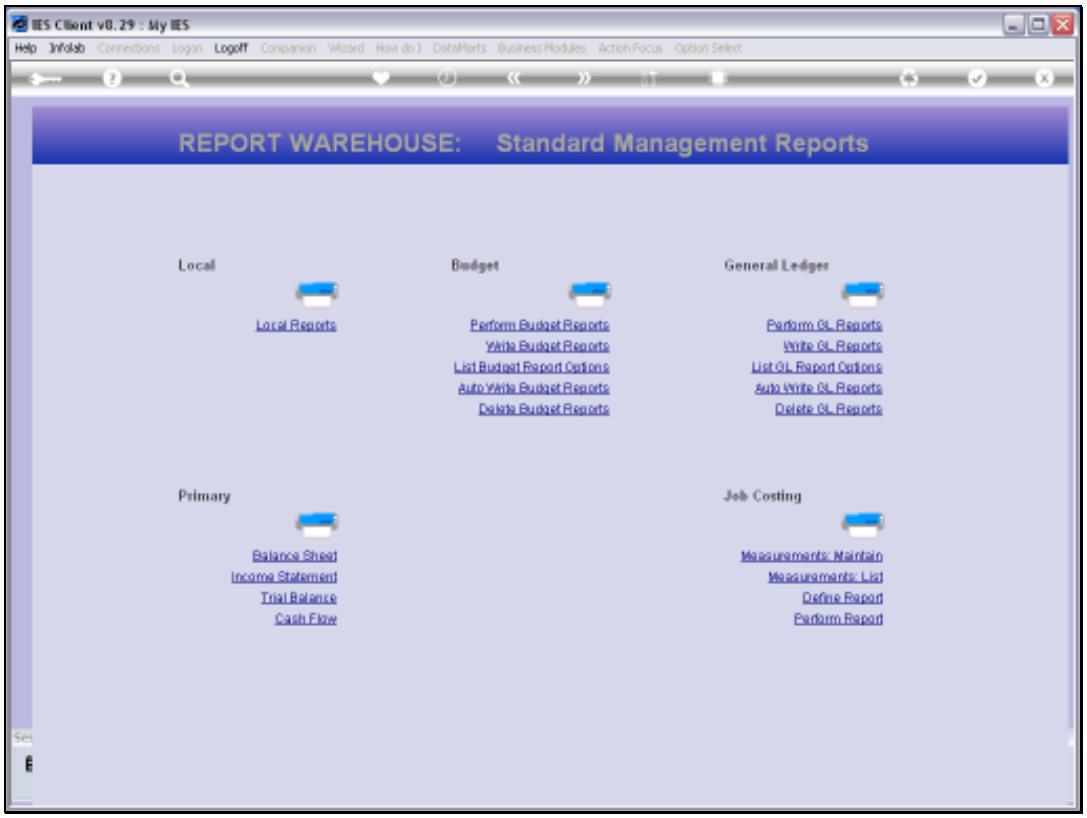
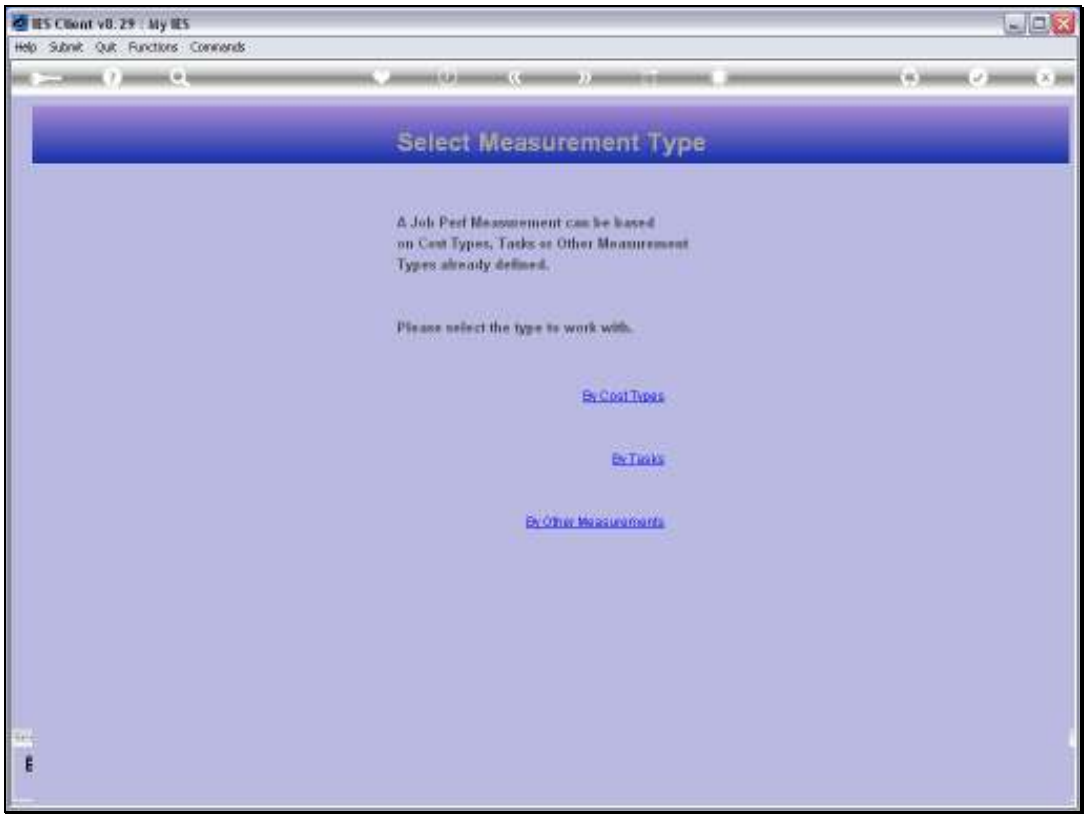


Slide 1

Slide notes: Measurement Types are new Intelligence Objects that we may define for Jobs, and the system provides a wizard for achieving this.

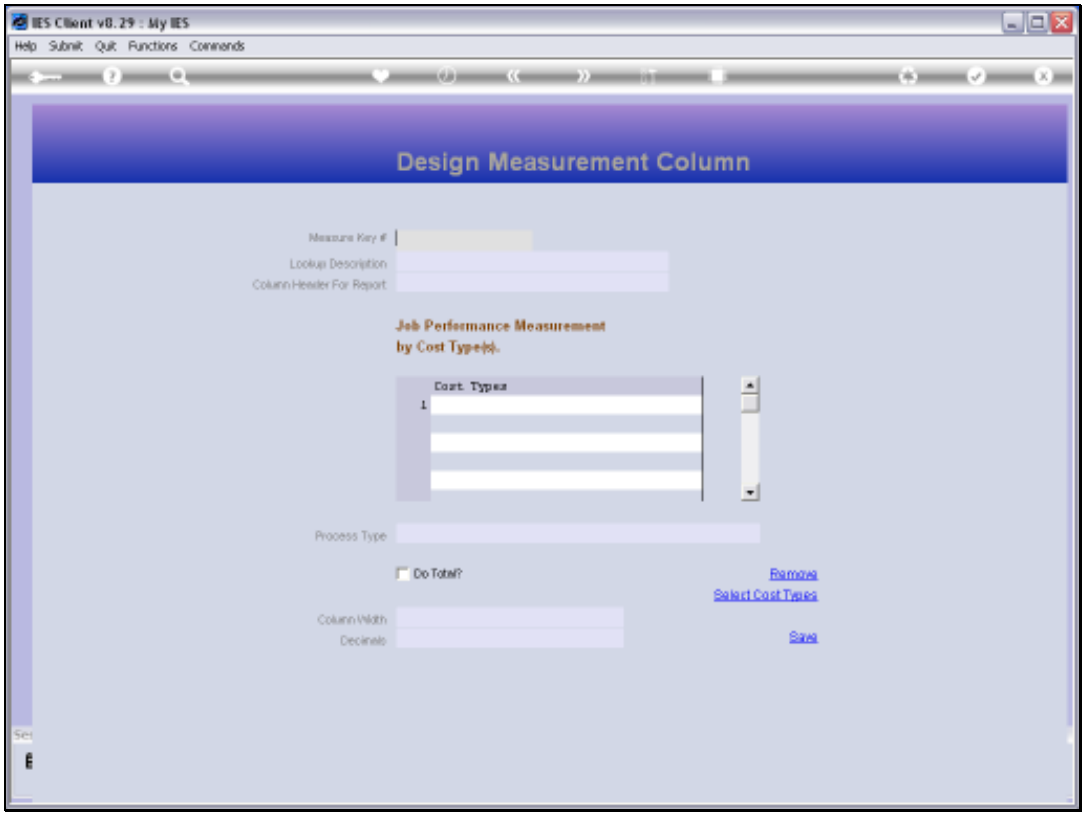


Slide 2

Slide notes: Measurement Types are primarily based on Cost Types or on Tasks, or else by other Measurements that have already been established.

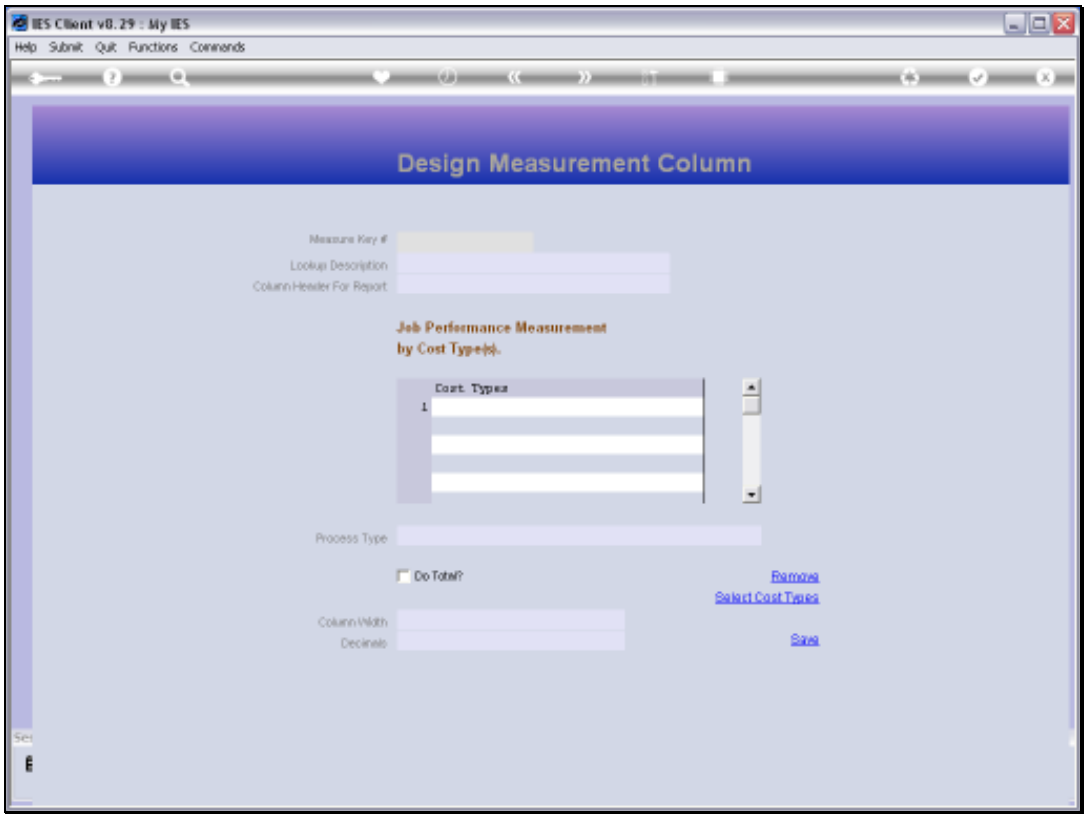
Slide 3

Slide notes: The Measurement Types are specifically for Job Costing, and Jobs have a number of innate Values that the system can provide at all times, for example Current Month Financial and Physical, also Year to Date and Life to Date values, and more. By utilizing these basic Values, and then using the formula elements provided by the system, it is possible to construct our own additional intelligence for Jobs, according to our requirements. The first method we look at is based on Cost Types.



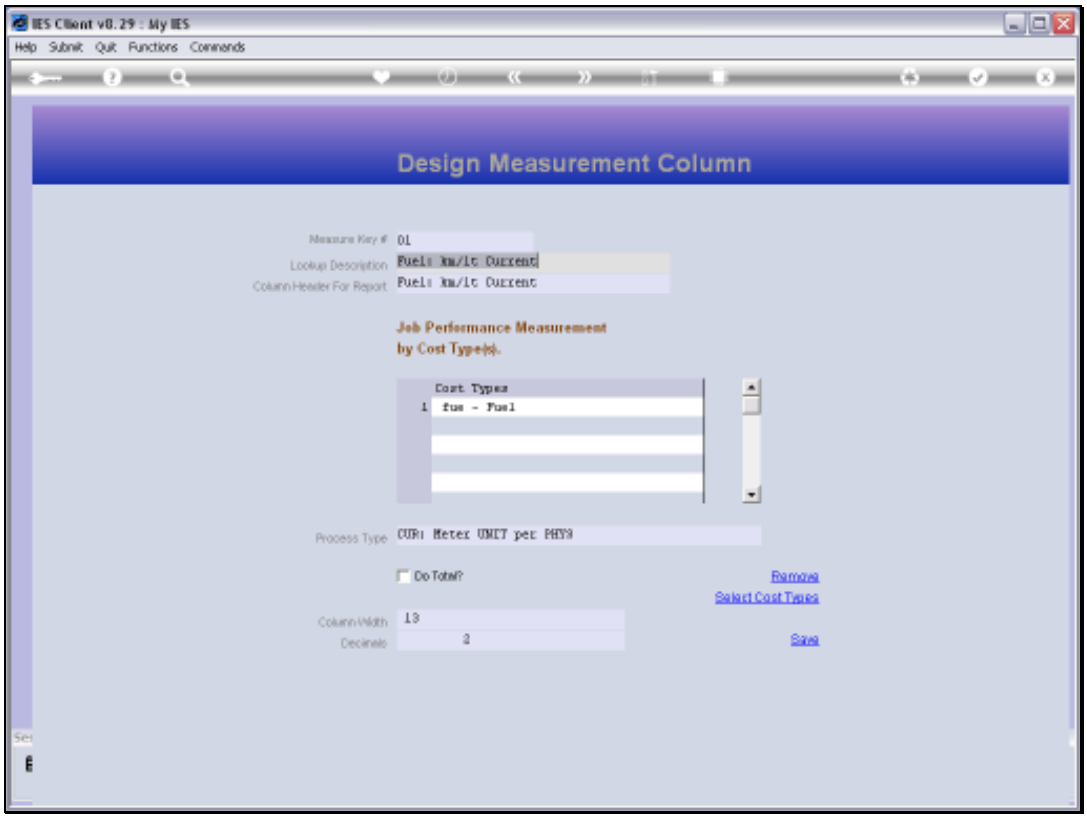
Slide 4

Slide notes:



Slide 5

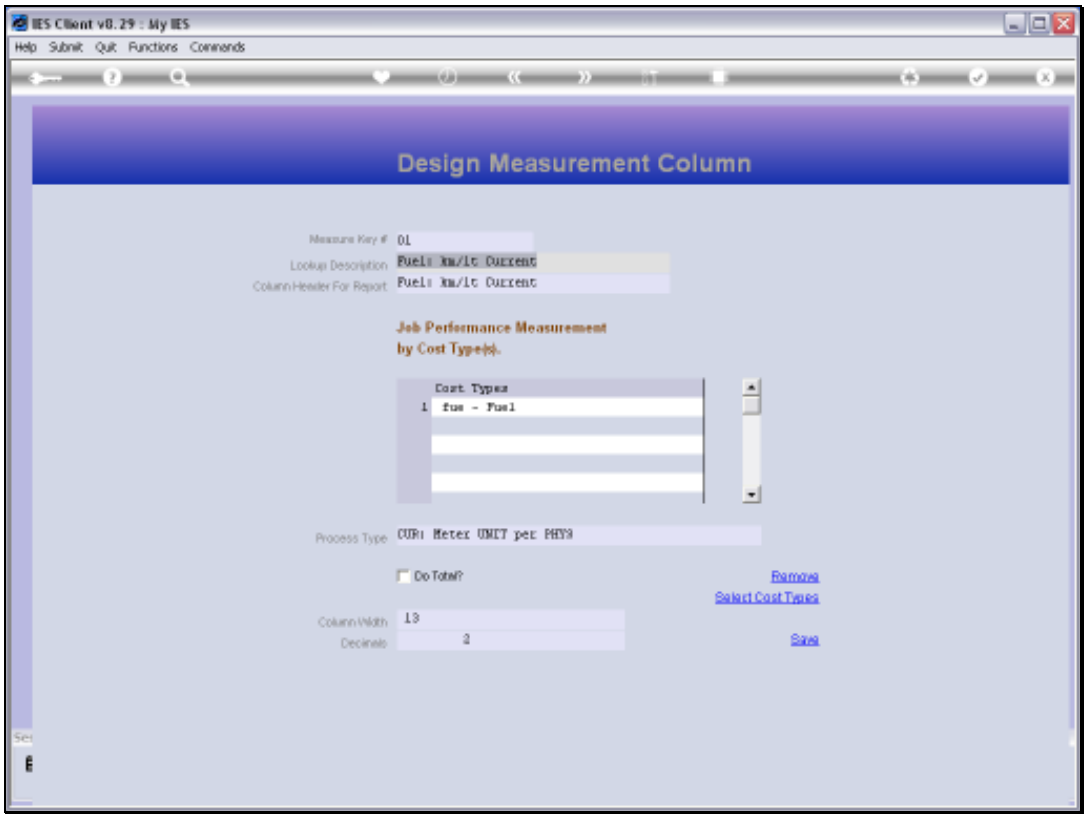
Slide notes:



Slide 6

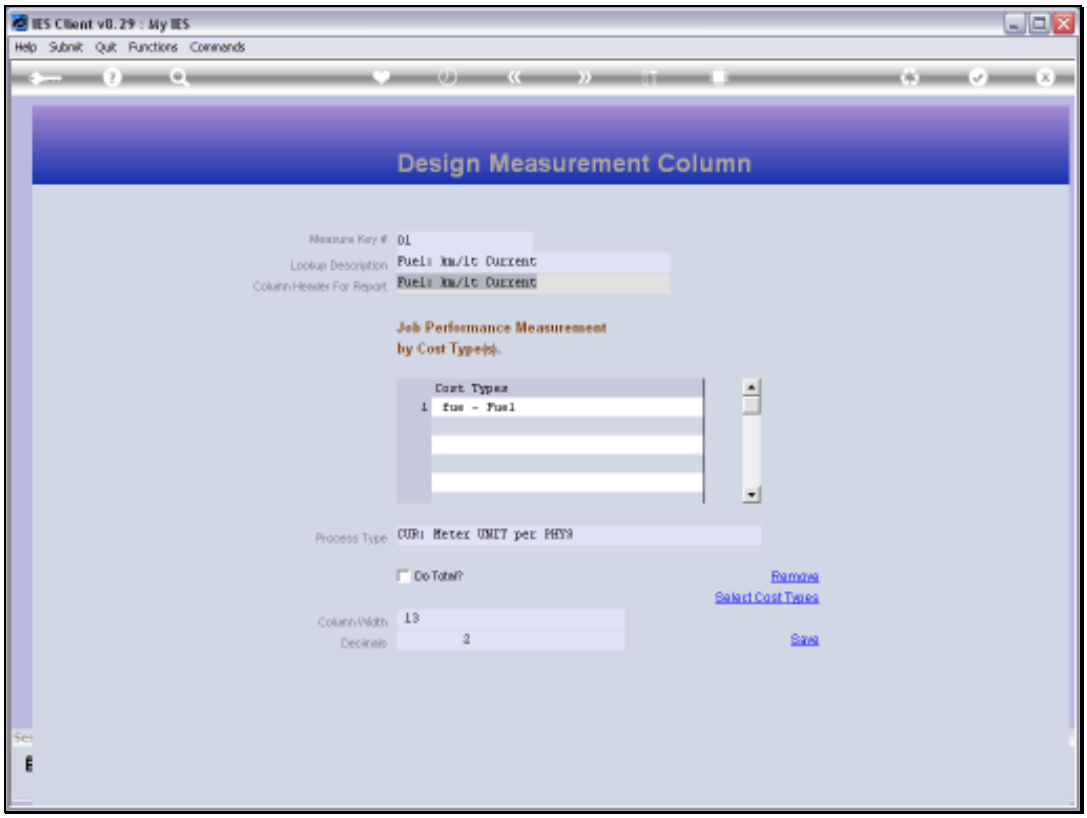
Slide notes: Here we have an example of how we can create a Value that will tell us the Fuel performance for Vehicles for the Current month, on the basis of Kilometers achieved per Liter of Fuel used. Once we have such a measurement, it can be applied in any number of Reports that will include any Vehicles in the system, and report for any Period what is the Current Month performance. We can do the same for Year to Date and Life to Date, and we can invent many more Values that we may imagine to need for our Jobs.

