



Infor PLM Accelerate 11.0 - Self-Service Reporting User Guide

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Contents

- Intended audience 4
- Related documents 4
- Contacting Infor..... 4
- Chapter 1. Overview 5
 - Report Components 5
- Chapter 2. Creating, Sharing and Saving Reports 7
 - Report Designer overview 7
 - Process of creating a new report..... 8
- Chapter 3. Running Reports 11
- Chapter 4. Sample Report Walkthrough..... 12

About this guide

This document provides information on how to install, configure and logging into the Infor PLM Accelerate software.

Intended audience

This guide is intended for system administrators. This document assumes that you have at least some knowledge in:

- System architecture and function for your Infor system
- SQL Server database

For the most up-to-date list of software and hardware requirements for Infor products, see the documentation for your system.

Related documents

You can find the documents in the product documentation section of the Infor Xtreme Support portal, as described in the "Contacting Infor" section below.

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at www.infor.com/inforxtreme.

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1. Overview

Self-Service Reporting is a capability within Infor PLM Accelerate that enables users, including non-Administrative users, to create, save, run and share reports on the Items they have access to. Users can only see the data they have permission to and export the reports to various formats. Users can build charts and graphs into the reports, perform aggregation functions such as Count, Group, Minimum and Maximum, group data visually, and other common reporting functions using a wizard driven interface.

Report Components

A report can contain several sections and the sections in each report can be reordered according to your preference. Every component displayed above is not required in a report. Some reports may contain several sections (report detail and charts) while others may only contain one or two.

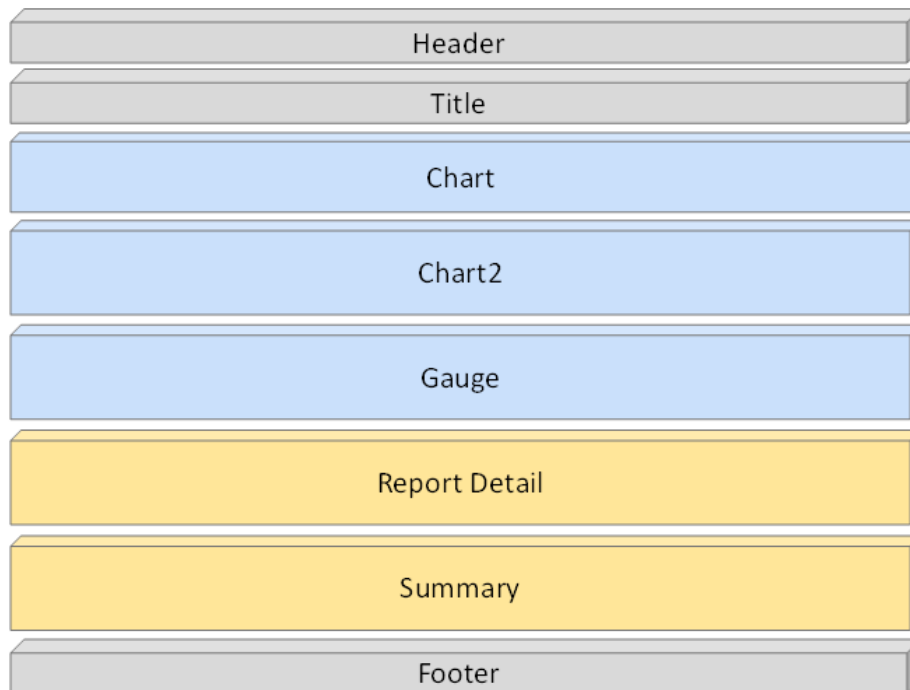


Figure 1.

- **Header:** Report Header for the report shown at the top of each page.
- **Title:** Title for the overall report. Note that each report component may also have its own title.
- **Chart:** A bar, pie, trend or funnel chart.
- **Chart2:** A second bar, pie, trend or funnel chart in the same report.
- **Gauge:** A dashboard that shows more gauge controls.
- **Report Detail:** The detail data of the report listed in columns of various styles.

- **Summary:** Typically a condensed summary of the report details using calculations to quickly summarize the data.
- **Footer:** Text that appears at the bottom of every report page.

