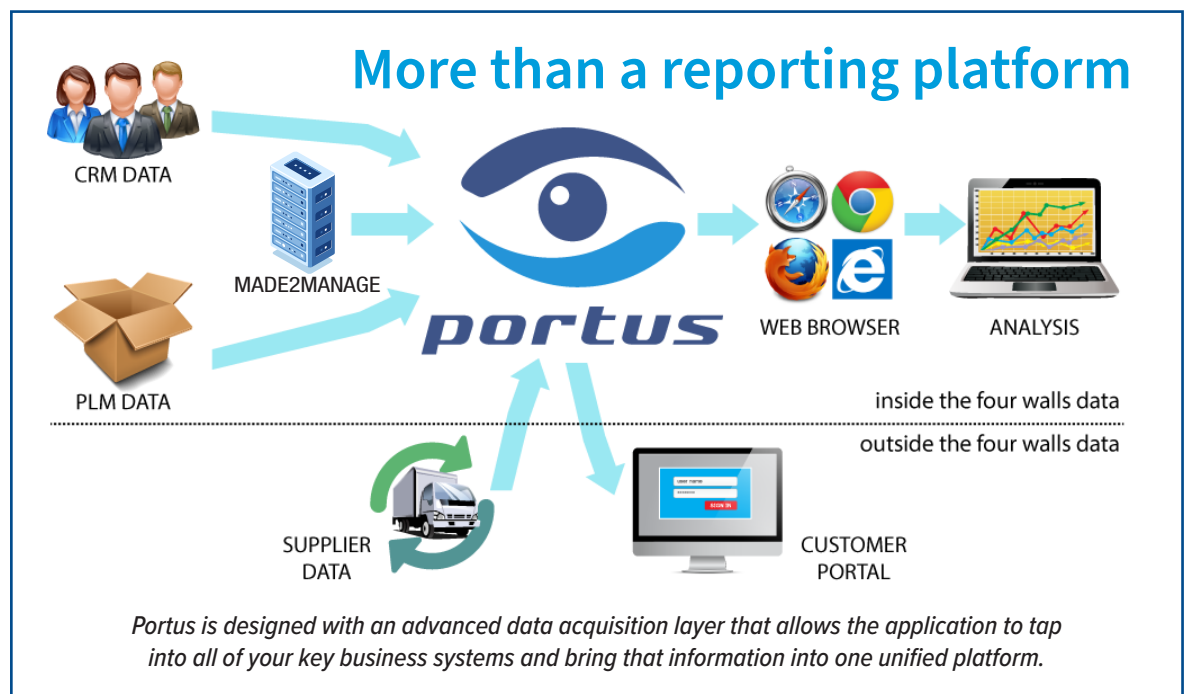# portus

A Dashboard Generator and Reporting Tool for Made2Manage®

Made2Manage users often struggle to efficiently turn the important business data collected by their system into useful analytics to drive the business. **Portus seamlessly integrates with your PLM, CRM, and Made2Manage** manufacturing software – as well as drawing data from your suppliers in real time – **to deliver multi-layered, drill-down analytics in a web browser.**

Portus puts all the information you need to make quality decisions at your fingertips with **interactive web-based reports** available anytime, anywhere. There are no new programs to learn. Portus does all the heavy lifting for you.

Purpose-built for manufacturers, Portus is a turnkey solution that you can start using immediately.

- **Intuitive browser-based interface**
- **Easy to customize**
- **Continuous drill down to more detail**
- **Interactive charts and dashboards**
- **One-click export to Microsoft Excel**

More than a reporting platform

CRM DATA
MADE2MANAGE
PLM DATA
WEB BROWSER
ANALYSIS
SUPPLIER DATA
CUSTOMER PORTAL

inside the four walls data
outside the four walls data

Portus is designed with an advanced data acquisition layer that allows the application to tap into all of your key business systems and bring that information into one unified platform.

Plugs right into Made2Manage Software

With real-time connections to M2M data tables, Portus provides immediate access to powerful views that illuminate all aspects of the business, including supply chain partners and customers.