Slide 7
Slide notes:



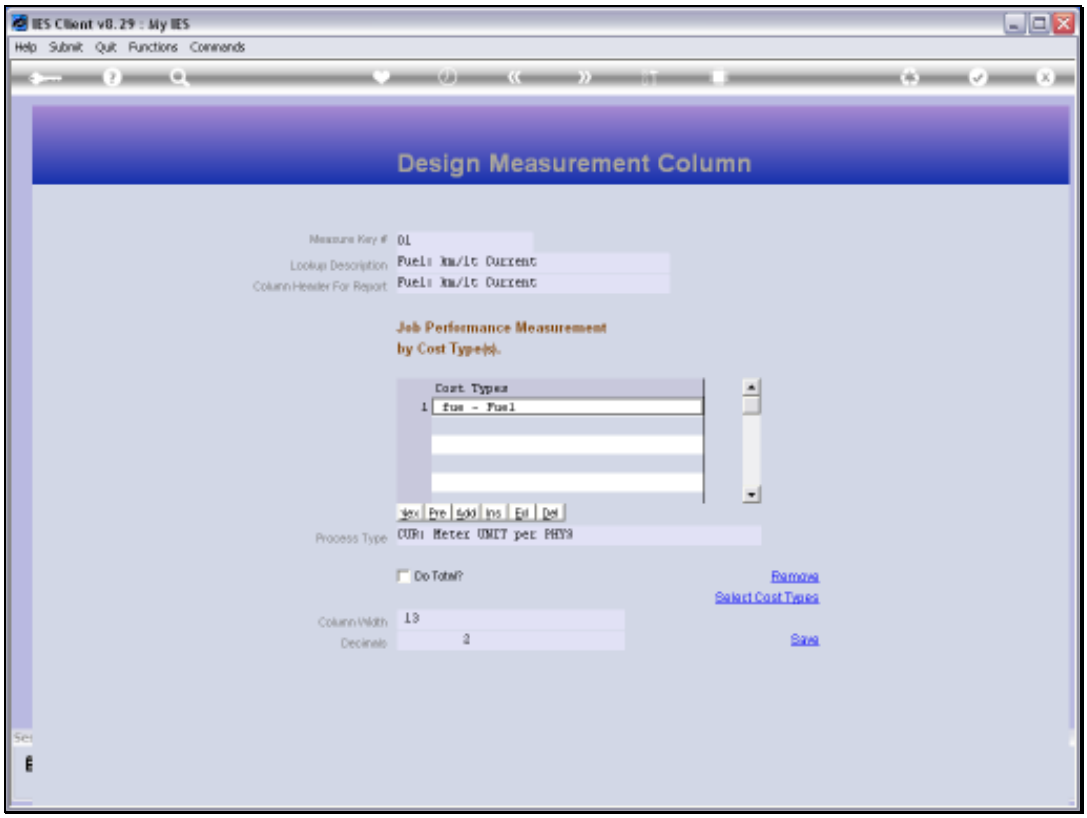
Slide 8

Slide notes: The Lookup Description is what we recognize the Measurement by, and often it is the same as what we will use as the Report Header for the column on Reports.



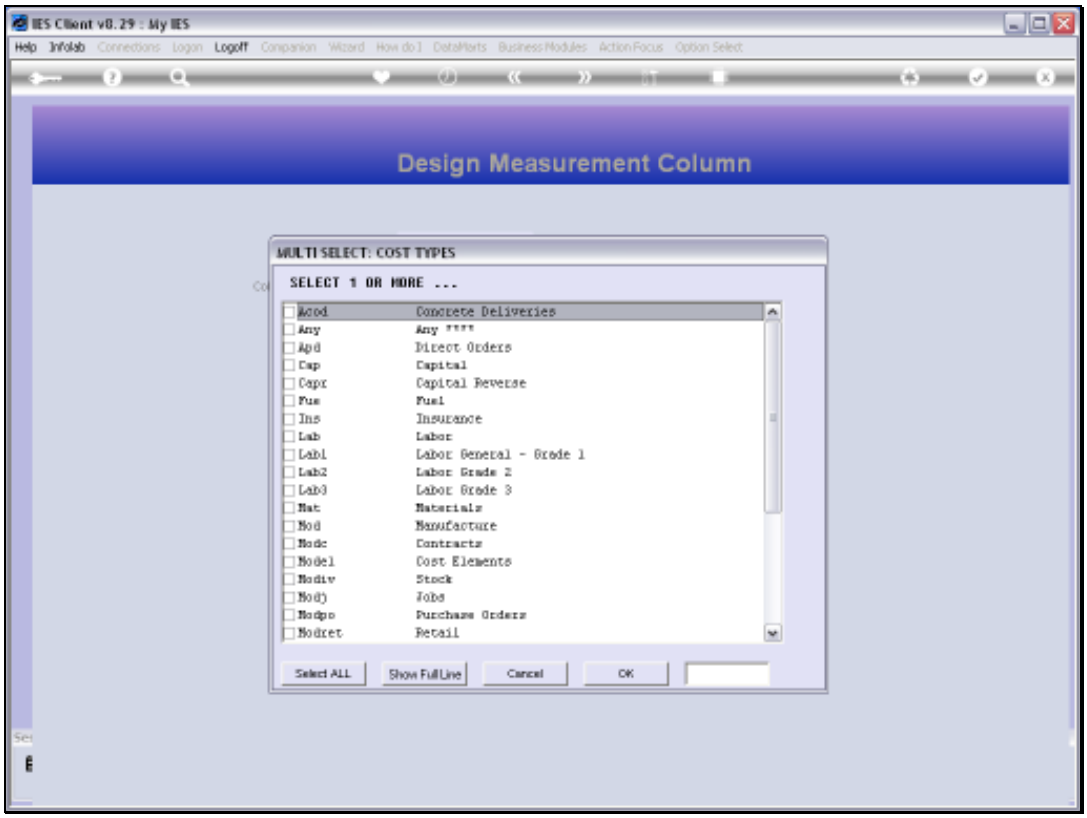
Slide 9

Slide notes: Any Measurement can be based on All Cost Types, some Cost Types or even a single Cost Type. In this case, we are interested only in the FUEL Cost Type, because that is the Cost Type that will know the total Fuel costs for the Job or Vehicle.



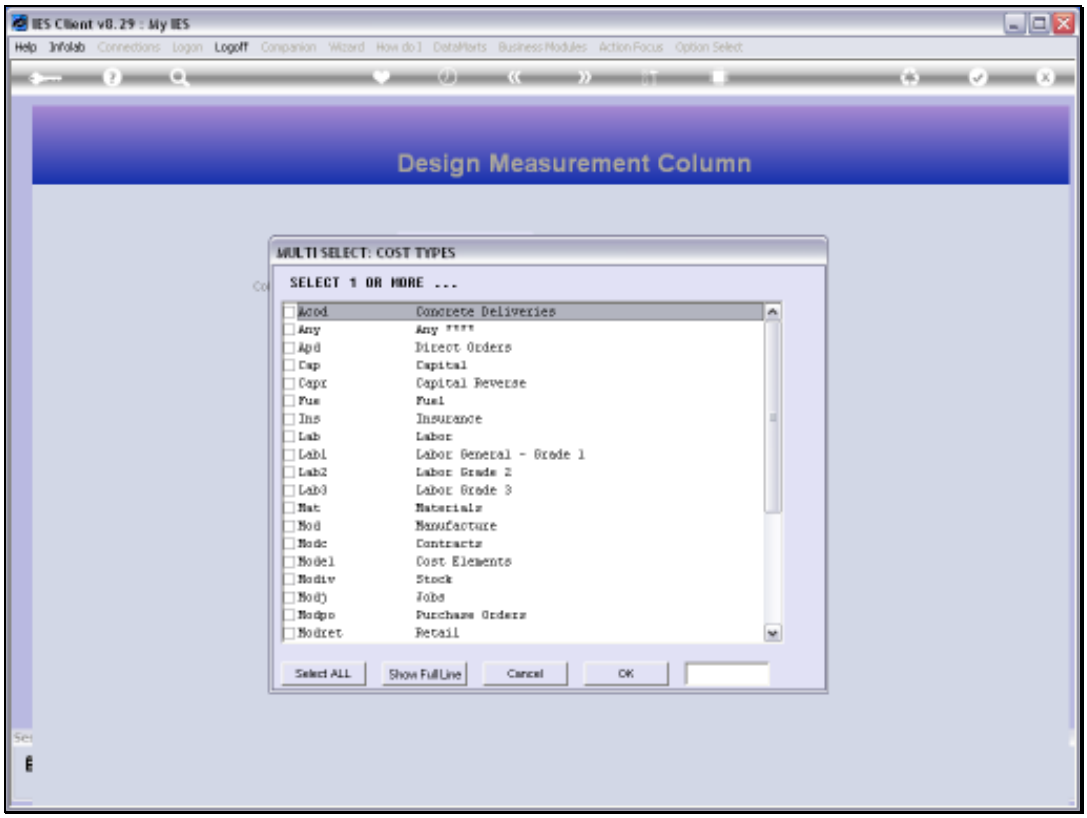
Slide 10

Slide notes: The 'Cost Types' function can be used to easily select the Cost Types that we wish to apply for a Measurement.



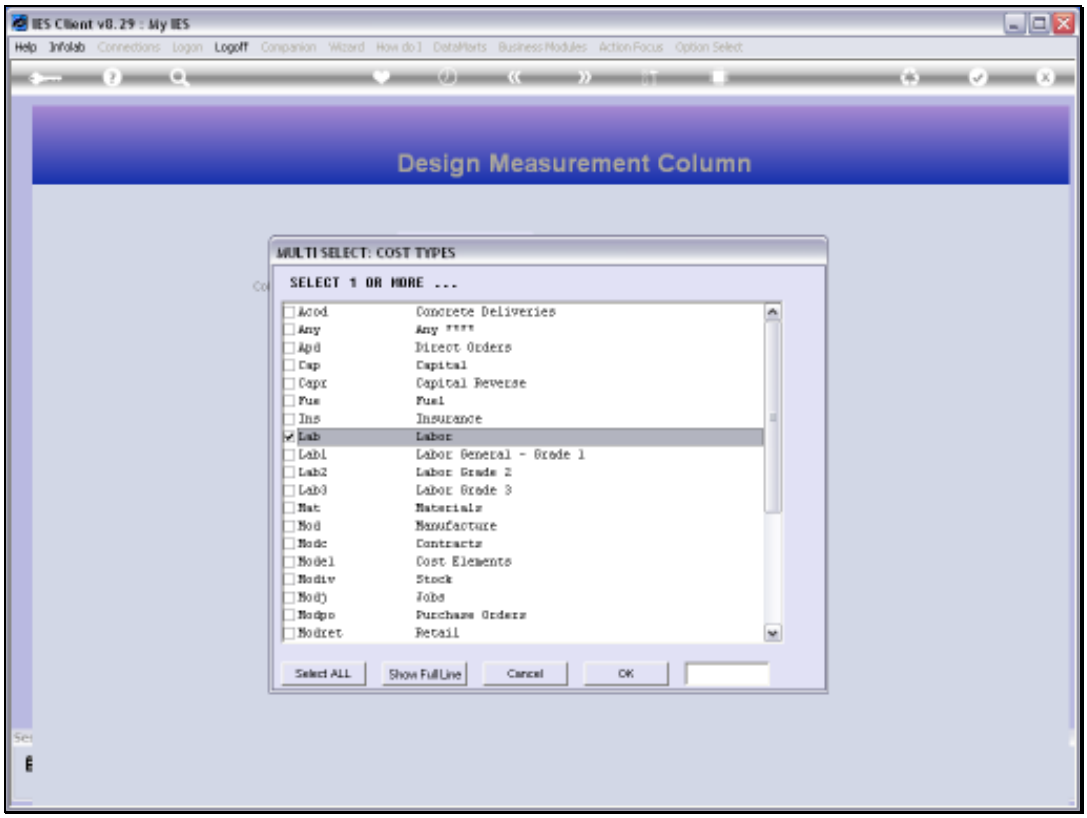
Slide 11

Slide notes:



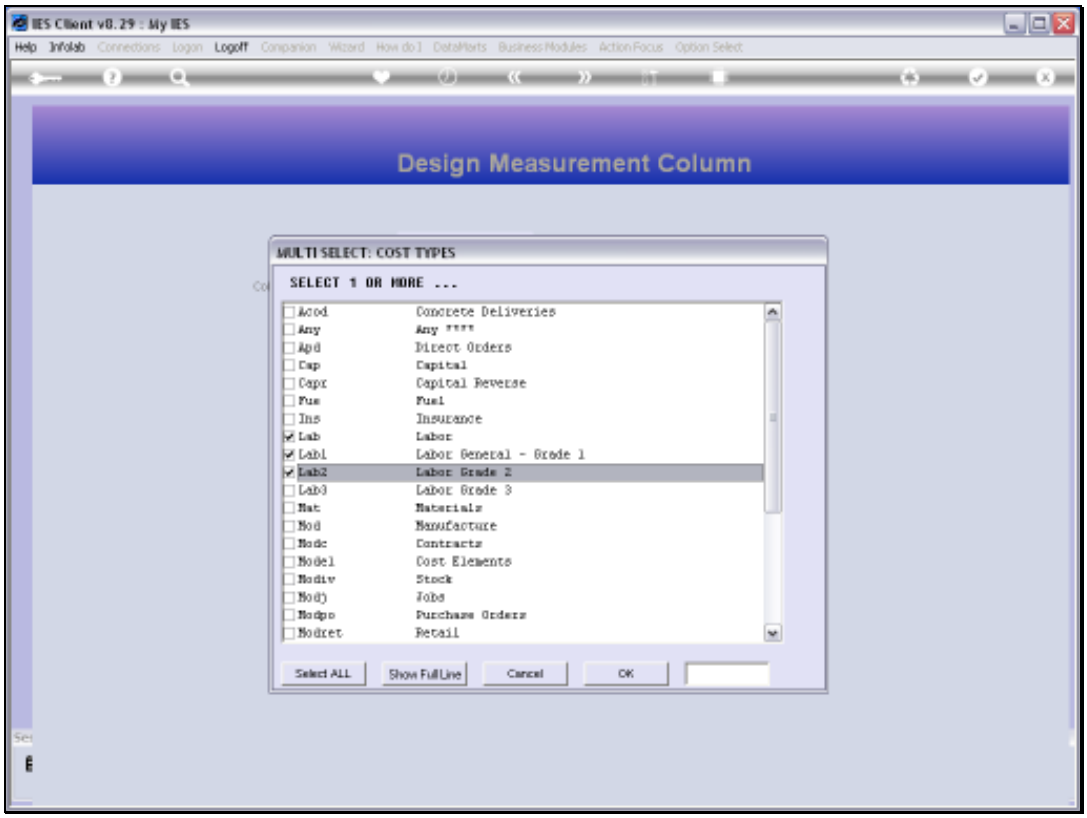
Slide 12

Slide notes:



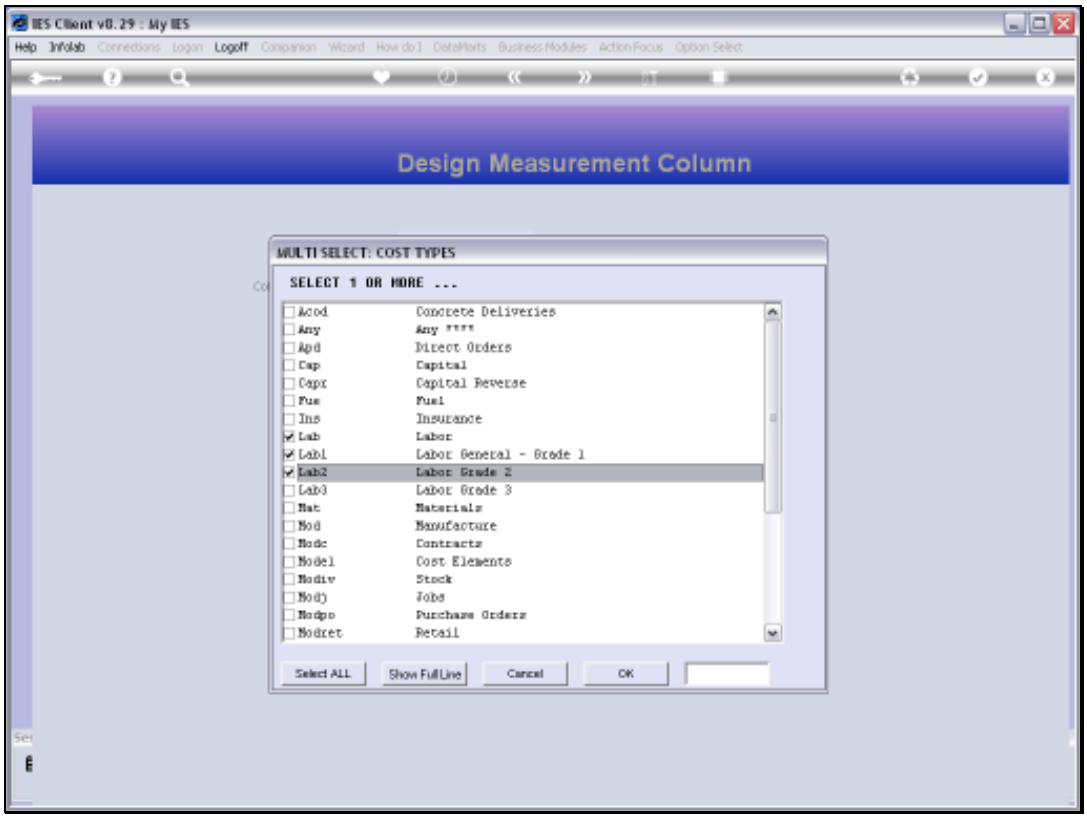
Slide 13

Slide notes:



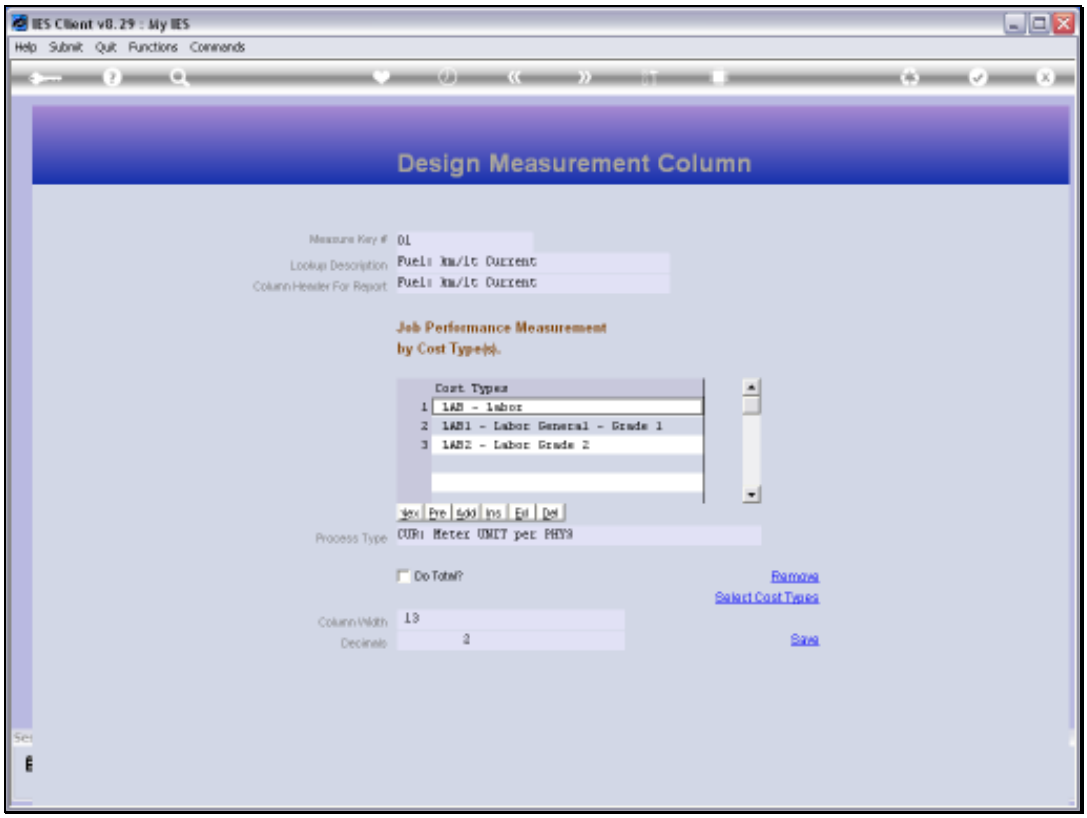
Slide 14

Slide notes:



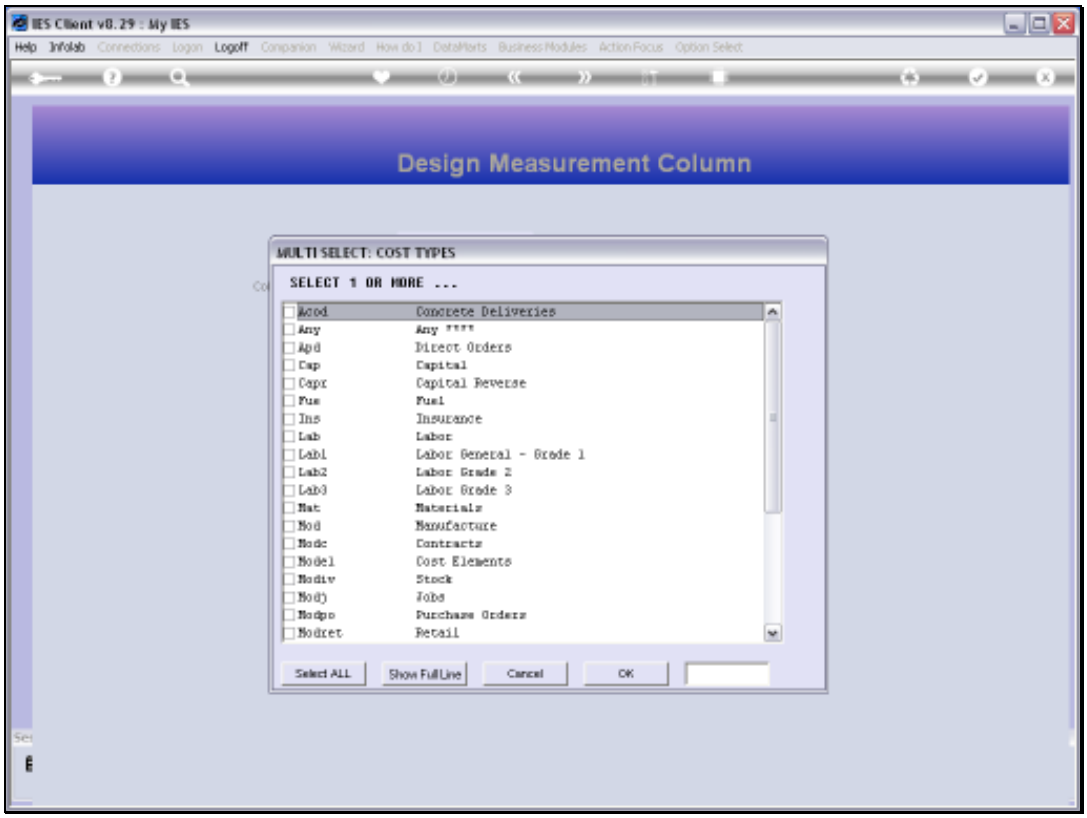
Slide 15

Slide notes:



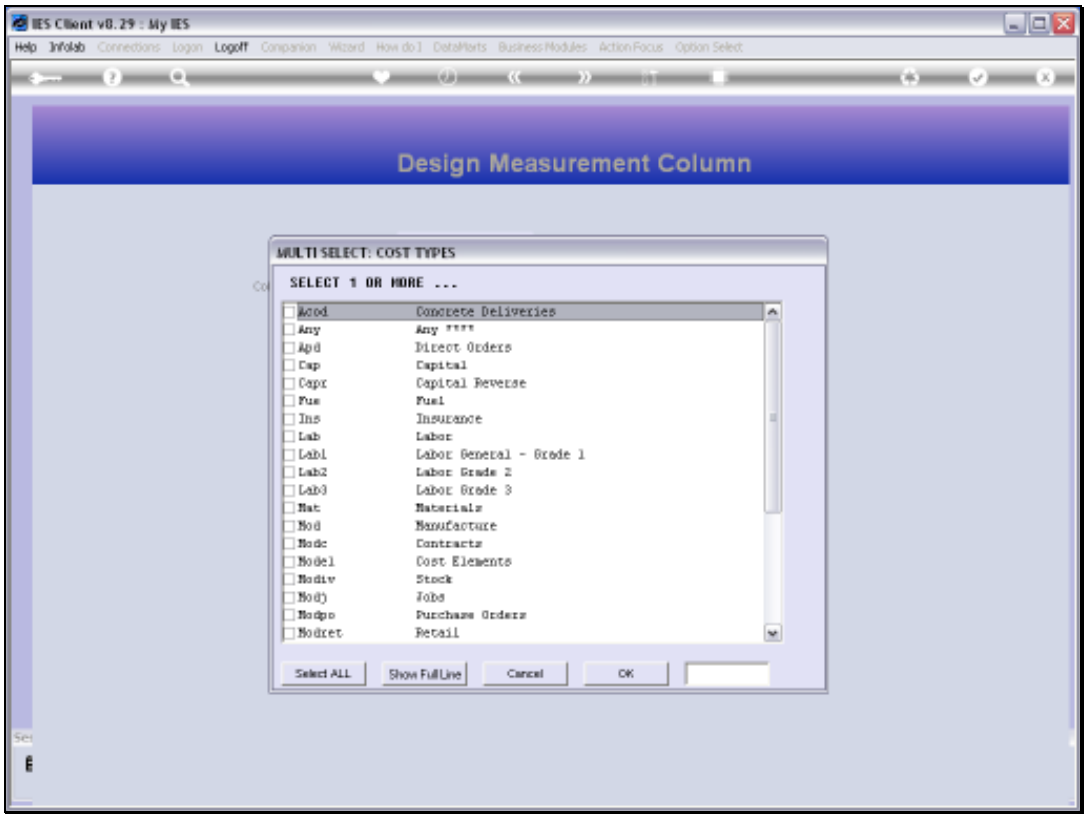
Slide 16

Slide notes: Having shown that, we will now return to the correct Cost Type for this Measurement, which is the FUEL Cost Type.



