



P3 System Reporting

Employees respect what management inspects.

- Peter Craig



Access to the Reporting System

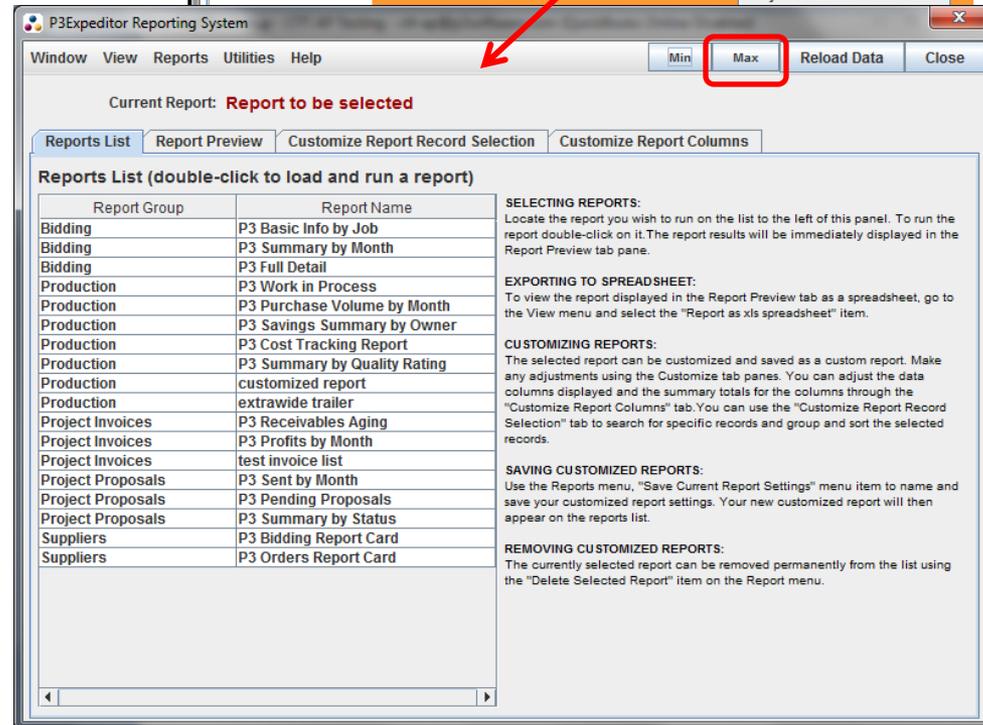
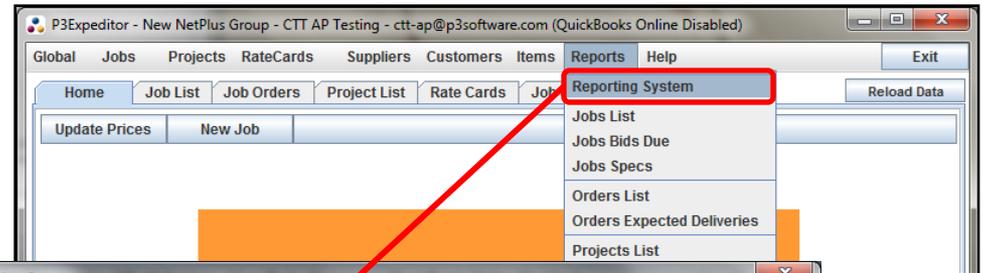
Simple, access from main Application.

Shows a list of reports:

- Report Group
- Report Names

P3 Standard Reports

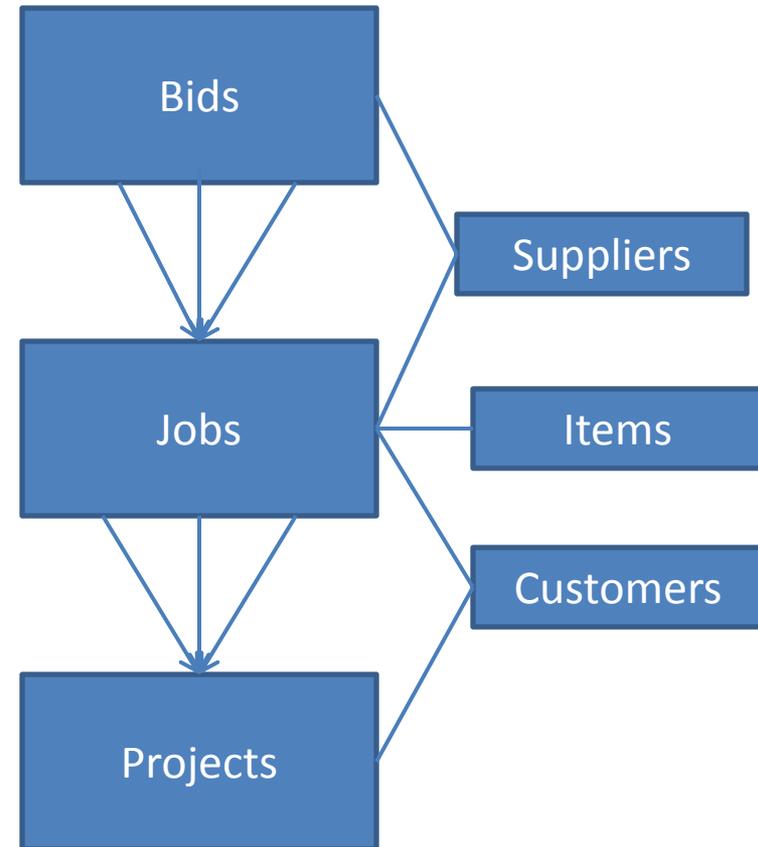
- Start with “P3”
- Starting point for customization
- Design report and rename





Types of Data

- **Bids: One Supplier – One Bid/RFQ**
 - Bidding Reports
 - Supplier Bidding Report card
 - All bidding statistics
- **Jobs: One Purchase – One Winning Bid**
 - Most reports are based on jobs.
 - Production Reports.
 - Supplier Orders Report Card.
 - Used for tracking Orders, Savings, Performance
- **Projects: One Project – Many Jobs**
 - Proposal Reports
 - Invoice Reports
 - Used For Reselling, Profit, Sales Management





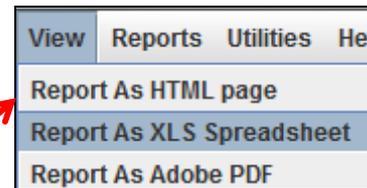
Viewing/Exporting Reports

- Output Options
 - Spreadsheet
 - HTML & PDF

- Opens directly in MS-Excel

Save As:

- Use .XLS format.
- Rename File.
- Close before running another report.



P3Expeditor Reporting System

Window View Reports Utilities Help

Report As HTML page
Report As XLS Spreadsheet
Report As Adobe PDF

Customized report

Reports Report As Adobe PDF Customize Report Record Selection Customize Report Columns

CUSTOMIZED REPORT

Run By: CTT AP Testing (ctt-ap@p3software.com)
Date: 10/6/14
Record Source: Job Order Records
Sorted By: Job Number Descending
Grouped By: Owner

Owner	Record Count	Job Number	Job Name	RFQ Stats	Order Date	Order Quantity	Order Price	Savings Benchmark	Savings Final Amount	Amount Saved	Savings Category	Account Manager	Print Typemmm
	1	ap0269		26 / 2	-	-	-	-	-	\$ 0.00			
	1	000067	testing	0 / 0	-	-	-	-	-	\$ 0.00			
	1	000064	Russ Reid Brochure	3 / 0	-	-	\$ 0.00	-	-	\$ 0.00			New Job
	1	000063		1 / 1	-	-	-	-	-	\$ 0.00			
	1	000062		1 / 0	-	-	-	-	-	\$ 0.00			
	1	000061		1 / 0	-	-	-	-	-	\$ 0.00			
	1	000058	Testing 123	2 / 2	-	-	-	-	-	\$ 0.00			
	1	000057	Russ Reid Brochure 2	3 / 0	-	-	-	-	-	\$ 0.00			New Job
	1	000056	RR Program Mail	2 / 0	-	-	-	-	-	\$ 0.00			
	1	000055	RR Program	0 / 0	-	-	-	-	-	\$ 0.00			
	1	000054	Russ Reid Brochure	0 / 0	-	-	-	-	-	\$ 0.00			New Job
	1	000053	Russ Reid Job 2	0 / 0	-	-	-	-	-	\$ 0.00			New Job
	1	000051	test.mvw	3 / 1	-	-	-	-	-	\$ 0.00			
	1	000050	AP Alpha Test	3 / 1	-	-	-	-	-	\$ 0.00			New Job
	1	000049	MWV	3 / 1	-	-	-	-	-	\$ 0.00			



