the 99 user-defined cost sets established in Cost Set Maintenance, CST140.

Budget Description A, B (10,A): Because the performance measurement application maintains two separate budgets for each measurement, assign names such as This Year and Last Year to these budgets. The system uses the entries that you make in these fields to identify the budgets in the maintenance and inquiry programs, and on printed reports.

A menu option exists that allows you to load budget B to budget A. Such a transfer is common at the year end when the budget that was formerly the current year budget becomes last year's budget. If you need to transfer data in a similar fashion, let budget B contain the more recent budget.

Measure by Warehouse? (1,A): Indicate whether to run performance measurement by warehouse.

Actuals Year (2,0): Indicate the year from which to enter actual data.

Tolerance Days plus, minus (3,0): Specify a range of days for five separate measures so that when the system calculates measures for a specific date, it uses a span of days as a basis to determine early, on time, and late performance rather than using only one day as a basis. Specify both plus and minus days. Plus and minus days are the number of days that a delivery, receipt, or other event can take place either before or after a scheduled date, respectively, and still be considered as having taken place on-time.

- Plus means late
- Minus means early

For example, you might allow vendors a tolerance of two days before scheduled date of delivery and a one day tolerance for late delivery. Therefore, you establish a plus entry of 1 and a minus entry of 2. To calculate the vendor performance measurement, the system considers all deliveries that occurred from two work days before and two days after the scheduled date as on-time deliveries. The system considers vendor deliveries that occurred outside of this span of days as either early or late.

Specifically, you must establish both plus and minus entries for each of the following five performance measures.

- For MPS Performance
- For Manufacturing

The plus and minus entries determine the days tolerance used to calculate a percentage of on-time receipts to the total number of receipts. That is, the system uses the tolerance to determine the percentage of receipts that occurred near their schedule date relative to those that were not received as scheduled.

- For Vendor Delivery
- For Shipping Performance

The plus and minus entries determine the days tolerance used to calculate a percentage of on-time purchase order receipts or deliveries to the total number of receipts or deliveries that occurred during that month. This measurement does not include days set up in Shop Calendar Maintenance, SFC140, as weekends, holidays, or shutdowns.

- For Component Issues

The plus and minus entries determine the days tolerance used to calculate the number of transactions that occurred within the tolerance of their schedule date.

Transaction Effect #1, #2, #3, Ratio of (2,A): Specify the transaction effect code for the transaction type to use as the numerator for the user-defined ratio. The system divides the total of the transactions specified here by the value in the related Ratio To field.

Transaction Effect #1, #2, #3, Ratio to (2,A): Specify the transaction effect code for the transaction type to use as the denominator for the user-defined ratio. The system uses the value specified here as the divisor for the value in the related Ratio Of field.

Num Amt Qty (1,A): Specify the type of measurement represented by the user-defined ratio. Use one of the following values:

- N, Number of transactions
- A, Amount of transactions stated in currency
- Q, Quantity of items in the transaction stated in stocking unit of measure

Ratio Description #1, #2, #3 (30,A): Specify a description for each of the user-defined ratios that you established.

Measure #1, #2, #3: Specify a description for each of three user defined values to enter and accumulate in PRF Actuals Maintenance, PRF130, for user defined measurements. Infor LX performs no calculations against these values.

Screen actions - PRF100-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

PRF parameter list, PRF110D

After you establish your performance measurement parameters in PRF Parameter Maintenance, PRF100, you can use PRF Parameter List to generate a printed list of the parameters.

Access: Menu PRF

Print a list of PRF parameters

When you select this menu option, the system displays the Print Performance Measurements screen, PRF110D-01.

Field descriptions - PRF110-01

Fields	Description
Run Time Parameter (1,0):	Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - PRF110-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

PRF budget maintenance, PRF120D1

Use this program to establish budgets for your individual measurements. These budgets can contain amount, quantity, or percentage values. You can maintain both budgets A and B from the same screen, which displays the actual values for the specified measure.

Access: Menu PRF

Specify criteria to establish budgets

Use the Budget Maintenance screen, PRF120D1-01, to establish a budget for your individual performance measurements.