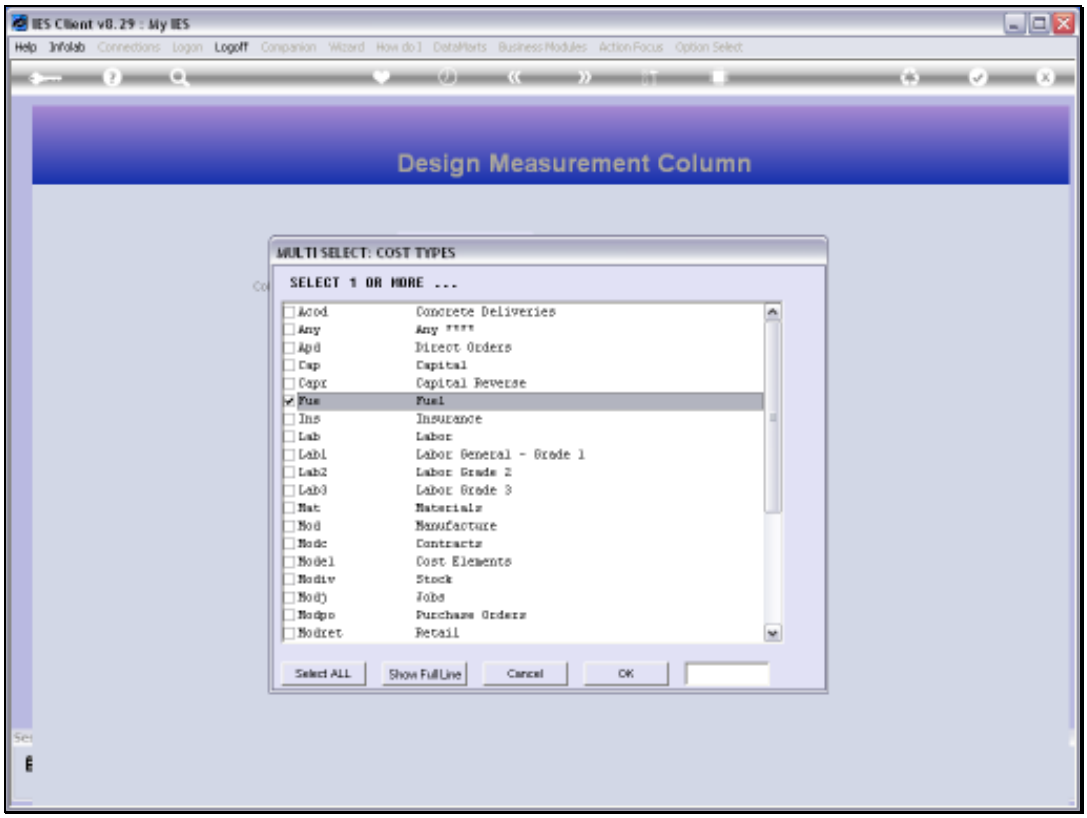
Slide 17

Slide notes:



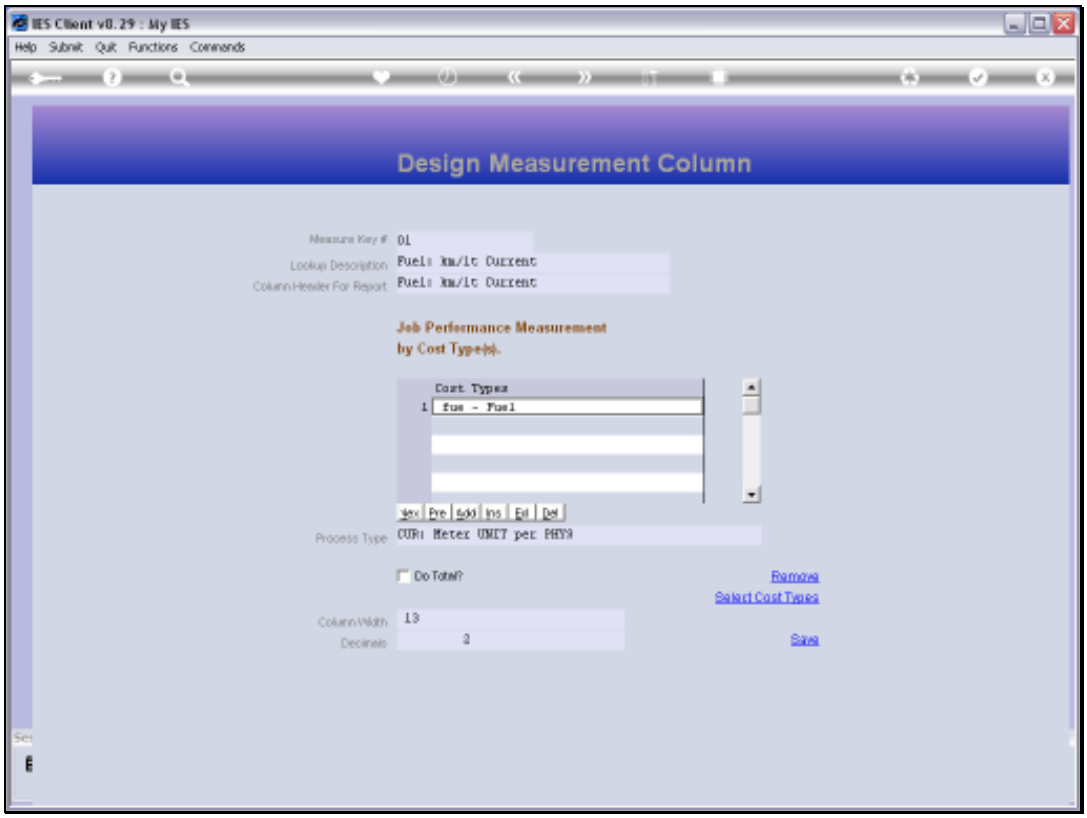
Slide 18

Slide notes:



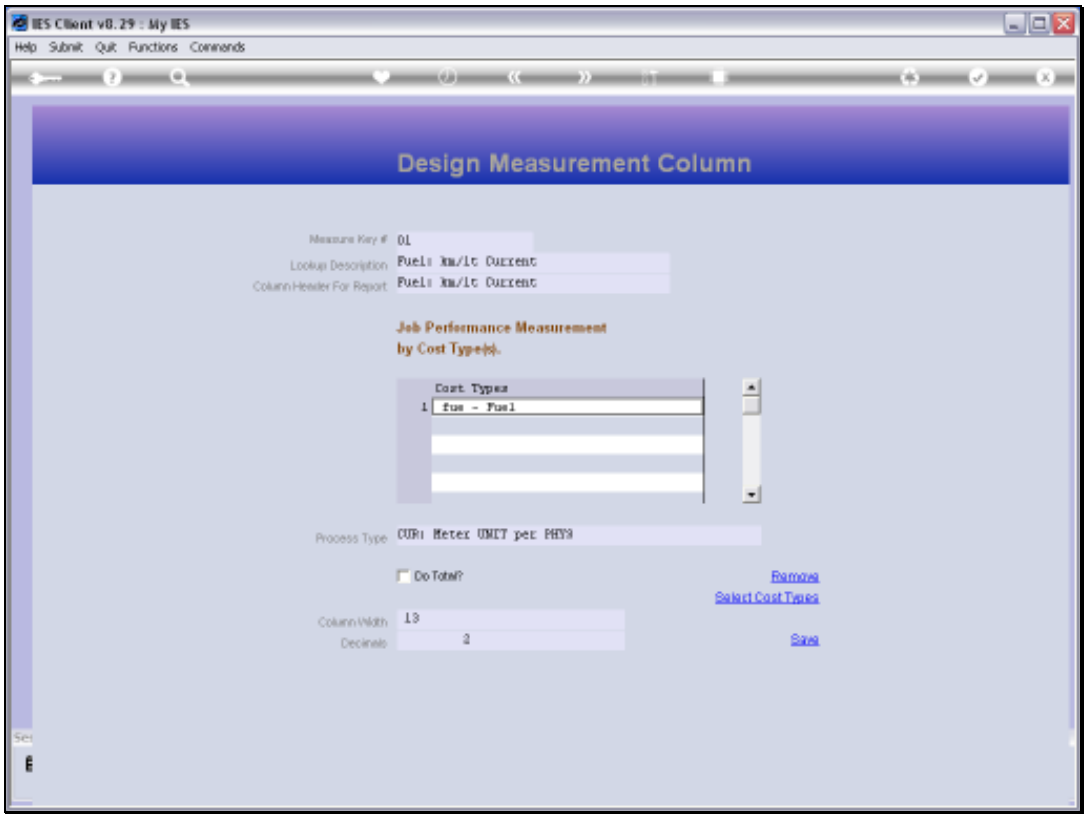
Slide 19

Slide notes:



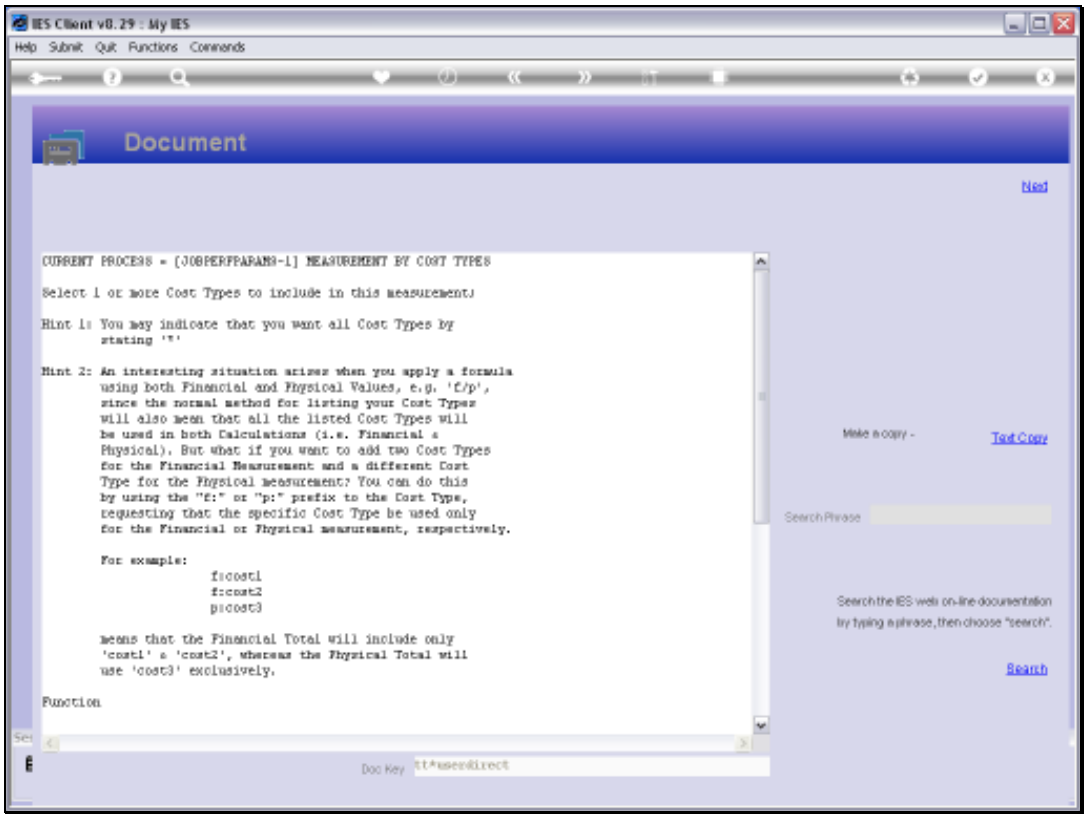
Slide 20

Slide notes:



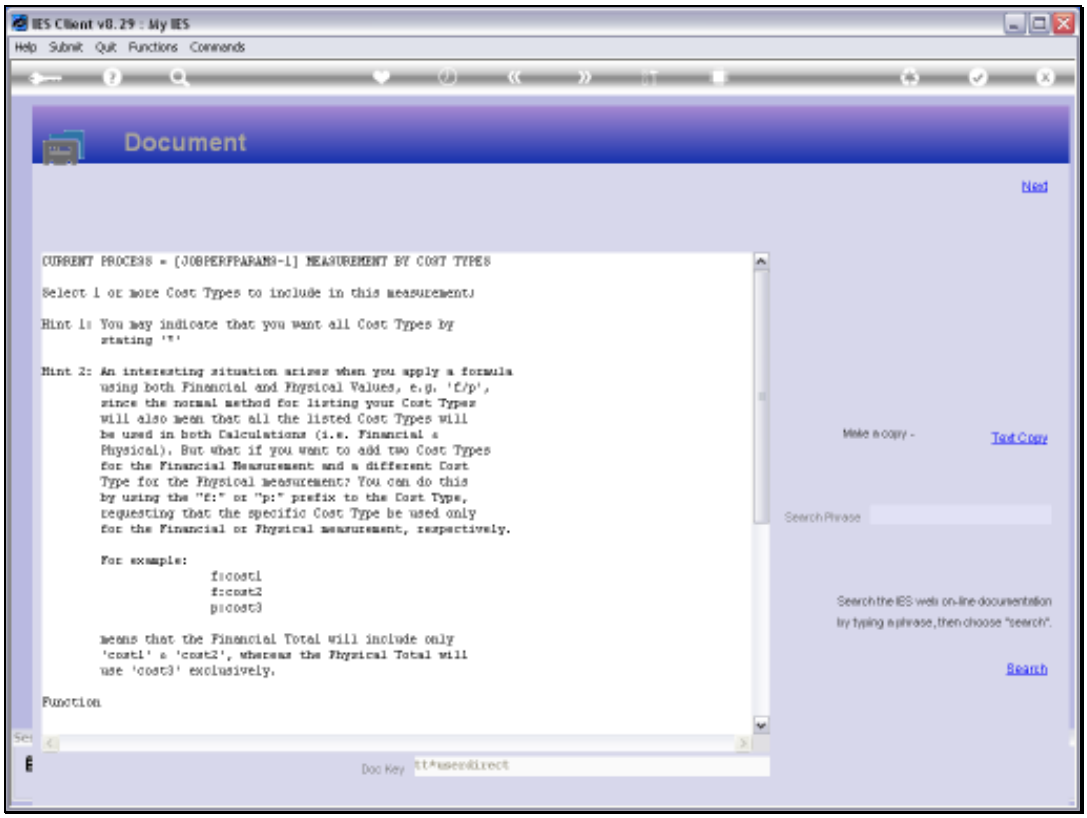
Slide 21

Slide notes:



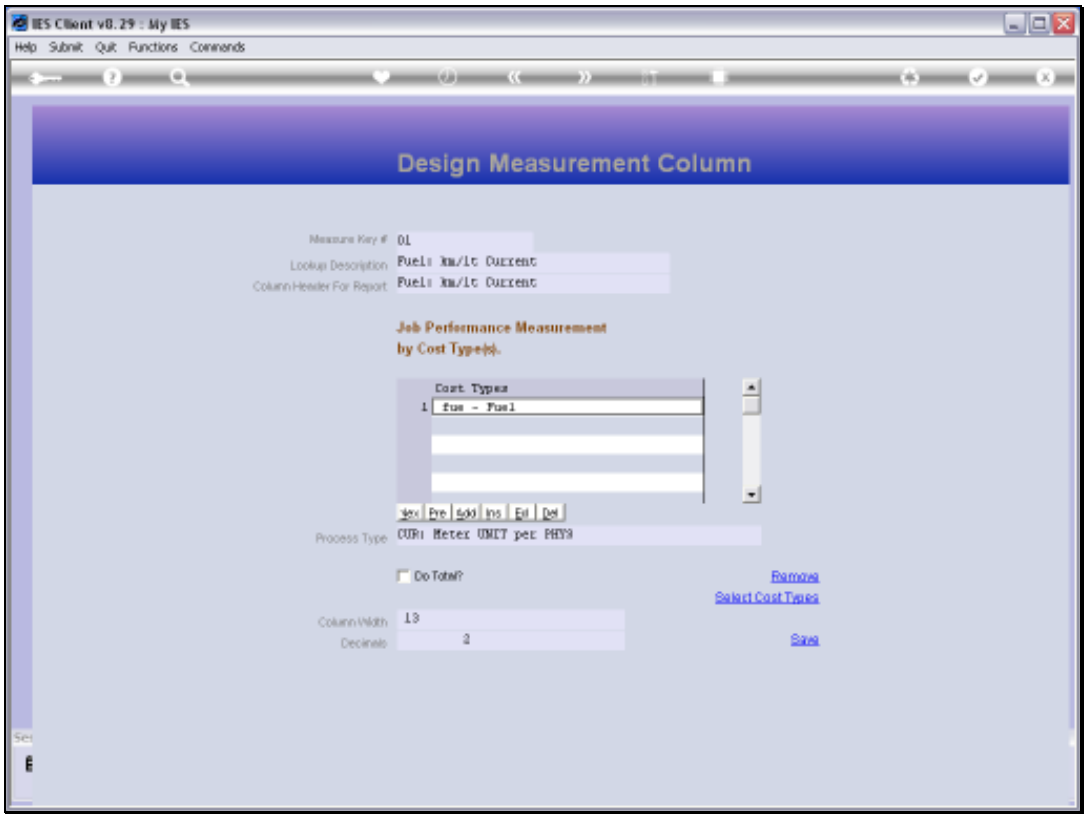
Slide 22

Slide notes: When we consider the Help on the Cost Types, we may note that we can just indicate an asterisk to imply ALL Cost Types. There is also described, in the Help, a way to combine only some Cost Types for a Financial portion of the formula, and others for Physicals.



