**Elevate Roundtable Reporting Dashboards-20240425\_212242-Meeting Recording**

0:10  
OK, Hello.

0:19  
Got people joining us here.

0:20  
Looks like more to come.

0:22  
I see Tina, I see John.

0:24  
Felix, We're going to be talking soon.

0:26  
John.

0:28  
What else we got?

0:29  
Oh, somebody from Pennsylvania.

0:30  
Oh, nice.

0:30  
You got the background, Tina.

0:32  
That's great.

0:33  
Hi, Lee.

0:34  
How you doing?

0:35  
Hey, you're you're obscured by the background.

0:37  
Though.

0:37  
We can't see you.

0:38  
We can just see the background.

0:40  
Oh, there you go.

0:41  
My shutter.

0:44  
OK, good.

0:45  
Good.

0:46  
Good to see you.

0:47  
Good to see you, Ben.

0:50  
I am great.

0:51  
I'm doing well.

0:53  
Thrilled to see so many folks attending.

0:55  
And I'm.

0:55  
I'm really happy to see everybody joining us here in this round table.

0:59  
We had some competition from the other sessions.

1:01  
There's some pretty good topics.

1:03  
JJ is joining.

1:05  
How about that, Matthew?

1:08  
OK.

1:09  
All right, guys.

1:10  
JJ, Hey, fancy seeing you here.

1:13  
No, So glad you joined.

1:15  
We got Reynold.

1:16  
We should have Shane.

1:17  
I think he's supposed to help me wrangle you guys since I know how wild you are.

1:24  
So he may be wrapping it up his session.

1:26  
So to kick this off, what I was gonna do to make this a true round table was to throw some questions at you guys.

1:35  
I think this is automatically being recorded.

1:37  
Let me double check.

1:38  
OK.

1:38  
Yeah, it is being recorded.

1:42  
Hello Chinta.

1:45  
Good to see you.

1:45  
We've got Robert Goodrick joining.

1:48  
OK.

1:48  
If somebody else can help me out.

1:50  
And can anyone else see the admit button when someone tries to join is am I the only one who can admit people?

1:56  
I think so.

1:57  
You got.

1:58  
I am the only one.

1:58  
OK.

1:59  
I'll just keep an eye on that then.

2:01  
So let me throw the first question out there.

2:03  
Those of you who can share on the camera, it's it's really great, if not totally get it.

2:10  
First question I have for the team is who uses reporting the most in your organization.

2:19  
Like if you if if you guys have a have a main consumer of reports and their specific needs as is there.

2:27  
Is there a group or two that just they're just head and shoulders above the wrist in terms of who needs reporting from you and feel free to jump in anybody who wants to start, this is Julie from Alabama and we're I mean we're just getting off the ground.

2:52  
We've just recently gone live.

2:54  
But for reporting purposes I would say the the most intensive use is, is is really our directors in order to provide requested information to our legislators on demand and we had a lot of trouble with that with getting relevant information out of our old database.

3:19  
So yeah, we're really excited about everything that that that we can pull out of operating, but also our my Co workers as well need reports and we're and we're in the process of you know building, building those beyond queries, building those as well.

3:40  
OK, great.

3:41  
That's really good context.

3:42  
So when you say requested information to legislators, does that mean they requested from you or you have a standing kind of under request of periodic reporting that they need to see.

3:56  
There are annual reports that we provide but also throughout the year they ask us for information a lot of times totals and and sons that, you know, they've just never asked previously and and before it was always a scramble.

4:18  
OK, how?

4:19  
How can we put this together?

4:22  
But now you know as long as the information has been captured and operate what we know, we'll be able to give it, give it to them.

4:32  
Wow, that's really powerful.

4:36  
I'm taking some notes here.

4:37  
Anybody else want to chime in?

4:39  
Who is the most, who consumes the most reporting from your organization?

4:44  
If I suppose if it's different from Julie's case or if you just want to say me too, it's I can say definitely John, Felix, NCDOA.

4:55  
It's a lot of the same thing where it's like you have your annual reports that are going to our fiscal folks.

5:00  
We need to let them know like what how much inventory we have what the value of that inventory is.

5:07  
We need to let them know how much we spent on materials per building how much did we spend on HVAC repairs on on electrical repairs, plumber repairs.