- Executive dashboard
- Operations
- MRP "what if" analysis
- Vendor performance
- Labor efficiency
- Service

- Customer portal
- Inventory management
- Finance and accounting
- Interactive charts and graphs
- Supply chain part availability and pricing

SIGN UP FOR A
FREE
30-DAY TRIAL

Report	Description	Drill To	Special Features
Company Performance	An Executive Dashboard containing six different charts covering six key business drivers (Bookings, Billings, Backlog, AR Aging, AP Aging, Customer On Time Delivery).	Each chart is drillable to detailed reports with further dills to the individual transaction level from there.	Ability to apply a single filter to all six charts to see information for a particular customer, sales person, territory, etc.
Sales Performance	A series of charts that measure the performance of a sales organization at the territory/sales person vs targets set by sales management.	For each territory the actual results are drillable to the individual transaction (i.e. Sales Order) level.	The mechanism of setting and recording the targets in a database is handled by a special app developed by Portus.
Customer OTD	A chart that measures On Time Delivery to a customer. It is rendered in the Portus standard two Y axis format with Bars for the volume of shipments and a line graph measuring the On Time Percentage over time on the x axis.	Drill to individual shipment transactions to substantiate the OTD performance in detail.	Multiple filters to look at data for a particular customer, product, comparison date, etc. Ability to base performance measures on work days rather than calendar days and for user definition of late based on allowed days early and allowed days late.
Supplier OTD	A chart that measures On Time Delivery from a supplier. It is rendered in the Portus standard two Y axis format with Bars for the volume of shipments and a line graph measuring the On Time Percentage over time on the x axis.	Drill to individual receipt transactions to substantiate the OTD performance in detail.	Multiple filters to look at data for a particular vendor, product, comparison date, etc. Ability to base performance measures on work days rather than calendar days and for user definition of late based on allowed days early and allowed days late.
Supplier Quality	A chart that measures incoming inspection results for a supplier. It is rendered in the Portus standard two Y axis format with Bars for the volume of receipts and a line graph measuring the Yield percentage over time on the x axis.	Drill to individual inspection transactions to substantiate the quality performance in detail.	Multiple filters to look at data for a particular vendor, product.
Supplier Pricing	A table showing the Quantity/Price of every part purchased from a supplier over time. Historical numbers are compared with current open Orders to see if increasing or decreasing volumes are having the expected impact on Price.	Drill to individual part details (Part Inquiry) or individual PO Details (PO Detail).	
Supplier Summary	A table tracking several parameters for each supplier including, historical receipts, value of open orders, value of open AP and several others. This report is a designed to get a lot of information about a single vendor in one place.	Drill to individual part details (Part Inquiry) or individual PO Details (PO Detail).	
Supplier Scorecard	Combines On Time Delivery and Incoming Inspection results to provide a single score for supplier performance for each supplier.	Drill to individual receipt transactions to substantiate the OTD performance in detail. Drill to individual inspection transactions to substantiate the quality performance in detail.	
Work Center Performance	Charts showing actual hours vs estimated hours by work center for the previous week with real time updates for the current day. An option of this report allows for automated refresh and run through individual work centers for use in Video Boards on the factory floor.		
Scrap Performance	A comprehensive chart showing the trend in Scrap as a percentage of Shipments. Scrap is analyzed from Labor Logs, PINS and Inventory Disposition.	Drill to the individual transaction for all 3 sources of scrap.	

