



InTempo Connect 2022 User Conference

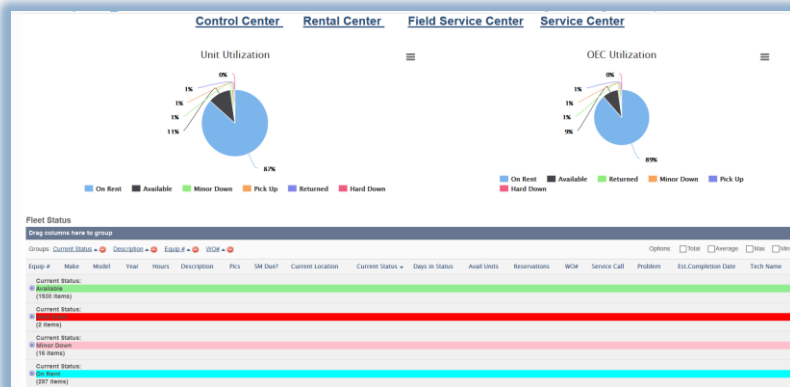
Building a Better Business with InTempo Reporter (Part 1)

Chris Kennedy – Project Manager
Tony Tye – Sales

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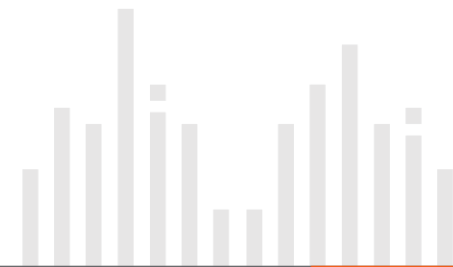
Creating Effective Dashboards





Reporter 101: Today's Topics

- Introduction To The Three R's
- Dashboard Types
- Report Types
- Schedule Types
- Let's Build a Dashboard Live





Three R's of Creating Effective Dashboards

Three Rs of Effective Dashboards



What's Right?

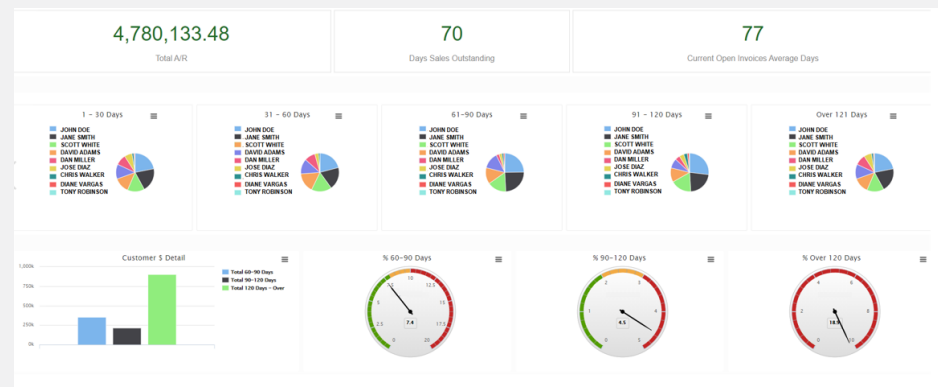
Answering these questions will help create the right Dashboard for the right audience:

- ✓ Who is the target audience?
- ✓ What access level do they have?
- ✓ What is the purpose of the dashboard?
- ✓ Actionable or informative?
- ✓ What types of information required?
- ✓ Summary or detailed data?
- ✓ Location specific or company wide?
- ✓ Public display or sensitive?
- ✓ Visual or data focus?
- ✓ Need for color to highlight specific data?
- ✓ Time sensitive Data?
- ✓ Live filters needed?
- ✓ Additional Formatting?
- ✓ What type of platform will be used?
- ✓ Data needs to be refreshed daily or frequent?
- ✓ What actions are being driven?
- ✓ How will the user interact with system?

