

Exercise: List Parts Issued from Warehouse

Suppose you need a list of all parts issued from a warehouse to all jobs on a given date. You intend to use the report in Excel to analyze contents, and you would like the following features:

- Prompt for one or multiple warehouses
- Prompt for date and time range
- Prompt for one or multiple part categories.

The list report will use the Materials Issued Star and the data elements below:

- Filters – Warehouse AND Part Category 1 AND Issue/Return Date
- Dimensions – Warehouse, Work Order Number, Part Number, Part Type, Crew, Craft, Maintenance Type, Description, Billing Type Name, WO Schedule Date, WO Complete Date, Issue/Return Date
- Fact – Issue Number, Entered Date, Quantity, Base Price, Amount

Insert filters and prompts

1. From the Insert Data menu, expand AdHoc 2.0 View > Materials Issued Star.
2. Expand the Warehouse Parts dimension.
 - a. Right-click Warehouse and click *Filter for report*.
 - b. Click *Prompt every time the report runs*, and click OK.
3. While within the Warehouse Parts dimension, add the part category prompt.
 - a. Right-click Part Category 1, and click *Filter for report*.
 - b. Click *Prompt every time the report runs*, and click OK > Apply > OK.
 - c. Close the dimension.
4. Expand the Material Issue Date dimension.
 - a. Right-click Issue/Return Date and click *Filter for report*.
 - b. Click *Prompt every time the report runs*, and click OK > Apply > OK.
 - c. Close the dimension.

Insert dimension elements onto the canvas

5. Expand the Warehouse Parts dimension.
 - a. Ctrl-click to select Warehouse, Part Type, Part Number, and Description.
 - b. Click the *Insert* button.
 - c. Close the dimension.
6. Expand the Work Order dimension.
 - a. Ctrl-click to select Work Order Number, Craft, Work Order Crew, and Maintenance Type.
 - b. Click the *Insert* button.
 - c. Close the dimension.

Continued...

Rearrange columns in the first half of the report

7. If necessary, arrange the columns in an order matching the report sample.
 - Use cut and paste to move columns one at a time.
 - Select the column that you want to move, and click Cut (or Ctrl+X).
 - Select the column on whose left you want to stack the column, and click Paste (or Ctrl+V).

Continue adding dimensions and facts

8. Expand the Billing dimension.
 - a. Double-click Billing Type Name.
 - b. Close the dimension.
9. Expand the WO Schedule Date dimension.
 - a. Double-click WO Schedule Date.
 - b. Close the dimension.
10. Expand the WO Complete Date dimension.
 - a. Double-click WO Complete Date.
 - b. Close the dimension.
11. Expand the Fact – Materials Issued table.
 - a. Ctrl+click Issue Number, Entered Date, Quantity, Base Price, and Amount.
 - b. Click *Insert*.
 - c. Close the fact table.
12. Expand the Material Issue Date dimension.
 - a. Double-click Issue/Return Date.
 - b. Close the dimension.

Rearrange columns in the second half of the report

13. If necessary, arrange the columns in an order matching the report sample, using cut and paste.

Add finishing touches

14. Apply a sort to two columns: Warehouse and Issue Number.
15. Add the title “Daily Parts Issued List.”

Save and run the report

16. Click Save.
 - a. Give the report a file name like “Daily Part Issue List.”
 - b. Select a location in “My Folders” and click OK.
17. Click Run and respond to the prompts you requested.
 - a. In the Warehouse prompt, click Select All.
 - b. In the part category prompt, click Select All.
 - c. In the date range prompt, select December 15, 12:00 a.m., through December 15, 11:59 p.m.
 - d. Click OK. Result: the report runs with all data.
18. Export the report to Excel.
 - a. Within the Menu on the left hand side of the canvas, click Run Report.
 - b. Click View in Excel 2007 Data Format.