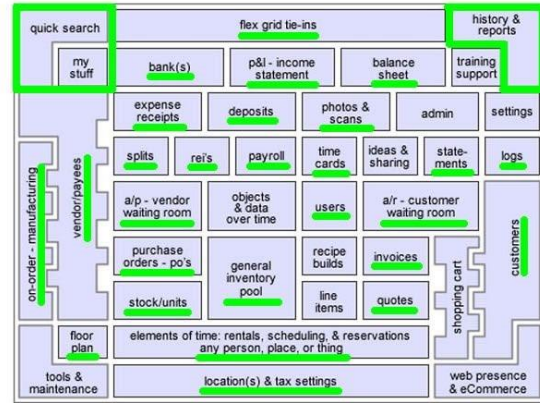


# Business Functions - Reporting

## Histories & Reporting Functions



## ➤ Reports

- Define the needs
  - Game of business
  - What is data?
  - What data points are needed?
  - Who sets those requirements?
  - Who gets to view? - Permissions & viewing status
  - Time frame - day to day, weekly, monthly, annually
  - What is the progression?
  - Looking forward - where is it going? Final destination?
  - Good data in = good data out
  - Simplify - one place to get your report
- Catch the data
  - System thinking
  - Centralized the data
  - Categorize the data
  - Validate it
  - Media, files, photos, scans, etc.
- Secure & store data
  - Standard data
  - Custom data
  - ADILAS - all data is live and searchable
  - Build your own reports
  - Data library - access as needed
  - Half of the entire application is reporting
  - Archiving

- Transform & progress
  - Able to transfer to other systems
  - Transactional data to aggregated sums or totals
  - Labeling & barcoding
  - Scheduling & automation
  - Custom paperwork
  - Fill out specific forms
  - Flags, tags, & phases
  - Concepts of data assembly line
- Show & filter
  - Saved favorite reports
  - Every section - basic & advanced searches
  - Multi-locations
  - All sorts of filters & criteria
  - Drill-down to data details
  - Prove it by the details
  - Roll call
  - Open access 24/7
- Reporting uses
  - Exports
  - Archiving
  - Built on browser technology
  - Compare with multiple windows, tabs, split screens, etc.
  - View PDFs, Microsoft Office, Open Office, CSV
  - Mobile ready
  - Both secure & public reports
  - API sockets & raw data
  - Business intelligence
- Quick search
  - Access from every page
  - Reports - show & view
  - Navigate - go & do
  - Tied to permissions
  - Tons of key word actions - home, new, last, adv, basic, numeric ids, text
  - Go anywhere in the system quickly
- Dealing with time
  - Everything is based on time
  - Dates, times, & time stamps
  - Life cycle tracking
  - News & updates
  - Scheduling & calendaring

- Permissions & view only
  - 100+ permissions
  - Permission check on every page
  - Your data
  - We help you store it
  - You pull it as needed
  - History & audit reports
  - HR pieces
- Common reports
  - Inventory
  - Expenses
  - COGS
  - Financials
  - Banks
  - Transactional data
  - Maintenance logs
  - Compliance
  - Oversight
  - Reports for CPAs
  - Reports for investors
  - Warnings, thresholds, notifications
  - Payroll & timecards
  - Taxes