The following is a sample generated report

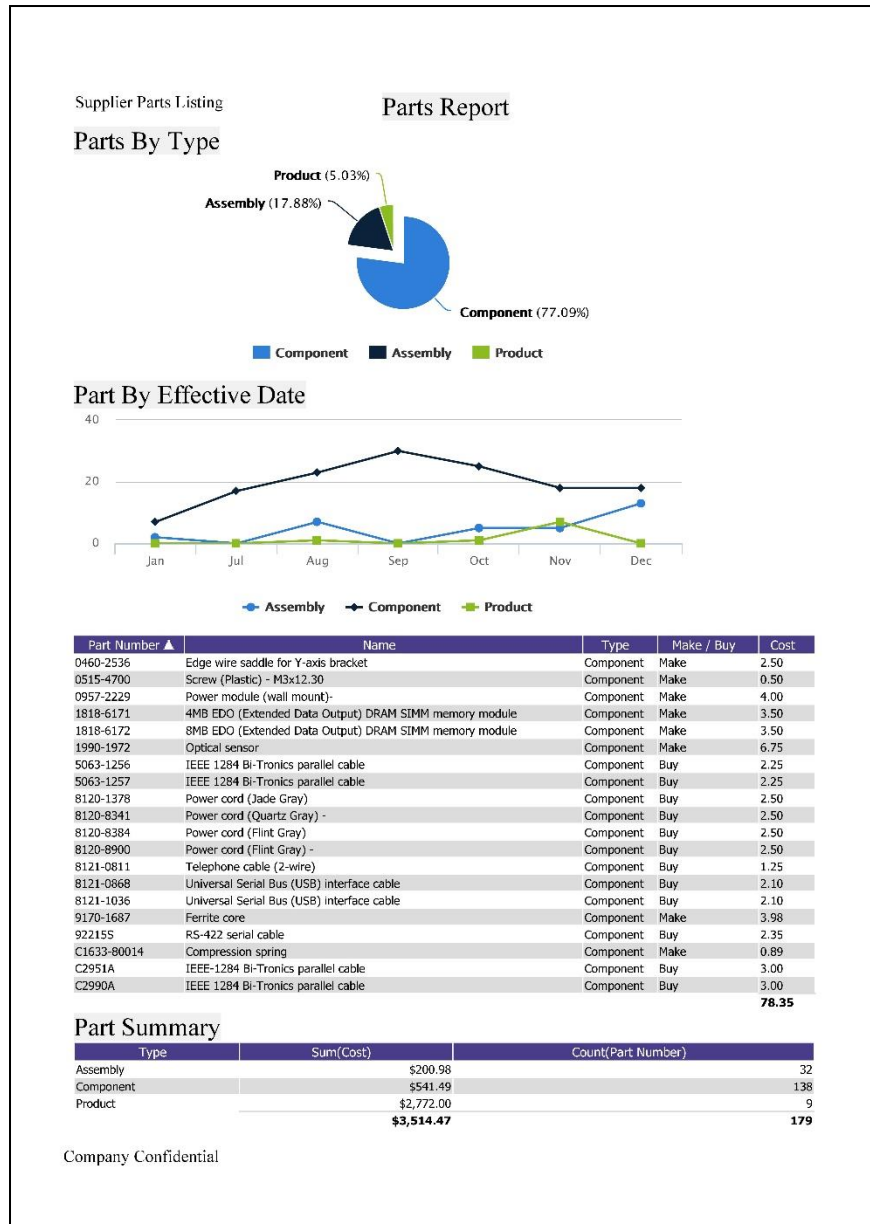


Figure 2.

Chapter 2. Creating, Sharing and Saving Reports

Creating a new report item is the process of creating a report template that can be used to generate reports. A new report item can be created by going to **My Innovator\My Reports** in the TOC and creating a new item.

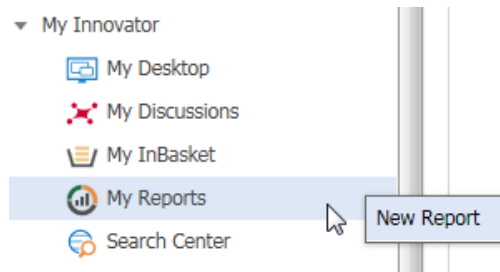


Figure 3.