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Dashboard Types

- ✓ Communication
- ✓ Analysis
- ✓ Research
- ✓ Sales
- ✓ Workflow



Communication

- Dashboard Types
 - Communication
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Available Details

Transfer All Locations

Contract #	Description	Equipment #	U.T. Date	Status	Type	Location	Work Order #	Description	To Site	Start Date	Start Method	Test Method	Contract Status	
0002	110725 ACME CONSTRUCTION	000001		Not Staged	65 FT DIESEL STICK 4WD *					9/27/21	Weld	Oct 08	07.00	1
0002	111128 ACME CONSTRUCTION			In Progress	9000LBS. 40-49 FT FORKLIFT *					10/1/21	Fit	Oct 08	09.00	1
0002	111128 ACME CONSTRUCTION			Not Staged	9000LBS. 30-45 FT FORKLIFT *					10/1/21	Weld	Oct 08	07.00	1
0002	111387 ANDERSON AND SONS CONTRACTORS			Not Staged	18.0 MET TON *					10/2/21	Fit	Oct 07	07.00	1
0002	111387 ANDERSON AND SONS CONTRACTORS	000002		Staged	SCREENER BKT TOP 21.0 MET TON *					10/2/21	Fit	Oct 08	09.00	1
0002	111373 NATURAL ENERGY, LLC	000003		In Progress	3.00 CUBIC YARD LOADER *					10/2/21	Fit	Oct 08	09.00	1
0002	111387 NATURAL ENERGY, LLC			Not Staged	21.0 MET TON SCREEN BUCKET *					10/2/21	Fit	Oct 07	07.00	1
0002	111054 NATURAL ENERGY, LLC	000004		In Progress	80 FT DIESEL ARTIC 4WD *					9/30/21	Fit	Oct 08	09.00	1
0002	111601 DELTA PRO CONTRACTING			Not Staged	18.0 MET TON *					10/7/21	Fit	Oct 08	07.00	1
0002	111601 DELTA PRO CONTRACTING			Not Staged	24" 18.0 MET TON BUCKET *					10/7/21	Fit	Oct 08	07.00	1
0002	111628 DELTA PRO CONTRACTING CORP			Not Staged	TOWABLE LIGHT TOWER 4 LAMP *					10/7/21	Fit	Oct 08	07.00	1
0002	111353 DELTA PRO CONTRACTING	000005		In Progress	65 FT DIESEL STICK 4WD *					10/2/21	Fit	Oct 08	09.00	1
0002	111676 DELTA PRO CONTRACTING	000006		Staged	14.0 MET TON (RUBBER) *					10/2/21	Fit	Oct 08	09.00	1
0002	111643 DELTA PRO CONTRACTING			Not Staged	70" HD MTL BUCKET *					10/2/21	Fit	Oct 08	09.00	1
0002	111676 DELTA PRO CONTRACTING	000007		In Progress	24" 18.0 MET TON BUCKET *					10/2/21	Fit	Oct 08	09.00	1
0002	111493 U.S. CONSTRUCTION, INC.			Not Staged	4,800LBS. MULTI TERRAIN LDR *					10/2/21	Fit	Oct 08	08.00	1
0002	110574 U.S. CONSTRUCTION, INC.			Not Staged	65 FT DIESEL STICK 4WD *					9/24/21	Set	Oct 09	07.00	1
0002	111421 U.S. CONSTRUCTION, INC.			Not Staged	300 AMP TOW BEHIND WELDER *					10/2/21	Mon	Oct 11	07.00	1

