

# Exception Reporting Using f4b

Section1 of these notes apply to all users however you will need at least an Administrators Licence to access the setup features in Section2.

## Section1(All Users)

### Purpose

- Exception reporting in f4b provides targeted reporting, optionally via emails that points users at specific issues that need attention.
- The reports are produced via the scheduler and are only populated/emailed when there are issues to be addressed.
- Minimalizing the quantity of reports produced and only producing summary information ensures that users are not swamped with lots of potentially confidential data.
- Viewing the reports via f4b enables the tools, forms and activities available to resolve issues to be launched directly from the exception report.

### Using Exception Reports

f4b applications provide access to relevant exception reports via activities available from the navigation section of the File Menu Fig1

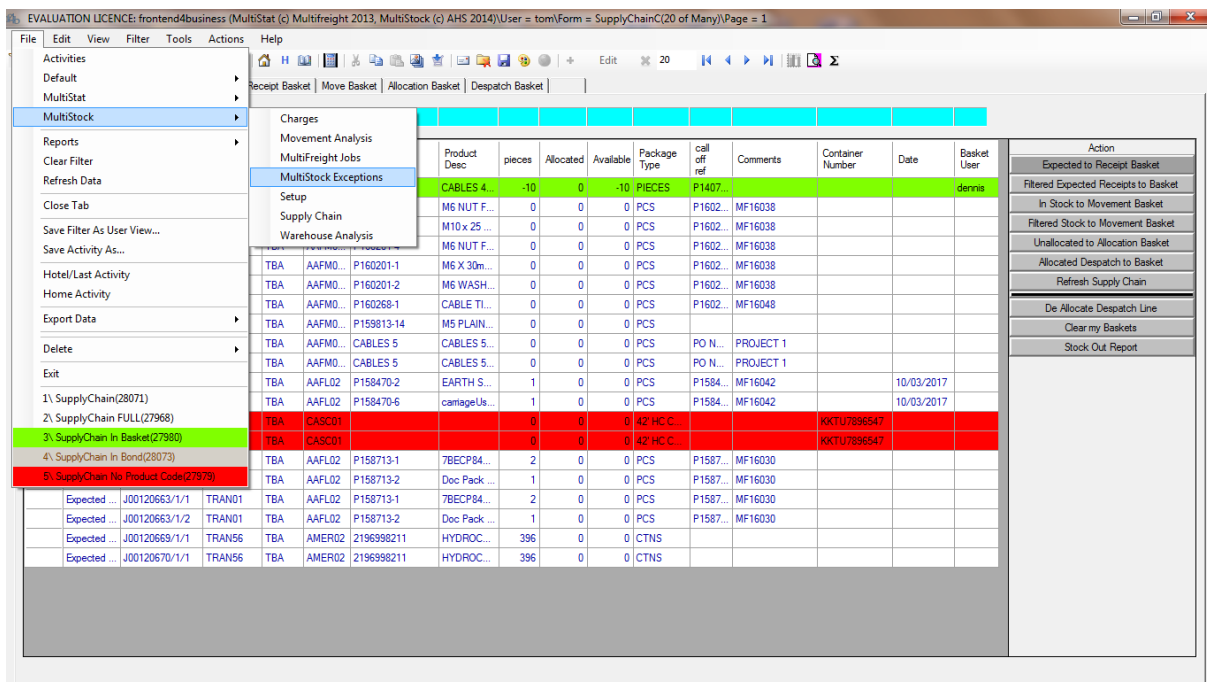


Fig1 Accessing application Exception reports

Opening the activity provides access to the Exceptions report Fig2. The report produced could have a mixture of issues to be addressed. For example there may be 12 warehouse deliveries due today and you only have capacity to deal with 10 per day.

QueryNo	Exception Name	Tab Name	Message	Exception Date	MaxCount	MinCount	ActualCount
27979	MultiStock	SupplyChain No Product Code	Supply chain products with no customer product code	16/01/2019 12:21	0	0	4
28103	MultiStock	OverAllocated WHS Locators	Over allocated WHS Locators detected in [StockMovements]	16/01/2019 12:21	0	0	3
28105	MultiStock	DuplicatedReceiptLocators	Duplicated Receipt Locators detected. Each Receipt to a location should have a unique [WHS Locator]	16/01/2019 12:21	0	0	4
28170	MultiStock	Zero Qty per Pack etc	Product with zero in [Qty per Pack] or [Packs per Outer]	16/01/2019 12:22	0	0	1

Fig2 This report is showing data cleaning issues that have been identified for attention but could show more. It is worth checking the favourites at the bottom of the File menu to see if you have access to other Exception reports

Selecting a line then using the Options in the Actions menu will launch the view(s) required to resolve the issue Fig3.