Report Designer overview

The Report Designer contains multiple tabs.

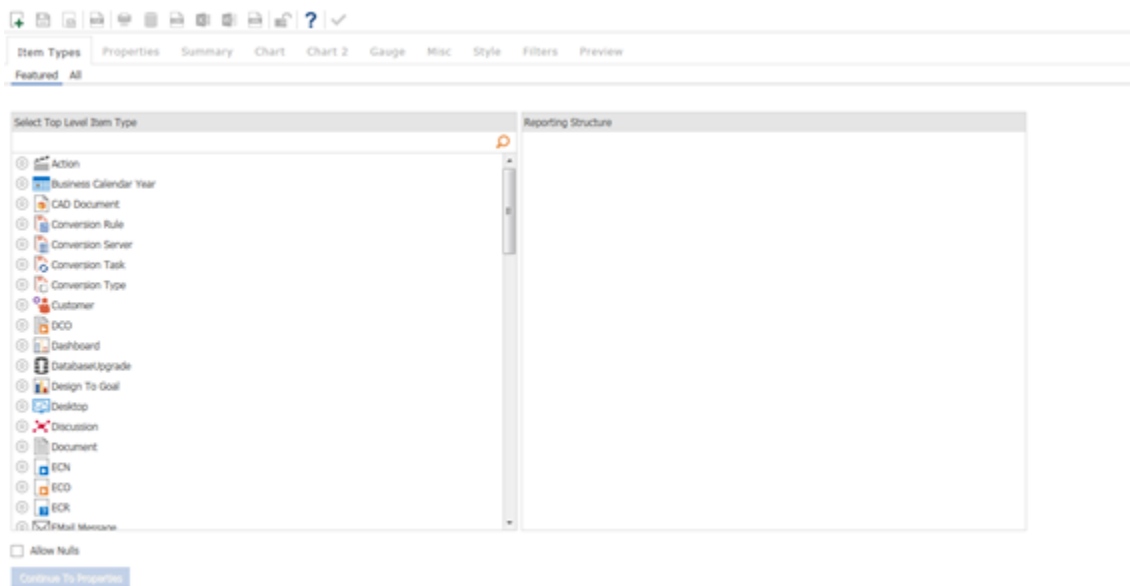


Figure 4.

- **ItemTypes:** Select the Top Level ItemType (and related ItemTypes and Item datatype properties).
- **Properties:** Choose which property values will be displayed in the report.
- **Summary:** Create a Summary section for the report.
- **Chart:** Create a bar, pie, trend or funnel chart.
- **Chart2:** Create a second bar, pie, trend or funnel chart.

- **Gauge:** Create a gauge(s) dashboard.
- **Misc:** Name the report and provide title and header/footer information.
- **Style:** Provide additional styling to the report (colors, layout, etc.).
- **Filters:** Define default data filters to restrict the amount of data shown conditionally.
- **Preview:** Run the report in Preview mode.

Process of creating a new report

The following are the basic steps for creating a new report:

1. Select the top-level ItemType from the list.

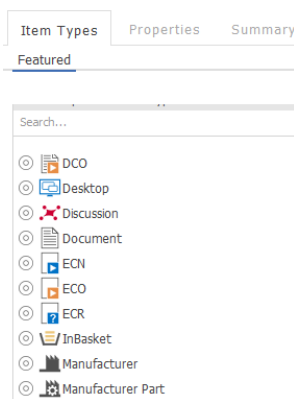


Figure 5.

2. Select properties that should be included in the report

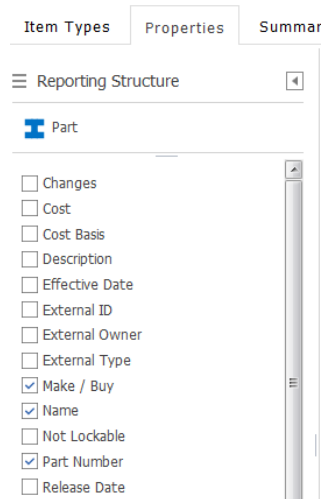


Figure 6.

