

## Info WorkPlace Reporting at MetalTek International, Carondelet Division

**MetalTek's IS department employs IWP to fulfill their reporting requirements.**

The Carondelet Corporation is a division of MetalTek International, a North American metalworker and manufacturer of alloy components. With over a century of experience, MetalTek's Carondelet Division offers innovative and custom solutions for the sand casting needs of severe service alloy users worldwide. The Company produces custom cast products in more than 380 alloys, manufacturing heat, corrosion and abrasive resistant stainless steel, as well as duplex, super austenitic and proprietary alloys.



Keeping track of such a diverse range of materials and manufacturing processes requires a powerful and flexible ERP package. In 1998, MetalTek International chose MAPICS XA to replace their homegrown ERP systems at two of their five locations. One of the major drawbacks of the Carondelet homegrown system had been the need to write and maintain custom reports. With scarce in-house programming resource available for the reporting task, a bottleneck in end-user report production often resulted. In addition, the implementation of another ERP system had been aborted because too much custom programming was needed to make the system fit their business! A lesson learned – The Carondelet Division decided on a policy to deliver business reports in the future without custom programming.

So as they moved forward with MAPICS XA, a key part of the IS vision was that no custom-written reports would be implemented. However, balancing the need to eliminate custom programming, coupled with the end user's demand to get information beyond the standard MAPICS XA reports, was recognized as a significant challenge.

In implementing Info WorkPlace (IWP) MetalTek has found the perfect answer – report production and productivity above and beyond the traditional custom programming approach. Virtually all parts of their business are now benefiting from over 150 customized IWP reports.

IWP was an integral part of the MAPICS XA installation from the outset. Early in the MAPICS implementation two members of the implementation team attended the standard IWP MAPICS Business Academy training course, run by The Oakdene Group in Chicago.



Initially the MAPICS XA-supplied data subsets were used as the basis for reporting. However, as IS grew more confident and creative in their use of IWP, the data subsets were extended across other areas of MAPICS. Once the systems went live two more employees – both in the IS Department – were trained in IWP. However, with part of the original team dispersed to other areas of the business, just one person using IWP is able now to satisfy report creation for the entire company.

As Joan McCready (IS Manager) points out "I have very few end-users who are interested in writing their own IWP reports. Because of the 20+ years of custom homegrown programs and reports, there is not a culture of do-it-yourself. Managers don't have time to write reports – we are very lean in “office staff”. Most managers are directly involved in either production, sales or purchasing - so they are too busy with other priorities."

Joan has created new data subsets to deliver end-user report requests. The subsets provided by MAPICS XA provided a good beginning, but didn't always help her to meet the specific requirements of her users. Reporting currently concentrates on MAPICS XA application files. Joan comments, "Additional data subsets and some enhancements to the existing core subsets were needed. Otherwise, I have not needed to add to, or modify MAPICS XA in any way."

The Carondelet Division has developed a truly comprehensive range of IWP reports from listings to summaries; to data extractions for download to PC applications --- over 150 reports to date. Reporting encompasses a wide range of MAPICS applications --- IFM, COM, EPDM / PDM, IM, PCC, MRP/CRP, PMC and PUR. In fact, IWP is helping virtually every department within the business to get information from MAPICS XA.

The variety of reporting embraces:

- Customer shipments and backlogs (“sliced and diced every-which-way”)
- Cost analyses
- Inventory audits for work in progress and location control
- Production control -- labor tickets and shop floor packets
- Manufacturing order status, history and ready to close; scrap and job cost reports
- Bills of material and COs with purchased parts

... and much more.

Even with payroll services outsourced to ADP, IWP has a role to play in providing supplementary reporting for time cards, employee time and absence and ELVDTA files for approved and unapproved leave / vacation.

When MetalTek's Carondelet location moved to MAPICS XA, even the AS/400 was a totally unfamiliar machine. They started out with no in-house RPG programming skills. Even Joan, the main user of IWP, had a COBOL background, and just AS/400 and RPG classroom experience. So getting up to speed was a concern, but as Joan confirms "...writing a report using IWP is much faster than writing in a third-generation language such as COBOL or RPG. Even if I must also design a new subset, I can still write a report in less time than writing in RPG." Such productivity gains have meant that Joan has been able to provide all the reporting needed by her users.

Specifying reports can be daunting. Most IS departments will relate to the constant round of refinements to a report design and definition before an end user is completely satisfied. In the worst case this may even require re-writing the program from scratch. "When end-users ask me for a new report, they often do not have any idea how to design or define reports. In the beginning, I would be given a report from the homegrown system and asked to reproduce it, which I did. A few of the end-users are now able to define what they want in a report. With the rest, I prototype what I think they want, then go back and forth with them to finalize the result.

Using IWP and Jacana I can make the changes quickly and easily and re-run the report. During this process, the users usually think of several other reports they also need, which may or may not be variations of the report at hand. Once the reports have been created any such refinements are easy, especially with the drag-and-drop and copy & paste features within Jacana. When the reports have been finalized, the users can run them from their MAPICS XA menu, and print and use them like a standard MAPICS XA report."

Joan concludes "The biggest advantage has been the removal of custom programming; we have not had to hire additional staff to write reports that are used daily to run the business. I see the product continuing to be extensively used at our location in the future."

For further information contact  
John Shaw - [jshaw@jacana.com](mailto:jshaw@jacana.com)  
[www.jacana.com](http://www.jacana.com)

Notes:

*Jacana*, an integral part of the Info WorkPlace reporting system, provides both on-line and off-line intuitive report design for Windows environments.

*Data subsets* are an important feature of Info WorkPlace. They store knowledge of the content, structure and inter-relationships of the files in the database. This means that critical information is automatically available to the report designer, without needing to know the technical intricacies of the database design or file structure.