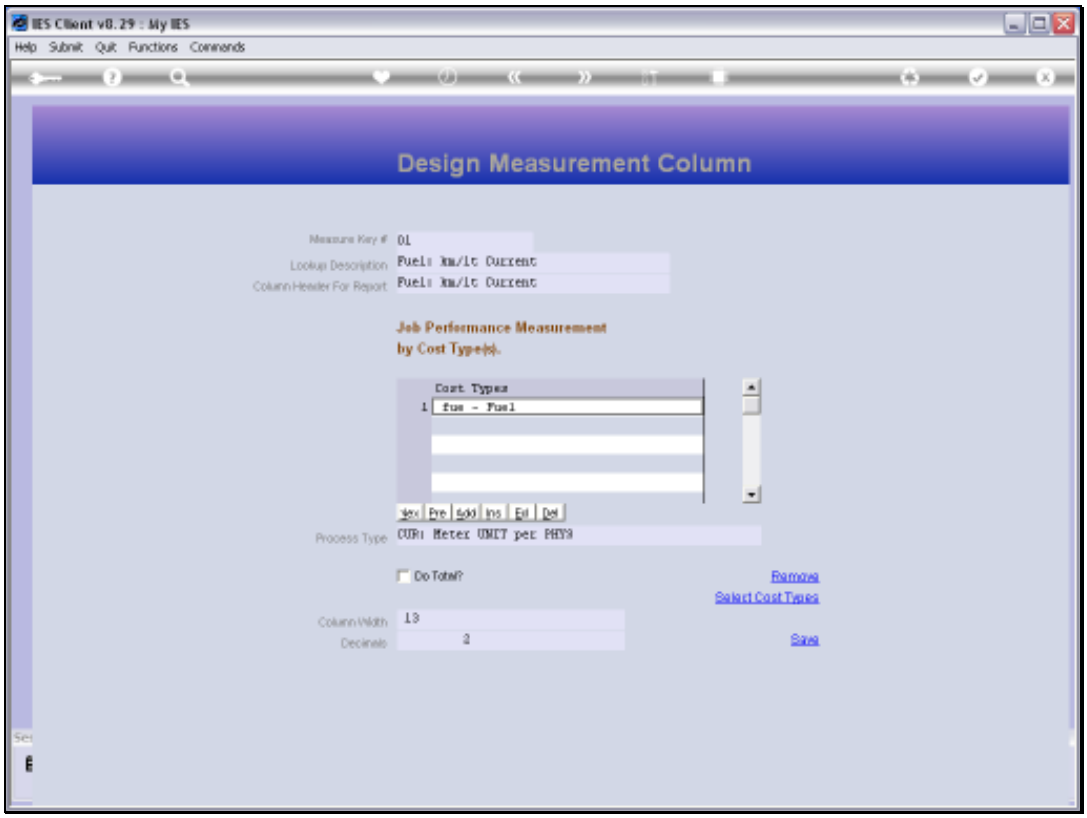
Slide 23

Slide notes:



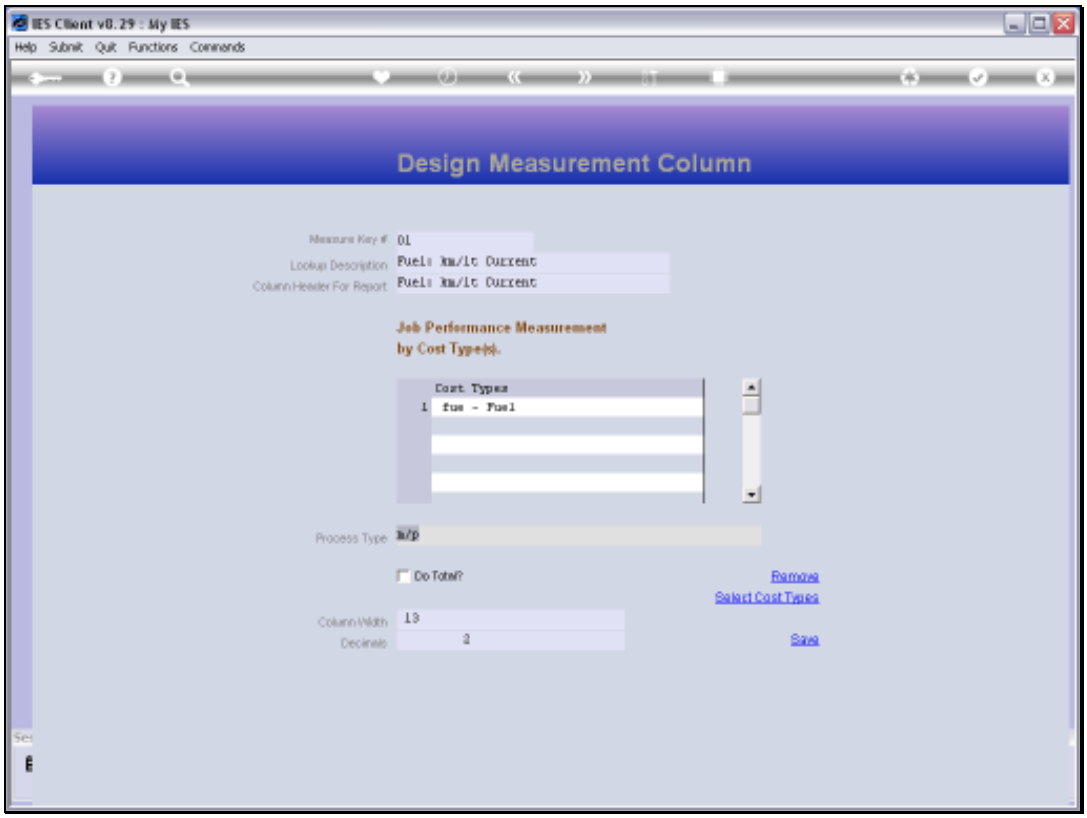
Slide 24

Slide notes:



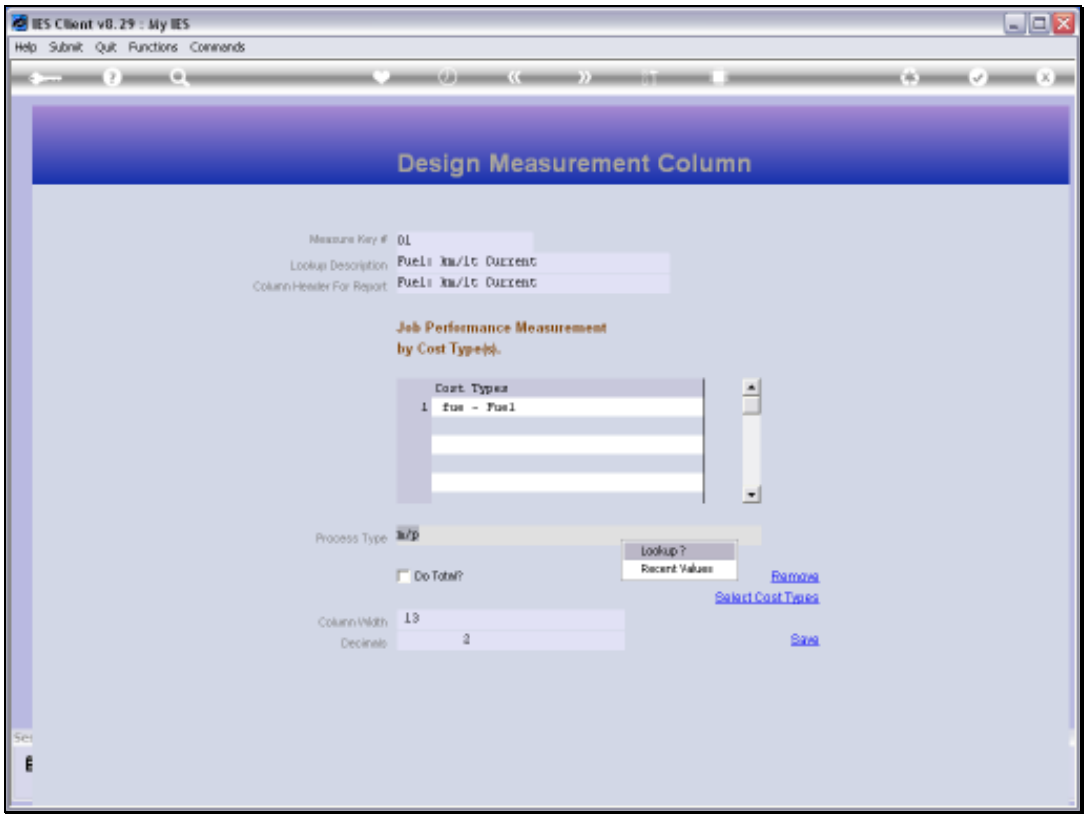
Slide 25

Slide notes: Next, we consider the all important PROCESS TYPE, which is the basis for the calculation of the required value.



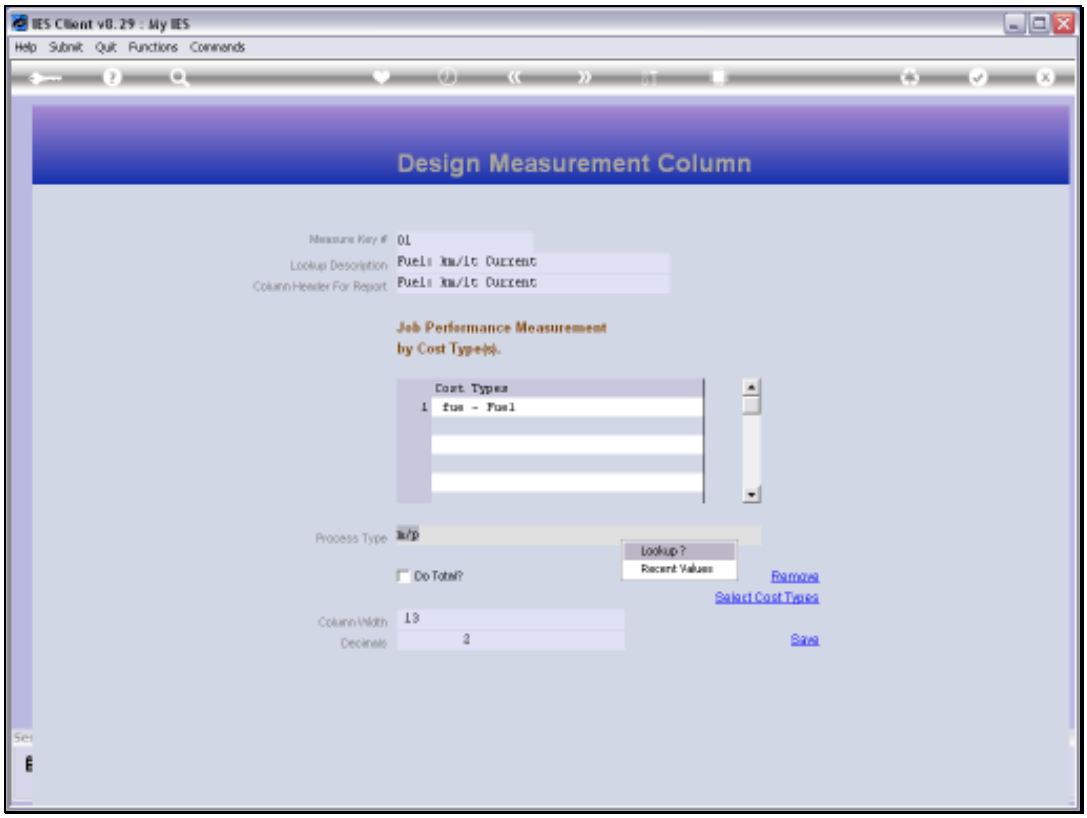
Slide 26

Slide notes:



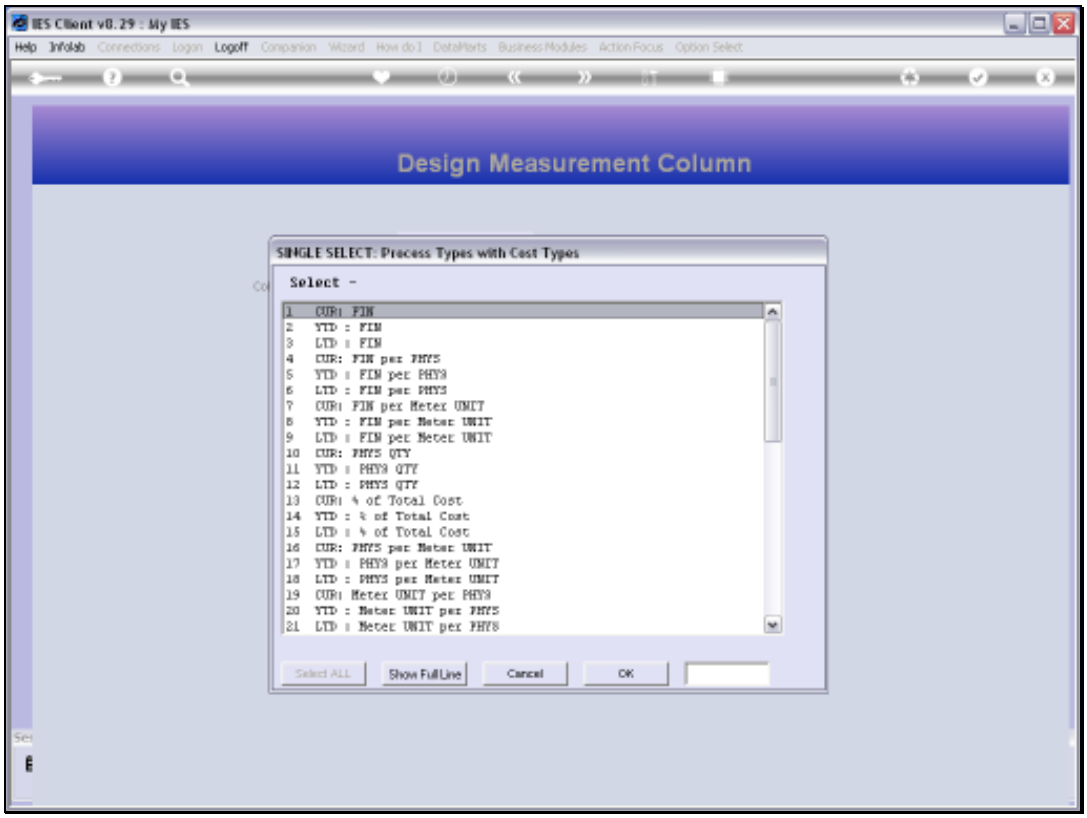
Slide 27

Slide notes:



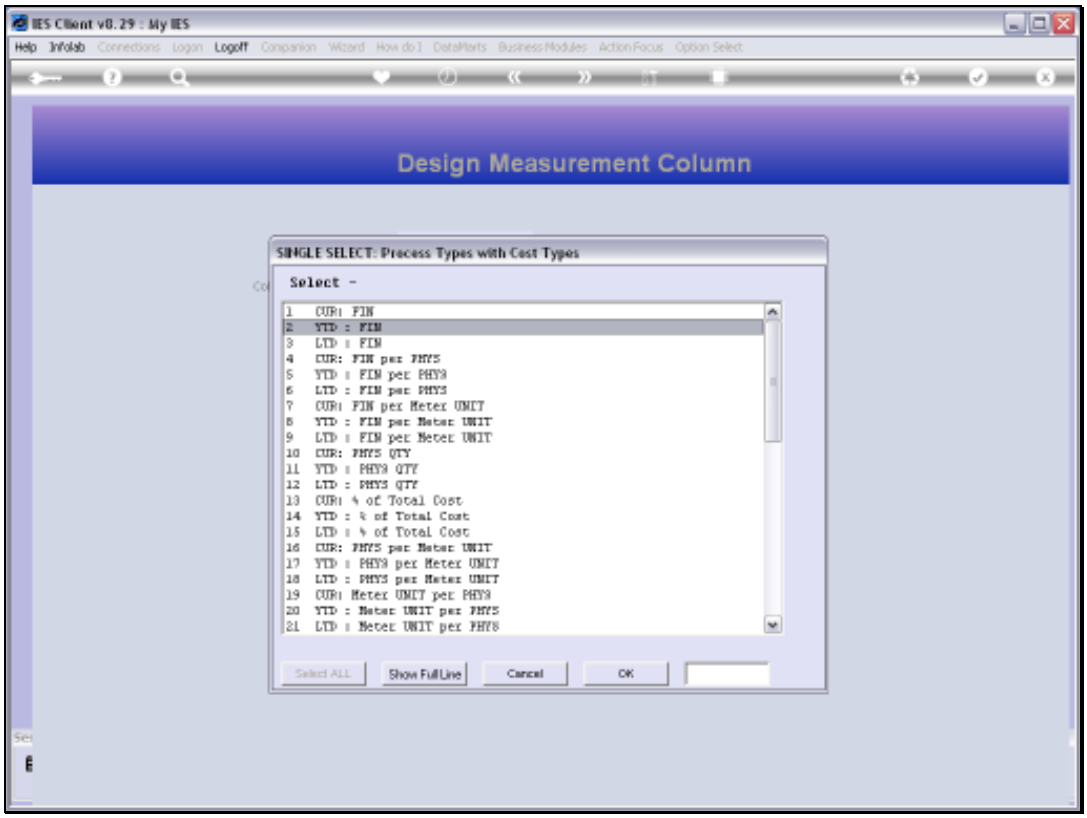
Slide 28

Slide notes:



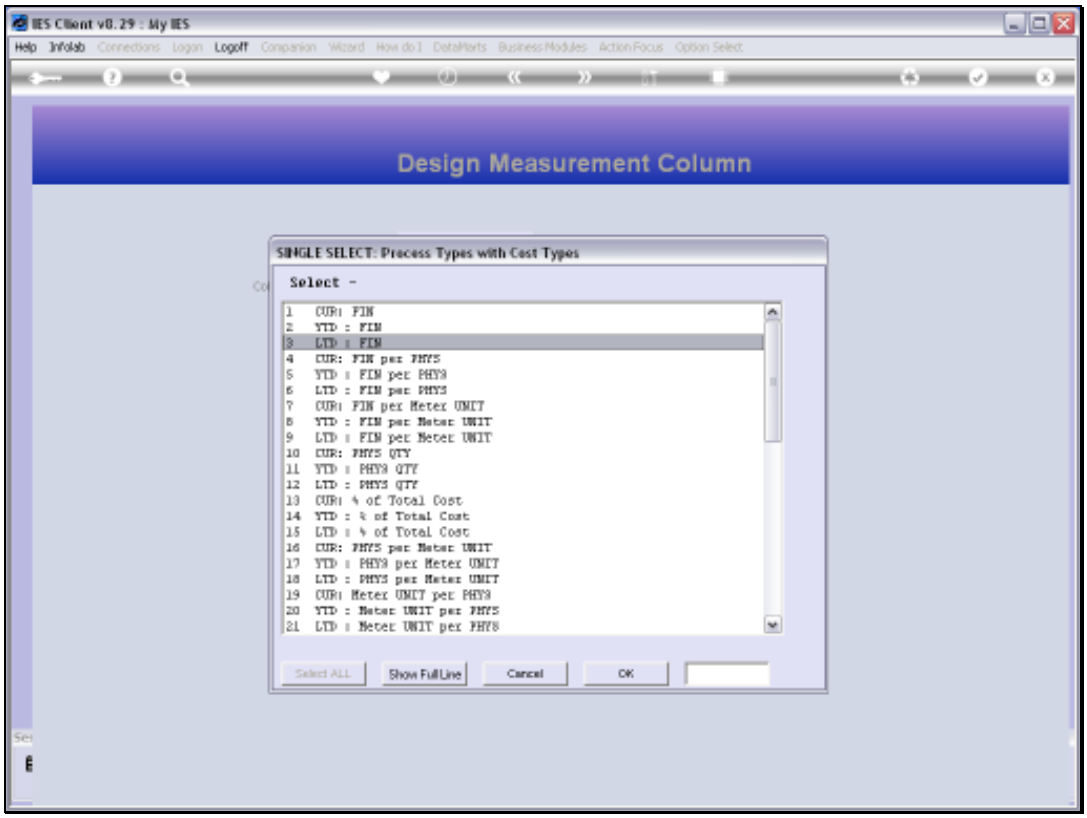
Slide 29

Slide notes: The Lookup will reveal all possible choices for the Process Type. In these options, CUR always means 'Current Month' in the context of a Period based Report, whereas YTD means Year to Date and LTD means Life to Date.



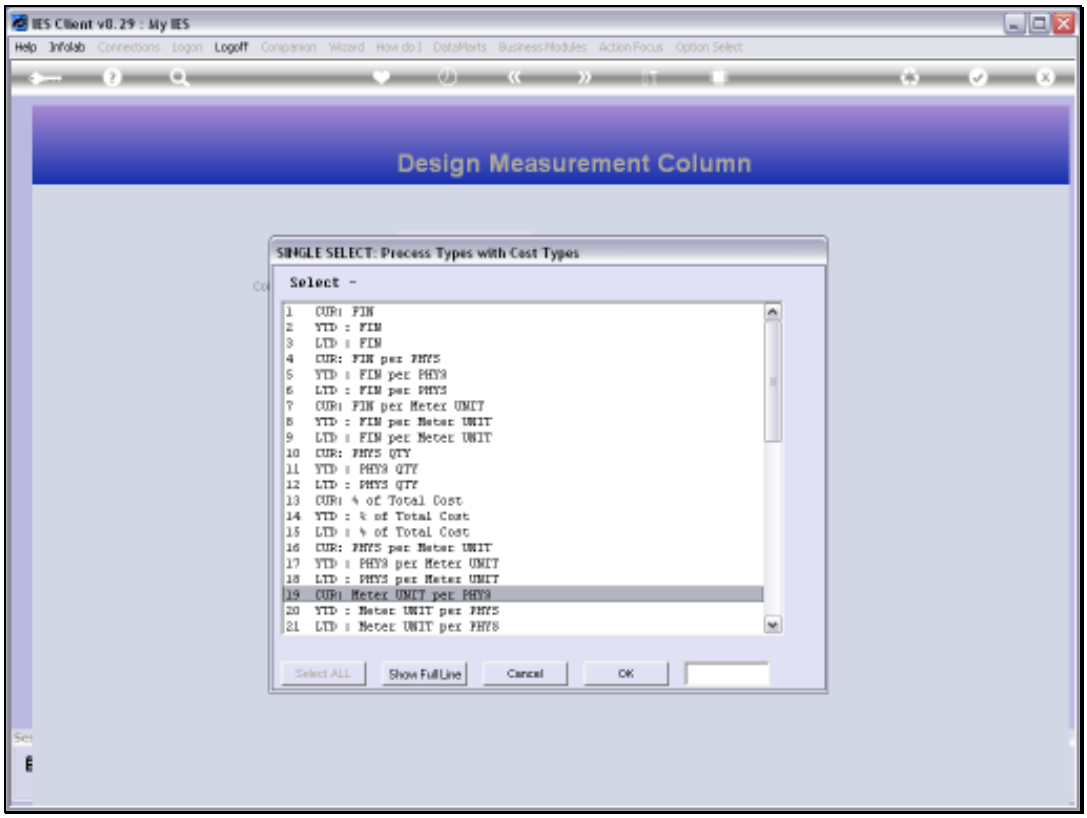
Slide 30

Slide notes: PHYS is short for the Physical value or the Quantity, whereas FIN is clearly for the Financial Value in any of these options. We also have Meter options, and these may be applied for Jobs that use Meters. Job Meters can be Odometers, Hour or other Meter types.