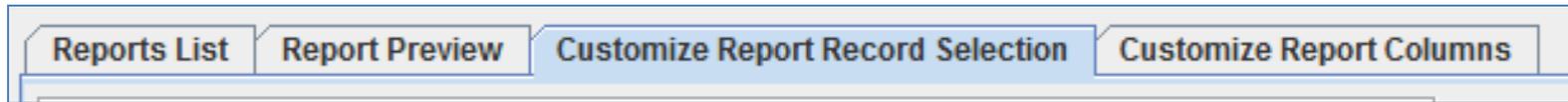
Customizing Reports: **Rows & Columns**



Two Tabs + Two Minutes = Custom Report



Customizing Reports: Row Selection



- Filters: select which records to report on

- 2 x Dates
- 3 x Categories
- Results description

- Display Options:

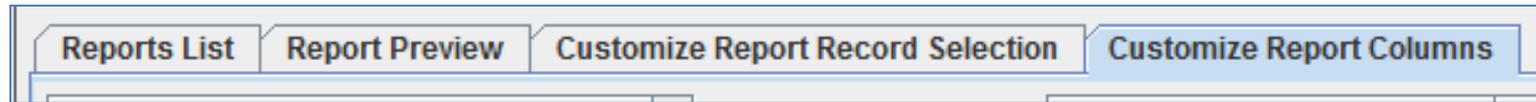
- Sorting
- Grouping
- Show Details

The screenshot shows the 'Customize Report Record Selection' interface for 'Job Order Records'. It includes the following sections:

