



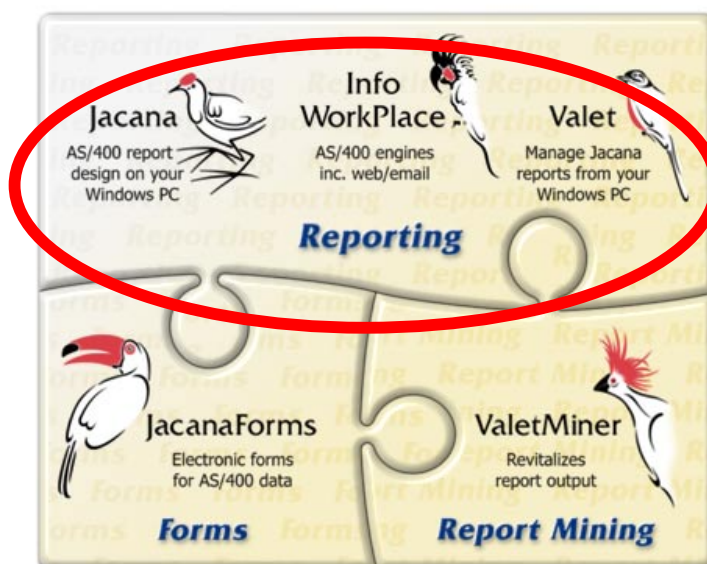
Info WorkPlace-Jacana-Valet
Overview

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EXECUTIVE OVERVIEW



What is Info WorkPlace?

Info WorkPlace, part of Momentum's information retrieval product set, is a powerful and cost effective reporting system. Easy to learn and use, Info WorkPlace (IWP) caters for the needs of both the DP professional and the less technically experienced business user.

Cost pressures, shortage of MIS professionals, increasing database complexity and users' lack of technical expertise all combine to block business users from the information contained in the their application databases.

IWP is designed specifically to address the issues relating to the scale and complexities of commercial applications, with the associated complex database structures and content that are found in the real world.

IWP offers a solution to the problem ... giving users the power to access the database for the information they need; BOTH to monitor business trends and decision making AND to meet the growing demand for management and regulatory reporting.

Info WorkPlace provides users with access to THEIR data to:

Present listings, summaries, trends, exceptions

Download to PC applications

Extract data for extra processing

Transform data to XML, HTML or PDF formats

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Using Info WorkPlace, you can address a whole range of reporting requirements, including:

- Printed reports, listings, executive overviews, exception reports, marketing and finance reports, regulatory reports
- Output to pre-printed forms such as statements, invoices, packing and picking slips
- Labels for packaging and mailings
- Advanced matrix style reports
- Bar codes for output to pre-printed stationery
- Output to disk or for use with PC word processing, spreadsheet or database applications
- Output in XML, HTML, PDF formats for use with e-business, e-mail and web applications

Info WorkPlace provides:

- Report design without technical knowledge of files, keys or database structure
- Added security to protect confidential data
- Comprehensive housekeeping and administration
- Advanced data manipulation for exponential, percentage, weighted averages, ranking and comparison calculations
- Use of macros, extra logic and derived fields
- Run time prompting of selection parameters

How is this achieved?

Through its unique and powerful **Information Interface**, Info WorkPlace learns, stores and applies the rules inherent in the database in a way that enables users to construct the most advanced reports without expert knowledge of files, keys, field names or database structure.

Easy report creation

With Info WorkPlace, you can design, modify, and generate reports that exactly reflect your specifications. Alterations are straightforward and easy—significantly reducing time consuming report maintenance tasks. Reports designed using Info WorkPlace can be used on an *ad hoc* basis or as part of daily or periodic processing.

You can rapidly create a report from scratch, or base it on an existing one. Default report styles reduce the effort involved in designing reports, and can help in maintaining consistency of report presentation throughout the organization.

Client/server Ease-of-use

Windows® based client server applications Jacana and Valet form part of Info WorkPlace, enabling report design, selection and run activity to be accomplished on the user's PC desktop.

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Confidential Information Protected

With fully integrated object security, Info WorkPlace protects data from unauthorized access to the level of individual fields, functions and reports on a group or individual basis.

High system efficiency

Info WorkPlace generates compiled code for greater speed and efficiency, using the native DB2 database directly, without the overhead of an intermediate application layer or interpretive code.

Operational Control

Info WorkPlace provides a set of management reports containing information about the composition and usage of reports created by Info WorkPlace. These help identify incomplete reports and reports with low usage for review or purging.

System-wide reporting

The Information Interface enables cross vendor application reporting. Reports and Data Subsets can be modified to cater for existing customization and add-ons.

Info WorkPlace is sophisticated and flexible—the complete reporting system for MAPICS ERP for iSeries.

BUSINESS ISSUES AND OBJECTIVES

Info WorkPlace steps up to the challenge in today's dynamic and highly competitive business environment, which demands **sophisticated, well presented reporting**; reporting which is responsive to changing and new management information requirements and leverages 'e' technologies.

Cost pressures and the shortage of DP professionals makes it hard for MIS to meet the information needs of line and senior management. On the other hand database complexity and a lack of technical expertise often obstruct business users needing access to the data in their database.

In tackling these problems in MAPICS ERP for iSeries, Info WorkPlace with its unique Information Interface approach, offers the most **cost-effective** means of raising the standard of information services needed by your organization.

Strengthening the analytical and reporting capabilities of MAPICS, Info WorkPlace offers users the power to access the MAPICS database for the information needed for:

- Monitoring business trends and decision making
- Catering for the needs of both the DP professional and the less technically experienced business user

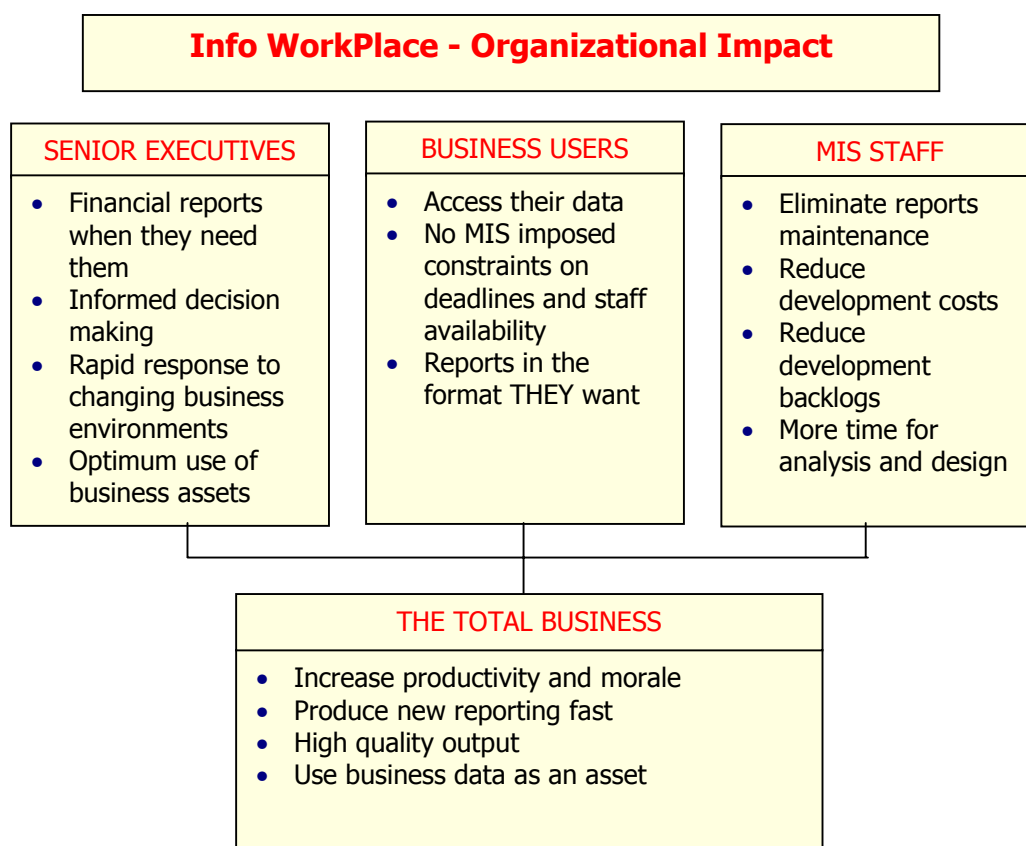
There is no need to subject reporting deadlines to MIS staff availability, since report designers require no knowledge of files, keys, file structures or database construction. Access the data when you need it or rapidly create a new report based on an existing one.