5:20  
So those are the big things and I I had created some in the old AM IQ and as we all know that went away.

5:27  
So we're we're definitely and actually like you said, I think we'll be sending you in a few weeks to kind of kind of teach us how to use these tools and things with the newer versions.

5:40  
But it's really kind of the same deal where and then then obviously often you get a request from from you know my boss's boss and from the legislature and they want to be able to have numbers to look at.

5:53  
So with a lot of the the tools and things, the search queries and such, we've been pretty blessed with this compared to old ways where I'd have to dump everything into a a Access database.

6:11  
But I'm definitely looking forward to learning more about the the new new ANALYZE.

6:17  
Is it ANALYZE?

6:18  
That's right, right.

6:20  
Some of you may be running IQ because that's the license name.

6:23  
It was the the Pentaho technology that went away but IQ, the license persists for those folks that might still be using it under that brand name.

6:33  
But this is really helpful already.

6:35  
Guys it's already been worth the time.

6:37  
We can stop now.

6:39  
Can I ask can I ask a question Lee does anyone does anyone need any particular or specific types of reports for capital projects Quiet.

6:55  
OK Lee I just jump in Lee I, it's JJ I jump into I mean very similar to what the previous to it's to it said I wanted to add as well and you and I have had a lot of conversations about you know our reporting and stuff but we're we're currently getting ready to go to a trial So the the attorney general's office all of the data for the defense for the trial that we're getting ready to go to in June was provided out of operate.

7:31  
So that was another big yeah there we we got sued by a group on the school side so that the state wasn't providing appropriate funding and this and that and we disagree and we've got a lot of data that tells a different story.

7:48  
So wow.

7:49  
Oh my goodness.

7:53  
Thanks for sharing that, JJ.

7:57  
It's always exciting to have JJ on the call.

8:01  
It's stories like that.

8:04  
You brought the attorney General from County.

8:07  
Yes.

8:08  
Tony here.

8:09  
How are you?

8:10  
Great.

8:11  
Yes.

8:12  
You asked about if we are requiring a report for capital purpose, right?

8:22  
Yes, we do.

8:23  
Actually a lot of information that are required from us is about cost for you know a budget purpose.

8:39  
So when we are you know, planning to do the budget for the next following year, we are requiring a lot of information about what was the cost and where the costs are or where the expenses where.

8:55  
And then AI mean in in that particular case is when we are requiring a lot of a report.

9:07  
OK.

9:08  
Thank you for that background.

9:12  
So we got a lot of where are you from?

9:15  
I'm sorry.

9:16  
Broward County.

9:18  
Broward County.

9:18  
Thank you.

9:22  
And that was Chinta Cooper right now that was oh, he oh, I I, I don't want to say your name wrong.

9:31  
Oh, he Aliseh.

9:33  
Aliseh.

9:35  
OK OK.

9:36  
Sorry about that.

9:37  
I apologize.

9:40  
Great.

9:40  
Thank you, guys.

9:41  
This participation's wonderful.

9:44  
OK.

9:44  
Since we got such good stuff out of the first question, I want to really be selective about my next 8.

9:50  
And I don't think we're going to get through all of those.

9:52  
So, OK, let's see, Let's see.

9:58  
What are you using now to make the key reports you need for your people?

10:03  
I I'm not going to assume you're all in ANALYZE.

10:06  
Maybe you're having to use other tools at this point for certain things.

10:10  
Maybe some of you are full on in ANALYZE.

10:13  
But what what are you using now to make the reports for your for your audiences or I heard Bert from somebody.

10:24  
Yeah, JJ, Bert.

10:26  
OK so for those now you guys, you guys had the analyzed training I think or have you not had that one yet what you watching well they might have been worse might have done analyzed training or two day conference over a tenant too but I so I just talked with Thomas somebody pictures of folks on my tone.

10:52  
I said when you get time and according to these you're gonna clean up a sectional electricals just laying there is that Devin who accidentally left his speaker area.

11:02  
Somebody's got the live I I muted him I muted him JJ using Bert.

11:07  
So J, JS using Bert for some I I'm assuming you guys have a lot of you've told me about some of your reporting needs some of it very specialized.