Report	Description	Drill To
Bookings	A pivot table style report which allows slicing and dicing of bookings on several parameters including customer, part, sales person, territory, product code, commodity code and time.	Drill to individual sales order level details of a particular number on the base report.
Billings	A pivot table style report which allows slicing and dicing of billings on several parameters including customer, part, sales person, territory, product code, commodity code and time.	Drill to individual invoice level details of a particular number on the base report.
Backlog	A pivot table style report which allows slicing and dicing of backlog (i.e. Open Orders) on several parameters including customer, part, sales person, territory, product code, commodity code and time.	Drill to individual sales order level details of a particular number on the base report.
Shipments	A pivot table style report which allows slicing and dicing of bookings on several parameters including customer, part, sales person, territory, product code, commodity code and time.	Drill to individual sales order level details of a particular number on the base report.
Shipped not Invoiced	A simple report that details shipment transactions with no corresponding invoice transactions for follow up by management.	Drill to individual sales order level details of a particular number on the base report.
Sales Order Detail	A mash up report that brings all elements related to a single sales order into one logical report, including Header information, individual line items and shipments and invoices against the sales order.	Drill to Part Inquiry to obtain details on any part on the Sales Order.
Sales Order Changes	A new report based on the audit log mechanism in Made2Manage that details the changes that happened to the key elements of a Sales Order (Quantity, Price, Delivery Dates, etc.) by change date.	Drill to individual sales order level details of a particular number on the base report.
BBB Detail	A report with all of the details of a particular BBB dynamic to the individual transaction level. The report can be run for Backlog, Billings between a date range and Bookings between a date range.	Drill to individual sales orders or individual part numbers for more detailed information on any single element of the report.
Invoice Analysis	A report detailing the billings for a particular time period to the invoice level with actual and estimated costs to calculate Gross Margin for each invoice and aggregated by customer, part number, etc.	This report has advanced continuous drilling to see the details of costs in the following hierarchy: • Drill to accumulated costs by category (i.e. Material, Labor, OH, etc.) for the Parent Job for source shipment that drove the invoice • Drill to each sub job feeding the parent job with costs by category (i.e. Material, Labor, OH, etc.). • Drill into Material Cost details to see detailed accumulation of Material cost by component, by sub job spanning Issue, Buy and Make transactions. • Drill into individual transaction level detail for material cost showing Inventory Transaction, Purchase Order or Work Order that drove the material cost. • Drill into Labor/OH Cost details to see detailed accumulation of labor and OH cost by Work Center. • Drill further into individual labor log entries showing operator and start/stop time that drove the actual hours, labor cost and overhead cost. • Drill into Other Costs by ocdist detailed transaction that was assigned to the job.
Quote Detail	Details of all Quotes created between a date range or all Open Quotes without regard to date created. Ability to filter and sort by Customer, Part Number, Estimator, etc.	
Backlog Analysis	An advanced report that established the Supply Chain status of every sales order in the backlog by looking through the MRP statistics for any sales order and reporting on the Clear to Build date and Gating Items to make the sales order shippable.	Drill to a special report that details all of the component level contingencies of a sales order rank ordered by the most pressing items first.
Open RMA's	A report analyzing Open RMA's on several dynamics, including days open, linked sales orders and jobs and RMA comments.	Drill to RMA Detail report.
RMA Detail	A mash up report about a single RMA spanning Header, Line Level and Shipment information.	Drill into the part level details of any component part number's Part Inquiry report.
RMA Dashboard	A series of charts and tables that show the performance of RMA Turn time, Aging of Open RMA's, Volumes of RMA's Opened, Received and Shipped. Pareto of RMA's by part number and many others.	Drill to RMA Detail report.

Report	Description	Drill To	Special Features
AR Summary	Details the status of Open Accounts Receivable by Customer. Includes standard Aging of receivables by past due status. Adds the current backlog, the customer terms and credit limit to add context.	Drill into the Customer Aging report for any single customer.	Includes a special section to calculate Average Days to Pay (ADTP) for invoice collections over the past 30, 90, 180 and 360 days. This measure is directly comparable to the terms that have been extended and can be used to determine if the customer is slowing down or speeding up in terms of payments. Also integrated with Portus Comments to be able to add and track AR related comments for any customer account.
Customer Aging	Details of Open Invoices for a single customer.	Drill into Customer Invoice Detail for any single invoice.	Integrated with Portus Comments to be able to add and track AR related comments for any particular invoice.
Invoice Detail	Mash up of all details for a particular AR invoice including header information, line items and customer payment information.		Integrated with Portus Comments to be able to add and track AR related comments for any particular invoice.
AP Summary	Details the status of Open Accounts Payable by Vendor. Includes standard Aging of Payables by past due status. Adds the current Open PO, the vendor terms to add context.	There are specific Drills to the transaction level detail for each of Open PO's, Vouchered Payables and Unvouchered Payables.	Also includes Received Goods not Invoiced details for each vendor so that the total potential liability to a single vendor (Open PO's, Vouchered Payments and Unvouchered Receipts) can be seen in one report.
AP Invoice Detail	Mash up of all details for a particular AP invoice including header information, line items and payment(s) to vendor information.		
Days of Supply	An Inventory Level analysis report that calculates the Days of Supply for each part number in inventory by looking at historical usage and future demand as predicted by the MRP. The Days of Supply for each part can be compared to a target number (e.g. 30 or 90) to see what parts are most expensive in terms of working capital utilization.	Drill to Part Inquiry to obtain details on any part in Inventory.	
On Hand Inventory	The real time detailed view Raw Material on hand inventory with valuations at different costs (Std Cost, Average Cost and Last Actual).	Drill to Part Inquiry to obtain details on any part in Inventory.	
Work In Process	The breakdown of current WIP Balance by Job Number, with details of Part Number being built, Sales Order link and other classifying information (Product Class, Group Code, etc.)	Drill to Part Inquiry to obtain details on any part in WIP. Drill to Sales Order Detail to obtain details on any Sales Order linked to a Work Order.	
Cycle Count Results	Details the results of Cycle counts and provides measurements of count accuracy by dollars and quantity and absolute value.	Drill to individual count records to see Ticket #, Counters ID, transactions dates and other details of the counts.	
Cash Receipts History	Details of Historical Cash Receipts by Customer and other aggregators thereof over time.	Drill into the Payment level details of any number.	