You do not need technical knowledge to perform complex data manipulation and produce reports in the format that you want. In addition, default report styles reduce the effort involved in designing reports from scratch.

With the client/server options of **Jacana** and **Valet** Info WorkPlace brings extraordinary ease-of-use and convenience at the PC desktop to those designing their own reports, as well as those selecting and running reports.

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Info WorkPlace benefits all levels of user



Senior Executives

- Cost effective periodic and/or 'ad hoc' reporting
- Advanced summary and matrix reporting
- The ability to download summarized and formatted data to PC applications for use with spreadsheet, statistical analysis and graphical presentation tools
- The convenience of selecting and running IWP reports from the PC desktop

Business Users

- Fields that are described in user terms masking the underlying technical descriptions
- Macros/extra logic to simplify data conversions, selection, sorting and presentation
- Derived fields to ensure consistency of data across all reporting
- User views to help limit the scope of tables, files, fields available to the user
- Faster report production with less reliance on the MIS department
- Simplified modification of reports during design *and later*
- Production of reports which meet exact requirements
- Convenience of developing, selecting and running IWP Reports from the PC Desktop

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MIS Staff

- Makes more time available for system development, significantly reducing the reporting backlog
- Minimizes maintenance problems since reporting refinements can be accomplished within minutes
- Reduces pressure responding to "ad hoc" user reporting issues
- Produces complex reports faster
- Manages the system operating environment through full security and housekeeping functions
- Measures report run times and usage
- Meets audit needs since all reports created are self documented
- Keeps system performance efficient
- Ensures file linking / joining is done correctly
- Adapts to the introduction of new and/or changing applications and extends to non-MAPICS applications and customized additions to MAPICS itself
- Continues to evolve with new releases
- Ensures knowledge of the database is retained despite staff turnover

Total Business

- Reporting productivity
- More efficient use of MIS and business user resources
- Improved customer services
- Better and more rapid access to information about your business
- PC Desktop convenience

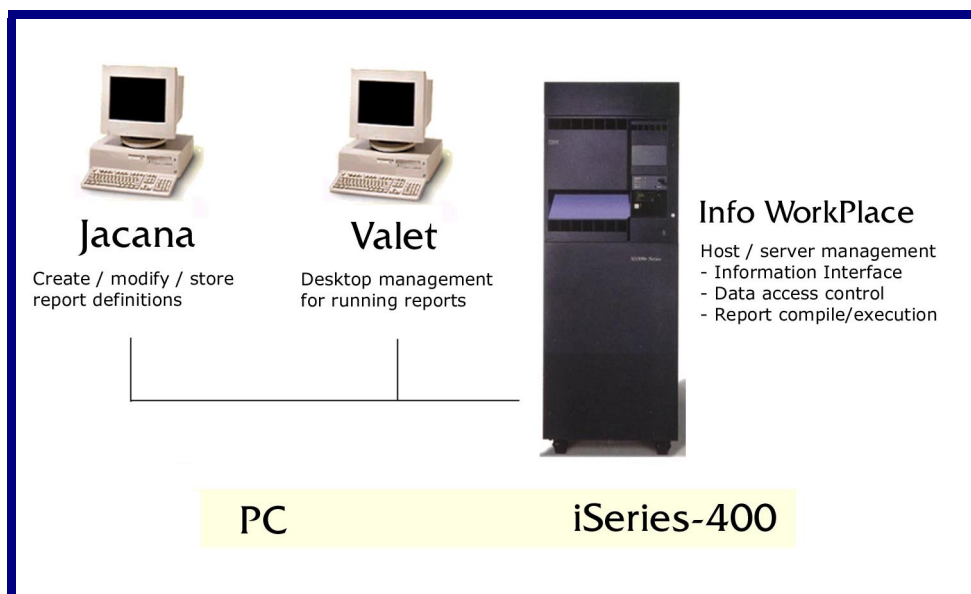
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PRODUCT OVERVIEW

What makes Info WorkPlace different?

There are three major aspects to Info WorkPlace's ease-of-use that distinguish it from other reporting solutions, namely:

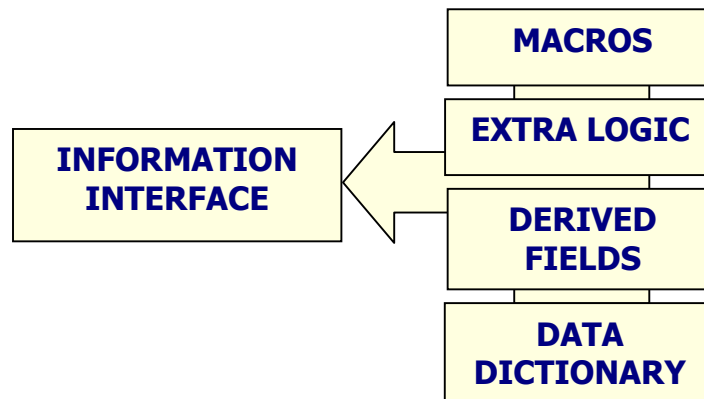
- A. The interface to the MAPICS database itself . . . via Info WorkPlace's unique knowledge-based Information Interface ... and the availability of MAPICS Data Subsets
- B. Designing Reports using Jacana
- C. Desktop convenience of running reports using Valet



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A. The Information Interface

Typical iSeries-400 relational databases, including MAPICS, contain 100's of tables and files with often cryptic table/file and field names. Fields often contain data as codes, flags, or other programming devices. Even dates are often unintelligible and meaningless to the non-technical user.



Data needed to create reports usually spans multiple files, which only the technical analyst knows how to join correctly. Incorrect file linkage can severely impact performance at best, and produce incorrect answers at worst.

Info WorkPlace's Information Interface provides the solution. The strength of the most important component of Info WorkPlace is that most users can be totally unaware of it, happily designing and producing reports without concern for the format or location of data in the database.

Info WorkPlace's Information Interface stores knowledge of the content, structure and inter-relationships of the files in the MAPICS database. Being 'taught' this knowledge when the Information Interface is set up, means that critical information is automatically available to the report designer ... there is no need for them to know anything about the database or file structure.

Info WorkPlace's Information Interface contains the following components:

1. Retrieval Map—a representation of the data relationships in a subset of the database
2. Data Dictionary—a complete list of the fields with their definitions that are included in the subset
3. Skeleton Logic—automatically generated program code necessary to access all the files in the subset
4. User Views—collections of fields reflecting information for specific users or purposes.