11:15  
So you have some folks or maybe yourself even that's able to crank out some some custom Bert reports.

11:22  
Correct.

11:23  
Gotcha.

11:25  
What are, is there anything that would change that or do you think these are just reports that are meant for custom Burt or are there features you wish that we had that would have allowed have allowed you to stay in our package?

11:40  
Well, I mean, Lee, from what you've showed me, you know, with analyzing the dashboard and how stuff can be a lot more interactive, it's really just a matter of us getting to that.

11:53  
So, OK, well, then let's, let's keep talking then.

11:58  
Jji, we need to have a call here soon anyway and catch up and maybe this can be a topic for us.

12:04  
Be excited to have that conversation.

12:07  
Who else would like to volunteer?

12:08  
It looks like Julie's got her hand up about what they're using to make reporting.

12:13  
Oh yeah.

12:13  
I was going to say one or two of the Burt reports that we're in the process of having created.

12:23  
Part of it was because the personal queries don't give subtotals and totals of dollar amounts of all of the items, all of the resulting items that that show up from the search.

12:43  
And yeah, you can export it into Excel and then do some, but we have to do so many of these it it's just easier to to have a, yeah, that report created.

12:56  
OK, that this is very helpful because as a product manager I can, I can hear that and I can look at the specifics of that report and this is how we'll know where the next enhancement should be in the product.

13:10  
So that hopefully the next time this kind of situation comes up, you won't have to go to Bert so quickly and there's nothing wrong with Bert.

13:18  
There's going to be a place for that in a lot of cases because of how much custom stuff you can do to it.

13:24  
Things like the header information at the top, how you summarize stuff, put your special logo for you know your state or county or city.

13:32  
There's there's some of those intangible things that that make it pop that you don't typically see in a in an embedded analytics solution anyway.

13:43  
So, but all of this is, you know one of my last questions, what we'll get to will be around enhancements and ideas for those.

13:51  
So be get those wheels turning, you want to hear that feedback.

13:57  
OK, anybody else on you know what tools you're using now And we've heard about Bert and it seems like Bert is filling a gap when we can do things and analyze.

14:05  
Are people using the same that tool?

14:07  
Are they using as anyone using Analyze heavily or is anyone using other tools to get the reports that they need out of our system?

14:18  
This is Robert Goodrich with the Florida Department of Corrections.

14:21  
Sorry, my camera's not playing the way it normally would with me, no problem.

14:26  
We are utilizing on the operate system.

14:29  
The classic aim still is what we utilize for tracking our reports and we're primarily focused currently on number of work orders created, whether they're by the technicians or the facilities, number of work orders completed within a certain time frame, how many are over, let's say 15 days, 30 days, 60 days old.

14:55  
And we're still using that format to generate all of these reports within the multitude of thousands of facilities within the state of Florida that we're currently using.

15:07  
And that's that's typically the the basics of what we're using.

15:10  
We haven't gotten into the whole analyze part, but we're still in the infantile stages of getting more license years to expand this product to capture all the costs and things of that nature.

15:25  
We just haven't gotten there yet, but we're well on our way.

15:29  
Wonderful.

15:30  
Now that's great background, especially the specific examples that's excellent.

15:34  
See it sounds like you're doing work order aging there 3060 etcetera and and I happen to be your your customer success manager, Robert.

15:44  
So we should talk about your goals in general, in general terms and of course we can cover this too.

15:54  
Thank you.

15:55  
Anybody else?

15:57  
Yes, I have another addition to do.

16:02  
I would like to see or we would like to see a little more complexity in the in reporter LED us to do projections of expenses and you know given that the inflation is a a a topic that is a gaining importance for a sake of do projection and estimate how much the the project is going to increase for the following years 125 years ahead.

16:40  
So add a little more complexity to and let us to use different percentage of inflation per year.

16:51  
No, no, like a flat percentage of inflation for for the old period.

16:59  
I rather we prefer something that lets us to like apply maybe different rate for those year that we want to project.

17:12  
I don't know if I explained myself, you know, I think that was very helpful.

17:17  
What was your name again and where were you from?

17:19  
So I can listeck from Broward County.

17:23  
Oh, sorry.