This screen displays the 26 available performance measures. These measures are organized into four separate groups. This grouping illustrates that for some of the measures you must specify additional data before you can proceed to the next screen and perform budget maintenance.

Field descriptions - PRF120-01

Fields	Description
Item Type (1,A):	For performance measures 1 through 5, specify an item type code. You initially define these codes in Item Type Master Maintenance, INV171, and assign the codes to individual items in IDF Enterprise Item.

If the budget applies to all item types, specify an asterisk (*) in this field. Otherwise, specify a valid item type number.

Planner Code (3,A):

For performance measures 8 through 11, specify a planner code. Planner codes allow you to set up many budgets for the same performance measure. For example, two or more different managers can establish their own budget and they can, by using unique planner codes, identify separate budgets.

To make changes that affect all budgets for the specified performance measurement regardless of planner code, specify an asterisk (*) in this field. Leave this field blank to establish a budget; blank is a valid planner code.

Transaction Effect Code (2,A):

To update the Total Amount at Cost budget, specify a transaction effect code. You initially define transaction effect codes in Transaction Effect Maintenance, INV150.

Select Measurement (2,0):

To specify the performance measurement to maintain, specify the desired measurement number. This screen displays the available measures. For some measurements, that is, 1 - 5, 8 - 11, and 12, you must complete at least one other field, as previously described.

Warehouse (3,A):

The system displays this field only if you specified that performance measurement runs by warehouse. You set the warehouse parameter in PRF Parameter Maintenance, PRF100.

If the Warehouse parameter is set to Y in PRF Parameter Maintenance, PRF100, you must specify a valid warehouse code before you can maintain the budget for any measurement. You set up warehouse codes in Warehouse Master Maintenance, INV110.

When you run performance measurement by warehouse, the system checks your user's ID for warehouse security. You set up warehouse security in Infor LX Security Maintenance, SYS600.

Screen actions - PRF120-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Add or maintain budget information

When you continue with budget maintenance, the system displays the Budget Maintenance screen, PRF120-02. The heading at the top of the screen displays the name of the performance measurement that you selected on the previous screen.

Field descriptions - PRF120-02

Fields	Description
Budget A Amount (15,5):	The system displays the budget name you specified for Budget A over this column of input-capable fields. To specify a budget value for each period, position the cursor in the desired field. The system displays the respective period numbers on the left of the screen.
Budget B Amount (15,5):	The system displays the budget name you specified for Budget B over this column of input-capable fields. To specify a budget value for each period, position the cursor in the desired field. The system displays the respective period numbers on the left of the screen.

Screen actions - PRF120-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

PRF actuals maintenance, PRF130D1

Just as the PRF Budget Maintenance program, PRF120, allows you to update budget data for each of the performance measurements, the PRF Actuals Maintenance program lets you maintain the performance measurement data that results directly from processing actual manufacturing activity.

Access: Menu PRF

Specify criteria to maintain actual data

The Actuals Maintenance screen, PRF130D1-01, displays the 26 available performance measures. These measures are organized on the screen in four separate groups. This grouping illustrates that, for some of the measures, you must specify additional data before you can proceed to the next screen and perform budget maintenance.

Field descriptions - PRF130-01

Fields	Description
Enter Item Type (1,A):	<p>For performance measures 1 through 5, specify an item type code. You initially define these codes in Item Type Master Maintenance, INV171 and assign the codes to individual items in IDF Enterprise Item.</p> <p>If the changes apply to all item types, specify an asterisk (*) in this field. Otherwise, specify a valid item type number.</p>
Enter Planner Code (3,A):	<p>For performance measures 8 through 11, specify a planner code. Planner codes allow different managers to adjust their performance measurement data separately, to tailor them to their own particular needs and not affect actual performance measurement data for other managers or planners.</p> <p>To specify changes that affect all actual performance measurement data, regardless of planner codes that keep the sets of managers' data separate,</p>

specify *** in this field. Leave this field blank to maintain actual performance measures; a blank is a valid planner code.

Enter Transaction Effect Code (2,A): To update the total amount at cost measure, specify a valid transaction effect code. You initially define transaction effect codes in Transaction Effect Maintenance, INV150.