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The Information Interface only uses existing access paths when reading the database—no new join files or access paths are created. This ensures the following benefits and efficiencies:

- File linking / joining is done properly
- Performance is optimized by eliminating inefficient joins
- No user creation or recreation of resource-hungry joins
- Efficient processing and selection of data from large complex databases

In summary, the Information Interface delivers a means of presenting a database to the report designer as meaningful information providing the ability to:

- Describe fields in more user friendly terms, translating / masking DP terminology
- Attach macros or extra logic to fields to accomplish, for example, date or currency conversion for data selection, sorting, output or other purposes
- Add derived fields for common calculations or data manipulation
- Limit the number of tables/files and even fields available to each user or group of users

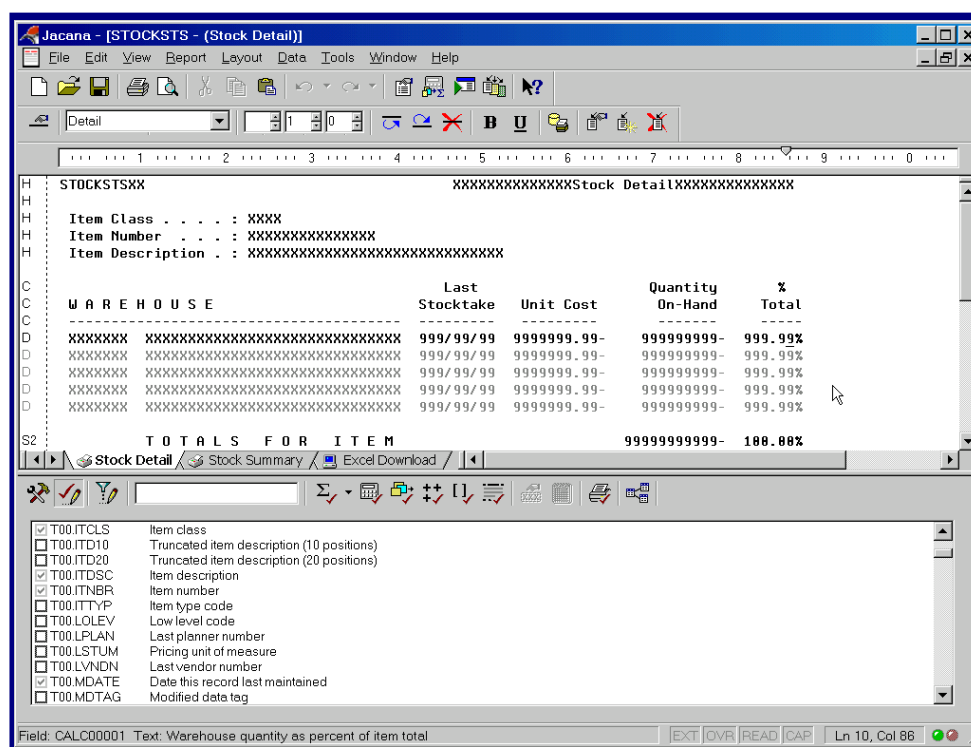
MAPICS Data Subsets

For MAPICS Data Subsets are delivered as standard with IWP for Release 3 and above. These data subsets are designed to enhance access to MAPICS data and include sample reports in the following areas.

- Item Planning and Order Information (IM, MRP, MPSP, COM, PUR)
- Engineering (PDM)
- Manufacturing Order Information (IM, PCC)
- Buyer Purchased Item Profile (IM, PUR)
- Customer Order Information (COM)
- Shipped Order History (COM)
- Inventory Transaction History (IM)
- Financial Transactions (IFM)



B. Designing Reports Using Jacana



Using the intuitive design features offered by Jacana end users can originate their own report specifications on their desktop.

Info WorkPlace and Jacana, in combination, deliver a powerful client/server solution that offers the flexibility, ease-of-use and productivity of a Windows-based application together with the advantages of Info WorkPlace's Information Interface and report production on the iSeries-400.

Jacana maximizes the use of standard Windows features, providing the flexibility for users to work in the way they want:

- Move toolbars or close them down
- Expand the work area by moving the *DataCrafter* (positioned in the bottom part of the screen in the above example); resize it or turn it off
- Work on multiple reports concurrently ... cascade reports, tile reports, make report icons ... even split the report layout window horizontally or vertically
- Use 'Intellimouse' functions
- Modify the number of detail lines to be shown in the report representation
- Cut, copy & paste parts of the layout design
- Show the type of line in the margin i.e. header, column, detail, total
- Apply the ruler or display the cursor as a 'cross-hair' to pinpoint positioning of fields or text

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All field selection, sequencing, calculations, summarization, work field creation, layout ... in fact all report design criteria can be done off-line in Jacana and the final report definition submitted to Info WorkPlace on the iSeries-400 for compilation and execution.

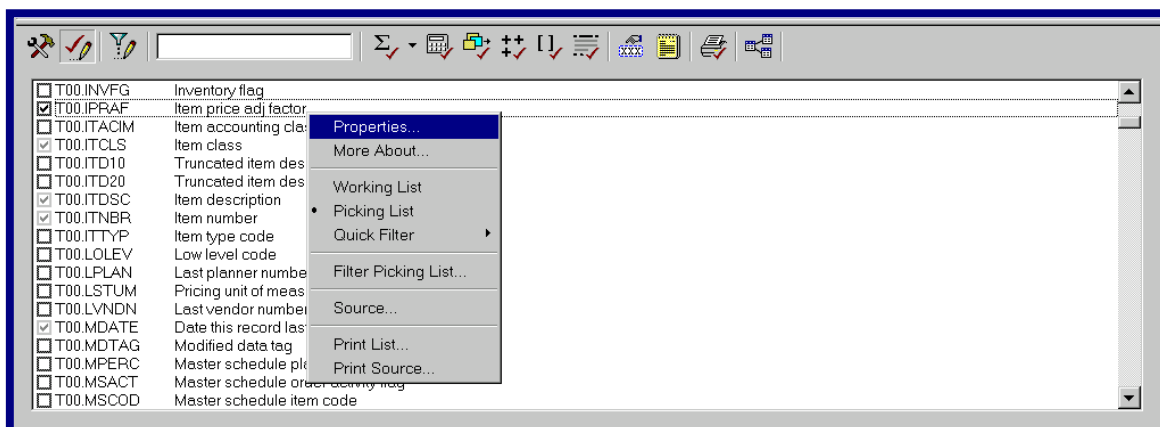
Using Jacana you can:

- Design new report definitions
- Modify existing report definitions
- Store your report definitions locally (on your PC) for future use.

Speeding up report design, Jacana's *DataCrafter*, *ReportWizard*, *LayoutWizard*, *Report Specifications Builder* and intelligent use of the right mouse button provide automated services which enhance ease of use and productivity. Jacana's intuitive prompting, especially when creating conditions and calculations, plus *smart totaling* assist users in the more advanced aspects of report design.

Using the Data Crafter

Jacana gives users the full advantages of Info WorkPlace's Information Interface. Jacana simply presents a list of fields that the user has authority to use. Technical know-how about the database, its structure, files or keys and specific skills to perform complex data manipulation are no longer needed.



Jacana's *DataCrafter* allows the user to filter, select and view the available fields. If the user has access to a large number of fields Jacana enables a more manageable working list to be created at any time.

The *DataCrafter* provides a range of facilities and services to make the task at hand easier.

- *QuickFilters* to help choose the fields
- Separate views of summary, condition, calculated fields and fields used for selections or run time parameters are maintained.
- Creation of new report fields are managed
- Immediate access to the properties and source of any field is provided.

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Using Report Layout

Jacana's WYSIWYG *Report Layout* can be used to build from scratch a report design exactly matching specific requirements. Tailoring covers all aspects of report presentation including detail or summary format, properties and attributes for individual lines and / or fields.

Easily add fields to the report layout by dragging them from the *DataCrafter* ... an outline of the field will appear as it is positioned in the layout. Use of the right mouse button further speeds up design, allowing optionally the addition of a label, heading and / or totals associated with the field at the same time.

| WAREHOUSE | Last Stocktake | Unit Cost | Quantity On-Hand | % Total |
|--------------------------------------|----------------|-------------|------------------|---------|
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | 999/99/99 | 9999999.99- | 99999999- | 999.99% |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | 999/99/99 | 9999999.99- | 99999999- | 999.99% |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | 999/99/99 | 9999999.99- | 99999999- | 999.99% |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | 999/99/99 | 9999999.99- | 99999999- | 999.99% |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | 999/99/99 | 9999999.99- | 99999999- | 999.99% |
| TOTALS FOR ITEM | | | 99999999- | |

Additionally,

- Change field and line characteristics with a single mouse click ... space before, space after, bold or underline
- Add text anywhere
- Turn on the ruler to help align items
- Implement standard report templates to specify default heading and footer lines to consistently position commonly used fields such as user name, report title, page number, date and time of report production or whatever you need
- Attach banner and control pages
- Add special instructions to appear when the report is run