17:24  
Gotcha, gotcha.

17:25  
Thank you.

17:28  
OK, I will.

17:31  
And and out of curiosity, do you work closely with Brian Kraus?

17:35  
Yes, he's my supervisor.

17:38  
OK, great.

17:39  
That way.

17:39  
I, I know if I have a meeting with him about this, we can we can get you in there and you guys already know each other quite well.

17:47  
So great.

17:49  
Anybody else what you're using these days?

17:53  
Yeah, Thomas Deforge with the State of Vermont facility Data and reporting coordinator, a heavy, heavy user of Bert as well.

18:03  
And I second what you said, Lee, about the yeah, like the logo and title branding things of that nature, great use case for that.

18:12  
That's one of the main reasons that we use it so heavily.

18:16  
But another piece that hasn't been talked about is graphic reporting, primarily using the AIM CAD tools.

18:23  
The Shane demonstration that we just had, they're getting a lot of use out of that and would love to see expanded functionality of of you know of being able to show things like lease data and other things that are not currently in there.

18:38  
So can you expand on that lease data and and what else might you like to see in a in a graphical reporting of a space?

18:47  
Yeah, so in a graphical report like using the AIM CAD tools, bringing data into AutoCAD or even in the space viewer within offer a a.

18:58  
A drawback that that we've come across is, is not being able to actually graphically see leases on a floor plan and and what areas they take up or those lease tenants lease you know things of that nature.

19:12  
So when we're looking at an an occupancy of a particular building graphically we we see the the internal organizations that we have but we don't see the external ones that are we're leasing out to.

19:26  
So that's some, I think you just dropped some gold on us there.

19:31  
That's really good point Thomas.

19:32  
That's good, very good.

19:34  
Thank you.

19:35  
Yeah.

19:38  
OK.

19:41  
Thank you very much for that.

19:43  
OK.

19:43  
We probably ought to get a couple other questions in unless somebody's really wants to tell us what reporting tools they're using.

19:50  
If it hasn't been mentioned yet, are we good there?

19:55  
OK.

19:57  
I suppose I should offer to Reynold or Shane.

20:00  
If you guys have some hot questions that you want to make sure this group we get answers, get their their thoughts on, I'll, I'll let you jump in or I can keep going.

20:11  
You can keep going.

20:12  
I just I think the the, the lease and the capital were too.

20:15  
I wanted to hear some feedback on and that's good.

20:17  
Thank you, Thomas and Elisa.

20:20  
Perfect, perfect.

20:23  
OK.

20:24  
While we still have a decent chunk of time here, what do we have to 145?

20:29  
Is that right?

20:32  
Maybe up to 145.

20:35  
Does anybody?

20:36  
You know, I don't wanna drive everything.

20:38  
Just is there anyone on this call that has a pressing question or topic that they wanna make sure that this group discuss is in the round table?

20:45  
Wanna open it up?

20:46  
Open up the floor to you guys burning questions or topics or I'll just keep us going.

20:55  
Oh, right, JD, just got something.

20:56  
What you got?

20:58  
Lee, I know you and I talked about this before a while ago, but getting more within the query screens, you know, obviously it's limited the columns that you can return, you know, and which makes sense because you can have instances where you would get duplicates and things on the query screens.

21:21  
But you and I had talked about putting some functionality into that query screen where you could maybe write some sequel.

21:31  
I think you and I had talked about that a while a while ago.

21:35  
Possibly some type of enhancement where when you go to that query screen, if you wanted to write some custom sequel in a in a field via the application, it might expand some of the functionality and and getting data out for reporting directly out of the query screen.

21:53  
I don't know if you remember that.

21:55  
I think it was you I was talking with about that.

21:57  
It does ring a bell.

21:59  
Now the I don't before we jump, before we go to a solution of it being a sequel statement which which is a little exclusive in terms of who knows how to do sequel like some people will be like yeah sequel and other people will be left out.

22:17  
I have to I have to put my product manager hat on and and say is there a way that would serve everyone.

22:24  
But I hear you and we do have some road map features we're talking about to give you expanded search capability.

22:32  
So let me follow your question or your point with a question when it comes to expanding the capability of search screens, because that's that's where we're at right now, right?