Deployment by OEC %

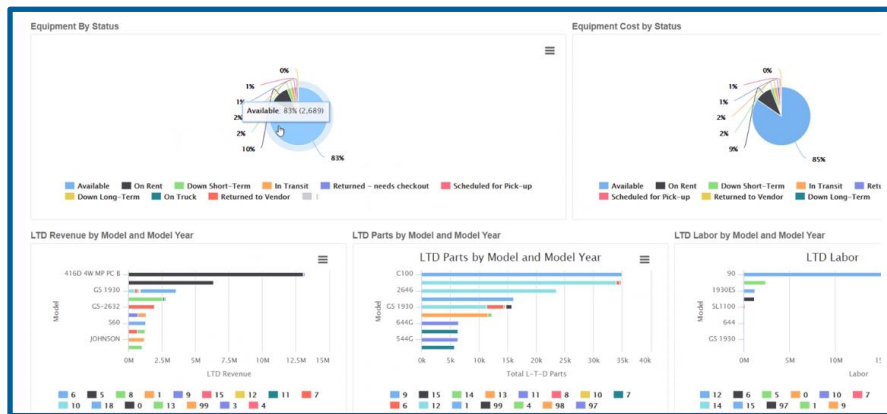
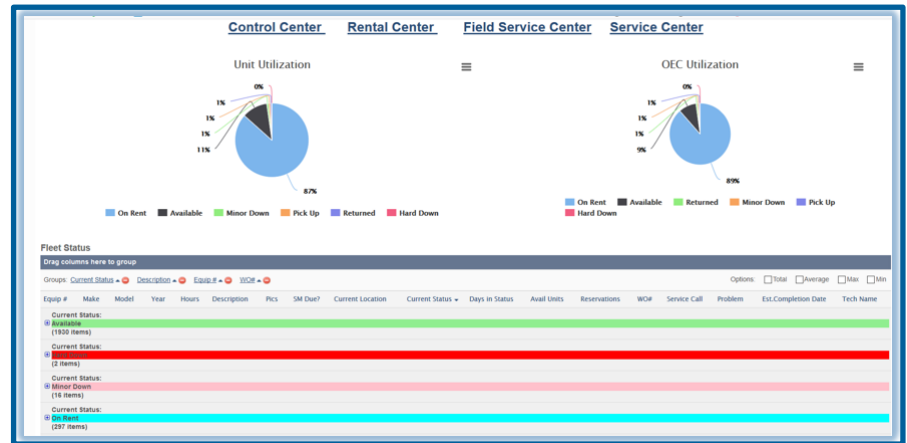
Account #	Name	Contract #	Status
1183	ACME CORPORATION	101589-0006	Ready to Close
1848	CONSTRUCTION SERVICES	107195-0003	Ready to Close
1818	ENERGY & UTILITY LLC	88327-0012	Ready to Close
1163	A1 CONSTRUCTION SOLUTIONS	106748-0003	Ready to Close
1480	PACIFIC TRANSPORT	104418-0025	Ready to Close
2286	ENVIRONMENTAL SERVICES LLC	108801-0002	Ready to Close
2486	CUSTOM BUILD CONTRACTORS	102264-0008	Ready to Close
1026	A.B.C AND SONS	105677-0003	Ready to Close
1628	U.S BUILD	106738-0002	Ready to Close
2389	NATIONAL ENERGY, INC	102240-0006	Ready to Close
2389	NATIONAL ENERGY, INC	102240-0007	Ready to Close
1391	COASTAL CONTRACTORS	109296-0001	Ready to Close
1568	GENERAL CONSTRUCTION SOLUTIONS	110198-0001	Ready to Close
1993	NATURAL ENERGY INC	110273-0001	Ready to Close
1789	NATURAL ENERGY INC	110481-0004	Ready to Close
1480	TOP TRANSPORT	110504-0003	Ready to Close
2433	INDUSTRIAL DESIGN BUILD, INC	111126-0001	Ready to Close
2516	COMMUNITY OIL AND GAS	111214-0001	Ready to Close
1991	RST RESOURCES	111306-0002	Ready to Close
2299	TRENCH SOLUTIONS LLC	111314-0001	Ready to Close