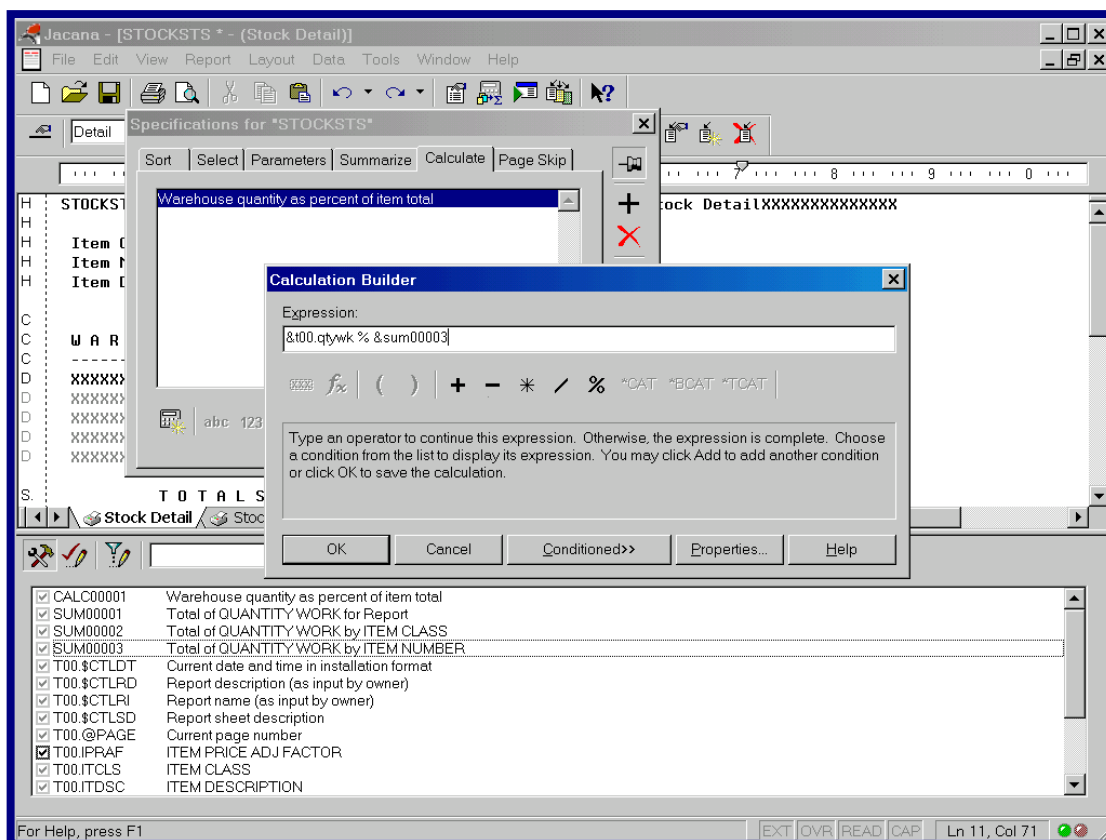
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Using Report Specification Builder

Data manipulation is simplified with the *Report Specifications Builder*. *Report Specifications Builder* is a straightforward point-and click expression builder offering a consistent user interface to create and refine report content. Using the dialog box and associated tabs the body of the report can be refined to establish:

- How the data is sorted
- How the data is summarized
- Run time parameters
- The selection criteria applied to the data
- Calculated work fields
- Where page breaks occur
- and all the associated refinements.

Extensions to the *Report Specifications Builder* include Condition, Selection and Calculation builders to simplify expression creation. Using buttons to indicate mathematical, field / function selection, parenthesis, arithmetic or character string operations, expressions can even be constructed with the click of a mouse button.



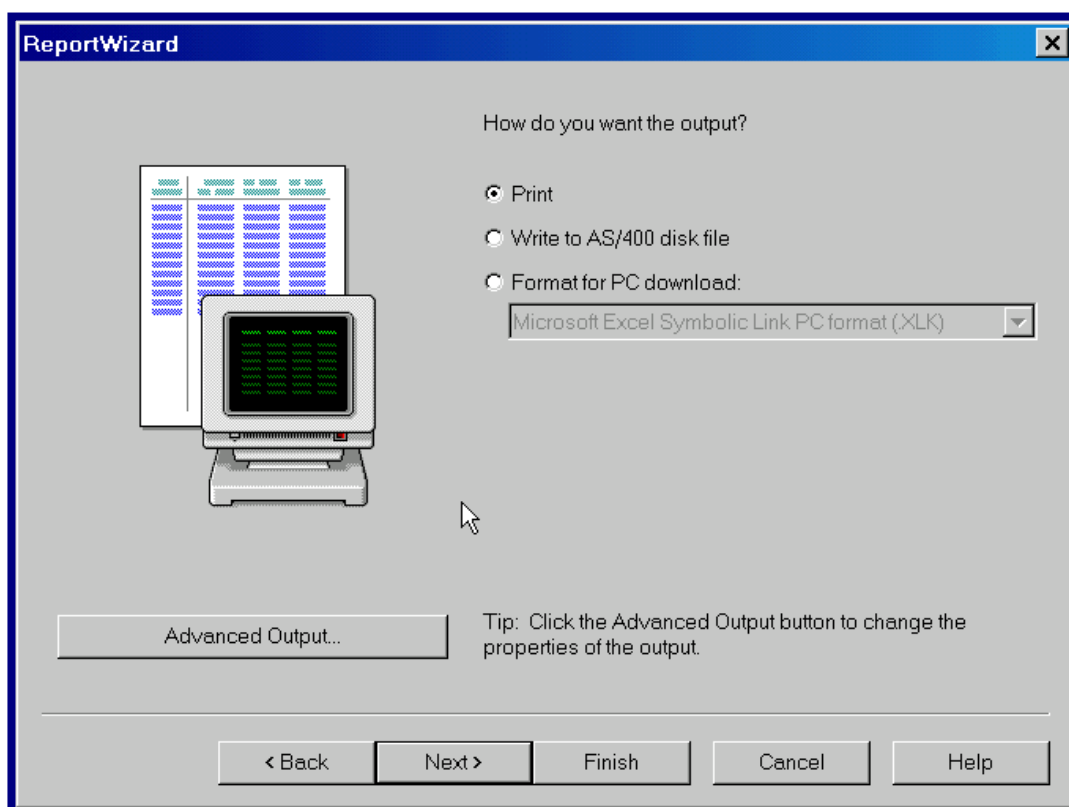
Info WorkPlace-Jacana-Valet

Jacana intuitively prompts each stage of the expression pointing out any inconsistencies that require correction.

Jacana also skillfully generates total and sub total fields in the *DataCrafter* summary list which reflect sorting and summarization criteria specified in the *Report Specifications Builder*. The helpful derived descriptions assigned by Jacana mean that such fields can be easily used in calculations, conditions and / or printed in the report itself.

Using ReportWizards

Step-by step report creation with Jacana's *ReportWizard* is an easy way to get reports started or completed quickly. *ReportWizard* displays a series of dialog boxes leading the user through the steps needed to create a report definition. Using answers to the questions about the information required in the report -- the fields, the sorting, the totaling and other requirements -- *ReportWizard* automatically creates a report definition and image for approval. Reports designed by *ReportWizard* can be fine-tuned later.



Custom templates and Wizards can be created to further simplify the report creation steps and improve productivity.

Info WorkPlace-Jacana-Valet

In summary ...

Jacana combines the ease-of-use of the Windows environment with the power, security and sophistication of the iSeries-400, allowing report definitions to be created and modified off-line, while retaining the benefits of the iSeries-400 where the reports are actually run.

This client-server approach ensures:

With **Info WorkPlace** on the iSeries-400...

- File linking and joins are correct
- Users cannot create superfluous and resource-hungry logical views
- Accurate, automatic measuring of report times and usage
- Optimized performance from compiled programs
- No reliance on SQL or ODBC drivers
- Large volumes of data can be processed
- Systems resources are fully managed
- Authorized access to data is not compromised

With **Jacana** on the PC providing ...