3. Modify the properties

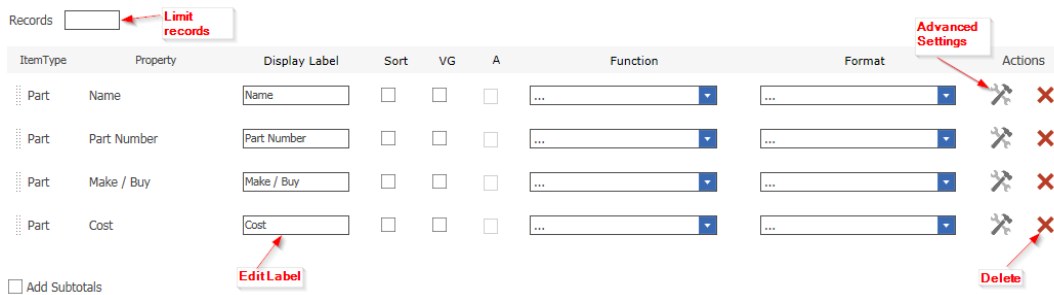


Figure 7.

4. Preview the report

Add Subtotals

Item Types	Properties	Summary	Chart	Chart 2	Gauge	Misc	Style
Name	Part Number	Make / Buy	Classification				
Power cord (Jade Gray)	8120-1378	Buy	Component				
Screw - M3 X 8mm long	XA9-1671-000CN	Buy	Component				
Right side cartridge tray clamp	RC2-3109-000CN	Make	Component				
Battery packLithium-ion (Li-Ion)	CB150-67036	Make	Component				
IEEE 1284 Bi-Tronics parallel cable	C2991A	Buy	Component				
Line Interface Unit (LIU)	C6659-60002	Make	Component				
Carriage assembly	C4723-69096	Make	Assembly				
Power cord (Flint Gray) -	8120-8900	Buy	Component				
Duplexer assembly -	C8955A	Make	Assembly				
Screw (Plastic) - M3x12.30	0515-4700	Make	Component				
Capping strips (E-size)	C4704-40070	Make	Component				
Carriage PC board -	CB111-67057	Make	Component				
Top cover	C4704-00021	Make	Component				
Power cord (Flint Gray)	8120-8384	Buy	Component				
JetDirect 400N modular input/output (MIO)	J4100A	Make	Component				
Top cover assembly	RM1-4465-000CN	Make	Assembly				
Universal Serial Bus (USB) interface cable	C6518A	Make	Component				
Scanner cover assembly (Upper ADF)	C6659-60038	Make	Assembly				

Figure 8.

5. Save and share the report

Add Subtotals

Item Types Properties Summary Chart Chart 2 Gauge Misc

Report Header Image Justification:

Name:

Title:

Description:

Header:

Footer:

Share Report

Set availability to:

- Public
- Private
- Shared with Identity

Figure 9.

- o **Name:** Report name which is required to save the report.

- **Title:** Main title for the report.
- **Description:** Appears under the main title.
- **Header:** Text that appears at the top of every page.
- **Footer:** Text that appears at the bottom of every page.
- **Share Report:** Reports can be shared to everyone (Public) or to a specific list of Identities (Aliases or Groups). A report can be shared with one of four options:
 - **Full** - Report is available to the user to view, modify, and save changes to the report.
 - **Read Only** - Report is available to the user to view, user can add or remove filters, and modify existing filters' values. Also user can modify (design) the report but cannot change the original design but can use Save As to create a copy.
 - **View Only** - Report is available to the user to view, but not to modify in any way or save changes to the report.
 - **Locked** - Report is available to the user to view, and user can modify existing filters' values, but user cannot add or remove or change filters or fields or save changes to the report.

Chapter 3. Running Reports

Once a report has been saved, it can be run by you or other users with whom you have shared this report. Reports can be run from four different areas in Infor PLM Accelerate.

- My Reports in TOC
- Selected Item(s)
- Selected ItemType
- Tear Off Menu

Running a Report

My Innovator

My Innovator navigation pane with 'My Reports' selected. A dropdown menu is open showing 'Parts Report' and 'Recent'.