Select Measurement (2,0): To specify the performance measurement to maintain, specify the desired measurement number. This screen displays the available measures. For some measurements, that is, 1 - 5, 8 - 11, and 12, you must complete at least one other field, as previously described.

Warehouse (3,A): The system displays this field only if you specified that performance measurement runs by warehouse. You specify the warehouse parameter in PRF Parameter Maintenance, PRF100.

If the Warehouse parameter in PRF Parameter Maintenance, PRF100D1, is set to Y, you must specify a valid warehouse code before you can maintain the budget for any measurement. You set up warehouse codes in Warehouse Master Maintenance, INV110.

When you run performance measurement by warehouse, the system checks your user's ID for warehouse security. Set up warehouse security in Infor LX Security Maintenance, SYS600.

Screen actions - PRF130-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Add or maintain actuals information

When you continue with actual maintenance, the system displays the Actual Maintenance screen, PRF130-01. The heading at the top of the screen displays the name of the performance measurement that you selected on the previous screen.

Field descriptions - PRF130-02

Fields	Description
Actual (15,5):	<p>This column contains the performance measurement data that results from actual manufacturing activity. To change the entries in this column, position the cursor in the desired field and specify the new data. Each of these fields represents a performance measurement for a period. The period numbers appear on the left.</p> <p>To update the actuals with the changes you specified, press Enter. The system then records your changes to update the Performance Measurement file.</p>

Screen actions - PRF130-02

Commands	Description
Standard screen actions	<p>All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.</p>

PRF period master maintenance, PRF140D1

Use this program to define valid periods for the Performance Measurement application. You use these periods only for the Performance Measurement application; these periods are separate from all other applications, including Configurable Ledger (CLD). Period data for this product is stored on the Performance Measurement Period Master file.

You can establish up to 13 periods for any year. Entries made from this program determine which periods are valid and which periods are either open or closed. Valid periods are those periods that fall within the range of periods defined from this program. You can set up multiple years or just one year.

If you run performance measurements by warehouse, each year that you define is uniquely identified by warehouse code and the year.

The Period Master Maintenance program is available from the Performance Measurement menu (PRF). The program will produce a panel, that lets you specify the warehouse and year.

Access: Menu PRF

Specify period warehouse and year

Use the Period Master Maintenance screen, PRF140D1-02, to specify the warehouse and period.

Field descriptions - PRF140-01

Fields	Description
Warehouse (3,A):	<p>The system displays this field only if you run performance measurement by warehouse. You specify whether to run performance measurement by warehouse in PRF Parameters, PRF100.</p> <p>This code, along with the fiscal year entry, uniquely identify the period master records to maintain.</p> <p>The system performs a security check on your user's ID to verify that you can change information for this warehouse. You maintain user security in Infor LX Security Maintenance, SYS600.</p>
Fiscal Year (2,0):	Specify a year for the period master. This entry, along with the warehouse code uniquely identify the period master.

Screen actions - PRF140-01

Commands	Description
F9=Create	Select create mode.
F10=Revise	Select revise mode.
F21=Delete	Select delete mode.
	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Add or maintain periods for a fiscal year

When you continue with period master maintenance, the system displays the Period Master Maintenance detail screen, PRF140D1-01. Use this screen to add or update periods for the fiscal year.

Field descriptions - PRF140-02

Fields	Description
Start Date (6,0):	Specify a start date only for the first period. The system uses the end dates for the remaining periods to calculate the respective period start dates.
End Date (6,0):	<p>The End Date is the last day of the corresponding period. Specify a period end date and specify a value in the Period Open field to designate that period as either open or closed. The system automatically calculates the start date for all but the very first period of the year.</p> <p>You do not need to define all 13 periods. Define as many as you want. For example, to define quarterly periods, define four periods.</p>
Period Open (1,A):	Specify whether a given period is open or closed. You can post actual performance measurements only to open periods. To designate a period as open, specify Y in the Period Open field displayed immediately to the right of the desired period ending date. To indicate that a period is closed, specify N in the period's Period Open field.