- Off-line report development minimizing iSeries-400 resource requirements
- End user report development taking advantage of Jacana's ease of use
- Deployment of advanced report development capabilities which do not require technical or programming skills
- Reduced training requirements of a familiar Windows environment
- Extended return on the investment in the MAPICS Information Interface and Data Subsets

With Info WorkPlace, reports are formatted exactly to your requirements. Output can be designed entirely by Info WorkPlace, entirely by you, or by a combination. A report can be created or modified in a matter of minutes.



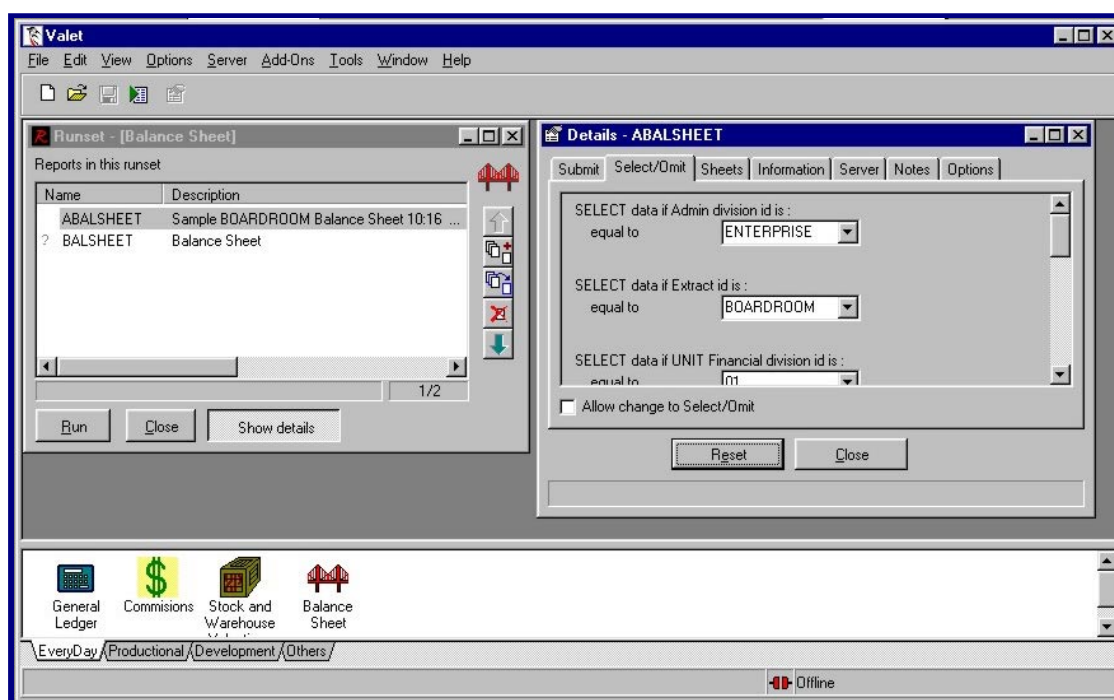
C. Selecting and running reports using Valet

Why Valet?

Valet enables Info WorkPlace reporting activity to be streamlined on the user's PC desktop.

Many business users expect everything to run within their familiar Windows® desktop environment . . . they dislike having to work with the 5250 emulation screens to run the reports they need. Valet offers the solution.

Operating specifically with Info WorkPlace, Valet provides users with options for selecting and running their Info WorkPlace reports from a Windows environment. Reports can be requested individually, multiple reports can be combined and run at the same time or report selection can be defined as a Valet icon.



Set your own Desktop Preferences ...

Valet enables characteristics of the Valet desktop to be tailored to suit each user ... how files are stored and retrieved on your PC; whether the desktop is loaded automatically on entry to Valet and saved on exit; how Valet communicates with the iSeries-400 etc.

Since Info WorkPlace can deliver data seamlessly to PC applications, by clicking on a Valet icon, a suitably defined report can be run to extract and download iSeries-400 data directly into a PC spreadsheet. Once the report has been run, simply “switch to” the PC application and the data will be there.

Info WorkPlace-Jacana-Valet

Client/server and security

Valet is a PC application (the ‘client’) which complements Info WorkPlace (the ‘server’). All the information about a report is held in the Info WorkPlace database on the iSeries-400. Valet will not allow the report definition itself to be modified, but it will allow the user to run the report and change output queues, job queues, job description and processing modes (batch, interactive, night, data queue), subject to authority.

Benefits of Valet

- Valet’s reporting environment can be set-up and modified off-line
- Automates report requests
- Simplifies access to frequently used reports
- Report select / omit rules and other report run parameters can be changed from the desktop
- Organize shortcuts by setting up report runs as icons
- Launch other PC applications using output of interactively run reports started by Valet
- Display output of interactively run reports

Creating a Runset

Valet Runsets are the mechanism for setting up ‘report runs’ for one or more reports. Create a Runset in seconds, and avoid having to select reports from a list each time they are required.

Runsets also have their own properties enabling you to:

- Enter notes about the runset
- Modify how the runset appears on your desktop
- Assign an icon to the runset
- Add the runset to the Windows operating system desktop
- Add PC operating system commands to run before and / or after the runset is run ... for example to initiate another PC program or application

Valet Organizer

As the number of report run icons increases it can be helpful to group similar or related report runs. Valet’s Shortcut Organizer enables icons to be categorized and held in separately identified groups within a row of user defined tabs. This is the perfect solution for reports that are used frequently or, where a number of reports are run periodically - set up an icon each for “Daily”, “Weekly”, “Monthly”, etc.

Users learn to use VALET in minutes . . . it’s that easy.



Info WorkPlace OVERVIEW OF KEY FEATURES

Data Handling

Info WorkPlace provides all the facilities to easily:

- EXTRACT data from as many files as necessary
- PROCESS data in any way possible on an iSeries-400
- PRESENT information in virtually any manner
- TRANSFORM data into XML, HTML or PDF formats

Extraction of data is based on existing fields but Info WorkPlace can also provide the ability (via the Information Interface) to:

- Decode/translate code values
- Introduce derived fields based on values in existing fields in one or more files
- Break down a structured code into its elements
- Combine multiple fields into one
- Attach logic macros to fields

Selection of data may be controlled by:

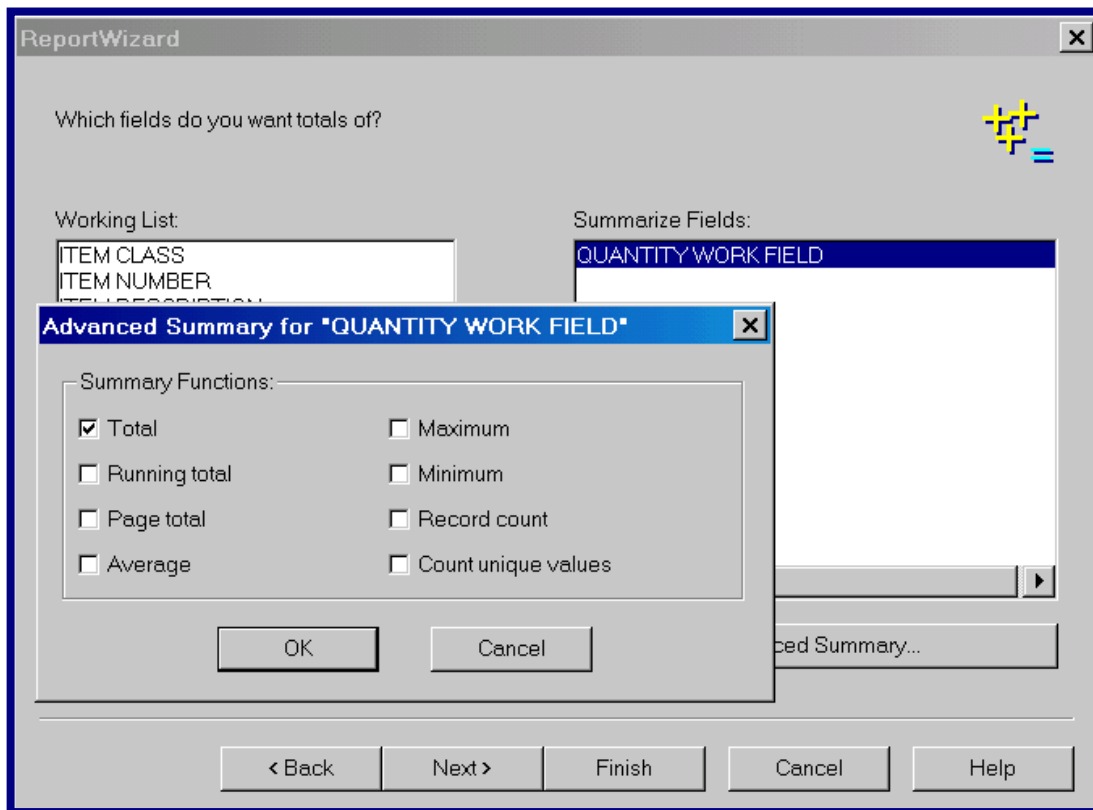
- Selection and/or omission involving up to 20 fields
- Select/Omit using calculated fields
- Select/Omit using fields not present in the output
- Up to 100 conditions/values per field used
- Complex IF, AND, OR statements
- Various comparison types—EQ, NE, GT, LT, GE, CT, LIST, RANGE, START
- Fixed comparison values
- Variable comparison values—prompted and entered at report run time
- Generic selection on character string(s) in fields
- Blank value selection
- Selection by absolute value