Reservations

Contract #	Customer Name	Status	Job Location	Contractor	Equip	Status	Description	Date	Date Out	TimeOut	Quantity	Special Details
0002	111026 CUSTOM BUILD CONTRACTORS	A	B-001	LatLong		Not Staged	9000LBS. 40-49 FT FORKLIFT *	10/1/21	Weld	Oct 08	07.00	1
0002	110725 CUSTOM BUILD CONTRACTORS	A	C-002	LatLong	000001	In Progress	65 FT DIESEL STICK 4WD *	9/27/21	Weld	Oct 08	07.00	1
0002	111128 CUSTOM BUILD CONTRACTORS	A	B-001	LatLong		Not Staged	9000LBS. 30-45 FT FORKLIFT *	10/1/21	Weld	Oct 08	07.00	1
0002	110490 CUSTOM BUILD CONTRACTORS	A	C-002	LatLong	000002	Staged	TOWABLE LIGHT TOWER 4 LAMP *	9/23/21	Weld	Oct 08	07.00	1
0002	110490 CUSTOM BUILD CONTRACTORS	A	C-002	LatLong		Not Staged	65 FT DIESEL STICK 4WD *	9/23/21	Weld	Oct 08	07.00	1
0002	110490 CUSTOM BUILD CONTRACTORS	A	C-002	LatLong		Not Staged	77" PALLET FORKS .3.5 CYD LOADER *	9/23/21	Weld	Oct 08	07.00	1
0002	111367 RESERVATION ACCOUNT	A	D-048	LatLong		Not Staged	18.0 MET TON *	10/2/21	Fit	Oct 07	07.00	1

Analysis

- Dashboard Types
 - Communication
 - Analysis
 - Research
 - Sales
 - Workflow



Research

- Dashboard Types
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Select Vendor #
Choose a value

Select P.O. #
Choose a value

Open Purchase Orders

Drag columns here to group

Group:	Vendor #	Name	Order Date	P.O. #	Seq #	Status	Qty Ordered	Open Qty	Qty Received	F.I.E. Code	Item #	Description	Open \$	Location #	Employee	Ordered By
0000	01	Name: ADVANCED MASONRY (19 items)														
0000	01	Name: ALEX C PABIS CONTRACTING (1 items)														
0000	01	Name: ALEXANDER BROTHERS INC. (19 items)														
0000	01	Name: AMTOWER AUTO (MAPS) (19 items)														
0000	01	Name: ANDREA'S SALES COMPANY (8 items)														
0000	01	Name: APPLIED INDUSTRIAL TECH (3 items)														
0000	01	Name: BELTEX (5 items)														
0000	01	Name: BIG BOTTLED GAS SERVICE (1 items)														
0000	01	Name: BLACK DIAMOND EQUIPMENT RENTAL (12 items)														
0000	01	Name: BONE SAFETY SIGNS (47 items)														
0000	01	Name: BROCK MANUFACTURING CO (3 items)														
0000	01	Name: BURKS INDUSTRIAL EQUIPMENT (8 items)														
0000	01	Name: C HARPER BUICK GMC (1 items)														
0000	01	Name: C HARPER FORD KIA INC (2 items)														
0000	01	Name: CLEMCO INDUSTRIES (1 items)														