Selected Item(s)

Part Number	Revision	Name
0460-2536		Parts Report
0515-4700		Parts Report
0957-2229	A	Power module (wall mount)-
1818-6171	A	4MB EDO (Extended Data Output...

Selected ItemType

Design navigation pane with 'Parts' selected. A dropdown menu is open showing 'Parts Report' and 'New Report'.

Tear Off Menu

Reports menu with 'Parts Report' selected.

Figure 10.

Chapter 4. Sample Report Walkthrough

The following is a sample walkthrough for creating a new report.

1. Go to **My Innovator/My Reports** and create a new Item.

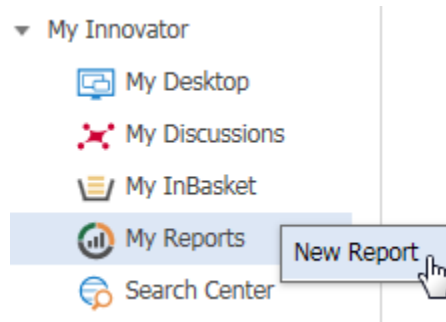


Figure 11.

2. Select the **Part** ItemType, add **Document** relationship and **created_by_id** property.

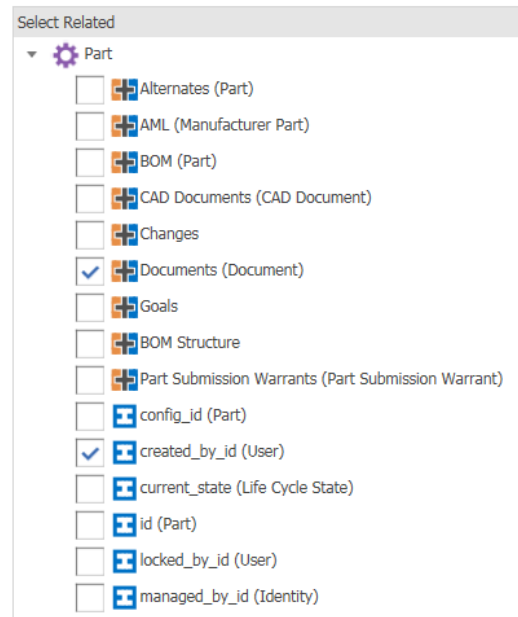


Figure 12.

3. Add properties as shown below.
 - a. Sort by **Part Number** and **State**.
 - b. Visually Group (VG) by **State**
 - c. Format **created_on** and **weight** properties.

Records

ItemType	Property	Display Label	Sort	VG	A	Function	Format	Actions
Part	Part Number	<input type="text" value="Part Number"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Part	Name	<input type="text" value="Name"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Part	State	<input type="text" value="State"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
User	keyed_name	<input type="text" value="Part Creator"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Document	Document Number	<input type="text" value="Document Number"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Document	Name	<input type="text" value="Doc Name"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Part	created_on	<input type="text" value="CREATED ON"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	7/31/2015	
Part	Weight	<input type="text" value="Weight"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	0,000.00	

Figure 13.

4. For Summary, add a **Count** for **Part Number** property.

Title Records

Property	ItemType	Display Label	Sort	Function	Format	Actions
Part Number	Part	<input type="text" value="Count(Part Number)"/>	<input type="checkbox"/>	Count	0,000	

Figure 14.

5. For Chart, create a **Pie Chart** for **State** property.

Chart Type **Pie**

Title Records

Part

Label **State** Function **Group** Sort Sort (z-a)

Part

Value **State** Function **Count** Sort Sort (z-a)

Separator ... Function ... Value Ranges

Show Legend

Legend position **Bottom**

Explode largest slice

Show Percentage

Show Value Labels

Show Slice Labels

Combine Bottom %

Chart Type **Pie**

Scale %

Target report

Figure 15.

6. For Misc, create a report title and share with two Identities.

Report Header Image Justification:

Name

Title

Description

Header

Footer

Share Report

Set availability to:

Public

Private

Shared with Identities:

Identity	Permission
Change Specialist I	Full
Component Engineering	View Only

Figure 16.

7. For Filters, add filter values for **Part Number** and **created_on** properties.

ItemType	Property	Operator	Value(s)	Blank	Param	Actions
Part Number	Part	Begins With	M	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✗
created_on	Part	Between(Calendar)	<input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✗

Show Filters In Report Description

Require Parameters in Viewer

Filter Logic

Figure 17.