22:40  
It's like expanding the capability of existing search screens of the queries, right.

22:46  
So we're there, right?

22:48  
So is it safe to say that you would be satisfied by expanding the capability to be all the fields that are currently displayed on that search screen?

22:59  
Or would you need to go beyond?

23:03  
So when you ask that question, like would you need to go beyond, like joining things together that might be in a different search?

23:12  
Is that what you're asking?

23:13  
I wouldn't even go that far.

23:14  
Not not even having to do joins or anything like that.

23:18  
Just expanding it, you know where you know you can search based upon any of the criteria, any of the fields that that are there.

23:27  
But you're limited on the columns that you can include in the query result.

23:36  
Yes, over on the left you know that the display order column, you know you, yes, the top the stuff at the top's already there.

23:44  
You guys did take it a step further in capital projects where some of the financial transactions and things you can include those columns 'cause you have those views out there that aggregate, you know, the the pay apps in the contract amounts and things like that.

23:59  
But expanding that even further where you could return more of those columns that may be populated in in the application.

24:09  
OK, that's a great comment.

24:12  
And now I get you, so, so yeah, So for those of you who are newer to the application, you do, we do search screens.

24:19  
You have a list of fields which correspond to columns typically in the table behind the screen.

24:26  
And then and those can be displayed, they'll have a little number there and you decide the order left to right that they'll be displayed when the results come back, which is just the listing of rows of data.

24:37  
And it turns out that some of the fields that we allow you to filter on are from other tables and they don't have that little that ability to put the display number and show them.

24:51  
So what JJ's talking about is well, I can filter by these things but I'd also like to see them in the in the returned results.

24:58  
We get that.

24:58  
We hear that fairly often and you know I'm kind of I'm kind of 1 to 1 to rip the Band-Aid off on a request like that and just do all the searches, you know because because and this isn't a commitment, right.

25:15  
I have, I can't I have to pull the pulled up there.

25:17  
But I want to say that JJ has a has a search screen in mind, but we hear from other folks that they have another search screen in mind.

25:25  
It's different, similar requests.

25:28  
And so from a product standpoint, I want to find a solution that would address all the search screens.

25:34  
It may not look exactly like what JJ is talking about, but I'm, I'm really glad you brought it up.

25:42  
And I have, I have the custom sequel written down just to kind of frame the conversation, but I'll explore it in terms of what what it's really possible for us to do.

25:56  
Appreciate it.

25:57  
Thank you, definitely.

25:58  
Definitely really good stuff.

26:01  
Anybody else with some, some goodness hopefully.

26:08  
I just want to amplify what JJ was saying.

26:10  
I I think that Pennsylvania would find that really beneficial as well.

26:15  
If I can search on it, I feel like I should be able to put it on the results so that I can export it and and share it with whoever's made the request.

26:26  
That's a good way to also going back to I I can't remember who said it, but as far as like totaling things if that would be a possibility would would definitely be a a major plus.

26:39  
Right now we do have the ability to do a basic count aggregation on queries.

26:46  
I believe it's a, it's a but it might not be all of them in in terms we're talking just about the search screen right now.

26:53  
We're not even really in the analyze world ANALYZE.

26:57  
You certainly can get all the counts and aggregation you want.

27:00  
And when we do that training John, I'll show you that stuff.

27:04  
But when we're we're kind of we're kind of talking about core operate analyse here.

27:09  
The search screen is pretty core to the product and pretty much any great enhancement or improvement to the search screen kind of effects every customer which you know there's a case to be made there that that helps everybody.

27:24  
SO22 heavy hitters chiming in on that one.

27:28  
Definitely.

27:28  
I'm going to raise that as we get into our planning in our road map discussion.

27:34  
So thank you.

27:36  
All right.

27:36  
So I think we got that one pretty well vetted.

27:39  
All right.

27:41  
I got to be real choosy on the what might be the last question of the day.

27:48  
We've kind of covered a lot of it.

27:52  
All right, well, I'm, I'm gonna open it up to the, the, the most fun question of all.

27:58  
What do you guys wish you could see in the product or you it might already be there.

28:03  
Some of you guys may not be familiar with all the features, but what features of of analytics or reporting and it could be an area of reporting.