Total Contracts Not Signed

InTempo

02	05	0	02	09
Loc 1	Loc 2	Loc 3	Loc 4	All Locations

Signature Status

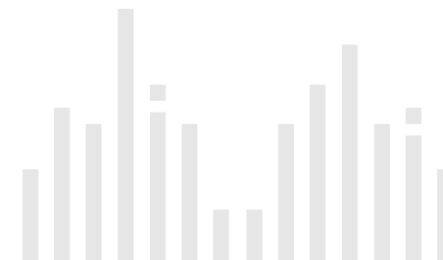
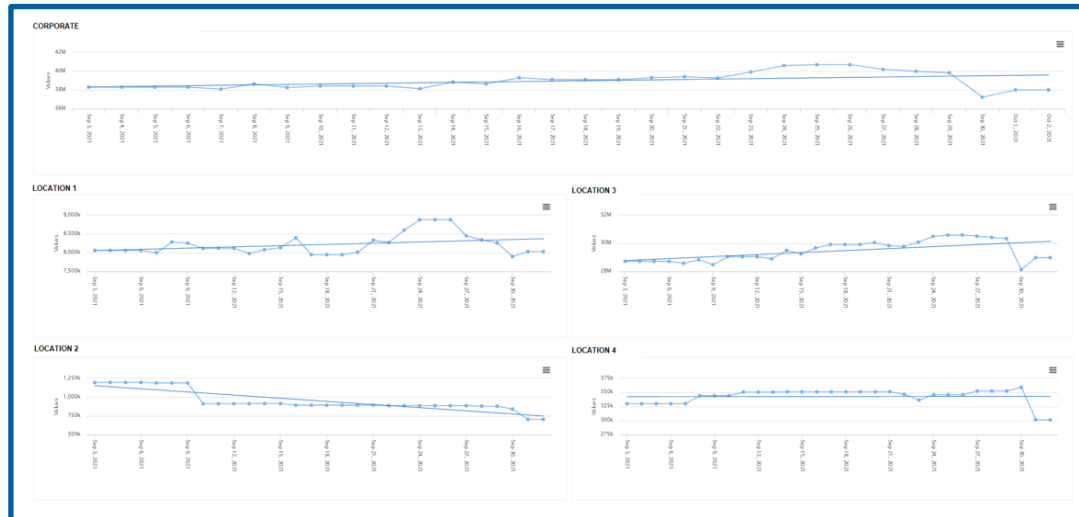
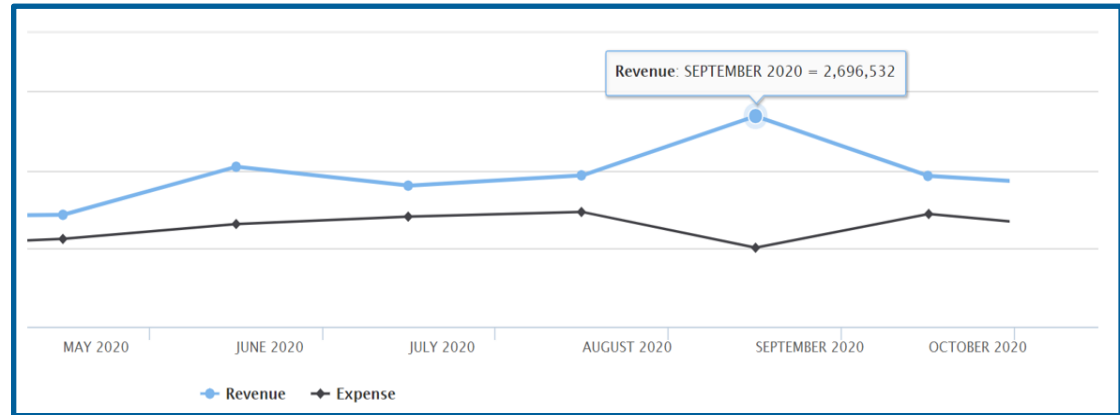
Drag columns here to group

Location	Contract #	Customer Name	Job Contact Name	Phone#	Name	Date Out	Time PDF Created	Last Maintenance Date	User Submitting	Status1	Status	Printed Name	Signature Timestamp	Latitude	Longitude	To Email
Status:																
Not Available To Sign:																
(1 items)																
Status:																
Not Signed:																
(19 items)																
Status:																
Signed/Initiated:																
(28 items)																
Status:																
Signed/Initiated:																
(5 items)																
Status:																
Viewed Not Signed:																
(1 items)																