Screen actions - PRF140-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

PRF period end close, PRF900D

After you accumulate transactions for a given period and you want to post the performance measures to lock in values that will not be affected further by actual transactions, you must run PRF Period End Close, PRF900, to close that performance measurement period.

The PRF Period End Close program creates a performance measurement record that is uniquely identified by period number and warehouse code. This record contains each of the performance measurements for that period.

We recommend that you run PRF900 prior to the following programs:

- Shop Costing Post/Close, CST900
- Shop Order Close, SFC900
- A/R Period Close, ACR900

- Inventory Month & Yr End Close, INV900
- Month End Close, PUR900

However, it is not imperative that you run PRF900 before you run CST900 or SFC900. You must run both SFC900 and PRF900 for a deletion of shop orders to occur.

Access: Menu PRF

Close a performance measurement period

Use the Performance Measurement Period Close screen, PRF900D-01, to close a performance measurement period.

Field descriptions - PRF900-01

Fields	Description
Is the period ready to be closed? (3,A):	You must specify YES to confirm that you want to perform the period close. To exit the program without closing the period, specify NO and press Enter. You can also press F3 to exit without closing.
Enter the Warehouse (3,A):	<p>If you run performance measurement by warehouse, specify a warehouse for the closing. In fact, the system displays this field only if performance measurement runs by warehouse, which you specify in Parameter Maintenance, PRF100.</p> <p>When you execute this program, the system first verifies the user's ID for security clearance. Your security officer sets up warehouse security in Infor LX Security Maintenance, SYS600. This security determines which users can adjust or otherwise affect warehouse data.</p>
Enter the Year (4,0):	Specify a year for the closing. Specify a number that represents the desired year, for example, 90 = 1990. There must be a period master defined for this year and warehouse. You can update performance measurement period data in PRF Period Master Maintenance, PRF140.
Enter the Period (2,0):	Specify the period to close. This period must be defined for the year specified in the previous field.
Purge Shop Order records? (1,0):	Specify 1 = Yes to purge shop orders as part of the shop order close process. Specify 0 = No to close the month without purging shop order records.
Run Time Parameter (1,0):	Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - PRF900-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Load B to A budgets, PRF920D

At some point during the year, you may want to transfer performance data from one budget to the other. If you perform this transfer, the system overwrites the data from the budget to receive the transferred information, and duplicates and stores the remaining budget information in the available budget records. Afterwards, you can specify new budget data and store the data in the budget from which you duplicated the data.

Typically, such a transfer takes place at the end of a year, when you must transfer actual data for the current year into a budget and create records to make this information available. Because the system lets you transfer data from Budget B to Budget A, new data is typically stored in Budget B. You can transfer actual data into Budget B in the Load Actuals to B Budget program, PRF930.

However, to preserve the original data from Budget B when you load actual values, you must execute the Load B Budget to A Budget program, PRF920, before you transfer the actual value data. Because of these relationships between budget transfers and actual loading, Budget A is normally designated to contain older data than Budget B, though this is not necessary.

If you perform this transfer program, the system transfers data for all performance measures simultaneously. You cannot selectively transfer budgets for only a few measures and leave the remaining performance measurement budgets untouched.

Access: Menu PRF

Transfer performance data from one budget to another

Use the Load B Budget to A Budget screen, PRF920D-01, to transfer performance data from one budget to another.

 Field descriptions - PRF920D-01

Fields	Description
To Load (Budget B) to (Budget A):	The system displays the budget names that you established in PRF Parameter Maintenance, PRF100, in place of the terms Budget B and Budget A.
Clear Budget B? (3,A):	After you transfer the Budget B data to Budget A, you can clear the storage records for Budget B to prevent confusion that might arise from two separate budgets with different names that contain identical data. To clear Budget B records, specify YES. Otherwise, you can specify NO to preserve the data in Budget B. If you do not clear the Budget B fields, you will have identical information in both Budget B and Budget A.
Warehouse (3,A):	<p>The system displays this field only if you run performance measurement by warehouse. You determine whether to run performance measurement by warehouse in PRF Parameter Maintenance, PRF100.</p> <p>Specify a warehouse code so the system can select the appropriate budgets.</p>

Screen actions - PRF920D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

Load actuals to B budget, PRF930D

This program lets you transfer actual performance measures to a budget so you can use these actual measurements to guide your expectations of future activity. After you load the actual measures to a budget, you can begin to generate new actual data. Often, the need to transfer actual measurements to budgets occurs at a period of the year end.