28:11  
Would you like to see our company invest in building out, you know, fortifying, deepening, You know, where would you like to see us put our resources if if you could pick and why This is, this is the Christmas question really.

28:37  
So if you guys have some thoughts, I know you got some ideas, so many ideas that they're locking up, that's OK That's totally on the spot like that.

28:58  
That's fine, that's fine.

29:02  
So I'll just throw something out there that might get the wheels turned a little bit.

29:06  
I can safely, I think, commit to saying that we're gonna have a feature in the next release that allows you to.

29:15  
Are you guys familiar with query operators?

29:18  
The the the login operators like employee, shop and user Like you can do a query and based on whoever's logged into the system it's gonna use their employee ID.

29:31  
If you picked that little value, if you picked the shop value on, let's say the shop field, I'm looking for a shop, I happen to be looking for the shop I'm in.

29:43  
No matter who logs in and uses that query, it's going to pick the shop that they are in because it's their session on in the operating system.

29:50  
So these I will, I'll just call them for shorthand login operators, right?

29:55  
And the real power of login operators on the work desk is that you could make one work desk for a whole group of people.

30:02  
If I if they happen to be in a shop, then you filter on the shop and you made one dashboard in some cases with a bunch of widgets in it that's automatically filtered for the person that's logged in.

30:17  
So you only, but you only made one one of each piece of content.

30:21  
We can do that right now with queries.

30:24  
We cannot yet do it with views and tables.

30:28  
That's going to change.

30:29  
That's the feature that I want to get into the fall, which means that any of the views or table sources, database views or table sources you'll see in the database and they could be custom ones.

30:43  
If you own the custom reporting license, your custom sources could have would be Views or tables will be able to filter for operators and we'll use the same ones User, employee and shop.

31:00  
So with that with that new capability you would be able to make dashboards from any data source in the database, saved queries, standard tables and views or custom tables and views and just cut the effort down immensely.

31:17  
And I don't know if Jake from Utah is in on this call, but he would probably be chiming in.

31:22  
He's one of the first people to to raise it for us.

31:28  
So knowing.

31:28  
But I was thinking, yes, yes, the exchange is aware.

31:32  
So knowing that, knowing that we're able to or will soon be able to put you guys in a position to make work desks for users that filter automatically on their login.

31:46  
Can you see that going somewhere else?

31:48  
Can you see, can you see a use case for work desks that is, you know, really important to your organization.

31:57  
So I guess that's my ultimate question.

31:59  
Assuming that the work desk is gonna become a dynamic thing for your login at your login experience, who is it gonna help the most?

32:07  
What are you?

32:07  
What would what could you guys see it being useful for?

32:10  
I see JJ's ready, so Lee, that's just for the work desk, right?

32:16  
So it's not like it's because I I use the security filters heavily at the role level when people log in to apply certain filters, you know, 'cause there's multiple different, but you're just talking.

32:29  
That's just for the work desk, right?

32:33  
Yeah, it's for it is for the work desk widgets, yes.

32:39  
OK, got it.

32:39  
OK, that that that that.

32:41  
I just wanted to clarify that.

32:44  
So there's that I have AI have a question.

32:47  
OK there.

32:50  
How are you thinking to, I mean because that's that's is like for the first or second level of the parliament, you know of the organization.

33:05  
But if for example is a supervisor or the a manager or the director you know when we are moving up in that organization, how is going to group the data for them It's going to show, I mean just for a clarify that the the question, the director is able to see the data of all the shop, right?

33:43  
Right.

33:46  
The the these operators is possible to you know like a ad all then to a director.

33:58  
So the director could see a combine a data, a combined dashboard with all that data for all the chop that he is overseeing.

34:10  
I mean the question is how we are going or you are thinking to manage, combine the data for the management labels.

34:23  
OK, great question.

34:25  
So it really apply, I we've covered this in some webinars, but it's the question of where do you apply filtering for different levels of the organization.

34:35  
And the short answer is you apply tighter filtering the lower you go.

34:41  
So the field person is employee level.

34:44  
The shop supervisor would be would be probably shop level.

34:51  
But you it depends.

34:52  
It'll depend on the particular report.

34:54  
Sometimes you want to give the tech technician visibility at the shop level for specific stuff.