MovementType	WH Code	Customer Code	Job Number	job-id	HaulageLine	CargoLine	Basket User	Product Code	Product Desc	WHLoc	In Stock	WHS Locator	Allocat	Area	Available
In Stock	FRAN04	STOR001	Unknown	0	0	0	0	0	G180 20	B SHED	1	17229	0	0.00	0.00
Unallocated Des	FRAN01	ABC002	0	0	0	0	0	0		TBA	0	TBA	0	0.00	0.00
Expected Receipt	FRAN01	CASC01	J00120659	122367	1	1	1	1		TBA	0	TBA	0	0.00	0.00
Expected Receipt	FRAN01	CASC01	J00120660	122368	1	1	1	1		TBA	0	TBA	0	0.00	0.00

Fig3 The tab view/form required to resolve the selected issue, returning to the Exceptions report and repeating this process adds further tab views to the activity

Exception reports can be generated and automatically sent as emails to relevant parties prompting the recipients to take the necessary actions Fig4

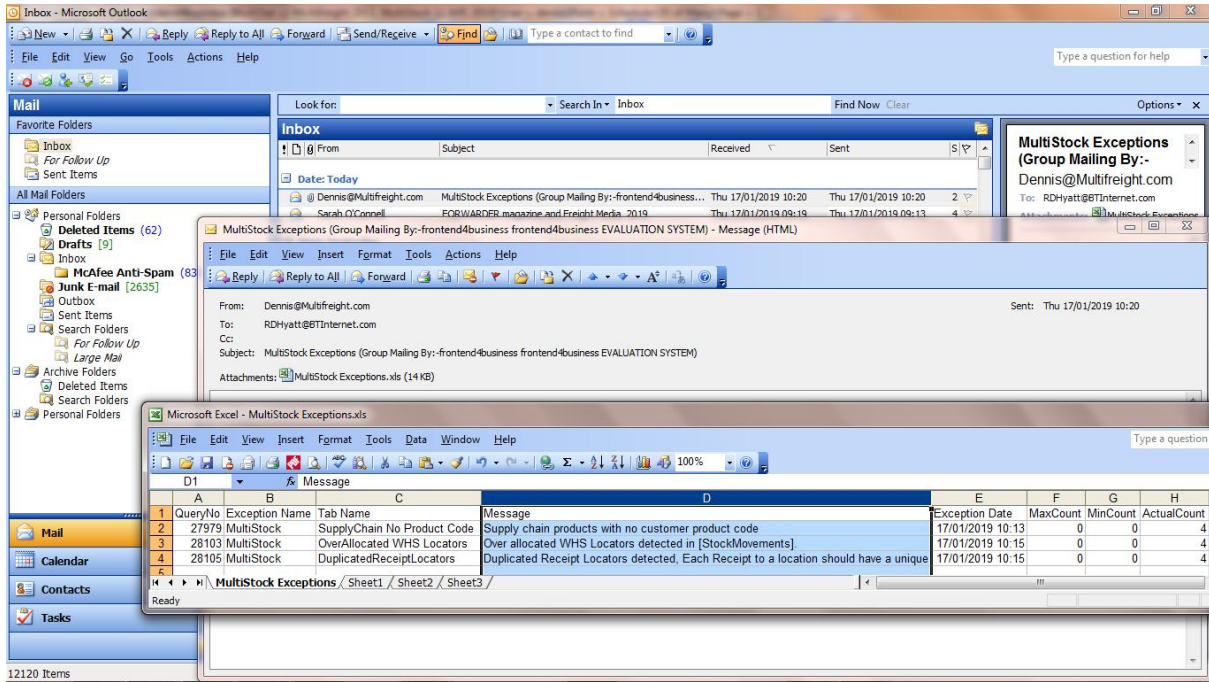


Fig4 Sample of what Exceptions report recipients receive via email

As issues are resolved the scheduled task that produces the report will remove resolved issues until no issues remain and no report is produced or emailed.