Because this program transfers actual performance measurements to the B Budget, the system eliminates any data that is previously stored in the B Budget to accommodate the newly loaded data. However, before you execute this program, you can use the Load B Budget to A Budget program, PRF920, to preserve the Budget B data. If you perform the budget transfer program, the system eliminates the data that was previously stored in Budget A to make room for the transferred data.

This program transfers actual performance measures for all 26 measures to their respective B Budgets. You must include all measurements; you cannot include only some of the measurements.

Access: Menu PRF

Transfer actual performance measurements to a budget

Use the Load Actuals to B Budget screen to transfer actual performance measures to a budget.

Field descriptions - PRF930-01

Fields	Description
Warehouse (3,A):	<p>The system displays this field only if you run performance measurement by warehouse. You determine whether to run the performance measurement in the warehouse parameter in PRF Parameter Maintenance, PRF100.</p> <p>Specify a warehouse code so the system can select the appropriate budgets. You set up warehouse codes in Warehouse Master Maintenance, INV110.</p>
Run Time Parameter (1,0):	<p>Specify Interactive to process the data in real time or Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.</p>

Screen actions - PRF930-01

Commands	Description
Standard screen actions	<p>All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.</p>

Performance reports, PRF200C

You can use this program to produce a performance measurement report that contains actual as well as budget information.

Access: Menu PRF

Specify criteria for a performance measurement report

Use the Performance Measurement Report screen, PRF201-01, to specify the criteria for a performance measurement report.

Field descriptions - PRF201-01

Fields	Description
Enter Item Type (1,A):	<p>For performance measures 1 through 5, specify an item type code. You initially define these codes in Item Type Master Maintenance, INV171 and assign the codes to individual items in IDF Enterprise Item.</p> <p>To include all item types on the report, specify an asterisk (*) in this field. Otherwise, specify a valid item type number.</p>
Enter Planner Code (3,A):	<p>For performance measures 8 through 11, specify a planner code. Planner codes allow different managers to adjust their performance measurement data separately, to tailor the measurements to their own particular needs and not affect actual performance measurement data for other managers or planners.</p> <p>To include information for all planners on the report, regardless of the planner code that keeps the sets of data separate, specify *** in this field. A blank in this field is a valid planner code.</p>
Enter Transaction Effect Code (2,A):	<p>To include the Total Amount at Cost measurement on the report, specify a valid transaction effect code. You initially define transaction effect codes in Transaction Effect Maintenance, INV150.</p>
Select Report (2,0):	<p>To specify the performance measurement to inquire about, specify the desired measurement number. The screen displays the available measures. For some measurements, that is 1 - 5, 8 - 11, and 12, you must complete at least one other field, as previously described.</p>
Warehouse (3,A):	<p>The system displays this field only if you specified that performance measurement runs by warehouse. You set the warehouse parameter in PRF Parameter Maintenance, PRF100.</p> <p>If the Warehouse parameter in PRF Parameter Maintenance, PRF100D1, is set to Y, you must specify a valid warehouse code before you can maintain the budget for any measurement. You set up warehouse codes in Warehouse Master Maintenance, INV110.</p> <p>If you run performance measurement by warehouse, the system checks your user's ID for warehouse security. You set up warehouse security in Infor LX Security Maintenance, SYS600. The system includes only those performance measures for the specified warehouse.</p>
Print Bar Graphs? (1,A):	<p>By default, this report produces numerical values for the specified measurement. For a graphical representation of these numbers, accept the default</p>

value of Y. Otherwise, specify N to suppress the printing of the bar graph. These are the only two valid entries for this field.

If the value is negative or zero, the program does not print a graph.