35:00  
Sometimes you want them to have visibility of only their work assignments.

35:06  
Sometimes you want them to see which which records they edited and that would be their the user filter.

35:13  
So when you climb a level up to the shop supervisor, it's probably going to be about the same you'll they'll have a shop filter to see data for the shop they may have.

35:25  
They may still have specific things for themselves with the employee filter depending on the report.

35:31  
But once you climb above the shop supervisor level, the way it works now is that you turn the filters off, you basically let them see all shops.

35:40  
We're not filtering by shop.

35:43  
If we're not filtering by shop, then you see all shops and and I and when I've given presentations in the past, I call that the global level, the global view, you're seeing everything.

35:56  
Now the question you've made me think of is, is there a logical hierarchical like org hierarchy step above the shop level that we should have as a filter that would that would, yeah, because because it's like a specific or global, right.

36:14  
Well, not, I mean the option that we have right now, you have you have 3 levels, you have Employee, which is your specific user.

36:22  
You have Shop, which is your shop or they have no filters exactly.

36:28  
Keep in mind this is keep in mind this is for an individual field though you can filter on much more than one field.

36:34  
OK.

36:35  
But but we have Intermedia.

36:37  
Well, I don't know.

36:38  
I guess all the transition could have the same scenario that we have intermediate labels that oversee multiples, shop for example.

36:52  
And is there where we have issues, OK, OK, this has come up, but I see Tina nodding her head because she has folks that supervise multiple shops.

37:04  
We have some ideas on how to handle that, but it would probably not be what you think a shop operator isn't.

37:13  
Let me put it this way, it only works if you can, or at least the way it's implemented now.

37:21  
These login operators really only work if there's there's a one to one relationship with what with with what comes back.

37:29  
So you only have one employee IDs.

37:32  
Makes sense.

37:33  
You only have one user login.

37:35  
There's a user shop on your user's security record.

37:42  
There's a shop operator.

37:44  
Now you want to go a level above that.

37:46  
Now you now you're looking to filter on a list.

37:50  
Exactly, and it's it's going to be 1 to north.

37:54  
Where is the employee or the person or supervisor whatever, to see multiple chops, right?

38:03  
So I'm normally not supposed to do this, but I'll I'll throw it out there.

38:09  
One of the things we've considered for this is something that's called a sub query where basically you write, let's say, let's say you're searching for phases.

38:21  
Somebody if you could mute your line if you're not, if you're not speaking, thank you.

38:28  
Let's say you're searching for phases and you want those phases for a list of properties, a very specific list.

38:34  
And that list of properties is based on, I don't know, a zone.

38:40  
The idea of a sub query would be that you write a property query on the property screen and you save it and then you use that query as your parameter on the phase search.

38:58  
OK.

39:00  
And this same concept could be used for finding people that are managing multiple shops if you there's going to be a record somewhere in the system, right, that that shows you know that Herb is managing clearly the greenhouse but also HVAC and electric.

39:24  
And so there's going to be a query there if of where he's assigned to be managing these shops, right.

39:31  
So we'd save a query on that screen, and when it comes to filtering on what Herb is managing, you drop that value in, you drop the name of that query in, and the system is smart enough to pull those search results back and use that as the filter.

39:49  
So it's going to be like a a kind of custom a.

39:56  
What is the name that you gave to chop on?

40:00  
Operator, it's going to be a kind of custom operator.

40:05  
You could think of it that way because queries are so powerful in the system that we feel we've thought that this was an idea from Glenn Adams.

40:13  
So I have to give him credit that that if you get if with all the power of an individual search screen, if you were to save that query, if you were able to use that query as the you know the results of that query to be the filter for another query you've got.

40:34  
It's almost like inception.

40:36  
It's like query inception.

40:37  
You know it's it's it's going to the to the extreme of flexibility with the search screens and it would solve the multiple selection issue in spades.

40:49  
It wouldn't be an operator though.

40:51  
It would not be an operator.

40:52  
So again, I'm throwing this idea out there to see if if this resonates with you guys that it makes sense to you that you know that would wouldn't be complicated.

41:01  
Now JJ has already thrown the custom sequel idea out there and that has its own benefits around search.

