

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

Global Jobs Projects RateCards Suppliers Reporting System Home Job List Job Orders Project List Rete Cards Job Bids Dub Bids Du		P3Expeditor - New NetPlus Group - CTT A	AP Testing - ctt-ap@p3software.com (Q	uickBooks Online Disabled)	
Home Job List Job Orders Project List Reforming System Reload Data Jup date Prices New Job Jup date Prices New Job Jup date Prices	G	ilobal Jobs Projects RateCards	Suppliers Customers Items	Reports Help	Exit
Image: Special spectral sp		Home Job List Job Orders	Project List Rate Cards Job	Reporting System	Reload Data
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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

Reports Utilities He

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New Job

New Job

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- Output Options
 - Spreadsheet
 - HTML & PDF
- Report As HTML page Report As XLS Spreadsheet **Opens directly in MS-Excel** Report As Adobe PDF Save As: P3Expeditor Reporting System Window View Reports Utilities Help Min Max Reload Data Close Report As HTML page - Use .XLS format. ustomized report Report As XLS Spreadsheet Reports Report As Adobe PDF tomize Report Record Selection Customize Report Columns Rename File. CUSTOMIZED REPORT Run By: CTT AP Testing (ctt-ap@p3software.com) Date: 10/6/14 Close before running Record Source: Job Order Records Sorted By: Job Number Descending Grouped By: Owner another report. Order Savings Savings Final Order Amount Savings Account Print Owner Job Numbe Job Name Quantity Price nchmark Saved Category Typemmm ap026 26/2 \$ 0.00 00006 S 0 0 S 0 00 000064 **Russ Reid Brochure** 3/0 \$ 0.00 New Job \$ 0.00 1/0 \$ 0.00 1/0 S 0.00 Testing 123 2/2 S 0.00 \$ 0.00 New Job ss Reid Br 3/0 2/0 S 0.00

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Customizing Reports: Rows & Columns



Two Tabs + Two Minutes = Custom Report



Customizing Reports: Row Selection

ĺ	Reports List	Report Preview	Customize Report Record Selection	Customize Report Columns	

- Filters: select which records to report on
 - 2 x Dates

	Reports List Report Preview Customize Report Record Selection Customize Report Col					
 – 3 x Categories 	Data Source (for the Selected Report) Job Order Records					
	Record Selection/Filtering (Select date and category fields to base record selection on.)					
 Results description 	2nd Date					
	1st Category Active					
 Display Options: 	2nd Category Order Price > • 0 • 3rd Category • • • • •					
– Sorting	Selection Results: 42 records selected out of: 294 total records.					
	Record Sorting (Select fields to base sorting on.)					
– Grouping	Job Status V Job Number V					
- Show Details	Descending Order					
	Record Grouping (Records will be grouped and sub-totaled by the selected field.)					
	Record Dataile 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.

Summary

?

Based on type of data.

- 1	P3Expeditor Re	eporting System		and the second second					X
olumns.	Window View	Reports Utilities	Help			Min	Max	Reload Data	Close
ick.	Curre	ent Report: Produ	iction: P3	Work in Process					
-	Reports List	Report Preview	Customiz	e Report Record Selectio	n Customize F	Report Colun	nns		
	Columns	Not Included in Rei	port		Columns Inclu	ided in Repo	ort	Summary Line Fu	nction
	Job File Name		· · · · ·		Job Number		Cou	Int Non-Empty	
	Last Modified D)ate			Job Name				
	Customer: Inde	x	_		Customer: Com	pany			
er	Project: File Nar	ne			Project: Name				
C1.	Item: Index				Owner				
	Account Manag	er		Add To Report >>>	Job Status		Ord	ered Count	
t/Right	Print Type			<<< Remove	Active		Acti	ive %	
CINGIN	Inventory Type				Purchase Order		Cou	int Non-Empty	
	Special 1				Order Date		Cou	Int Non-Empty	
	Special 2				Delivery Date				
	Special 3				Order Quantity		Ave	rage	
	Special 4				Order Price		lot	al	
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T-t-L/T-t-L-6-P									
Total (Total of all num	eric values)								
Average (Average of a	all the Non-Zero	numeric value	es)						
Count Non-Zero (Coun	nt of all the Non-	Zero numeric	values)						
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maximum (maximum	numeric value i	in the column)							
Minimum (Minimum n	umeric value in	the column)							



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
Adaim	6	100.00%	-	6	47.66	67.00%
Alliance	29	34.60%	-	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%
Emst 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	5,468.40	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	60,005.00	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
Morrie 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