Report	Description	Description	Special Features
Cash Receipts Forecast	Projected Cash Receipts by Customer and other aggregators over future time buckets. To model the cash receipts, an algorithm is used to look at last 90 days payment history and use the average days to pay or the standard terms if there is no history.	Drill into any Invoice or Sales Order to see the details of any of the projections.	The Cash Receipts forecast looks at both Open AR and Backlog (which will eventually ship and be invoiced).
Payments History	Details of Historical Cash Payments by Vendor and other aggregators thereof over time.	Drill into the Payment level details of any number.	
Payments Forecast	Projected Cash Payments by Vendor and other aggregators over future time buckets. To model the cash payments, an algorithm is used to look at last 90 days payment history and use the average days to pay or the standard terms if there is no history.	Drill into any Invoice or Purchase Order to see the details of any of the projections.	The Cash Receipts forecast looks at Vouchered AP, Unvouchered Receipts and Open PO's.
Cash Flow Forecast	An advanced reporting and modeling solution that allows for running various scenarios to project future Cash Inflow and Cash Outflow. The key sources of future cash flow analyzed by this report are: 1) Open Sales Orders - based on user defined assumption a ship date is determined which is used as the invoice date and then assumptions about historical payment patterns by customer are used to project a cash receipt date. 2) Open A/R - assumptions about historical payment patterns by customer are used to project a cash receipt date. 3) Open Purchase Orders - based on user defined assumption a receipt date is determined which is used as the vendor invoice date and then assumptions about historical payment patterns to vendors are used to project a cash outflow date. 4) Open A/P and RGNI - assumptions about historical payment patterns to vendors are used to project a cash outflow date.	Drill to the details of Cash Inflow projections by Sales Order and/or Invoice Number. Drill to the details of Cash Outflow projections by Purchase Order and/or Vendor Invoice Number.	
GL Transactions Trend	Trend of net change by GL Account by GL Period over time.	Drill into Account Detail to see the transaction level details of the any account for a particular GL Period.	
GL Balance Trend	Trend of ending balance by GL Account by GL Period over time.		
GL Account Detail	Transaction Level details of one account for a particular GL Period or for a range of transaction dates.		