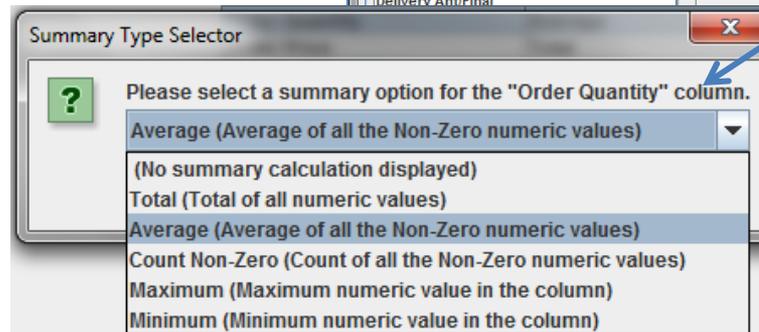
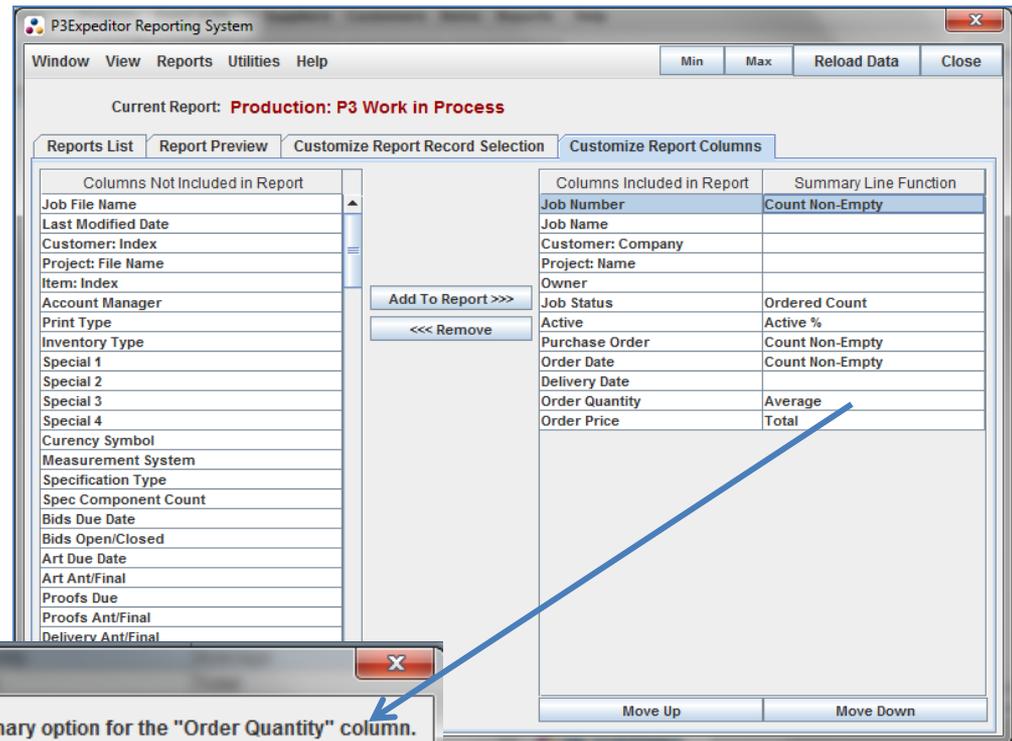
- Data Source (for the Selected Report):** Job Order Records
- Record Selection/Filtering (Select date and category fields to base record selection on.):**
 - 1st Date: Created Date (dropdown), This Year (dropdown), From: 01/01/14 (calendar icon), To: 31/12/14 (calendar icon)
 - 2nd Date: (empty dropdown)
 - 1st Category: Active (dropdown), Equals (dropdown), Active (dropdown)
 - 2nd Category: Order Price (dropdown), > (dropdown), 0 (dropdown)
 - 3rd Category: (empty dropdown)
- Selection Results:** 42 records selected out of: 294 total records.
- Record Sorting (Select fields to base sorting on.):**
 - Job Status (dropdown), Job Number (dropdown), (empty dropdown)
 - Descending Order, Descending Order, Descending Order
- Record Grouping (Records will be grouped and sub-totaled by the selected field.):** (empty dropdown)
- Record Details or Summary Only:**
 - Show Record Detail (Summary totals only when unchecked)



Customizing Reports: Column Selection



- Adding & Removing Columns.
 - Lots of data fields to pick.
- Changing Column Order.
 - Move Up/Down => Left/Right
- Summary Options:
 - Totals, Averages, Counts, etc.
 - Based on type of data.