41:10  
We're going to have to hash this out.

41:11  
I might get some of you guys on the phone and throw some ideas at you, but I hear I hear your point there and I think we're almost out of time.

41:23  
Are there any.

41:24  
Let me think, let me think There I I had put in the chat if anybody had questions, they had, there's a few people had hands up and they put them down.

41:32  
I was like, hey, post it in the chat so we can at least capture it and get back to you.

41:35  
OK.

41:36  
Yeah.

41:36  
Yeah.

41:39  
Cus I know John Felix had his hand up and then he put it down South.

41:42  
OK.

41:43  
OK.

41:43  
Sorry guys.

41:44  
Sorry about that.

41:47  
Yeah, please feel free to drop stuff in the chat.

41:49  
Even after the meeting closes, you should still have access to the chat, I hope.

41:57  
Let's see what else but we'll We'll have a record of it with Transcript.

42:03  
That's true.

42:04  
That's true.

42:06  
Is anybody in this call thinking about taking the Analyze and Work Desk training, getting further into that?

42:14  
We know John's going to be taking that here in May, I believe.

42:19  
Is anybody else thinking about taking that training from us and and investing time in the work desk If if the Department of Corrections in Florida, if they get the licenses for that analyze and we start implementing that, I would certainly be in great.

42:38  
OK.

42:38  
And then my final question for you guys looping back to where we started that that most of the core reporting is done for director level and above requested you know ad hoc reporting.

42:53  
Do you feel like work desk content and scheduled reports, you know emailing out, do you feel like that will get you where you need to go or do you feel like is there a gap that you can think of that you know to to suit that audience in, you know in a in a core reporting product like ours.

43:21  
Like these folks aren't probably are they logging in to operate or not If they're not do we need to get them these reports in another way?

43:28  
I'm Julie again and I, I really don't remember really if if we've discussed it yet or not.

43:42  
But Justin and I are are getting a plan together to do do some get, get a quote on doing some automation between DocuSign and operate so that then we can send out scheduled reports from operate to architectural engineering firms, organizations and construction contractors that aren't necessarily a DocuSign recipient in a particular DocuSign envelope but you know are interested in or or you know are part of the project.

44:24  
OK, that's really helpful.

44:26  
Yeah, the scheduled reports send out an e-mail with an attachment of the reports.

44:31  
Guys is APDF for the charts.

44:35  
It's a CSV file for the crosstabs and Bert reports also go out as APDF.

44:42  
Last question, do you guys see value if we were to somehow publish dashboards as a website that people could click on as a link?

44:55  
I'm seeing some nodding heads there.

44:57  
So we've got, is that the right level?

45:03  
Is it is the widget level better to publish or is it the dashboard level to publish?

45:11  
Lee, I would say the Dash, this is Jji would say the dashboard.

45:14  
Because I was going to ask earlier because I kind of dove into Microsoft BIA little bit, how you can take your BI and you can plug it into the database and you can actually publish that to a URL and embed it on your website and it updates real, you know, real time.

45:29  
Yeah, that would be excellent.

45:33  
OK.

45:34  
I thought that would be as a dashboard.

45:37  
As a dashboard, yes, I thought that was the case.

45:39  
We know at least one customer, I want to say it's Orange County has published dashboards and Teams channels, Microsoft Teams channels and they manage the permissions to the dashboards through the Teams access.

45:53  
So they've kind of that's been their approach because they invested a lot in Power BI.

46:00  
But you know when we see customers do something like that which is a lot of work, the natural next thought is to say well can we make that easier out of our product, you know, so we're we're already thinking about these types of things.

46:15  
We're also keep in mind with the custom reporting license, we want that to become.

46:22  
It's not very expensive.

46:24  
It's going to become more fully featured.

46:26  
And in fact, what we're hoping to do with it is make them searchable as a query so that you do a query for everything, query for tables, query for views, a query for custom tables, and a query for custom views.

46:44  
So hey, Lee, I hate to interrupt, but we're a couple of minutes past getting back to the OK, we gotta go back guys.

46:50  
Thank you so much guys for all the input.

46:53  
We'll talk, We'll talk soon.

46:55  
Bye.

3:13:17  
Good thing beer earning.

3:16:05  
Bye.