# Section2(Admin Users) Setting Up Exception Reports.

## Overview

Exception reporting comes down to record counting or more generally creating Views that produce/display the records requiring attention and setting limits as to when they trigger the exception, notes elsewhere in the documentation describe how to create new views.

Open the Exception Reporting activity from the Administrators Menu Fig5

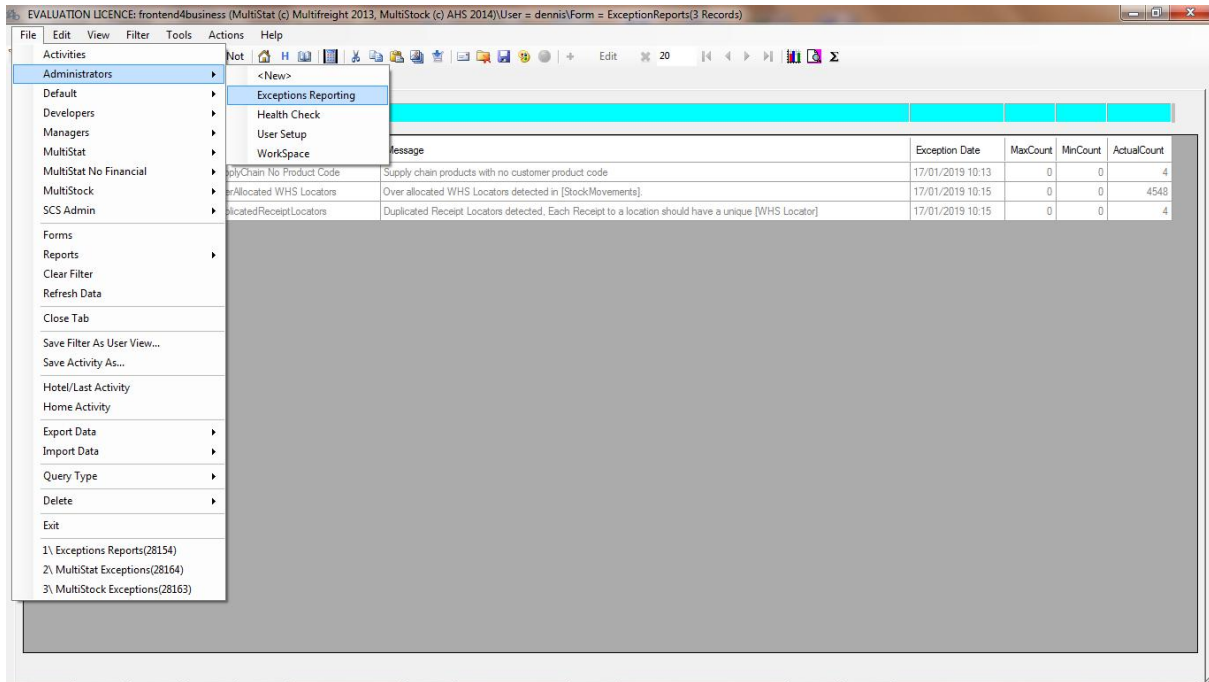


Fig5 Accessing Exception Reporting setup

The 2<sup>nd</sup> tab provides an action to add a new Exception for your view. Fig6

