Infor WMS Live Access Dashboards with Birst User Guide

Publication Information

Release: Infor WMS Live Access Dashboards with Birst Release level 11.3.2

Publication date: October 5, 2020

Contents

About this guide

Infor WMS includes a robust set of live access dashboards that are run from within the Infor WMS Reports menu. The live access dashboards are organized by functional areas including Inbound, Outbound, Inventory, Labor, and Billing. Each dashboard includes a set of real-time key performance indicators (KPIs) used to create a visual view of the health of operations. This document describes the Infor WMS Live Access Dashboards with Birst and provides instructions on customizing the Infor-provided visualizations, and on creating new visualization and live access dashboards.

Related documents

You can find the documents in the product documentation section of the Infor Support Portal, as described in "Contacting Infor" on page 5.

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at https://concierge.infor.com/ and create a support incident.

If we update this document after the product release, we will post the new version on the Infor Support Portal. To access documentation, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

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

Chapter 1 Infor WMS Live Access Dashboards with Birst overview

This chapter provides an overview of the Infor WMS Live Access Dashboards with Birst. The Live Access Dashboards can be found under the **Reports** menu in Infor WMS. The dashboards are broken down into five functional areas: Inbound, Outbound, Inventory, Labor, and Billing. Each of the dashboards include real-time visualizations of the key performance indicators (KPIs) that can quickly show the health of the operations.

Each live access dashboard page has embedded filters. All of the visualizations are displayed using the filter section. For date filters, the current date is defaulted as a starting point for analysis.

Inbound Dashboard

Dashboard Parameter Criteria:

- **Date**
- **Days History to Include**

This table lists the KPIs in the Inbound Dashboard:

	KPI	Description
1	ASNs Received	Column chart showing number of ASNs received or not received for the selected date range.
2	Current ASNs by Status	Pie chart displaying current ASNs grouped by status for the selected date range.
3	Late Receipts	List of late receipts displaying owner, status, and expected receipt date.
4	On-Time ASNs	Line chart comparing on-time ASNs and late ASNs for the selected date range.

5	Total Cases Received	Column chart comparing number of cases expected with number of cases received for the selected date range.
6	Total Quantity Received	Bar chart showing total quantity received each day in the selected date range.
7	Total Volume Received	Column chart showing total volume received each day in the selected date range.
8	Total Weight Received	Column chart showing total weight received each day in the selected date range.

Outbound Dashboard

Dashboard Parameter Criteria:

- **Date**
- **Days History to Include**

This table lists the KPIs in the Outbound Dashboard:

	KPI	Description
1	Current Orders by Status	Pie chart displaying current orders grouped by status for the selected date range.
2	Late Orders	List of late orders displaying owner, status, and requested ship date.
3	On Time Orders	Line chart comparing on time orders and late orders for the selected date range.
4	Orders Shipped	Column chart comparing number of orders shipped with number of orders not shipped for the selected date range.
5	Picking by Area	Bar chart displaying completed picks and open picks by area for the selected date range.
6	Picking Percent Complete by Ship to Group	List of lines and lines picked by ship to group.
7	Total Quantity Shipped	Column chart showing total quantity shipped each day in the selected date range.
8	Total Volume Shipped	Column chart showing total volume shipped each day in the selected date range.

9	Total Weight Shipped	Column chart showing total weight shipped each day in the selected date range.

Inventory Dashboard

Dashboard Parameter Criteria:

- **Date**
- **Days History to Include**

This table lists the KPIs in the Inventory Dashboard:

	KPI	Description
1	Adjustments by Quantity	Column chart displaying positive and negative adjustments for each day in the selected date range.
2	Adjustments by Reason Code	Column chart displaying adjustments by reason code for each day in the selected date range.
3	Cycle Count Accuracy	Column chart displaying accuracy percent for each day in the selected date range.
4	Cycle Count Summary	Column chart displaying number of cycle counts for each day in the selected date range.
5	Expected Stockout	List of items showing owner, item description, order demand, available quantity, and on hold quantity.
6	Location Analysis	Bar chart displaying number of empty locations and taken locations by area for the selected date range.
7	On Hold	Column chart showing number of locations, LPNs, and items on hold by hold reason.