Presentation of Data

Info WorkPlace provides a multitude of features allowing straightforward refining of all aspects of a report's design, content and layout. Some of the advanced capabilities, which illustrate Info WorkPlace's design flexibility and control, are to be seen in the areas of:

Handling totals

- Look-ahead percentage calculations against any total, subtotal or average
- Running / graduated totals
- Subtotal positioning anywhere in a report line/page
- Embedded subtotaling at up to 20 levels
- Output of totals before the detail records involved
- Page by page totaling



Controlling paging

- Comprehensive page skipping and/or numbering control, including complex AND/OR relationships
- Line printing control to avoid the separation of headings from their associated detail data (referred to as Widows and Orphans) during page skipping
- Page numbering option for the format 'page n of n '
- Start a new print file on change of sort
- Automatic page sizing if 'printer' output is altered to 'screen' output and vice versa.
- Restart page numbering when a particular sort change occurs

Editing Layout

- Output in detailed or summary form or a combination of detail/summary in the same report
- Conditional line printing
- Total freedom to mix data and text in report lines
- Alteration to any headings or labels
- Field values to be used as column headings
- Optional headings and footings
- Addressable select/omit criteria which can be printed anywhere within the report
- Adjustment to left and right margin sizes

Info WorkPlace-Jacana-Valet

- Ability to underline or highlight lines or fields
- Control over the space between fields and lines
- Alteration to the format of fields using edit codes, edit words and print macros
- Multiple records per line/lines per record
- Allows use of DDS keywords (e.g., bar-codes)
- As many heading/footering lines as required

Operational Control

- Optional Banner page on each report identifies the contents of the report and assists distribution
- Optional Control page sets out selection criteria, number of records processed, average report run time, details of work fields used, the selection values entered by the user, the sorting sequence applied, etc.
- Message text can be specified which will be displayed at execution time to the user running the report and can be used to explain the purpose of any parameters to be entered.

Multi-sheet reporting

Multi-sheet reporting allows different styles of reports to be used with a single pass / extract from the database. All the multi-sheet reports must, however, use the same Select and Sort criteria. There are no restrictions to the format or type of output. For example, detail, summary, matrix and PC output (sheets) can be produced from a single pass of the data. Multi-sheets offers some potentially significant performance benefits.

Info WorkPlace security enhances data access and control

Since Info WorkPlace is a data access and retrieval tool, corporate data cannot be modified or removed in any way using standard Info WorkPlace functions. Security features within Info WorkPlace ensure that existing iSeries-400 security is not compromised by the product, but enhanced.

Additional levels of security at both application and data levels are provided to maintain database integrity, protecting data from unauthorized access, modification or removal.

To prevent abuse or misuse, limitations can be imposed in various ways, including:

- Allowed processing modes—interactive, batch, night or data queue
- Allocation of a specific output queue and library
- Limiting production runs for maximum run time and records selected/read, and, most importantly,
- Access rights to Info WorkPlace objects

Info WorkPlace-Jacana-Valet

Info WorkPlace uses a combination of eight types of object:

- Subsets
- Groups
- User Views
- Fields
- Reports
- Instances
- Macros
- Functions

... with six classifications of access right:

- Use
- Read
- Add
- Change
- Delete
- Produce

The potential strength, flexibility and application of this combination is illustrated in the following chart ... if a user/user group does not have a particular right to an object, they will not be able to use the object in that way.

| Object type | Use | Read | Add | Change | Delete | Produce |
|--------------------|------------|-------------|------------|---------------|---------------|----------------|
| Subsets | | ✓ | ✓ | ✓ | ✓ | |
| Groups | | ✓ | ✓ | ✓ | ✓ | |
| UserViews | | ✓ | ✓ | ✓ | ✓ | |
| Fields | | ✓ | ✓ | ✓ | ✓ | |
| Reports | | ✓ | ✓ | ✓ | ✓ | ✓ |
| Macros | ✓ | ✓ | ✓ | ✓ | ✓ | |
| Functions | ✓ | ✓ | | | | |

Info WorkPlace-Jacana-Valet

Info WorkPlace provides security through the assignment of access rights to users. An access right to an object allows the user to make use of the object in a particular way. Access rights can be granted to individual users or to groups of users.

A user's access to any Info WorkPlace object or function is controlled by their user profile that is managed by the system administrator. The user profile will determine whether or not a particular Info WorkPlace function can be accessed.

Additional Security provided by User Views

The User View is a powerful concept unique to Info WorkPlace. This is simply a collection of fields that typically contains the information needed to satisfy a particular area of interest or reflects a particular category of information (e.g., data required by the marketing department).

User Views are extremely easy to set up and modify—yet incur no performance penalty—while providing a level of security by presenting only those fields required by an individual user or department group.

With its comprehensive range of security features, Info WorkPlace can prevent users undertaking unauthorized tasks, including the protection of sensitive data to the level of individual fields, functions and reports on a group or individual basis.

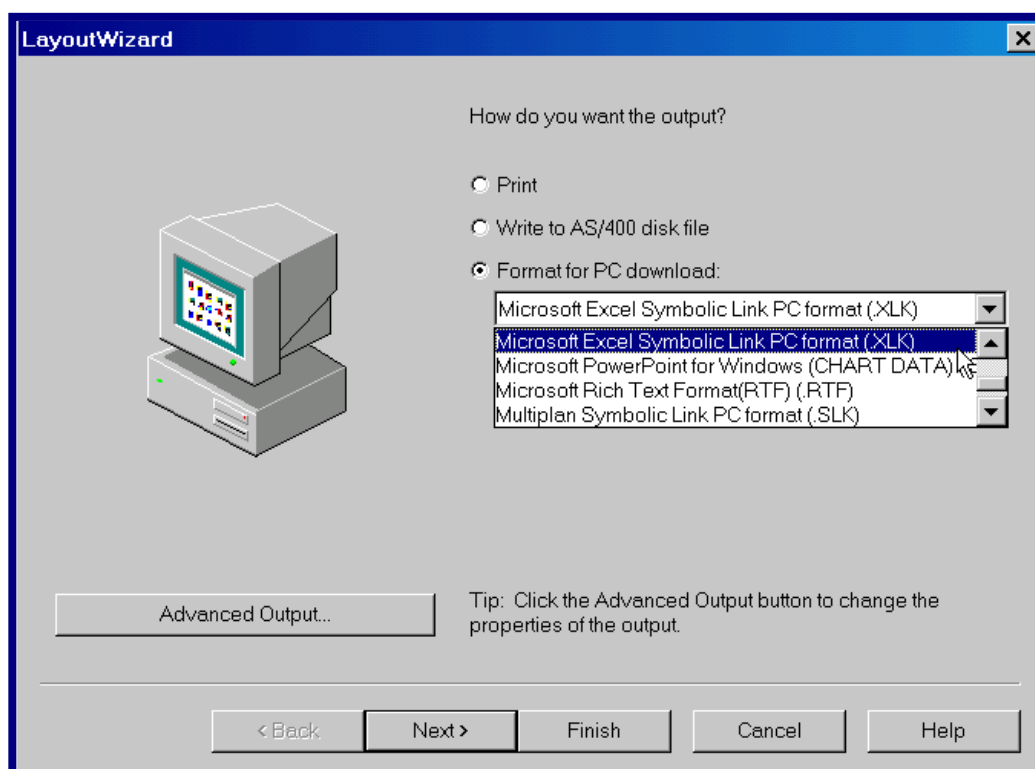
In addition to the security features, Info WorkPlace includes an extremely comprehensive set of audit/housekeeping reports which provide the usage and definition details for all reports.