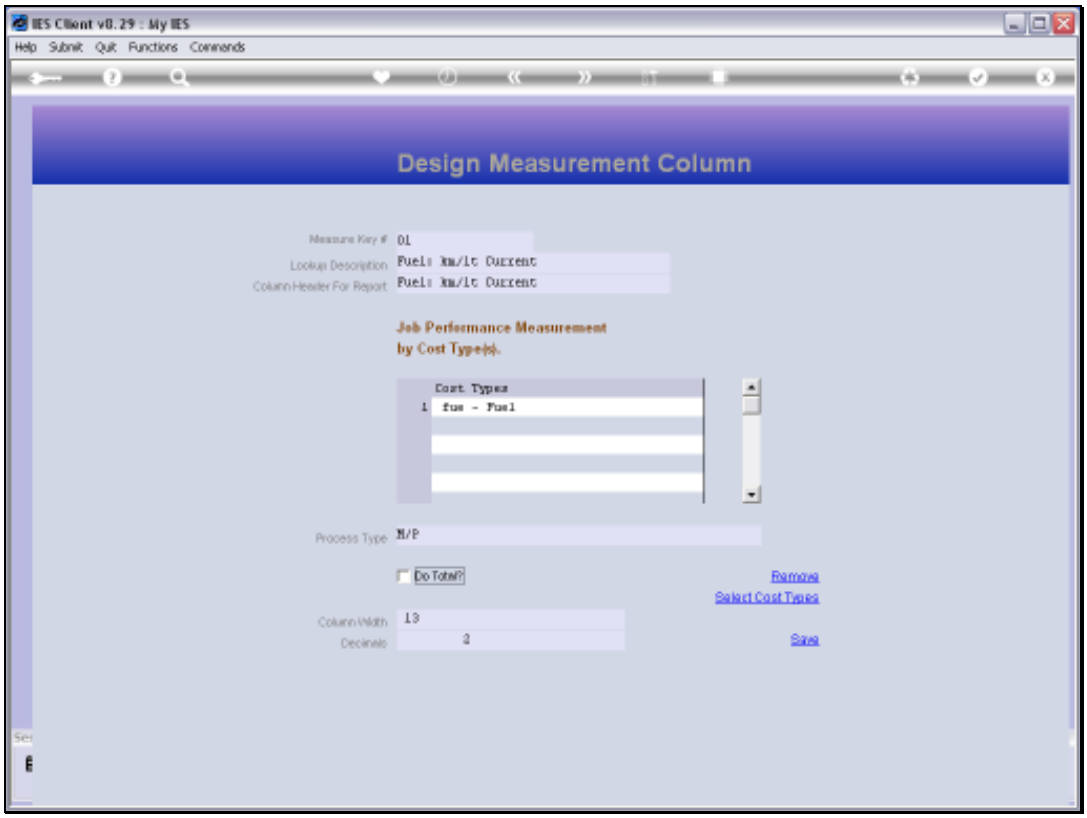
Slide 31

Slide notes: There are even Profit and Loss and Recovery Measurement Process Types.



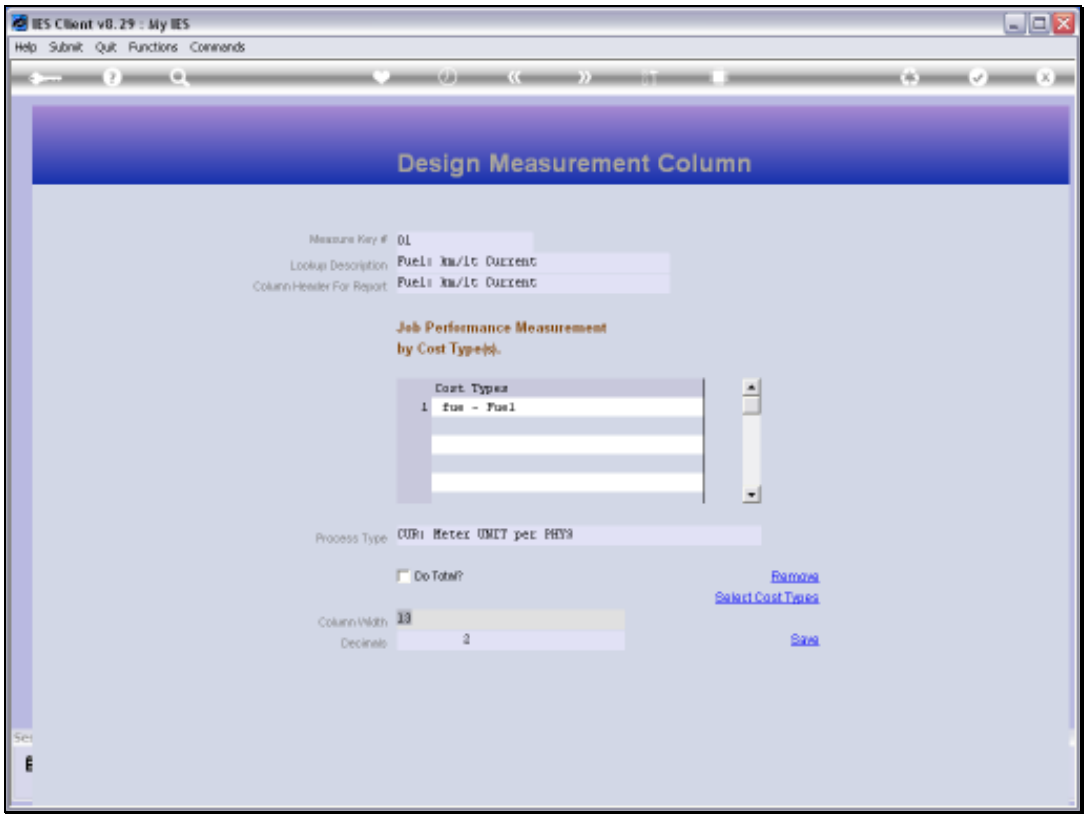
Slide 32

Slide notes: For the current measurement type, we want to calculate the Kilometers achieved per Liter of Fuel used. Therefore, we should use the Meter Unit which will yield the Kilometers, and divide that by the Physical, which will yield the Quantity of Fuel used, i.e. Liters. And since this Measurement is for 'Current Month' performance, we choose the 'CURRENT, Meter Unit per Physical' option.



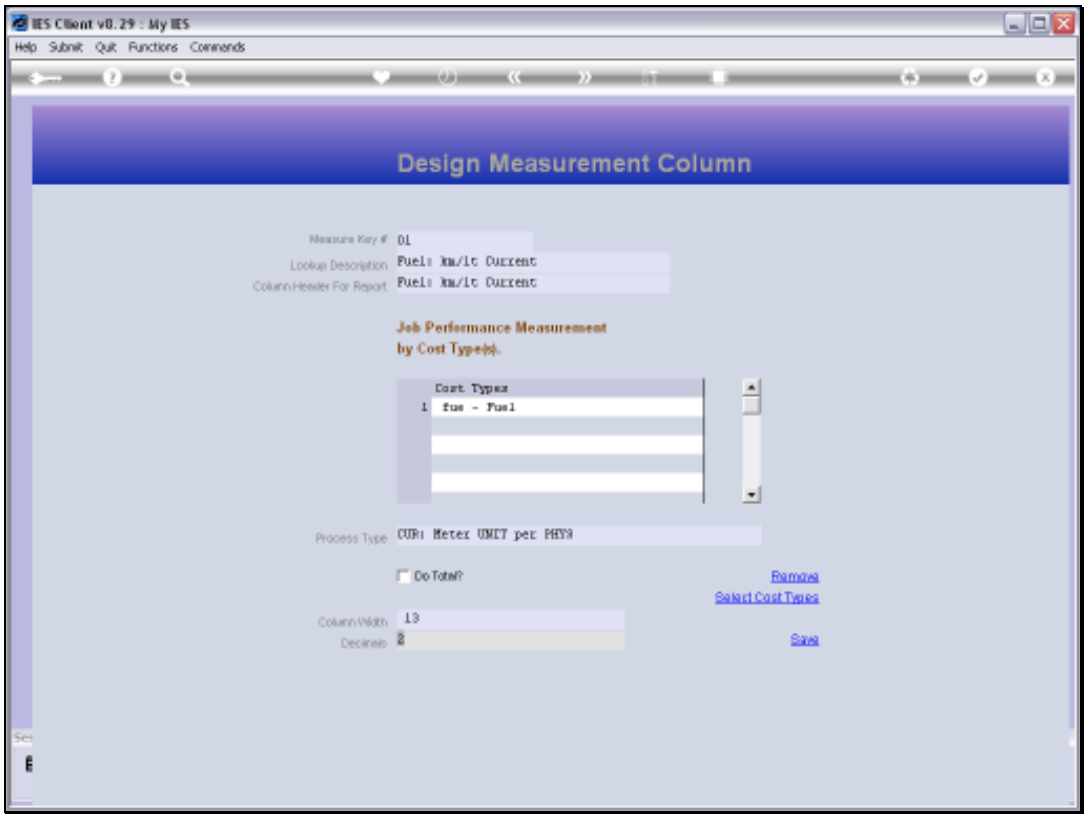
Slide 33

Slide notes: We can also indicate whether this column will be totaled when used on a Report, how wide the Column should be, and with how many decimals the value should be displayed.



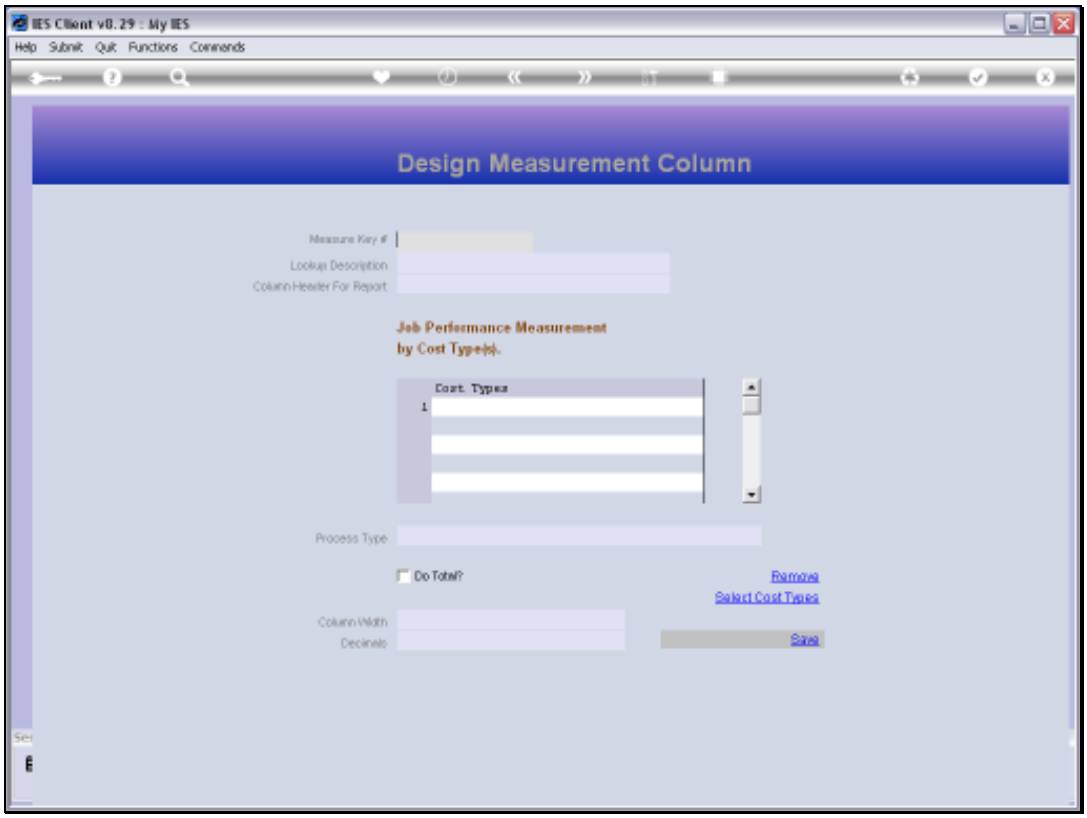
Slide 34

Slide notes:



Slide 35

Slide notes: After making changes or defining a new Measurement Type, we choose SAVE.



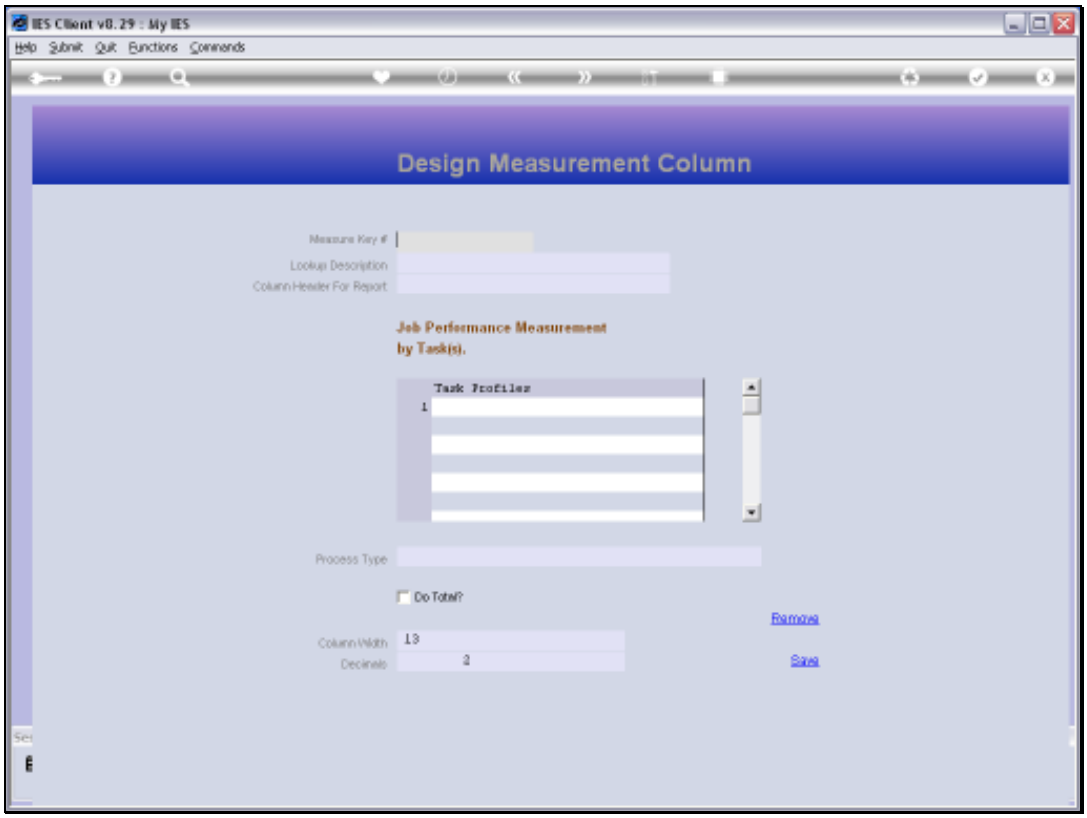
Slide 36

Slide notes:

Slide 37

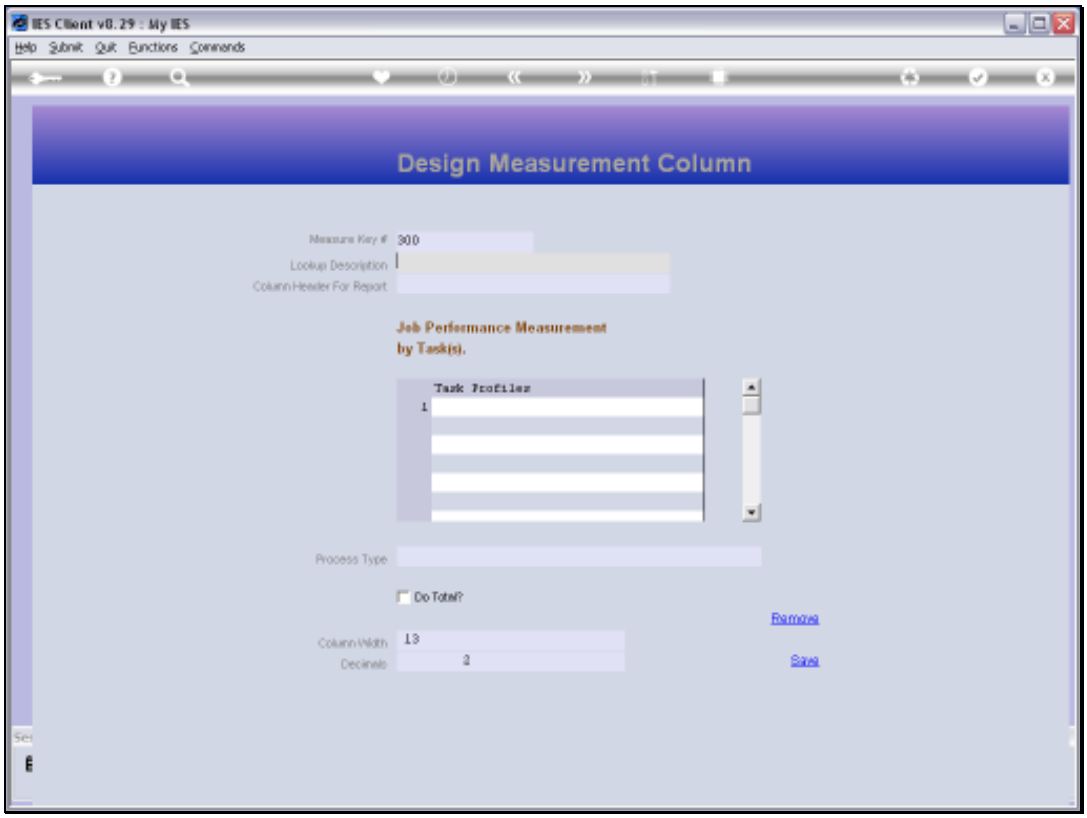
Slide notes: So that is an example of a Measurement Type based on Cost Types. If we use the Service Department Costing module, then we may also have Job performance Tasks that can be measured, and we will now look at an example of a Measurement based on such Tasks.

Slide 38
Slide notes:



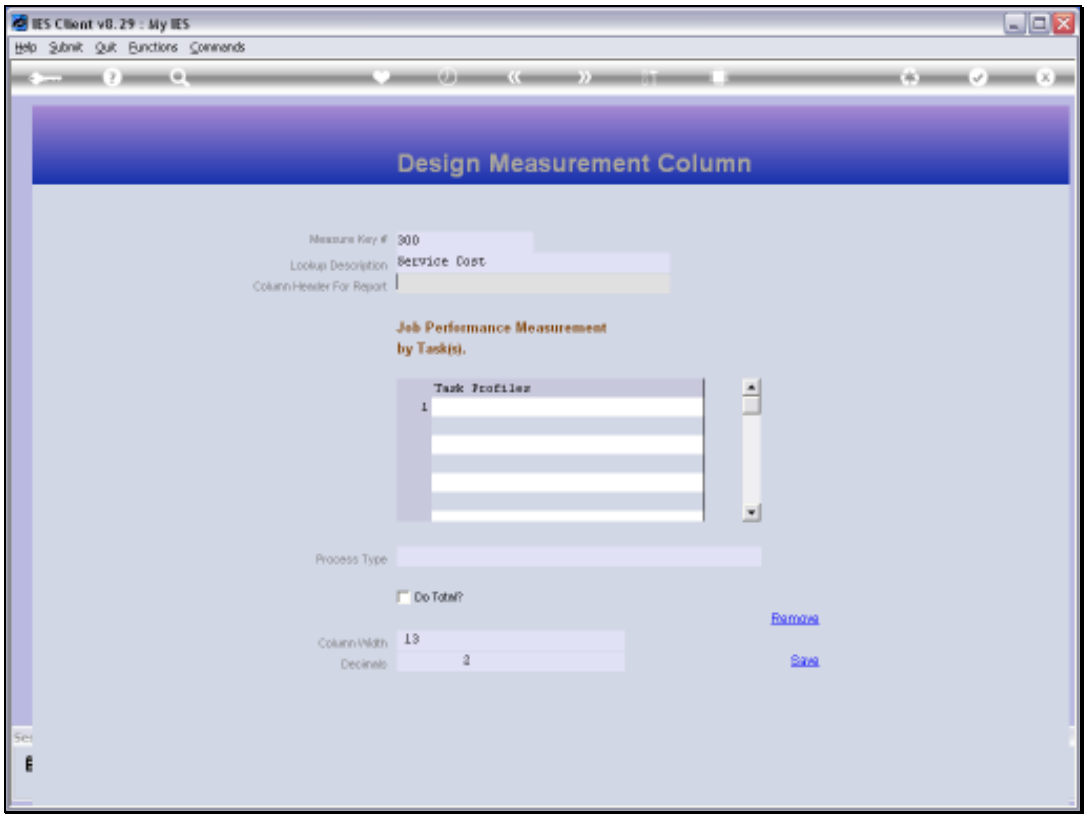
Slide 39

Slide notes: This time, we will define a brand new Measurement Type. The Key that we use must not yet exist, and must be either 2 digits between 1 and 99, or else 3 digits between 100 and 300. The maximum number of custom measurements in a Datamart is currently set at 300.