Report	Description	Drill To	Special Features
Bill of Material	Details of the Bill of Material in several formats (Flattened, Level by Level or Indented) for a particular assembly. The BOM includes cost and other classification fields from the part master for each component in the BOM report for comprehensive slicing and dicing of BOM's.	Drill into the part level details of any component part number's Part Inquiry report.	Several options allow you to add other informational elements (e.g. AML information, Last PO Price or BOM References to the report.
BOM Analysis	An tool that allows the user to look at the components of a bill of material in several categories (# of AML Records, Lead Time Range, ABC Code, Std Cost Range, etc.).	A custom drill allows you see the results at the intersection of any category. For example show me details of all parts that have only 1 AML record.	
What - If BOM	A Quick and Dirty planning tool where for a particular assembly, the user provides a build quantity and the system comes back with all of the items on that BOM and highlights what components are readily available and therefore no issue in terms of building the What-if Quantity and what items will need to be procured and which of those are likely to be the gating item.	Drill into the part level details of any component part number's Part Inquiry report.	Last PO information for each component can be optionally displayed to provide a first order to inquiry to acquire any needed parts.
Costed BOM	A specialized BOM reports that looks at the cost components of every component including Material, Labor, Overhead, Subcontract and Other costs and builds up the cost through the various levels of the Bill of Materials.	Drill into the part level details of any component part number's Part Inquiry report.	
Part Inquiry	The most used report in Portus, this is a Mash Up Presentation of 10 different reports on one logical browser screen. It is the "everything you ever wanted to know report" for a single part number. Sections include Part Master Details, On Hand Inventory by Stores Code, Job Shortages by Job, Open Jobs (building the part question if any) by Job, Open PO's by PO, AML, Where Used.	This report has several drills: 1) PO History Drill 2) Inventory Transactions Drill 3) Supply Demand Drill 4) Invoice History Drill	A very specialized feature of the Part Inquiry report is the Market Availability section which brings in real time inventory information for the part in question from several electronics distributors (Arrow, Avnet, etc.) so that side-by-side with the ERP dynamics you can see the outside the four walls availability at suppliers. In addition, Part Inquiry is augmented with the Portus Comments engine to be able to record and track comments about a single part number from any system user.
Item Master Search	An advanced searching tool to help find a particular part in the item master. Search options include by part number, part description, part memo, part comment. Other customer search fields can be added based on individual customer request. The output is a rich collection of columns spanning item master fields, current quantity statistics (e.g. on hand, on order, demand), last transaction date statistics (last issue, last receipt), cost statistics (standard, average, last), and historical usage statistics (Last 30, Last 90, Last 360).	Drill into the part level details of any component part number's Part Inquiry report.	
Item Master Changes	A report based on the audit log mechanism in Made2Manage that details the changes that happened to the key elements of a Part Number in the Item Master (Costs, Flags, Lead Times, etc.) by change date.	Drill to individual part number level details of a particular element on the base report.	
Part Statistics	As the name implies, Part Statistics provides a listing of all parts n the Part Master or a filtered subset with several statistics on each including, on hand balances, on order balances, last issue date, last receipt date, Issue Transactions over a user provided period of time, Receipt Transactions over a user provided period of time and several other statistics.		

Report	Description	Drill To	Special Features
Live MRP	This is the most advanced tool in the BI and Analytics module which based on an ultra efficient and quick real time MRP engine to provide real time MRP statistics on the shortage status of all open and release jobs in the factory. The MRP will run in 20 seconds or less (in most cases in 5 seconds or less) and classify the kit requirements of an open or released job into supplied from stock, supplied from a purchase order or Job that is on time, supplied from a purchase order or Job that is NOT on time or Not on Order.	Drill into the specifics of any shortage category or the entire kit list with further drills into Part Inquiry.	
Job Shortage	Part of the LiveMRP family of reports this analysis shows the detailed job shortages for one Job. The shortages are classified into the standard categories of In Stock, On Order On Time, On Order Not on Time and Not on Order.	Drill into the part level details of any component part number's Part Inquiry report.	Job shortage is augmented with the Portus Comments engine to be able to record and track comments about a particular job shortage item.
Shortage Detail	Part of the LiveMRP family of reports, this report is comprehensive analysis of all shortages on all open and released jobs.	Drill into the part level details of any component part number's Part Inquiry report.	
Job Inquiry	Everything you want to know about a single job. Key Dates, Route Status, Shortage Status, Costs Accumulated, Lots Used and Lots Created in a single interactive report.	Drill into details of costs accumulated down to the component and operator level. Drill Into details of component level shortages Drill into details of Lot Numbers Used in the Job in question. Drill into details of Lot Numbers Created by the Job in question.	
Job Log	A detailed report of all Jobs with the ability to limit results by Job Status. Limiting to Released Jobs only results in a detailed WIP report showing the current Work Center, Shortage Status, Costs accumulated and Parent/Sub job relationships.	Drill into the Job Inquiry report for details of routing, parts issues, and costs accumulated for any Job. Further Drills into Lots Used and Lots Created by each Job.	
Job Cost History	A report that shows historical Jobs for a single Part Number to compare costs by cost element (Material, Labor, Overhead, etc.) across different builds. Costs are accumulated through any sub jobs to provide a complete picture.	Drill to the details of any Cost Element at the Sub Job Level.	
Lot History	A detailed History of any single Lot Number from creation of the Lot Number to its path through WIP and eventual shipment or usage.		
Job Component Usage	For a given assembly, looks the job boms and issue quantities for the past 10 jobs and provides averages in order to monitor material usage.	Drill into the part level details of any component part number's Part Inquiry report.	
Job BOM Analysis	A comprehensive real time job shortage/job costing report spanning parent jobs and sub jobs at the component level.	Drill into the part level details of any component part number's Part Inquiry report.	
Scrap Report	Brings together 3 sources of scrap transactions in one unified, comprehensive report on scrap. The report takes into account: 1) Scrap from PINS transactions with accurate job costing taking into account exact router operation at time scrap. 2) Scrap directly from labor transactions. 3) Scrap from inventory transactions.	Drill into the part level details of any component part number's Part Inquiry report.	
RI Aging	Provides real time aging of items in a Receiving Inspection location(s).	Drill into the part level details of any component part number's Part Inquiry report.	
RI Throughput	Provides historical statistics of line items received and line items transacted out of a Receiving Inspection location(s).	Drill into the part level details of any component part number's Part Inquiry report.	