Report Samples

Data type can be customized in any report

P3 BIDDING REPORT CARD

Record Source: Bidding Data Records

Selected: Time RFQ Sent: From: 7/1/11 To: 12/31/11

Grouped By: Supplier: Company

Supplier: Company	Record Count	Bid Status	No Bid Flag	Bid Received	Bid Resp Hours	Price/Ave.% 1
Group Name	Count	Win %	Count	Received	Average (Hours)	Average PAR
Aclaim	6	100.00%	-	6	47.66	67.00%
Alliance	29	34.80%	-	29	66.51	95.60%
Andersen	65	87.50%	-	63	20.3	116.90%
Art Print	177	80.90%	-	175	54.56	105.30%
Beatle Press	6	33.30%	-	6	27.91	119.00%
Breaker & Co.	16	81.20%	-	15	15.91	103.30%
Commerce	27	45.50%	1	26	55.43	101.30%
Commendable	119	76.80%	-	117	27.8	96.40%
Conventional Press	6	0.00%	-	6	18.09	110.80%
Cranbury Lake	3	0.00%	1	2	70.93	121.00%
Davis Press	3	66.70%	-	3	21.64	75.30%
Dawson Imaging	2	0.00%	1	1	97.49	-
Downeast	3	66.70%	-	3	0	36.00%
Earthtone Graphics	3	0.00%	-	3	112.68	183.30%
Ernst Litho	43	29.70%	-	42	50.19	124.60%
Intecity Graphics	10	16.70%	-	10	17.92	104.90%
James & Co.	5	50.00%	-	5	21.12	92.00%
Johnson Brothers	6	66.70%	-	6	44.71	85.40%
Lehigh Valley Offset	2	100.00%	-	2	114.53	-
Linear Displays	5	100.00%	-	4	0.78	129.00%
Mailing Center	2	100.00%	-	2	1.73	-
Master Litho	8	57.10%	-	8	14.2	103.00%
Mirage Graphics	122	52.30%	-	120	46.22	95.60%
Pinetree	63	37.20%	-	63	53.18	100.80%
Regency Printing	21	73.70%	-	20	44.01	87.50%
South Street Group	15	55.60%	-	15	15.14	88.30%
Swiftprint	10	100.00%	-	10	23.03	75.00%
Tinker Stevens	154	60.90%	-	150	36.51	94.90%
Trans-Pacific Imports	3	66.70%	-	3	9.43	59.00%
Working Man Press	10	50.00%	-	9	74.44	98.30%
Supplier: Company	Record Count	Bid Status	No Bid Flag	Bid Received	Bid Resp Hours	Price/Ave.% 1
All Groups Combined	Count	Win %	Count	Received	Average (Hours)	Average PAR
REPORT TOTALS	944	63.80%	3	924	41.83	100.00%



Report Samples

Data type can be customized in any report

P3 ORDERS REPORT CARD

Record Source: Job Order Records

Selected: Created Date: From: 7/1/11 To: 12/31/11

Grouped By: Winning Bid: Supplier: Company

Winning Bid: Supplier: Company	Record Count	Number Bids	Savings Benchmark	Order Price	Amount Saved	Delivery On Time	Quality Rating
Group Name	Count	Average	Total	Total	Total	On Time %	Average (Range 1-5)
Aclaim	1	2.00	15,986.40	5,488.40	10,518.00	100.00%	3.00
Alliance	4	3.00	74,539.33	62,271.00	12,268.33	100.00%	3.00
Andersen	2	3.00	23,890.03	20,738.10	3,151.93	100.00%	3.00
Art Print	11	3.00	60,774.65	46,319.00	14,455.65	100.00%	3.00
Beatle Press	1	2.00	86,854.00	80,005.00	26,849.00	100.00%	4.00
Breaker & Co.	1	3.00	1,145.93	977.80	168.13	100.00%	3.00
Commerce	2	4.00	69,355.00	63,385.00	5,970.00	100.00%	2.00
Commendable	5	3.00	14,758.65	9,312.89	5,445.76	100.00%	2.80
Ernst Litho	1	4.00	16,644.12	9,700.00	6,944.12	100.00%	3.00
Master Litho	1	2.00	944.50	765.00	179.50	100.00%	3.00
Morie Press	8	3.12	13,910.53	11,214.00	2,696.53	60.00%	3.00
Regency Printing	8	3.00	305,224.34	262,682.00	42,542.34	100.00%	2.88
Sommerville	6	3.00	9,581.92	7,583.76	1,998.16	100.00%	3.00
South Street Group	2	2.50	4,013.08	2,535.73	1,477.35	100.00%	3.00
Tinker Stevens	18	2.83	37,606.48	34,625.00	2,981.48	92.30%	3.22
Winning Bid: Supplier: Company	Record Count	Number Bids	Savings Benchmark	Order Price	Amount Saved	Delivery On Time	Quality Rating
All Groups Combined	Count	Average	Total	Total	Total	On Time %	Average (Range 1-5)
REPORT TOTALS	75	2.97	737,405.63	599,253.28	138,152.35	94.00%	3