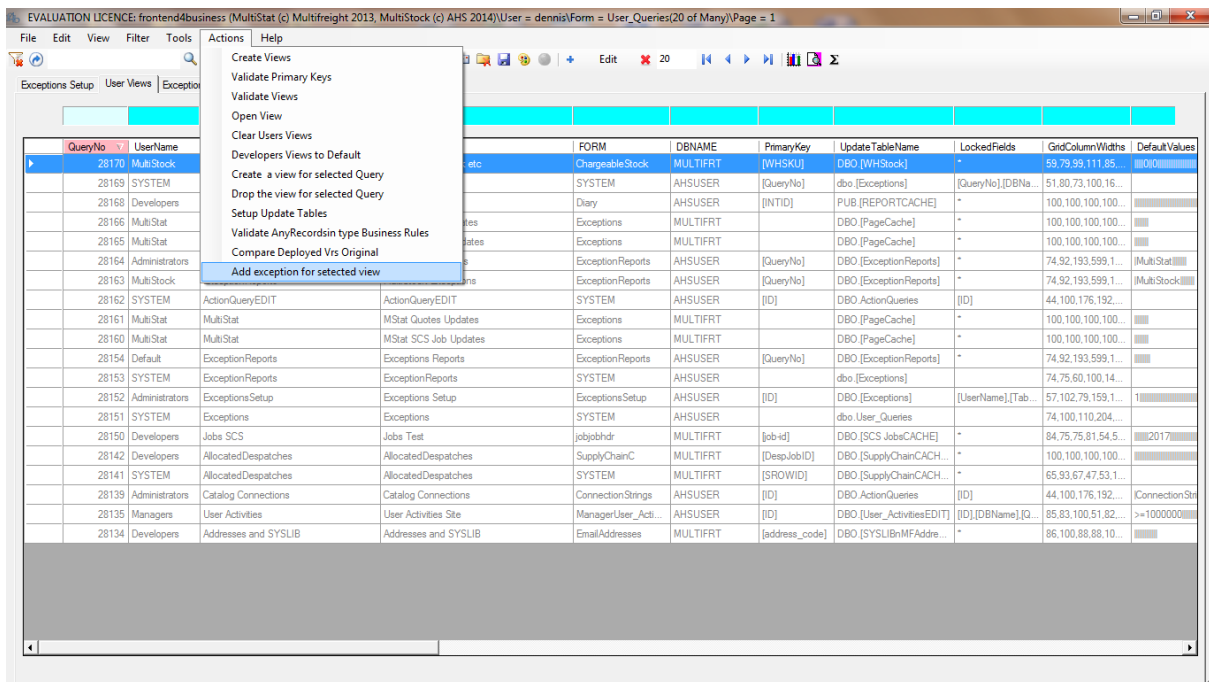


Fig6 Having created your view select it and add an exception for it.

Your new exception will have been added to the Exception Setup Tab, double clicking on the exception will allow you to edit the record Fig7.

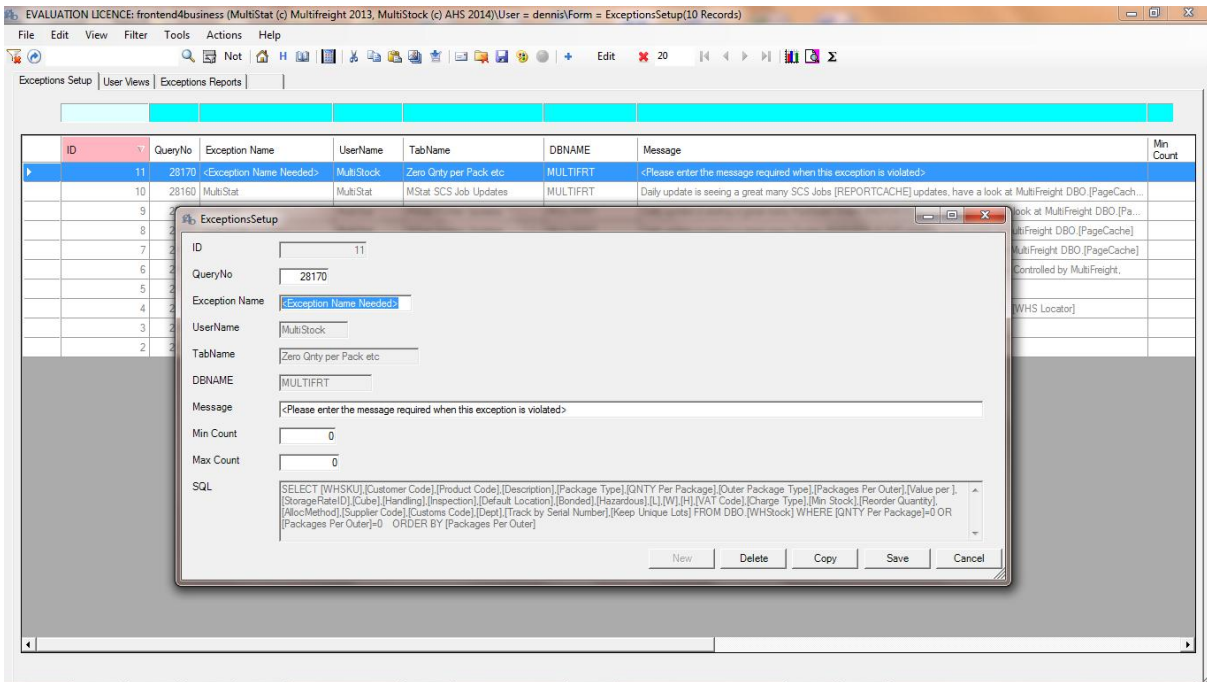


Fig7 Editing your exception

Creating a set of records with the same 'Exception Name' will result in all of them being evaluated when the report is populated, you can test it from here as shown in Fig8