Sales

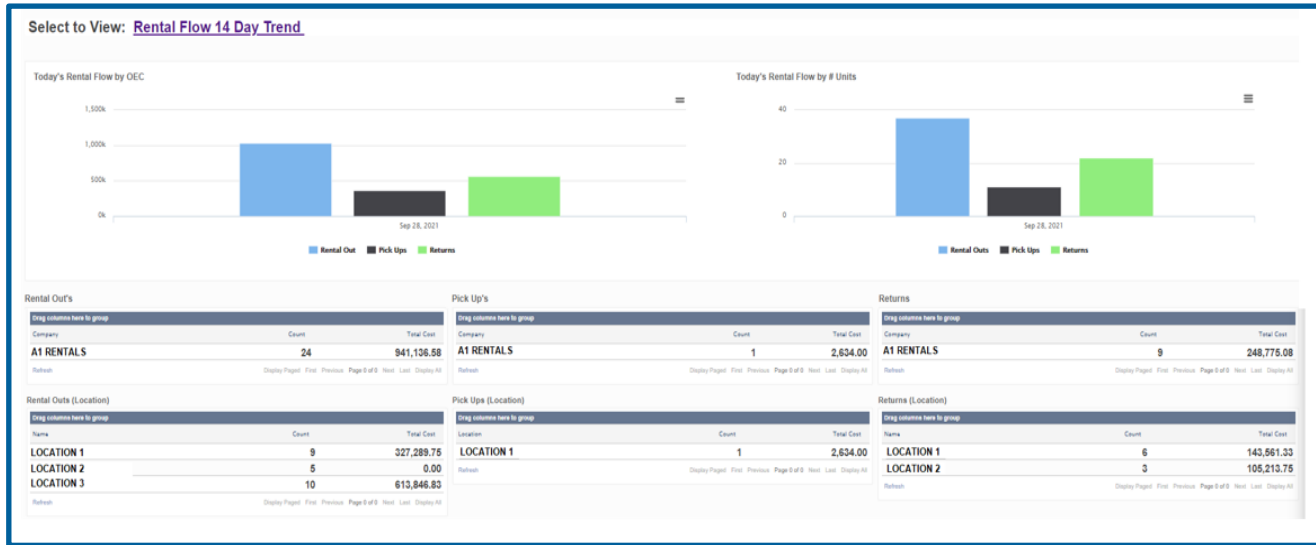
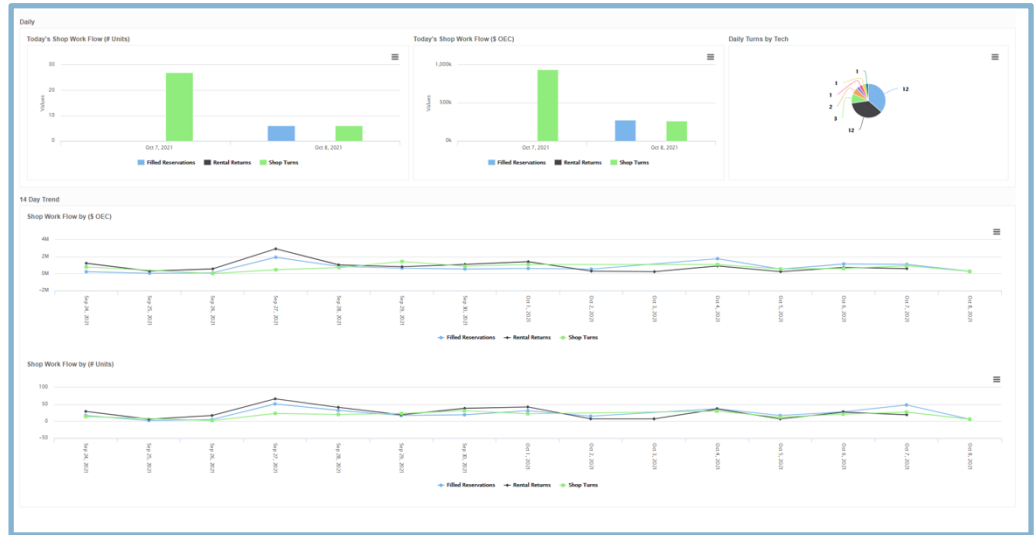
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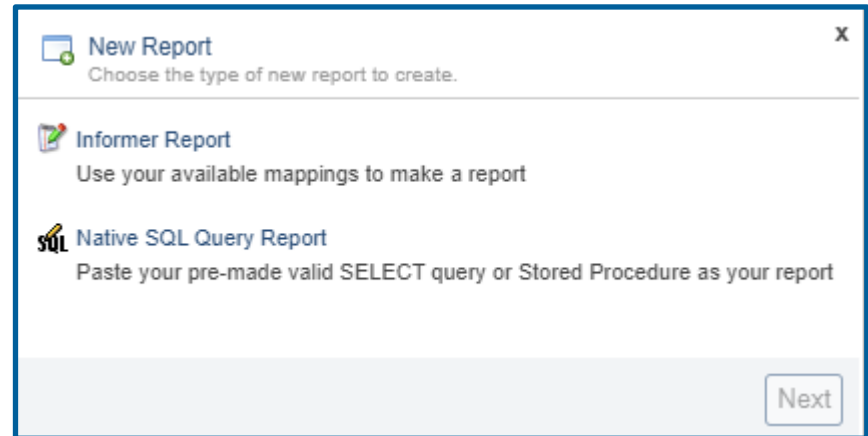
Workflow