Report	Description	Drill To	Special Features
Inventory Transactions	Flexible slicing and dicing tool to look at the Inventory Transactions over specific period of time and be able to do analysis by a single part number, a single job, a transaction type, etc.	Drill into the part level details of any component part number's Part Inquiry report.	
Material Expiration	A report detailing on hand inventory that has expiration control with details at the lot number level. Expiring materials are compared to demand number from the MRP to highlight potential problem areas.	Drill into the part level details of any component part number's Part Inquiry report.	
Excess Inventory	Details of Excess On Hand and Excess On Order balances based on the latest MRP for demand.	Drill into the part level details of any component part number's Part Inquiry report.	
PO Detail	A Mash Up report that brings all elements related to a single purchase order into one place. Header information and line level details are presented in one place with several drill options.	Drill into the part level details of any component part number's Part Inquiry report. Drill to Receipt level details for are quantities received on a particular line item.	
PO History	A flexible overall purchase order report that brings all of the header and line level elements of a Purchase Orders to one report. Using a status filter, the report doubles as an Open PO report.	Drill into the part level details of any component part number's Part Inquiry report. Drill to Purchase Order details of any component through PO Detail report.	
PO Reschedule	A real time Expedite, Push Out, Cancel tool that streamlines the changes need to PO's to being to balance with the latest MRP. Logic elements allow users to focus on the most imminent and most impactful PO Reschedule actions first. The report is designed to be shareable with suppliers for streamlined communications of order changes.	Drill into the part level details of any component part number's Part Inquiry report. Drill to Purchase Order details of any component through PO Detail report.	
PO Changes	A report based on the audit log mechanism in Made2Manage that details the changes that happened to the key elements of a Purchase Order (Quantity, Price, Delivery Dates, etc.) by change date.	Drill to individual Purchase order level details of a particular number on the base report.	
PPV	A report of Historical Purchase Price variances comparing actual prices on PO Receipts with the standard cost at the time of receipt. Several filter capabilities allow for aggregation of PPV data by various vectors (Buyer, Vendor, Commodity, etc.)	Drill into the part level details of any component part number's Part Inquiry report. Drill to Purchase Order details of any component through PO Detail report.	
PPV Open PO's	A report of anticipated PPV's on Open Order comparing the unit price on the Open PO's with the current standard cost. Several filter capabilities allow for aggregation of PPV data by various vectors (Buyer, Vendor, Commodity, etc.)	Drill into the part level details of any component part number's Part Inquiry report. Drill to Purchase Order details of any component through PO Detail report.	
Labor Hours	A detailed breakdown of Labor Hours logged by day by operator by department that can be compared to time logged on time clocks.		
Work Center Performance	Based on a user provided date range, reports on three key measures of Work Center performance: 1) Labor Hours. 2) Costs Incurred. 3) Scrap. The report has special algorithmic logic elements to split labor if an operator is working on multiple jobs simultaneously.	There is specific Drill Down report for each of Labor Hours, Labor Costs and Scrap Costs.	Filtering at the top of the report allow reporting by Work Order, Part Type or Employee.
S/N Search	Ability to search for a particular Serial Number and bring back any associated dynamics across multiple tables including shipments, RMA's, Receipts, etc.	Drill into the part level details of any component part number's Part Inquiry report.	