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Using Info WorkPlace with PC Applications

Allow Info WorkPlace to retrieve data from MAPICS and deliver it to PC applications.

Let Info WorkPlace do what it is good at . . . selecting and summarizing iSeries-4 data while protecting users from the intricacies of the iSeries-400 database.



By using Info WorkPlace to deliver iSeries-400 data seamlessly to a PC application, you can apply the strengths of a spreadsheet, database, word processing, or desktop publishing application to data that has initially been selected and summarized by Info WorkPlace.

To illustrate: select names and addresses based on account balance data in Info WorkPlace for a direct marketing campaign—using your word processor to generate the letters and merge the names and addresses. Or: download financial data summaries to a spreadsheet program where they can be used for modeling or presented as a 3-D chart for inclusion in your department's quarterly report.

Info WorkPlace can also be a powerful tool in cleansing data for OLAP or data mart applications!

Using Info WorkPlace to download iSeries-400 resident data to your PC application can offer some significant advantages and overcome a number of often-encountered difficulties.

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With PC applications, problems can arise trying to accomplish the following tasks:

- Handling and processing large numbers of records—all PC applications have established limits even if you don't encounter PC memory or disk problems before the application limit is reached
- Retrieving data from multiple files—often difficult to specify unless technical assistance is available to determine the correct and most efficient file linkages
- Extracting data in the format required and decoded—since most files contain flags and other technical devices which may need to be interpreted before the data can be used (dates and currency amounts are typical examples)
- Summarizing and combining data from multiple files
- Directly addressing large complex relational databases

Additionally, most PC-based query tools:

- Rely on SQL-based engines which usually require in-house SQL expertise,
- Do not provide all the answers to query requirements, and
- Frequently do not perform efficiently in an iSeries-400 environment

Let the iSeries-400, as the server, take the strain. Overcome these problems by using Info WorkPlace to:

- Free users from the details of iSeries-400 file and field names. Info WorkPlace's Information Interface protects the PC user from needing to know anything about the iSeries-400 files or database structure
- Leverage the investment in the Info WorkPlace Information Interface . . . the derived fields created, extra logic applied, the application of any macros (especially for date conversion)
- Enable multiple files to be linked together without user intervention . . . and prevent potential inadvertent performance degradation of production machines by untrained users setting up inappropriate file links with their query tools
- Ensure automatic security over sensitive information to a field level
- Minimize the risk of losing data, since the PC file in an iSeries-400 folder can be backed up as part of the normal iSeries-400 backup routines
- Overcome the constraint of files being too large for the PC application . . . summarize and select the data on the iSeries-400
- Provide the selection criteria and totaling facilities—averages, maximums, minimums and mathematical calculations
- Manage the output folder paths and documents (files)
- Embed the PC file creation queries into standard daily or periodic processing and incorporate run time variables if they are needed. The resultant file(s) can then be placed in an iSeries-400 folder for use with the PC application at the convenience of the user

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Making data available to PC applications

Quite often, the most difficult step is getting the data into the PC application. PC packages all have data import and/or data translation facilities and/or the ability to read files in specific PC data formats. Using one of these features will enable the use of data transferred from the iSeries-400 to the PC via Info WorkPlace.

When creating a report definition for download to a PC application, Info WorkPlace ensures that a suitably formatted file is created. Additional features available with Info WorkPlace can automatically launch a spreadsheet application to display the data. The data can be either detailed or summarized and all the facilities of Info WorkPlace can be utilized to manipulate the data prior to delivery to the PC application.

Info WorkPlace provides the following PC file formats that are capable of being used with all the leading PC applications:

- SLK Symbolic Link (Multiplan)
- DIF used by VisiCalc
- DBF dBase file
- CSV Comma Separated Variables
- TXT simple text for use by word processing packages

Using Info WorkPlace's macros to simplify report creation

Info WorkPlace's comprehensive macro facilities enable complex data manipulation to be performed easily and with uniform accuracy across any/all reports.

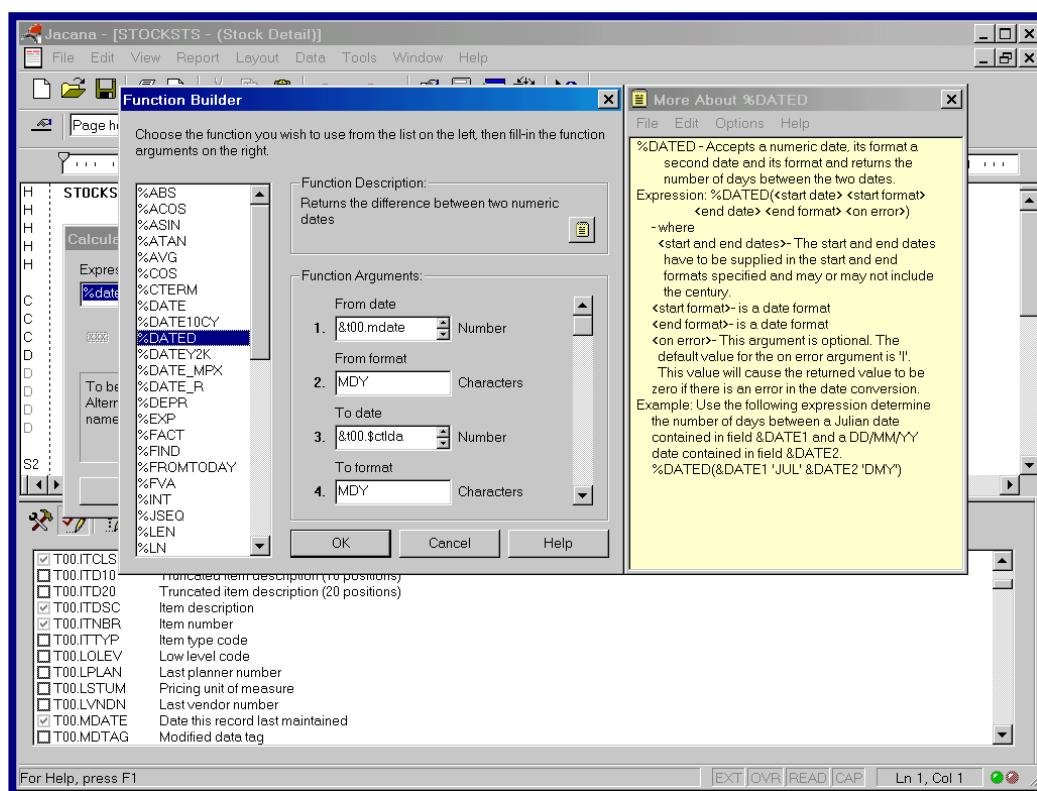
Macros are typically used to satisfy three significant objectives:

1. Relieve users of repetitive tasks such as date format conversions, currency exchange rate calculations or profit margin computations.
2. Enable users to perform complex data calculations/ manipulations that require technical skills the user may not have (such as centering a string in a field, converting numeric amounts to words, or specifying three-up labels).
3. Ensure certain calculations are consistently and accurately performed in all reporting for example, a loan repayment calculation or margin retention.

