Tips, Tricks, and Best Practices

* Settings – Corp-wide and User and Page
* Permissions
  + It would be awesome… if we could have a copy, a clone, and/or a template for permissions
  + On HR stuff… use the flex grid to keep track of cool little notes, both good and bad. Shari O. was talking about raises, quarterly reviews, spanking, termination, etc. Users are one of the 12 main players… use the photos, media/content, and flex grid – some great tools.
* Parent Attributes
  + Molly – great demo and good discussion
  + Russell built it, Wayne has been playing in there, but it could be really built out… Lots of potential there.
  + Kinda like a path through the woods, then a double track, then a dirt road, then a highway - progression
* Using the calendar and the settings
* If locked out? Do
* How to find your corp id – alias
* Server #
* Saving your own reports
* Pricing and tiered structure – smart groups
* Josh on setting up smart groups
* How do I enable sub inventory – Drea
* Kicking off a user – change password, remove permissions, and maybe payroll

Comments:

* Possible options for cross-corp checking for gram limits and such – Steve and Eric Tauer both have some code for things
* Custom Paperwork… Wow, we jumped into a big huge rabbit hole there… old but cool.

Up Next – BI – Business Intelligence & Big Data – Now that I have it, what can I do with it?

Alan and Steve

* What is big data – buzz word – lots of data and/or information
* Databases… What is really needed and/or used out of all of those records. Collecting data but what needs to be active and what needs to be stored and archived?
* Large companies – The amount of data at the same time… How do we handle the traffic?
* Data becomes a resource… it is worth something – what is that value?
* Trends and profiling
* Why do we even store this? Once looked at, it could help you make business decisions and/or be informed.
* Changes and making changes
* Adilas – All Data Is Live And Searchable
* Selling advertising – people want to know bang for the buck and how many eyes will see this data – stats
* Meta Data – about itself – data about the data – kinda like an index
* How do you gather all of the data? Say weather… temp, humidity, space, locations, etc.
* Libraries and bigger archives… it could be used to predict the virtual future or probable future – calculated guessing
* Tag or track or comment about data (getting more of a story)
* What about going back in time… if you have the data, you could do that.
* What do you do when you get too many ideas?
* Sometimes it takes a lot of data to help you boil things down… then as you start, you can start boiling things down into usable pieces. Similar to how we boiled down the 12 main player groups in business (invoices, deposits, users, vendors, items, stock/units, expenses, PO’s, customers, ect.)
* Using technology to help empower the users
* Build the funnel to get at the data… the data will keep rolling in, we just need to figure out what is important. Necessity is the mother of invention and/or coming up with a valid solution.
* Nobody wants more work… How can I make this data work for me?
* Thinking broad (generic) but then getting back to the underlying data.
* Watchers and feeders… having a higher level watcher that feeds in data to a bigger container. Sometimes called an aggregate or sum (average, max, min, counts, etc.)
* Train analogy – how much data are you pulling with you?
* Small experiment… three persons in the middle of the room. They are standing side by side (currently). Alan is going to send them to do things like – go find the tallest person (what does that take to figure that out) – What if you organized the people tallest to the shortest. Would that speed up your query?
* Watchers/feeders/triggers – the triggers will set the action in place and start/finish/do a process
* The difference between transactional data and aggerate data (already summed up data)
* Often data is stored and indexed in certain ways. Depending on what you ask for and how much data you ask for, it changes how quickly you can get to it. It is still there, you just have to go through it, and maybe in a different direction.
* Pain and/or trouble – what is your biggest problem? Once you know, you then have a goal.
* We can’t design it if we don’t know what you need and/or want
* It is amazing how time plays into the puzzle.
* Filters – what kind, what type, what group, what date range, what toggles, etc.?
* Is there a way to go back in time?
* To get a good report and/or dashboard… it may take wants, needs, and good consulting and questions. Taking it through the stages…
* The faintest note or scribble may be more valuable than the brightest memory
* Talking to developers – write it out, draw it out, and even map it out if possible. Providing a blue print (or mind map) of what is needed
* Draw me a tree – Christmas, oak, maple, willow, aspen, etc. Tell me a Christmas tree and then I can go in that direction.

Up Next – The Adilas Model – Vision, Future, & Wrap-up

4:15 pm

* From Drea… If you are updating inventory counts… you have to freeze your Metrc sales or do it when you are not selling.

Comment from the last session – wrap up

* Good overview and now I can apply that info.
* Pat – Fun group dynamics – fun and inviting
* Marisa – She has done tons of training – She likes the structure but also liked how each subject and/or topic allowed for some freedom. How does x tie in to y? Lots of questions and fun interaction. Great people.
* Tina – Very different on each presenter but a different view was just what was needed. I got some new ideas. View is a variable. You can break barriers by doing some custom. eXPO is super grateful for Bryan Dayton (right over there…>>). Pictures, napkins, and real layouts really help.
* Tatjana – A million things in one
* Drea – She loved to meet the developers and run some ideas past them… instant feedback – that was fun – lots of fun in the snow owl theme settings. I guess that I have something new to teach you… ☺
* Calvin – Getting feedback from everybody. Both presentations (labels and GMext Pro). Yes, we can switch things around and it should be easier to the users… we may have to increase the steps to make it correct, but the process will be easier.
* Kit – Fun to see the brainpower in the room – Lots of open doors – talk, bounce ideas, etc.
* Josh – People – a common theme – Lots of changes in the last year and half – evolution of the product
* Shari O. – Food and lunches – A huge thanks goes out to Shari O. – The different workshops are fun and we are working on more interal communications. – Shari O. is getting used to talking to the developers. That is really opening up doors and communications. Adilas wouldn’t be what it is without all of the different people who put their hand in the cookie jar. – A thank you goes a long way.
* Shay – I learned a lot and my head does hurt – Flex grid – build your own database – Looking forward to the future. Snow Owl theme settings and sub inventory have really helped – Awesome people – A validation of what she has been saying how everything could and does work together. Put the data in and feed the system.
* Bryan – It is cool for me to get a huge number of questions. He has reached out and been able to talk to other power users and get ideas. He also has some direction.
* Molly – She was joining us online but played a great role – Sometimes it is the little things.