Slide 40

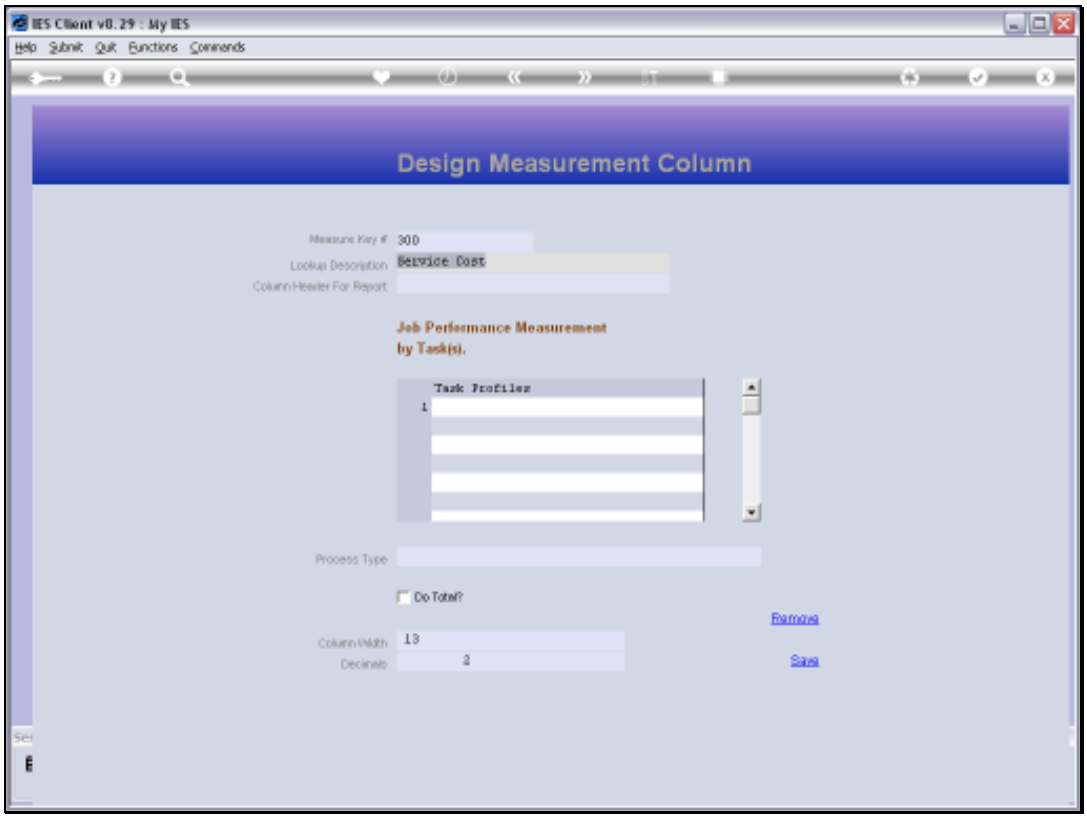
Slide notes:



Slide 41

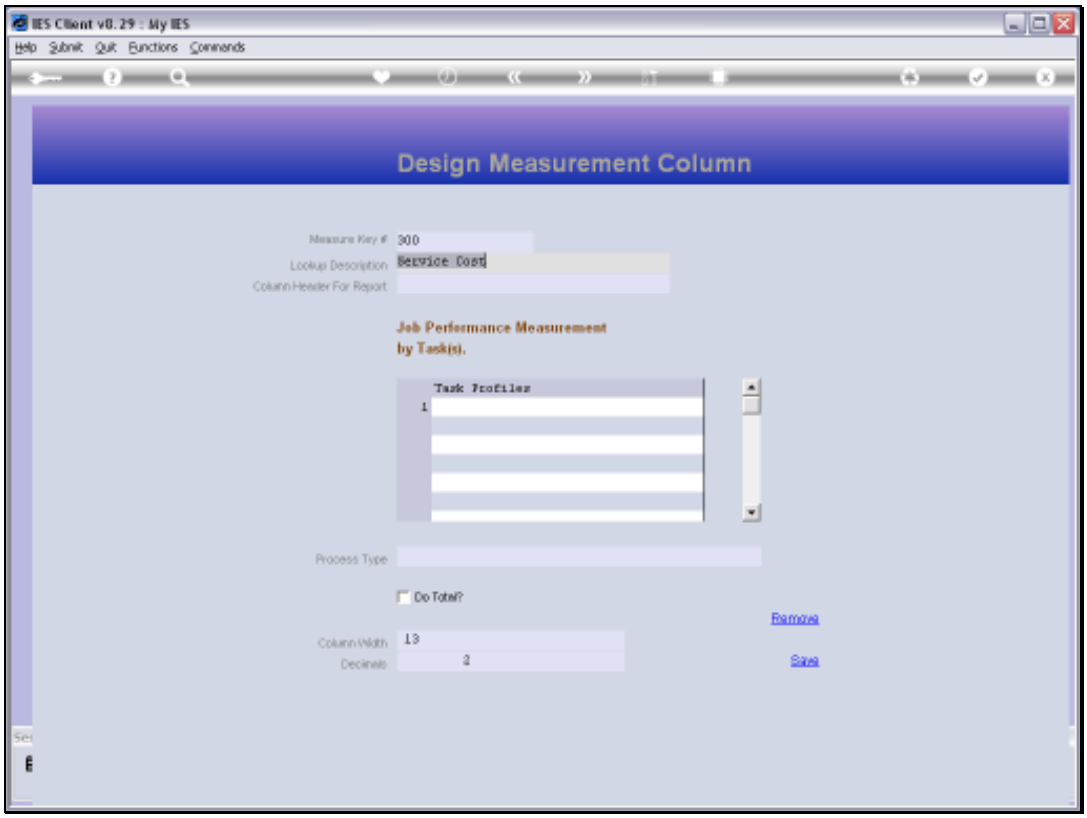
Slide notes: As with the Cost Types, we have a Lookup Description and a Column Header for Report usage.

Slide 42
Slide notes:



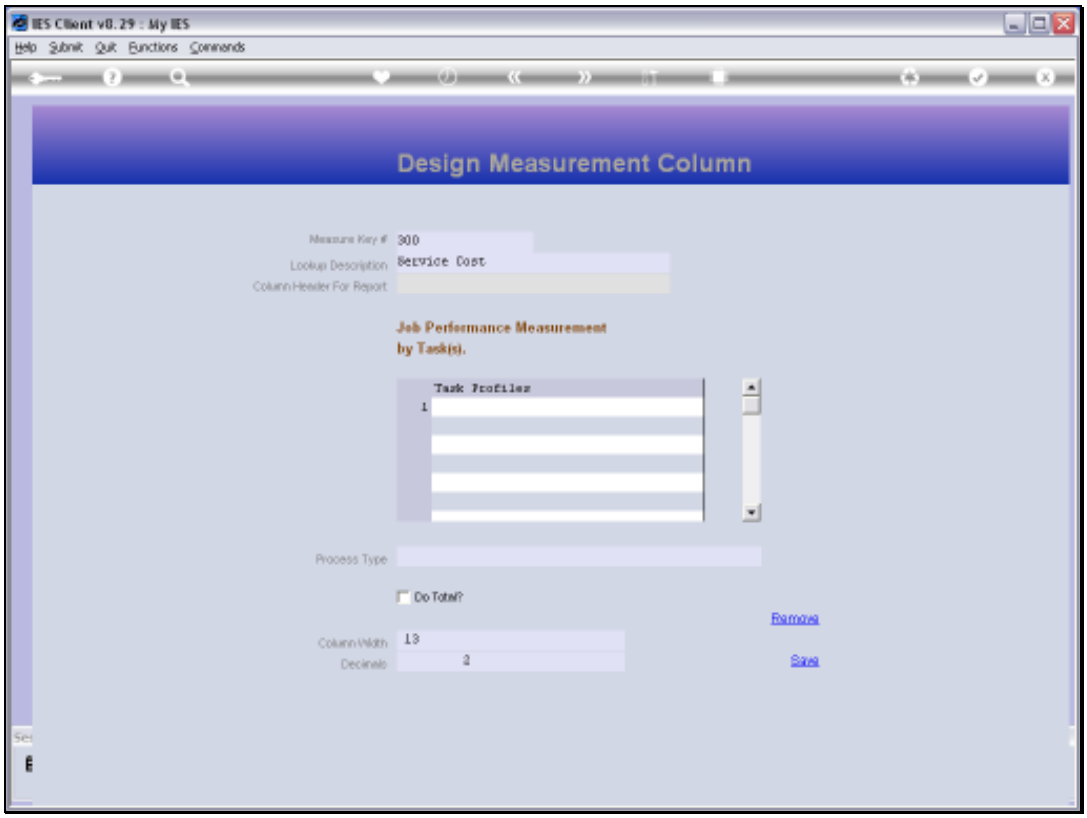
Slide 43

Slide notes:



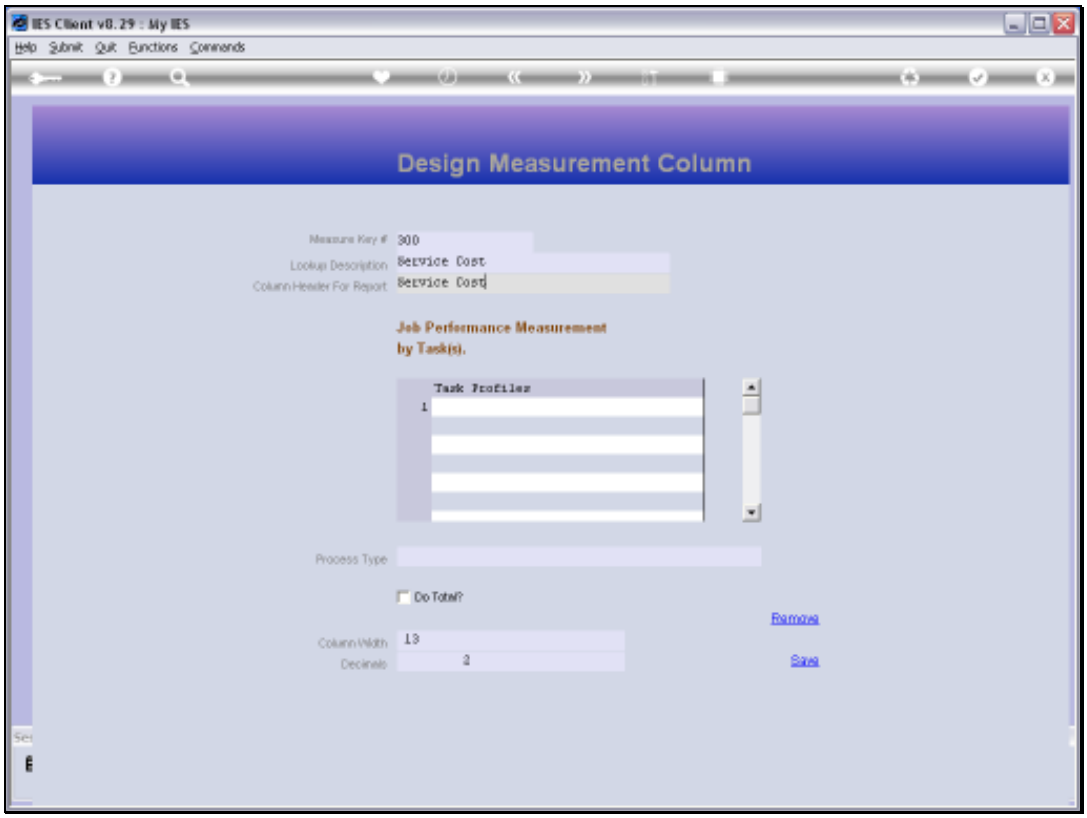
Slide 44

Slide notes:



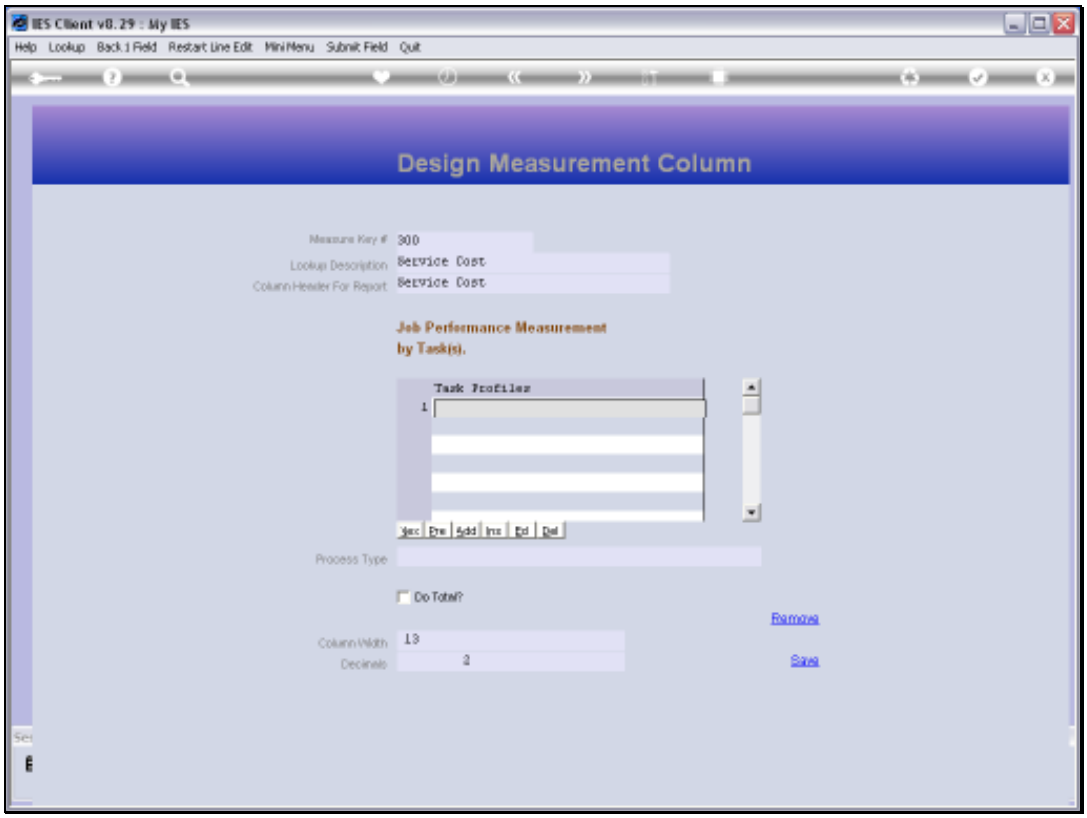
Slide 45

Slide notes:



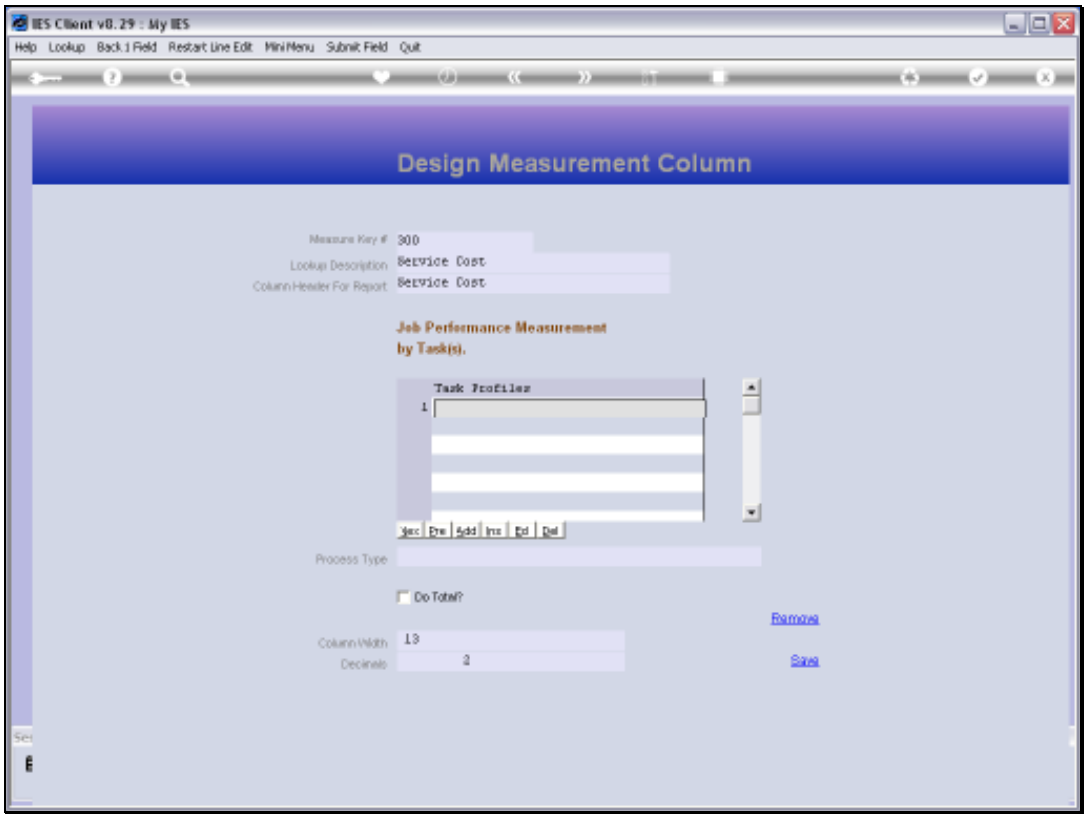
Slide 46

Slide notes:



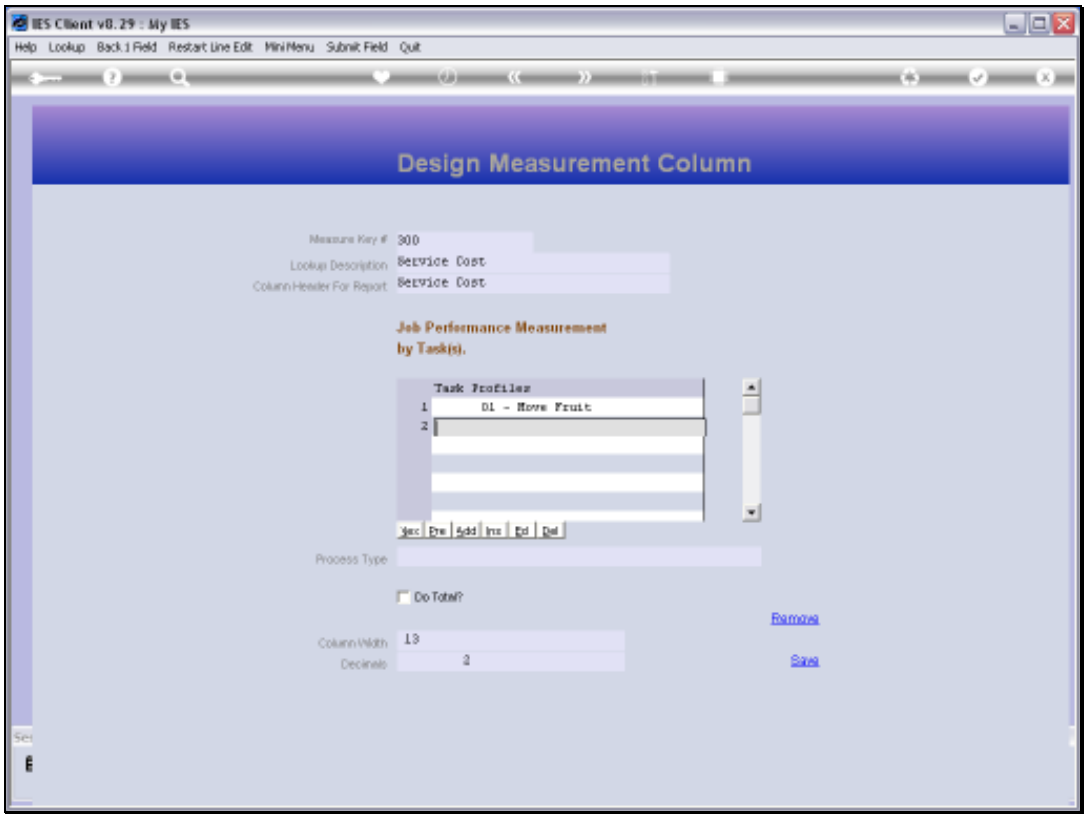
Slide 47

Slide notes:



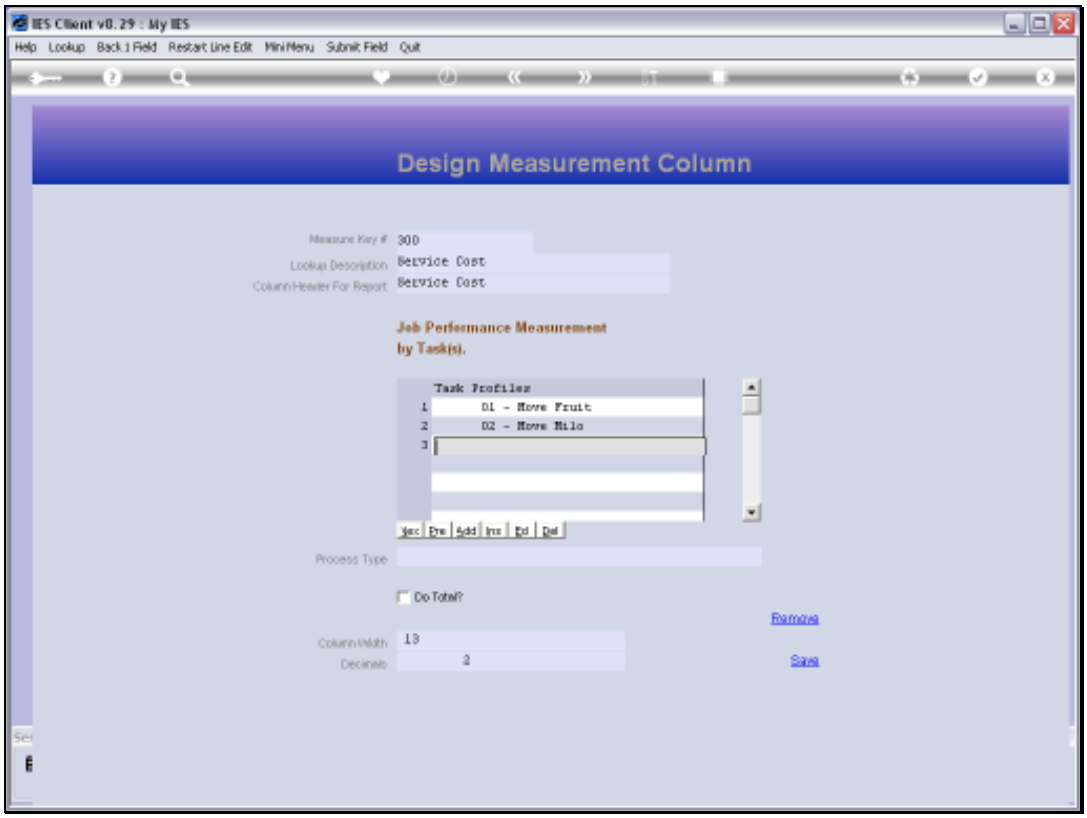
Slide 48

Slide notes:



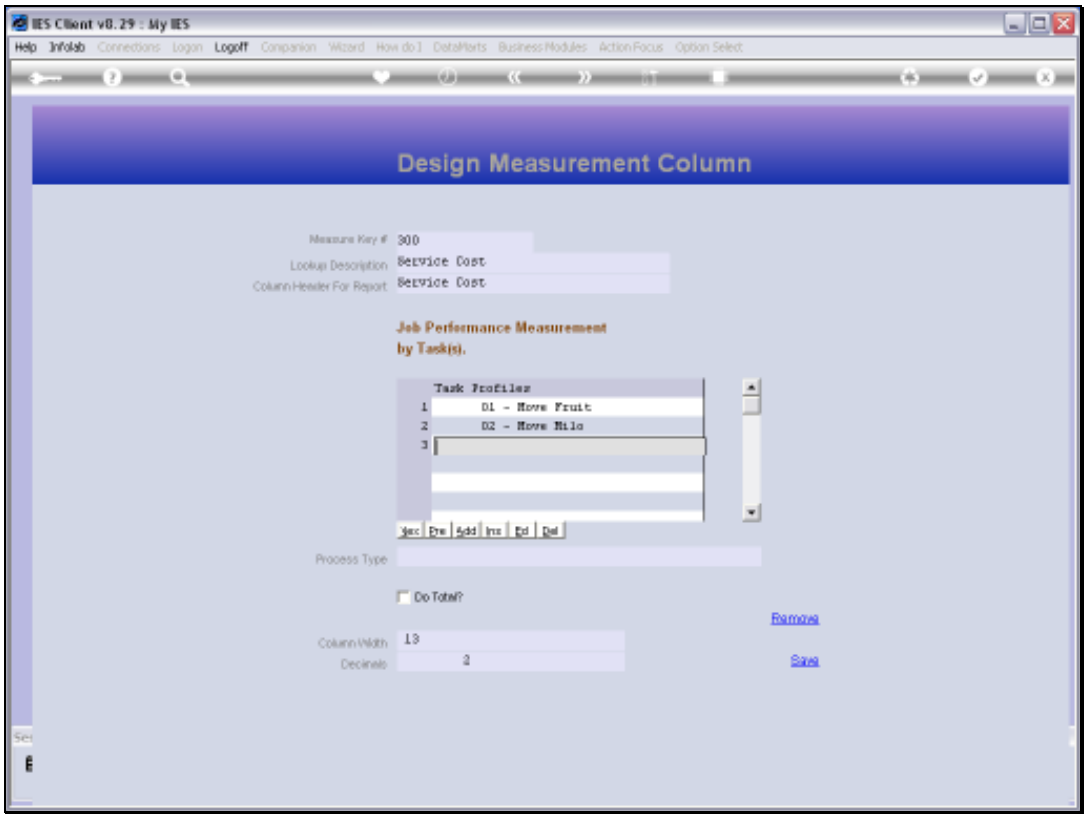
Slide 49

Slide notes: And this time we include Tasks instead of Cost Types. The system will calculate the Values for the included Tasks, and then apply the formula that we choose.