Labor Dashboard

Dashboard Parameter Criteria:

- **Date**
- **Days History to Include**
- **Hours History to Include**

This table lists the KPIs in the Labor Dashboard:

	KPI	Description
1	Bottom 10 Performers	Column chart and line chart comparing time (hours) and performance for bottom 10 performers over the selected date range.
2	Effectiveness	Donut chart displaying effectiveness percent over the selected date range.
3	Performance	Donut chart displaying performance percent over the selected date range.
4	Statistics by Area	Bar chart showing picks per hour, receipts per hour, and stores per hour by area for the selected date range.
5	Statistics by User Group	Bar chart showing picks per hour, receipts per hour, and stores per hour by user group for the selected date range.
6	Top 10 Performers	Column chart and line chart comparing time (hours) and performance for top 10 performers over the selected date range.
7	User Performance Distribution	Column chart showing number of users in various performance percentage ranges.

Billing Dashboard

Dashboard Parameter Criteria:

- **Month**
- **Year**
- **Months History to Include**
- **Customer**

This table lists the KPIs in the Billing Dashboard:

	KPI	Description
1	Orders Not Billed	Column chart displaying number of inbound orders not billed and number of outbound orders not billed over the selected date range.
2	Revenue by Charge Code	Donut chart displaying revenue from top 5 charge codes over the selected date range.

3	Revenue by Customer	Donut chart displaying revenue of top 5 customers over the selected date range.
4	Revenue History	Line chart showing revenue by month over the selected date range.
5	Revenue Not Invoiced	Donut chart displaying revenue not invoiced by customer over the selected date range.

Chapter 2 Working with Live Access Dashboards

The live access dashboards have embedded filters that allow you to quickly change the results for further analysis. The filters on the dashboard apply to each of the KPI visualizations on the page.

Live access dashboards are run from Infor WMS in HTML format. You can change the output format to PDF or Microsoft Excel for report distribution. Note that you can only export each of the individual visualizations and not the entire dashboard page.

Changing the output format

To change the output format:

1. Execute the live access dashboard from Infor WMS.
2. On the rendered dashboard page, click on **Dashlet Actions** in the upper right corner of the visualization dashlet.
3. Select **Export As** and select the desired format.

Depending on the KPI and the Infor-provided visualization layout, you may find it easier to understand the results by viewing the data in a different layout. For example, Total Weight Received is defined as a column chart but you can change it to a variety of other layouts including Pie, Bar, Line, or Table. When changing the layout in the dashboard, note that the layout changes are only temporary for analyzing the data.

Changing the visualization layout

To change the visualization layout:

1. Execute the live access dashboard from Infor WMS.
2. On the rendered dashboard page, click on **Dashlet Actions** in the upper right corner of the visualization dashlet.
3. Select **View Selector** and select the desired layout.

On the rendered live access dashboard, you may also want to investigate the KPI by modifying the analysis categories or adding a new measure.

Exploring in the visualizer

To explore within the visualizer:

1 Execute the live access dashboard from Infor WMS.

2 On the rendered dashboard page, click on **Dashlet Actions** in the upper right corner of the visualization dashlet.

3 Select **Explore in Visualizer**.

4 The Visualizer report is opened in the Visualizer Studio. You can modify the report to investigate results. Note that any changes you make in the Visualizer Studio are temporary.

5 When complete, close the Visualizer report by clicking on the red X in the upper right corner.

Depending on the data set that is returned from the live access dashboard filters, not all of the values are visible in the report dashlet. For example, if you leave the default date as today’s date but select to include 14 days of history, the size of the report dashlets is not dynamic. All 14 days will not be displayed.

Maximizing the visualization

To maximize the visualization:

1 Execute the live access dashboard from Infor WMS.

2 On the rendered dashboard page, click **Maximize** in the upper right corner of the visualization dashlet. The **Maximize** selection will display the individual visualization as full screen. This mode enables you to view the entire dataset to be analyzed. You can also deselect filter values in this mode to investigate further details. You can also export the dataset to PDF and Microsoft Excel.

3 To return to the live access dashboard page, click **Minimize**.

Chapter 3 Customizing Live Access Dashboards

Infor WMS Live Access Dashboards can be customized to more closely fit the needs of your business. The customization may include changing one of the Infor-provided Visualizer reports or creating a new Visualizer report to add to the live access dashboard.

See the Birst online help for additional instructions for working with Visualizer reports.

All Infor WMS Live Access Dashboard reports are Visualizer reports. Each report is embedded in a Birst live access dashboard. The Birst report dashboard includes the report parameters or filters used for rendering the Visualizer reports. Reports will be customized in the Birst Visualizer Studio, and added to one of the Infor-provided live access dashboards or to a custom live access dashboard in the Dashboards studio.