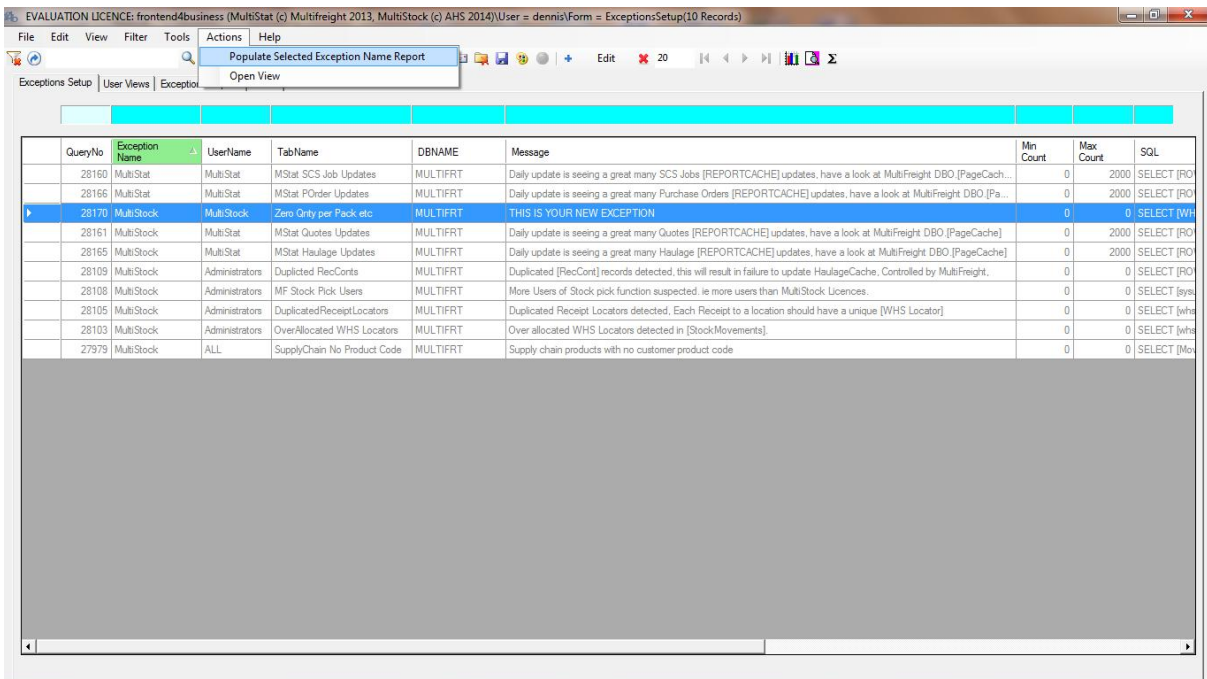


Fig8 Testing your Exception Report

The result of running the report is available on the Exception Reports tab Fig9. Filter for

QueryNo	Exception Name	Tab Name	Message	Exception Date	MaxCount	MinCount	ActualCount
28105	MultiStock	DuplicatedReceiptLocators	Duplicated Receipt Locators detected. Each Receipt to a location should have a unique [WHS Locator]	17/01/2019 11:31	0	0	4
28103	MultiStock	OverAllocated WHS Locators	Over allocated WHS Locators detected in [StockMovements].	17/01/2019 11:31	0	0	4548
27979	MultiStock	SupplyChain No Product Code	Supply chain products with no customer product code	17/01/2019 11:29	0	0	4
28170	MultiStock	Zero Qty per Pack. etc	THIS IS YOUR NEW EXCEPTION	17/01/2019 11:34	0	0	1