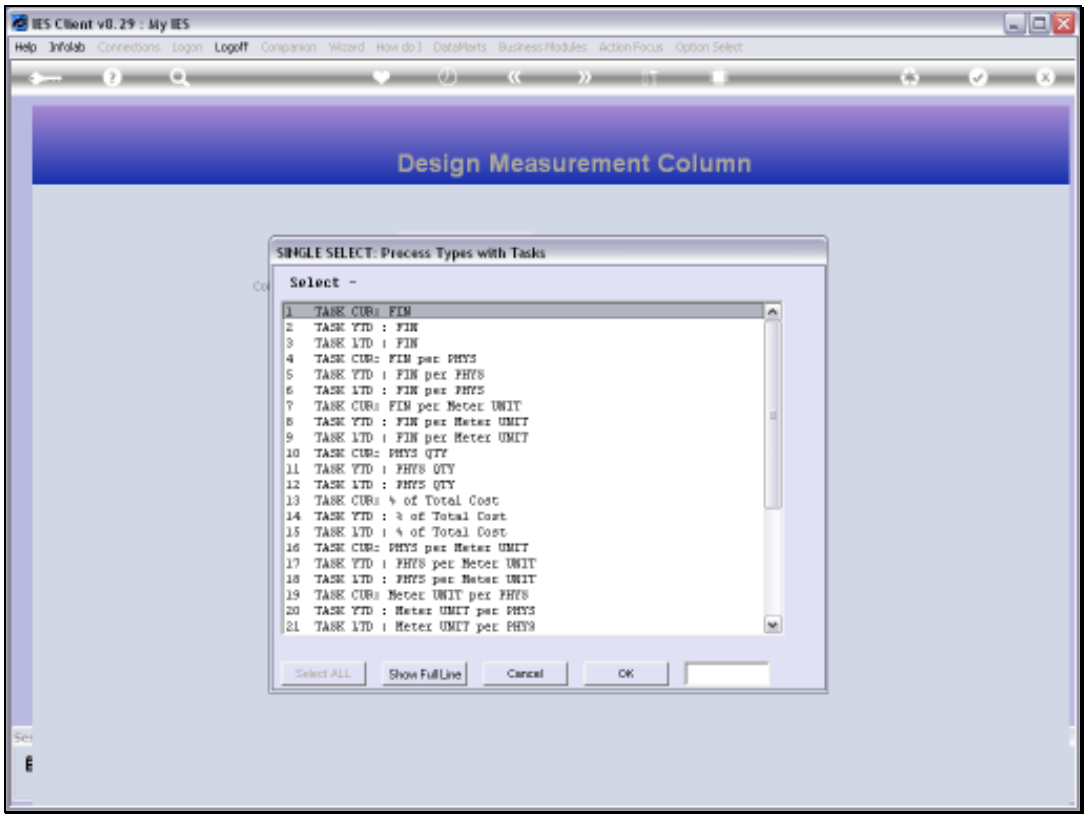
Slide 50

Slide notes:



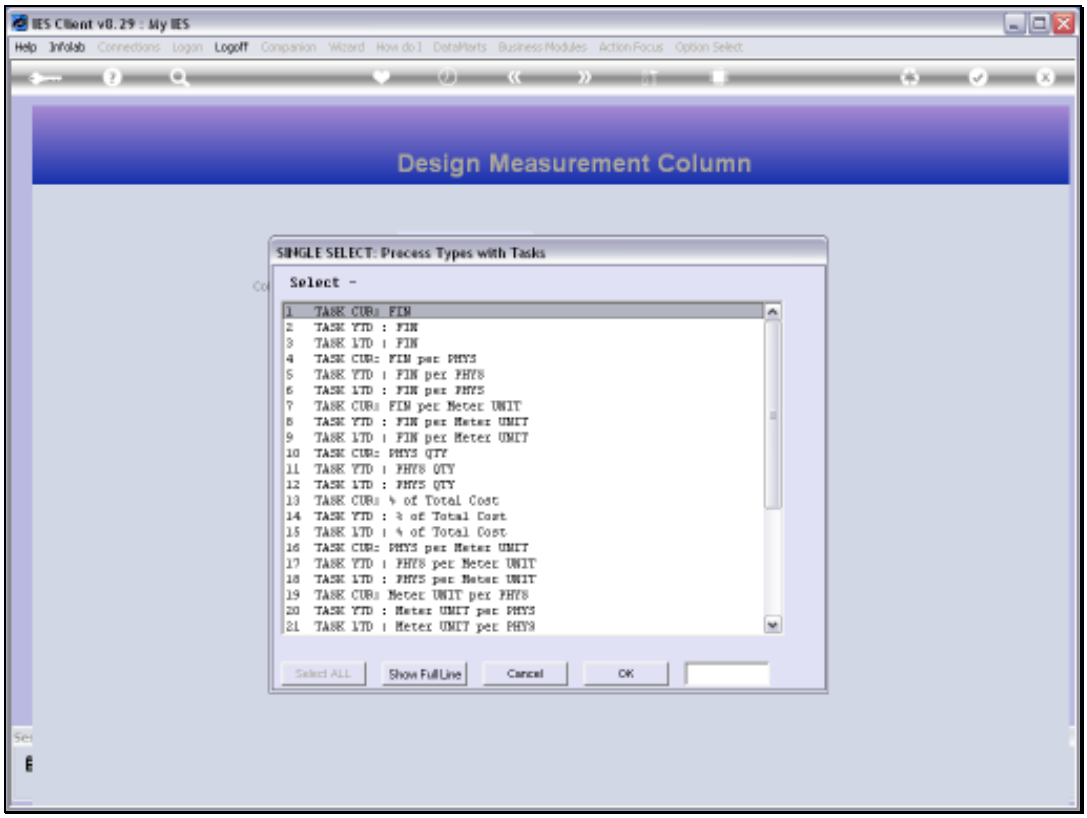
Slide 51

Slide notes:



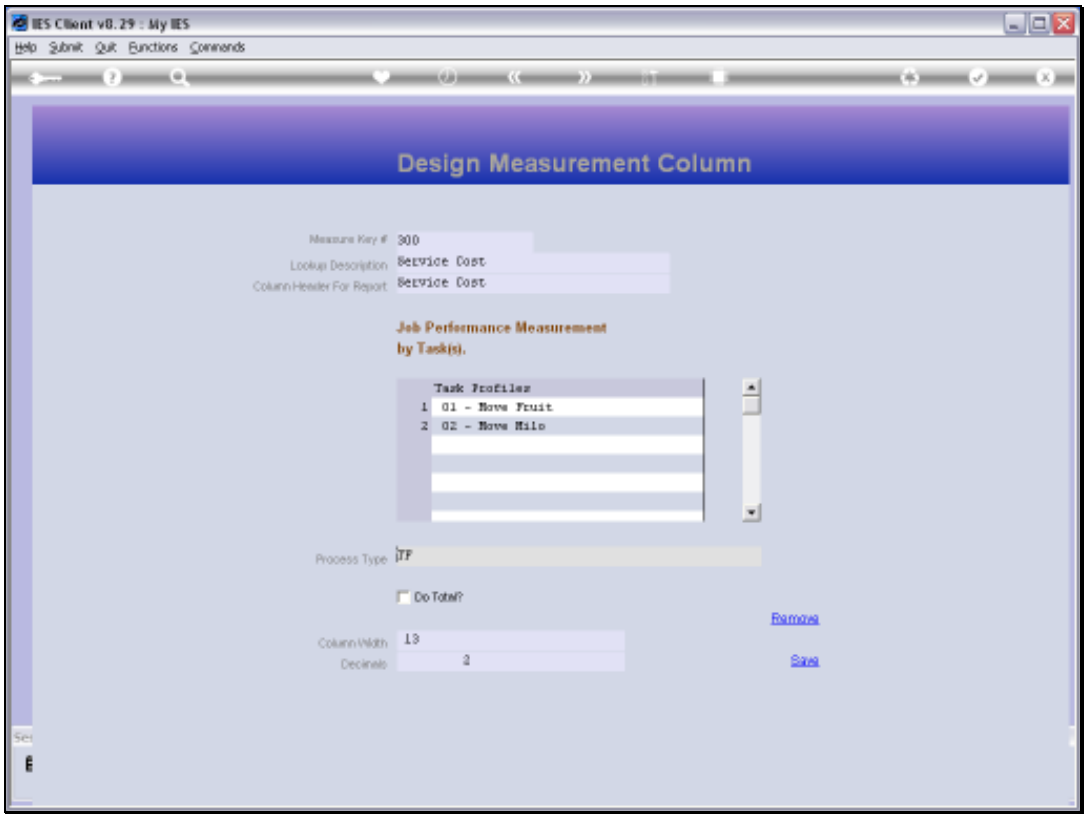
Slide 52

Slide notes: In this case, we will measure the Current Month ex for the selected Tasks, therefore we choose the Process Type for 'Task Current Month, Financial'. This Value may be Income on certain Jobs, and Cost on others.



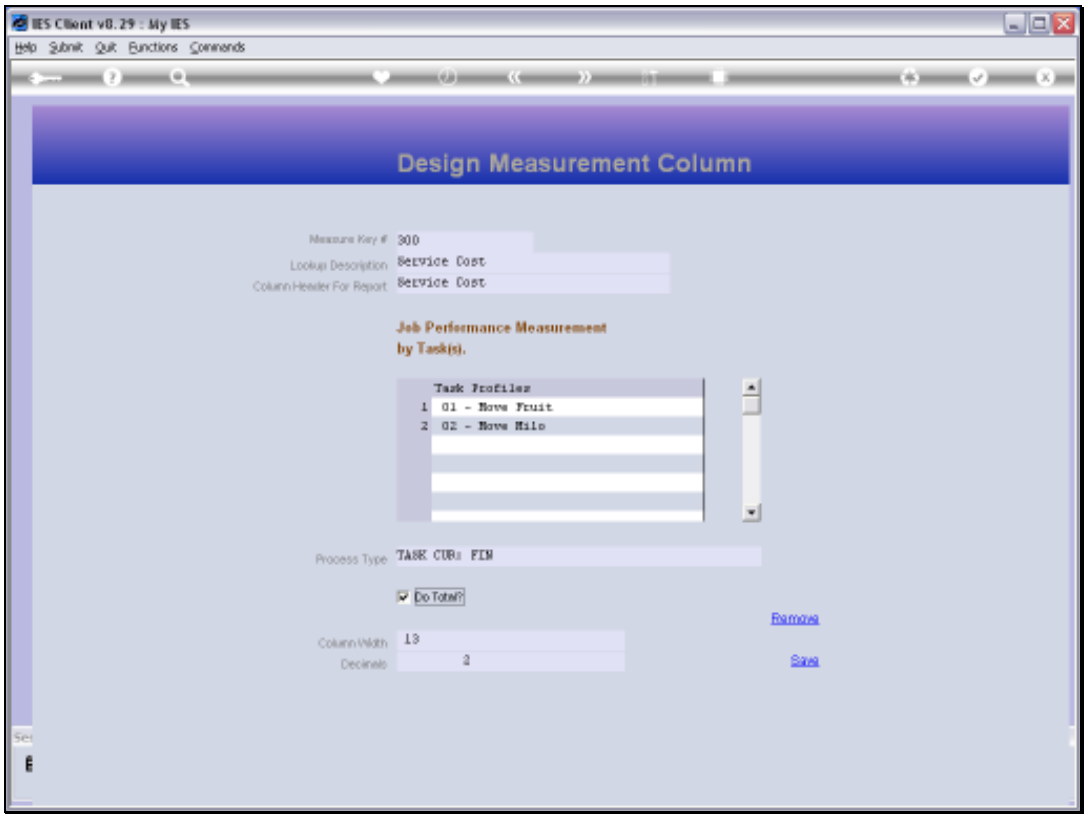
Slide 53

Slide notes:



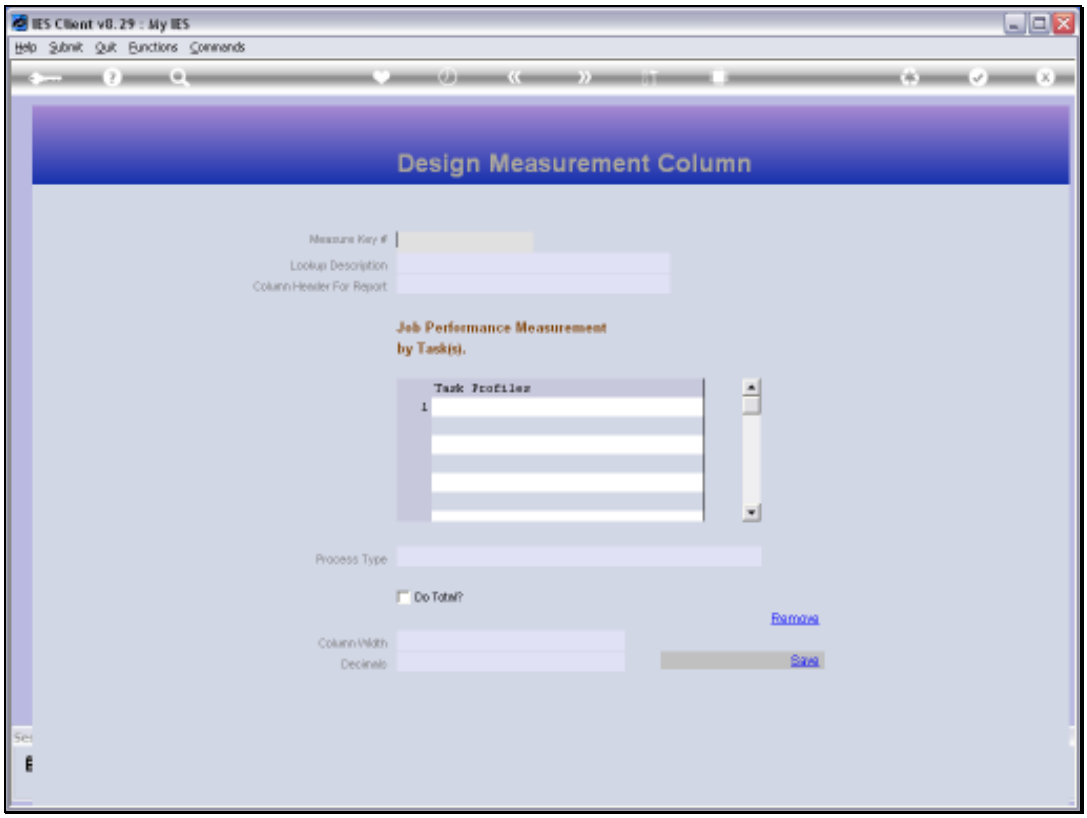
Slide 54

Slide notes:



Slide 55

Slide notes: Again, we have option for totals, column width and number of decimals for the final value.

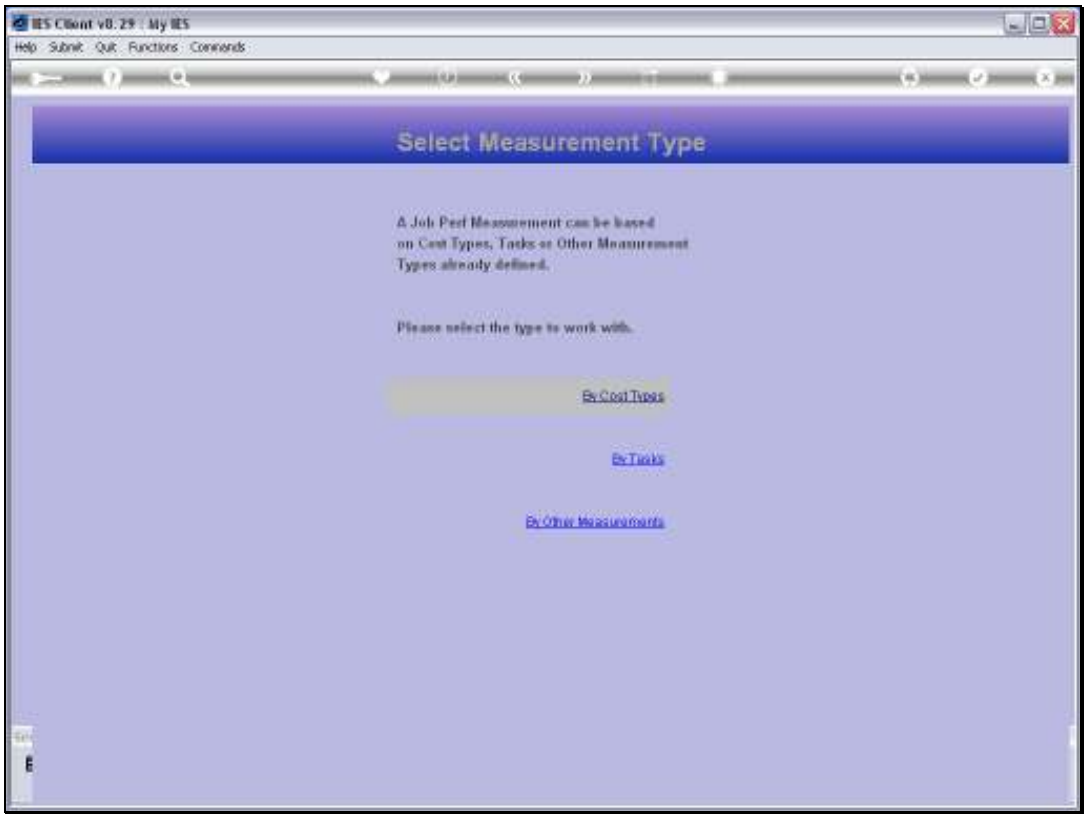


Slide 56

Slide notes: We use SAVE to establish our new Measurement Type.