Infor WMS Live Access Dashboards are saved in an Infor-provided catalog folder called Infor Reporting SCE in each of the operational reports and live access dashboards consumer spaces.

Do not save customized Visualizer reports or dashboards into these folders. Infor-provided folders, and their associated sub-folders, could be overwritten in a future update.

To create new reports and dashboards in Birst, your Consumer Administrator must create a custom catalog folder outside of the catalog folder structure provided by Infor. The use of a custom catalog folder prevents the custom reporting content from being overwritten in a future update.

Creating a new custom catalog folder

You must be a member of the Consumer Administrator security group to create a custom catalog.

To create a custom catalog folder:

1. Select a Birst consumer space and select **Admin**.
2. On the **Manage Access** tab, click **Manage Report Catalog**.
3. To create a new custom catalog folder, right click on **shared** in the catalog directory pane and select **Add folder**.
4. Specify a new folder name; for example “My Custom Reports”.
5. Click **Create**.

All modified or new reports must be saved in this new folder.

Modifying a report for an Infor Live Access Dashboard

In the Birst application, you will make your modifications to an Infor WMS visualizer report and save the report in your custom catalog folder. You also must create a new custom report dashboard to hold the modified report.

Note: Running reports outside of the Infor WMS application uses the default facility of wmwhse1.

To modify a report and create a new custom report dashboard:

1. Select the Birst application.
2. Click the consumer space, for example, SCE-WM-Consumer, and select the **Visualizer** studio.
3. From the **Report** menu, select **Open**.
4. In the Open Report window, expand the **shared** folder and expand the **Infor Reporting SCE** folder.
5. Highlight the report that you want to modify and click **Done**.
6. Make your modifications. From the **Report** menu, select **Save As**.
7. Browse to your **custom catalog folder** created by your Consumer Administrator and save the report with a new name.
8. To create a new dashboard, click on the **Hamburger** icon to open the Birst Navigation menu. Select the **Dashboard Studio**.
9. Click **Open** on the menu bar and select the Infor-provided dashboard for this customized report; for example, Inbound.
10. Click **Edit**. Click the visualization you are replacing with your modified version and click **Edit**.
11. Click **Edit Dashlet Properties** and browse to your custom catalog folder to select you customized version of this report.
12. Click **Apply** to close the Edit Dashlet Properties window.
13. Click **Publish**. Your customized version of the Visualizer report will be displayed when the live access dashboard is run from Infor WMS.

Adding and deleting a report for an Infor WMS Live Access Dashboard

Although the Infor-provided WMS live access reports are robust, you may need to create new visualizations or delete Infor-provided visualizations from a dashboard. All live access dashboard reports should be created in the Visualizer Studio and added to either a copy of the Infor-provided live access dashboard or to a new live access dashboard.

To create a copy of the Infor-provided live access dashboard:

1 In Infor Ming.le, select the Birst application.
2 Click the consumer space; for example, SCE-WM-Consumer. Select the **Dashboard Studio**.
3 Click **Open** on the menu bar and click **Clone** located to the right of the Infor-provided dashboard.
4 On the cloned copy, click **Edit** and assign a new name for the custom live access dashboard.

To create new Visualizer reports for the custom live access dashboard:

1 Click the **Hamburger** icon to open the Birst Navigation Menu. Select the **Visualizer** studio.
2 From the menu bar, select **Create New Chart**.
3 Select the measures and categories for your report, and select the format of the report.
4 From the **Report** menu, select **Save As**.
5 Browse to your **custom catalog folder** created by your Consumer Administrator and save the report with a new name.

To add your new Visualizer report to the custom live access dashboard:

1 Click on the **Hamburger** icon to open the Birst Navigation Menu. Select the **Dashboard Studio**.
2 Click **Open** on the menu bar and select your cloned copy of the live access dashboard.
3 Click **Edit**. From the menu bar, select **Insert** and the select **Existing Report**. Browse to your custom catalog folder to select your custom report.
4 Click **Done**. You can resize this new report dashlet and reposition the dashlets on the live access dashboard.
5 To permanently remove any report dashlet from the live access dashboard, click on the dashlet and select **Edit**. Select **Delete** and confirm the deletion.
6 Click **Publish**.

See the *Infor WMS Administration Guide* for instructions on how to add your custom live access dashboard to the Infor WMS Reports menu.