8. Preview the report to confirm appearance.

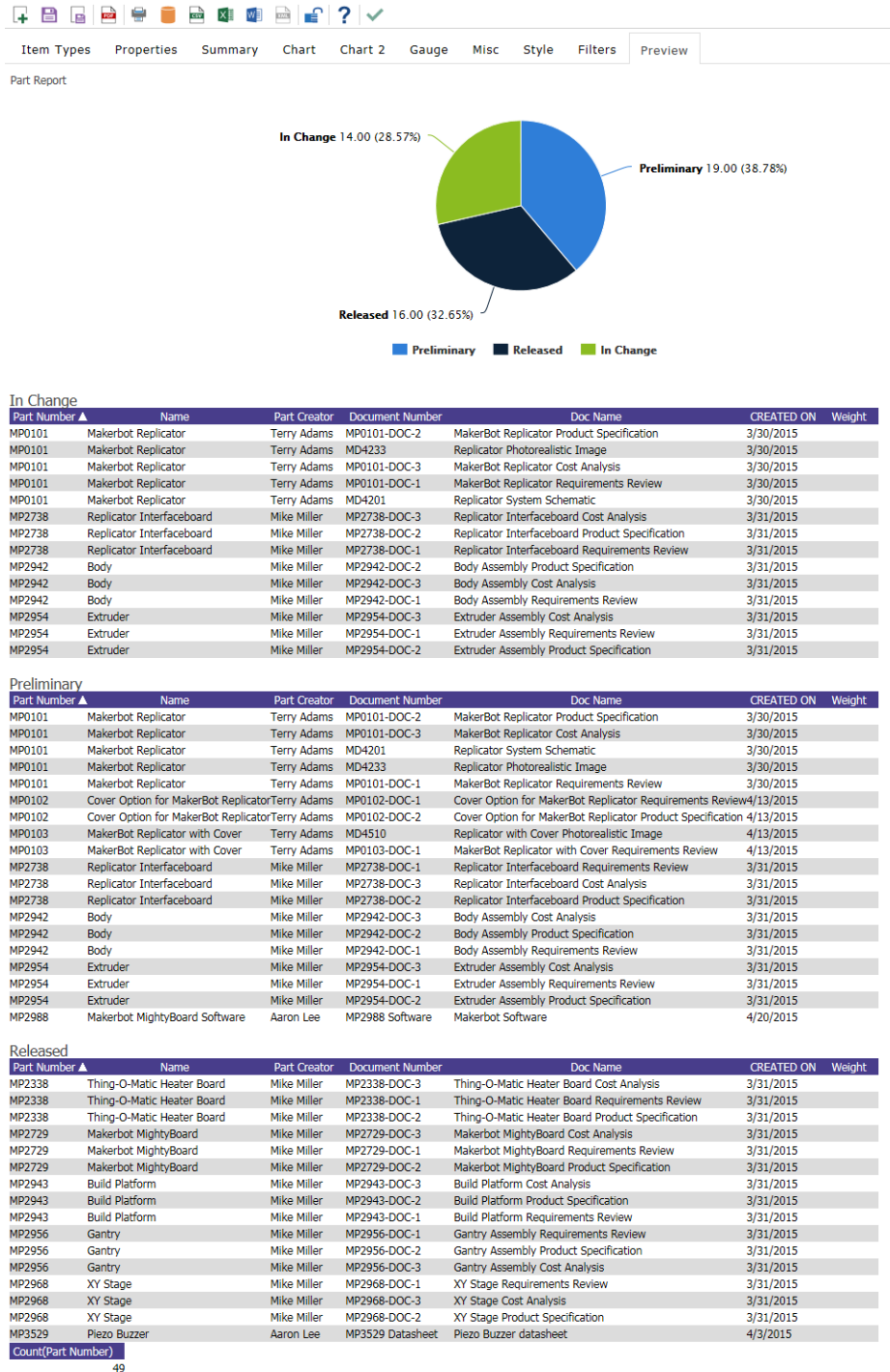


Figure 18.