- Dashboard Types
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Report Types

- Informer Drag and Drop
- Native SQL Query



Each report type can be used for the following purposes and more!!!

- Analytical, Informational, Audit, Exception, Fraud Detection
- All type system alerts i.e. (Scheduled Maintenance Alerts or G/L Posting Errors)

Schedule Types

- Reoccurring Email Reports
- Archive Reports
- Exception Reports

Report Schedule
Schedule a report to run at regular intervals

Report: Substitution Report

Schedule | Report Parameters | Archive | Email | Export

Description * Substitution Report

Date Range 7/15/19 - No end date

Start Time * 8:30 AM

Recurrence * Once Every 1 day(s) Daily Weekly Monthly Yearly Custom Every Weekday

Disable

Save Run Now Delete Cancel

Report Schedule
Schedule a report to run at regular intervals

Report: Substitution Report Scheduled by: CHAD TEASDALE

Schedule | Report Parameters | Archive | Email | Export

Description * Substitution Report

Date Range 7/15/19 - No end date

Start Time * 8:30 AM

Recurrence * Once Daily Weekly Monthly Yearly Custom Disable

Custom cron expression:

S M H Day Month DoW [Year]

0 0 12 * * ? Fire at 12pm (noon) every day

0 15 10 ? * * Fire at 10:15am every day

0 15 10 * * ? Fire at 10:15am every day

0 15 10 * * * Fire at 10:15am every day

0 15 10 * * ? 2005 Fire at 10:15am every day during the year 2005

0 * 14 * * ? Fire every minute starting at 2pm and ending at 2:59pm, every day

0 0 5 14 * * ? Fire every 5 minutes starting at 2pm and ending at 2:55pm, every day

0 0 5 14,18 * * ? Fire every 5 minutes starting at 2pm and ending at 2:55pm, AND fire every 5 minutes starting at 6pm and ending at 6:55pm, every day

0 0 5 14 * * ? Fire every minute starting at 2pm and ending at 2:05pm, every day

0 10,44 14 ? * WED Fire at 2:10pm and at 2:44pm every Wednesday in the month of March

0 15 10 ? * MON-FRI Fire at 10:15am every Monday, Tuesday, Wednesday, Thursday and Friday

0 15 10 15 * ? Fire at 10:15am on the 15th day of every month

0 15 10 L * ? ? Fire at 10:15am on the last day of every month

0 15 10 ? * 6L Fire at 10:15am on the last Friday of every month

0 15 10 ? * 6L 2002-2005 Fire at 10:15am on every last friday of every month during the years 2002, 2003, 2004 and 2005