Budget A (User Defined) (1,A):

You define Budget A and Budget B, the last two fields on this screen, on the Performance Measurement Parameters screen, PRF100-01. Use this field to specify that the budget you defined as Budget A prints on this report. If you specify that both Budget A and Budget B print, the system supplies data for the desired budgets to give you a side-by-side comparison. If you print a bar graph with this report, the system supplies one graph for each budget, Budget A or Budget B, that you include on the report.

To include both Budget A and Budget B on the report, leave the default values of Y in the two fields. Otherwise, specify N to exclude the information from the report. These are the only two valid entries for this field.

Budget B (User Defined) (1,A):

You define Budget A and Budget B, the last two fields on this screen, on the Performance Measurement Parameters screen, PRF100-01. Use this field to specify that the budget you defined as Budget B prints on this report. If you specify that both Budget A and Budget B print, the system supplies data for the desired budgets to give you a side-by-side comparison. If you print a bar graph with this report, the system supplies one graph for each budget that you include on the report.

To include both Budget A and Budget B on the report, leave the default values of Y in the two fields. Otherwise, specify N to exclude the information from the report. These are the only two valid entries for this field.

Screen actions - PRF201-01

Commands	Description
F18=Interactive	Process interactively.

All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 14)* in the overview information in this document.

Performance inquiry, PRF300C

This program offers you an online view of the type of information that the performance measurement report includes. You generate the report in Performance Reports, PRF200.

Access: Menu PRF

Select a performance measurement to view

Use the Performance Measurement Inquiries screen, PRF300-01, to specify the criteria to inquire about performance measurements.

Field descriptions - PRF300-01

Fields	Description
Enter Item Type (1,A):	<p>For performance measures 1 through 5, specify an item type code. You initially define these codes in Item Type Master Maintenance, INV171, and assign the codes to individual items in IDF Enterprise Item.</p> <p>To include all item types on the inquiry, specify an asterisk (*) in this field. Otherwise, specify a valid item type number.</p>
Enter Planner Code (3,A):	<p>For performance measures 8 through 11, specify a planner code. Planner codes allow different managers to adjust their performance measurement data separately, to tailor the measurements to their own particular needs and not affect actual performance measurement data for other managers or planners.</p> <p>To include information for all planners on the inquiry, regardless of the planner code that keeps the sets of data separate, specify *** in this field. A blank in this field is a valid planner code.</p>
Enter Transaction Effect Code (2,A):	<p>To produce an inquiry of the total amount at cost, specify a valid transaction effect code. You initially define transaction effect codes in Transaction Effect Maintenance, INV150.</p>

Select Inquiry (2,0): To specify the performance measurement to inquire about, specify the measurement number. The screen displays the available measures. For some measurements, that is. 1 - 5, 8 - 11, and 12, you must complete at least one other field, as previously described.

Warehouse (3,A): The system displays this field only if you specified that performance measurement runs by warehouse. You set the warehouse parameter in PRF Parameter Maintenance, PRF100.

If the Warehouse parameter in PRF Parameter Maintenance, PRF100D1, is set to Y, you must specify a valid warehouse code before you can maintain the budget for any measurement. You set up warehouse codes in Warehouse Master Maintenance, INV110.

If you run performance measurement by warehouse, the system checks your user's ID for warehouse security. You set up warehouse security in Infor LX Security Maintenance, SYS600. The system includes only those performance measures for the specified warehouse.

Screen actions - PRF300-01

Commands	Description
F15=Display Values	Display performance measurement values. All other screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

View actual vs. budget data

When you choose F15, Display Values, on the Performance Measurement Inquiries screen, PRF300-01, the system displays a table that offers you a side-by-side comparison of the actual performance measurement values to both Budget A and Budget B values.

Screen actions - PRF300-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

View a graph with actual vs. budget data

When you continue on the Performance Measurement Inquiries screen, PRF300-01, the system displays a bar chart with actual vs. budget data.

Screen actions - PRF301-01

Commands	Description
F14=New Measurement	Perform a new measurement.
F15=Values	Display performance measurement values. All other screen actions on this screen perform standard Infor LX functions. See <i>Generic help text for screen actions (p. 14)</i> in the overview information in this document.

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