Info WorkPlace comes with over 100 pre-defined macros. They can be used in a variety of ways, including:

- *Within the Information Interface data dictionary*—where macros can be attached to fields, causing the macros to apply to any report in which those fields are used. Macros can be selectively attached to one or more specific uses or 'instances' of a field, allowing the use of a macro appropriate to the situation(s) in which a field is used. Some of the common 'instances' are PRINT, SORT and SELECT.
- *In the creation of a work field*—an example might be to use a macro to calculate the number of days between two date fields.

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Use macros under a variety of 'instances'

To illustrate the benefits and use of instances, consider the example of a data field stored in 'absolute' format (the number of days since a given reference date). While this date format is useful for a programmer in a technical environment, it has very limited use or meaning to a report designer. However, by attaching macros to a field in the data dictionary, Info WorkPlace can ensure that:

- For the PRINT instance of the field, a macro translates the 'absolute' format to a format such as Month Day Year (e.g., June 15 2001) whenever the field is printed.
- For the SELECT instance, a macro translates the date to, for example, a MM/DD/YY format whenever the field is used to select (or omit) data for a report.
- For the SORT instance, no macro need be attached since the internal absolute date format will, in most cases, be appropriate for sorting data. (An alternative might be to attach a macro translating the date to the YY/MM/DD format that is often used for sorting.)

With this done, a report designer can use the same field in any report with no concern, knowledge or need to know about conversion of the date to a format suitable for printing, sorting or data selection.

Info WorkPlace's already extensive range of supplied macros is continually being enhanced and extended.

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Over 100 macros are included to provide functions often requested by users. Some of the common processing requirements covered include:

- Date formatting, conversion and calculations
- Character string handling functions
- Mathematical functions
- Financial functions
- Trigonometric functions

Supplied macros are only part of Info WorkPlace's capability in this area. To handle processing specific to your organization / application needs or, to handle unique database constructs or formats, you may (at any time) create your own macros.

Technicians normally create new macros. While they are usually in RPG or CL, they may include code to call external programs, enabling existing subroutines written in virtually any programming language to be used by Info WorkPlace.

Matrix reporting made easy

One of the advanced and unique features of Info WorkPlace is its Matrix Reporting. Easily created *true* matrix reports—not simple columnar designs.

Matrix Reports present 'like-data' across different columns, a major benefit that allows comparison of data across different time frames, locations, age groups, etc. Typical applications include financial performance reports and budget reviews.

Since a matrix report positions 'like' data values into one or more columns dependent upon certain pre-defined conditions, they are frequently used to allow rapid and simple comparisons of values.

Examples of matrix reports are found in all areas of business, for example:

| | Area A | | Area B | | Total | |
|--------------|--------------|-----------------|--------------|-----------------|--------------|-----------------|
| | No. of items | No. of invoices | No. of items | No. of invoices | No. of items | No. of invoices |
| Q1 | 2235 | 102 | 2433 | 121 | 4668 | 223 |
| Q2 | 1865 | 84 | 2102 | 95 | 3967 | 179 |
| Q3 | 201 | 98 | 1994 | 97 | 3995 | 195 |
| Q4 | 2176 | 103 | 2477 | 110 | 1653 | 213 |
| Total | 8277 | 387 | 9006 | 423 | 17283 | 810 |

- A report, showing for each month/period, etc., (down the page), the number of items and invoices generated for each cost center (across the page)

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| Products Requiring Reorder | | | |
|-----------------------------------|-----------|-------|-------------|
| Product | Warehouse | | |
| | London | Tokyo | Los Angeles |
| 010001 | YES | NO | NO |
| 010002 | NO | NO | YES |
| 010003 | NO | NO | NO |
| 010004 | YES | YES | NO |
| 060001 | NO | YES | NO |
| 060002 | NO | NO | NO |

- A table, indicating by warehouse, whether products need to be reordered

| Products Banded by Quantity on Hand | | | | |
|--------------------------------------------|------------------|---------|---------|----------|
| Warehouse | Quantity on Hand | | | |
| | 0-200 | 201-300 | 301-400 | Over 400 |
| Amsterdam | 010001 | | | |
| Los Angeles | 010001 | | | |
| Tokyo | | | | 010001 |
| Santiago | | | 010001 | |
| North London | 010001 | | | |
| South London | | 010001 | | |
| Amsterdam | 010002 | | | |
| Los Angeles | | | 010002 | |
| Santiago | | | 010002 | |
| North London | | 010002 | | |
| South London | 010002 | | | |

- An analysis, showing by warehouse location what quantity thresholds are held for each product

With its own ReportWizard in Jacana, through a series of panels, the report designer defines the characteristics and desired content of the matrix style report. Jacana will then automatically develop the layout format of the matrix report.

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SALESMTXXX XXXXXItem Sales by Warehouse MatrixXXXXX

| WAREHOUSE | ITEM CLASS A | | ITEM CLASS B | | I T |
|------------------------------|---------------|----------------|---------------|----------------|--------|
| | Month Sales | YTD Sales | Month Sales | YTD Sales | |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9999999.99- | 999999999.99- | 9999999.99- | 999999999.99- | 9999 |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9999999.99- | 999999999.99- | 9999999.99- | 999999999.99- | 9999 |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9999999.99- | 999999999.99- | 9999999.99- | 999999999.99- | 9999 |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9999999.99- | 999999999.99- | 9999999.99- | 999999999.99- | 9999 |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9999999.99- | 999999999.99- | 9999999.99- | 999999999.99- | 9999 |
| REPORT TOTALS | 999999999.99- | 9999999999.99- | 999999999.99- | 9999999999.99- | 999999 |

SALESMTXXX XXXXXItem Sales by Warehouse MatrixXXXXX

Item Sales by ...

Pick Matrix

- XFLD00001 Quantity sold this period (1)
- XFLD00002 Quantity sold this period (2)
- XFLD00003 Quantity sold this period (3)
- XFLD00004 Quantity sold this period (4)
- XFLD00005 Quantity sold year-to-date (1)
- XFLD00006 Quantity sold year-to-date (2)
- XFLD00007 Quantity sold year-to-date (3)
- XFLD00008 Quantity sold year-to-date (4)
- XFLD00009 Quantity sold this period (X)

Shows only the matrix column fields and associated summary fields in the picking list

In Info WorkPlace, powerful design features are available to easily extend the 'simple' single column matrix into the complex and sophisticated 'super column matrix' report often required.

These include:

- Having multiple fields associated in 'super-columns' as might be found in reporting against budgets where 'actual', 'budget', and 'variance' are to be shown as 'sub-columns' for each reporting period.
- The dynamic inclusion into individual column headings of the run time variable selections actually used; for example, the name of each warehouse you choose to include
- The simple specification and automatic creation of columns reflecting bands or ranges rather than specific values; for example, a matrix with outstanding amounts aged in columns of the past 30, 60, 90, 120 and over days
- A choice of totaling horizontally and/or vertically, of all or selected fields, at all or selected levels
- Flexibility to move, add, delete and modify fields and columns after initial report design

Reporting in a matrix format adds another dimension to reporting in general. Given the widespread need and the technical challenge such reports can be to develop and modify manually, Info WorkPlace's powerful yet easily used matrix features will delight the non-technical while satisfying even the most critical technician.

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SUMMARY

Info WorkPlace delivers improved cost effectiveness and reduced development backlog and can demonstrate significant productivity gains over conventional development tools. Reduce costs and boost morale by freeing MIS from the chore of maintaining reports and, at the same time, give users better and timelier information.

Info WorkPlace tackles the challenge of delivering well presented reporting, reporting which is responsive to changing and new management information requirements. In today's dynamic and highly competitive business environment, having access to the data in your database, presented in the right format, at the right time may be key to decision making that can keep you competitive.

Info WorkPlace'S BENEFITS

- Reporting backlogs melt away
- Reporting can be maintained and modified to meet changing requirements
- Reduced reliance on database and technical skills to produce the reporting
- Improved efficiency through simplified extraction, summarization and downloading of data to PC applications removing the need to re-key report information
- Enhanced decision making as information can be provided more rapidly
- Increased MIS productivity offering significant cost savings
- Improved access to MAPICS information through MAPICS Data Subsets

*Info WorkPlace is sophisticated and flexible
-- the complete reporting system for MAPICS ERP for iSeries.*