0 15 10 ? * 6#3 Fire at 10:15am on the third Friday of every month

0 0 12 1/5 * ? Fire at 12pm (noon) every 5 days every month, starting on the first day of the month

0 11 11 11 11 ? ? Fire every November 11th at 11:11am

Save Run Now Delete

Proforma Invoicing	0 15 10 15 * ?	Fire at 10:15am on the 15th day of every month
Proforma Invoicing	0 15 10 L * ? ?	Fire at 10:15am on the last day of every month
NEW ITEM SET-UPS	0 15 10 ? * 6L	Fire at 10:15am on the last Friday of every month
Contracts on Never Bill	0 15 10 ? * 6L 2002-2005	Fire at 10:15am on every last friday of every month during the years 2002, 2003, 2004 and 2005
Expiring Customer Insurance	0 15 10 ? * 6#3	Fire at 10:15am on the third Friday of every month
Expiring Customer Insurance	0 0 12 1/5 * ?	Fire at 12pm (noon) every 5 days every month, starting on the first day of the month
RATRNSFL Audit Report	0 11 11 11 11 ? ?	Fire every November 11th at 11:11am
Dead Stock Listing 0002 0001		

Archives Listing

Search Archives On selected archives...

Archive Title	Date Created	Created by	Record Count	Size
OEC On Rent Per Rep	11/7/21, 8:20 AM	Tony Tye - Intempo- WYNNE SYS	1156	391 KB
OEC On Rent Per Rep	11/6/21, 8:20 AM	Tony Tye - Intempo- WYNNE SYS	1139	386 KB
OEC On Rent Per Rep	11/5/21, 8:20 AM	Tony Tye - Intempo- WYNNE SYS	1122	380 KB
OEC On Rent Per Rep	11/4/21, 8:20 AM	Tony Tye - Intempo- WYNNE SYS	1120	380 KB
OEC On Rent Per Rep	11/3/21, 8:20 AM	Tony Tye - Intempo- WYNNE SYS	1114	376 KB
OEC On Rent Per Rep	11/2/21, 8:20 AM	Tony Tye - Intempo- WYNNE SYS	1130	383 KB
OEC On Rent Per Rep	11/1/21, 8:20 AM	Tony Tye - Intempo- WYNNE SYS	1116	379 KB
EOM-Equipment File Listing Summary	11/1/21, 6:05 AM	Tony Tye - Intempo- WYNNE SYS	1961	1432 KB
ENB Listing	11/1/21, 6:03 AM	TONY TYE	657	1553 KB
EOM-Equipment File Listing Detail	11/1/21, 6:00 AM	Tony Tye - Intempo- WYNNE SYS	1961	1432 KB
Inventory Receipt History AP Accrual Sub Ledger	11/1/21, 5:15 AM	Tony Tye - Intempo- WYNNE SYS	1767	1266 KB
ITMUSGFL	11/1/21, 5:00 AM	Tony Tye - Intempo- WYNNE SYS	100000	40314 KB
P/M/E Subledger	11/1/21, 5:00 AM	Tony Tye - Intempo- WYNNE SYS	2670	1751 KB
Sales Detail	11/1/21, 4:30 AM	Tony Tye - Intempo- WYNNE SYS	3185	1343 KB
Inventory Balance Over Item History File (By Loc)	11/1/21, 4:00 AM	Tony Tye - Intempo- WYNNE SYS	100000	75316 KB
Inventory Receipt History AP Accrual Sub Ledger Acct 1900	11/1/21, 4:00 AM	Tony Tye - Intempo- WYNNE SYS	427	330 KB
ENB Month End	11/1/21, 1:00 AM	Tony Tye - Intempo- WYNNE SYS	657	1553 KB
A/R Aging with As of Date 29,59,89	10/31/21, 11:00 PM	Tony Tye - Intempo- WYNNE SYS	2168	1123 KB

InTepo

Questions?

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Tony Tye

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Let's Build This Guy!!!

- Always know the status of your fleet.