Fig9 Effect of running this particular report. By default the result of all failing exceptions is displayed on this tab hence filter.  
(Note the result of this particular run would also be available to Basic users of MultiStock exceptions as per Fig2)

If you are creating a new report you should save a view of it remembering to decide which users or groups will have access to it Fig10(At the current time it is required that the filter here results in the WHERE clause shown on the save filter as view form has a simple [Exception Name] = '<exception name>')

Save Filter as User View

Format Dialect Remove Actions

CopyVB  Debug

Details SQL Fields XML

Owner: [ ] UpdateTable: [DBO].[ExceptionReports]

Form: ConcurrentMultiStock

Edit Mode: Developers

Action Type: MultiStat

Save Options: MultiStat No Financial

Save To: User Queries

Description: [ ]

Where [Exception Name] = 'NEW EXCEPTIONS'

Save Duration:  Session  Permanent Test Reset

View Name: ExceptionReports

Tab Name: NEW EXCEPTIONS

Save Cancel

Fig10 Saving a new exception report



To schedule the running and emailing of your exception report use the email button on the tool bar, select Scheduled, Spreadsheet and how often you want it to run Fig11

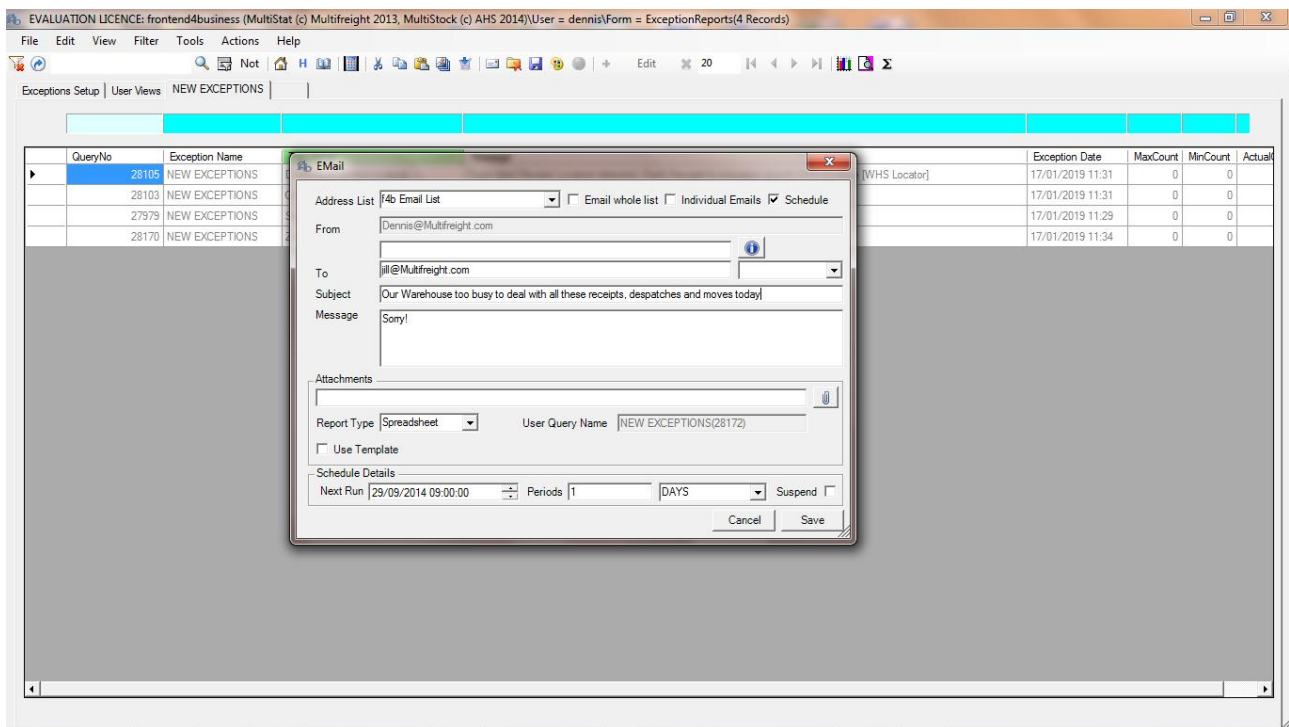


Fig11 Scheduling the emailing of an Expectations report.

Remember the email will only go out if there are failing exceptions.