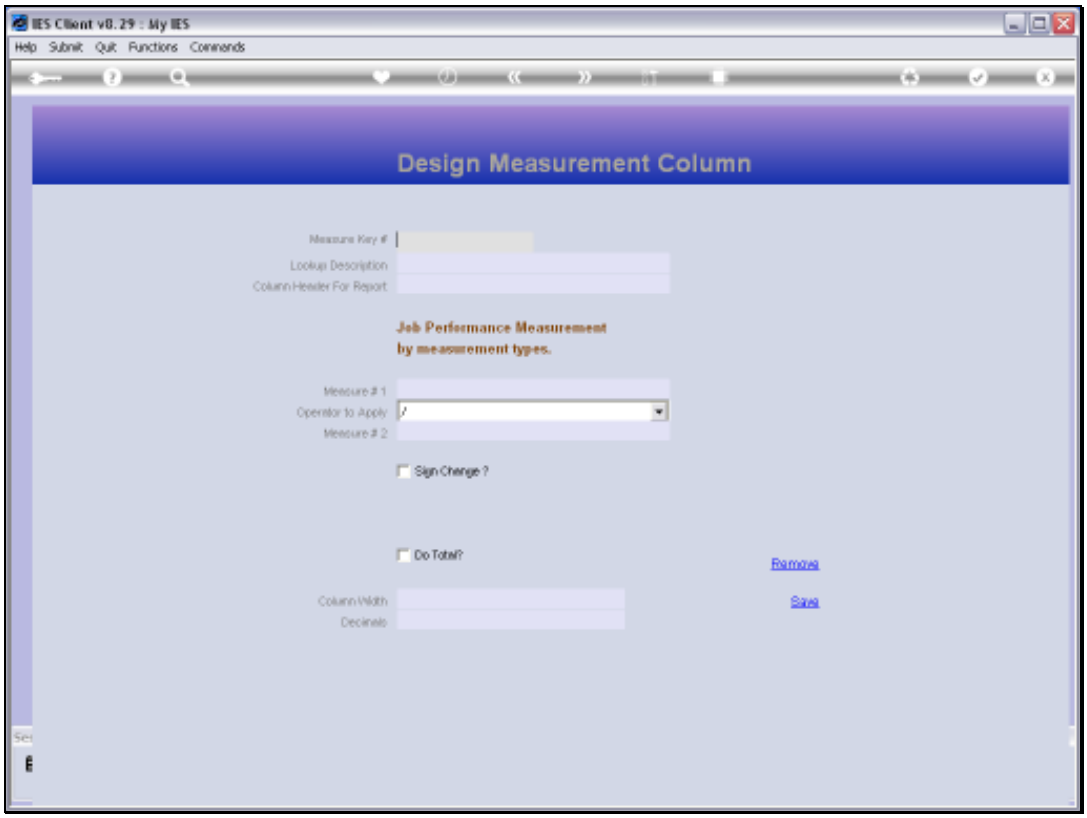
Slide 57

Slide notes: There is 1 more Measurement Type available, and this one is based on other Measurement Types that we have already established.



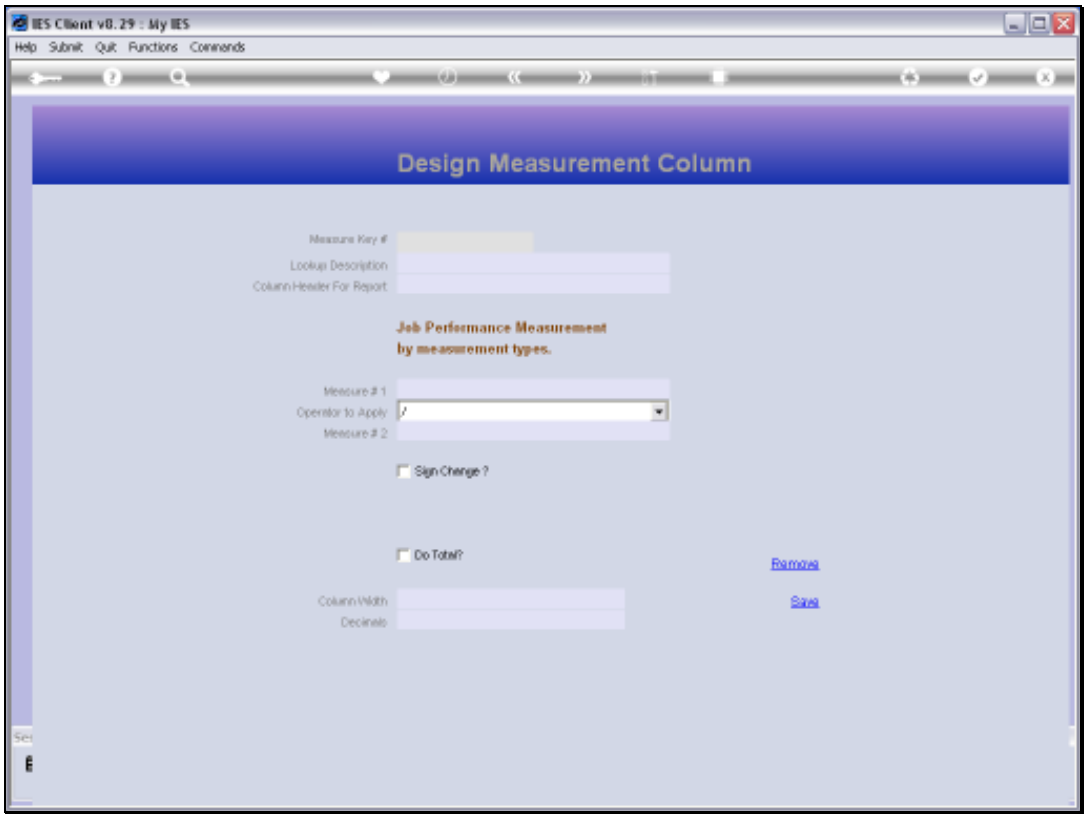
Slide 58

Slide notes:



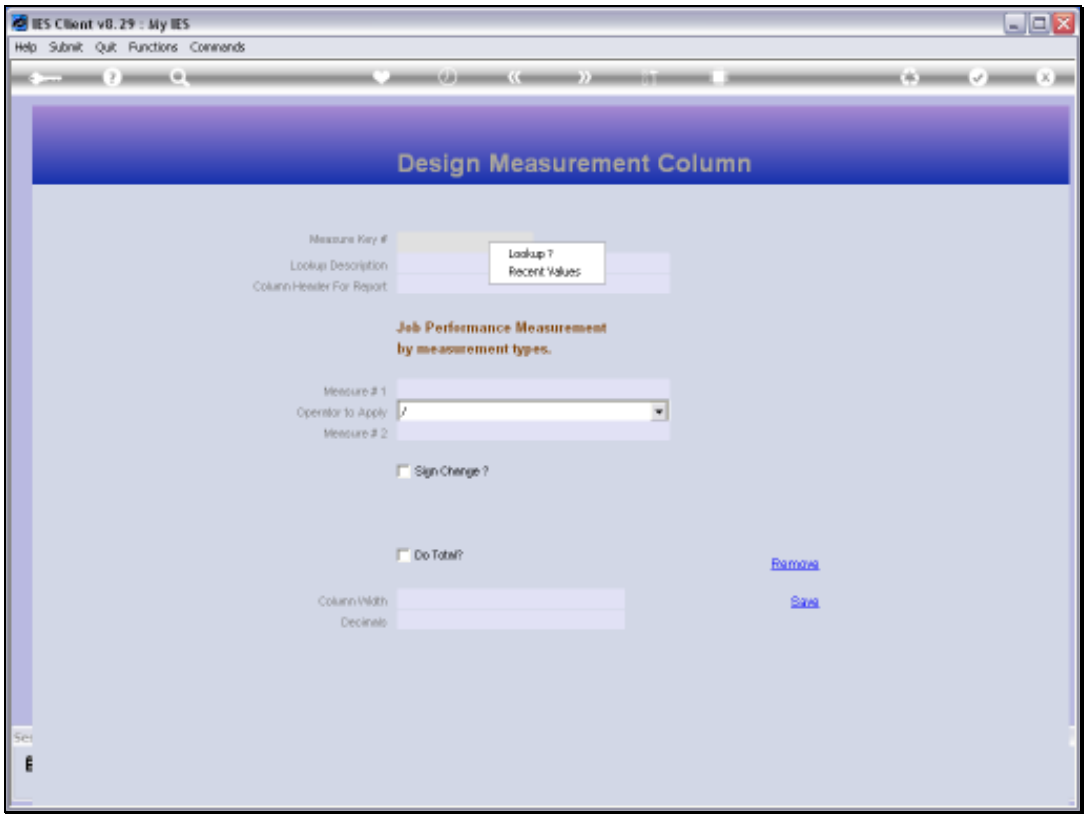
Slide 59

Slide notes:



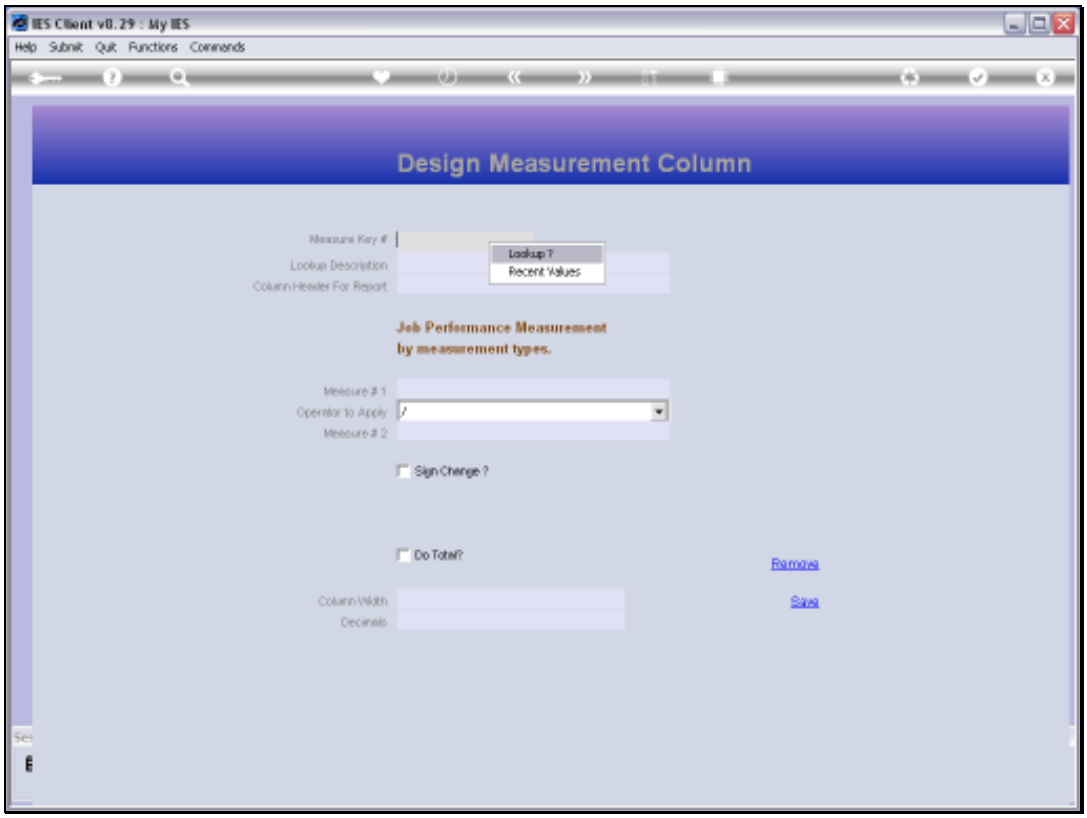
Slide 60

Slide notes:



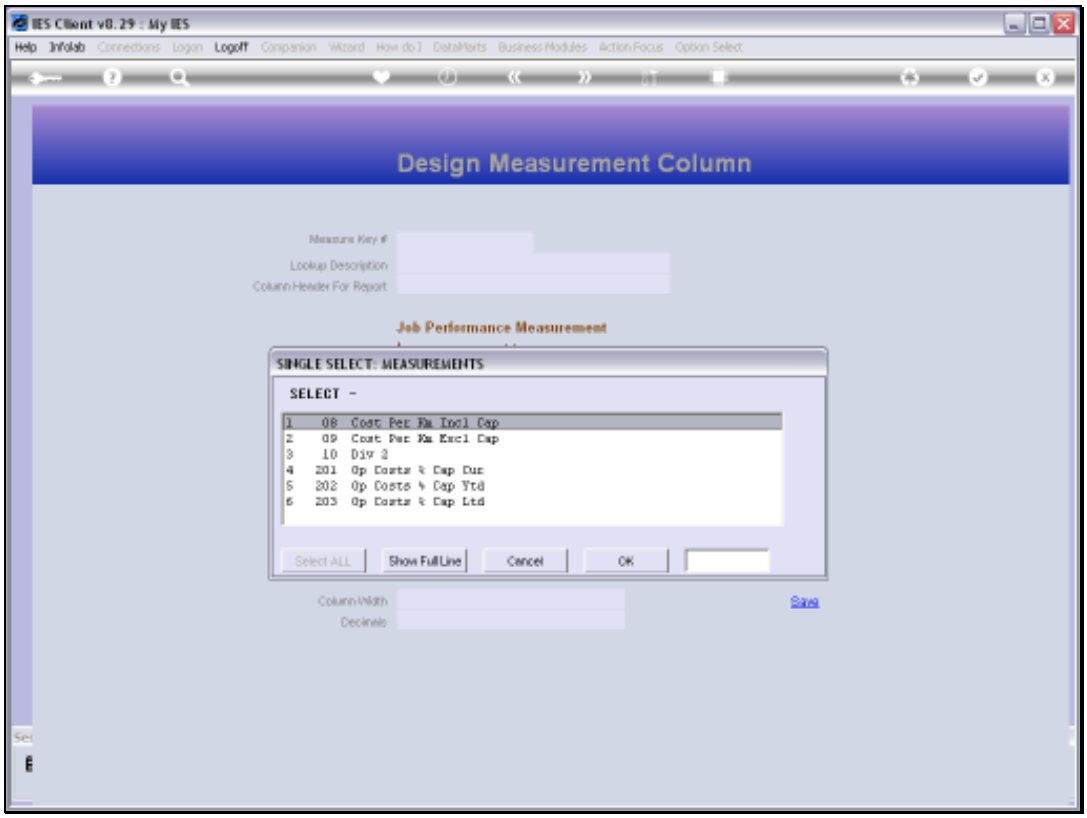
Slide 61

Slide notes:



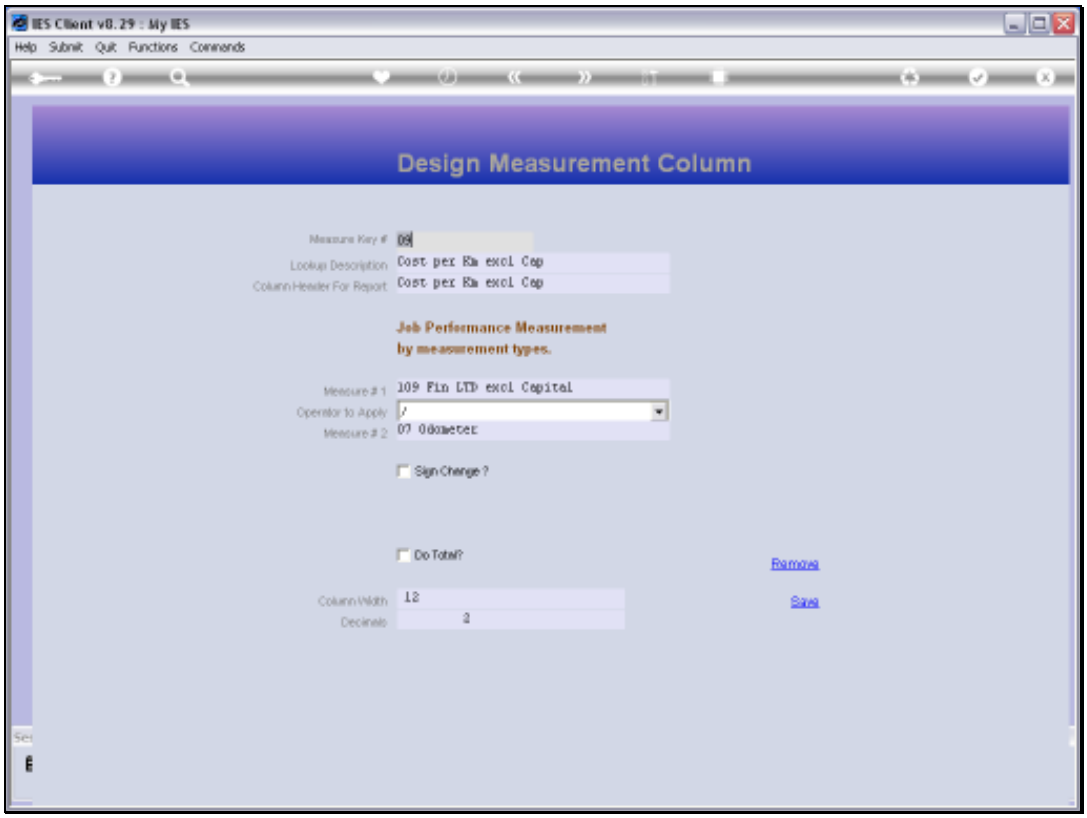
Slide 62

Slide notes:



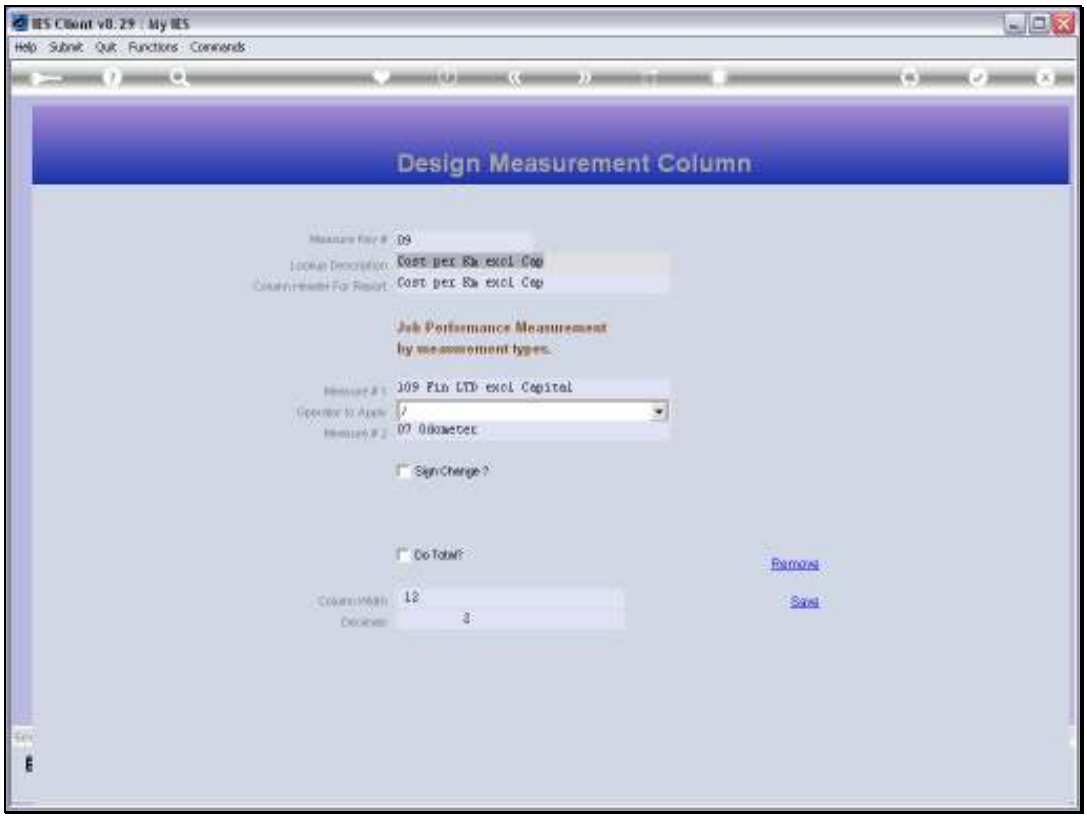
Slide 63

Slide notes:



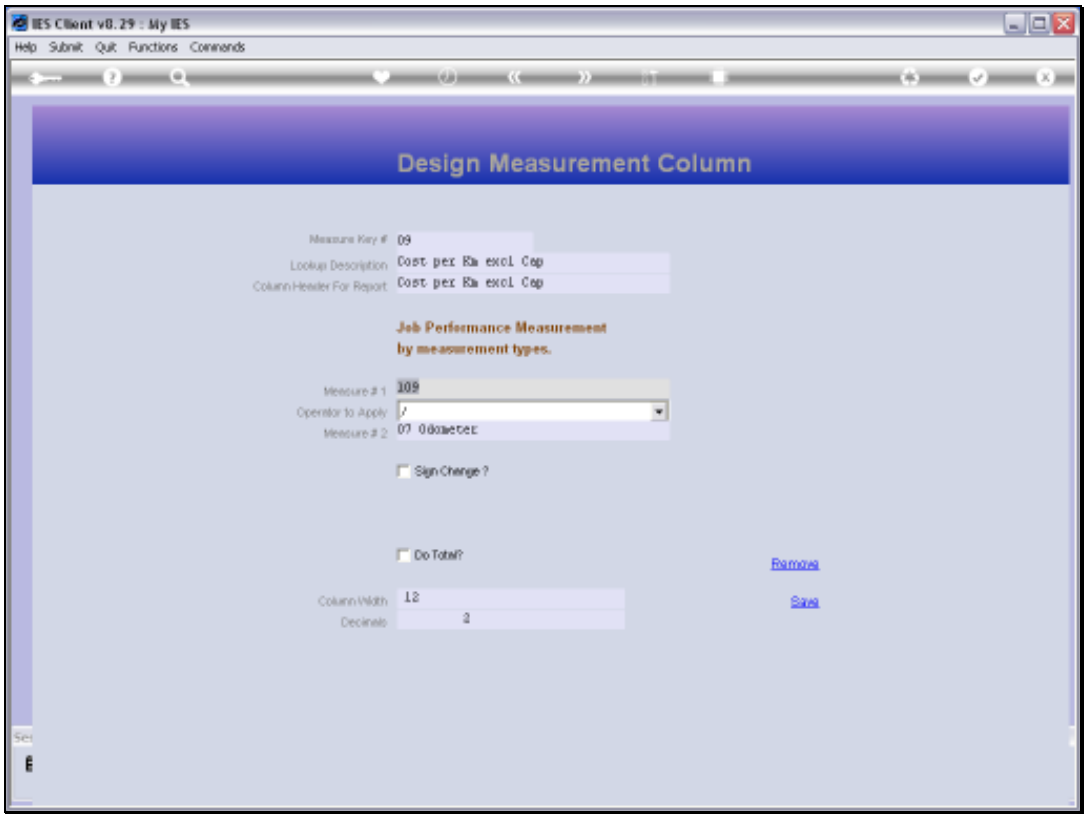
Slide 64

Slide notes: The example we look at here is to calculate the total operating cost per Km for a Vehicle. Since we already have a Measurement number 109 that provides the Life to Date Operating Cost for the Job or Vehicle, and we also have a Measurement number 07 that provides the Odometer reading, we can divide the 1 by the other to provide the answer we want.



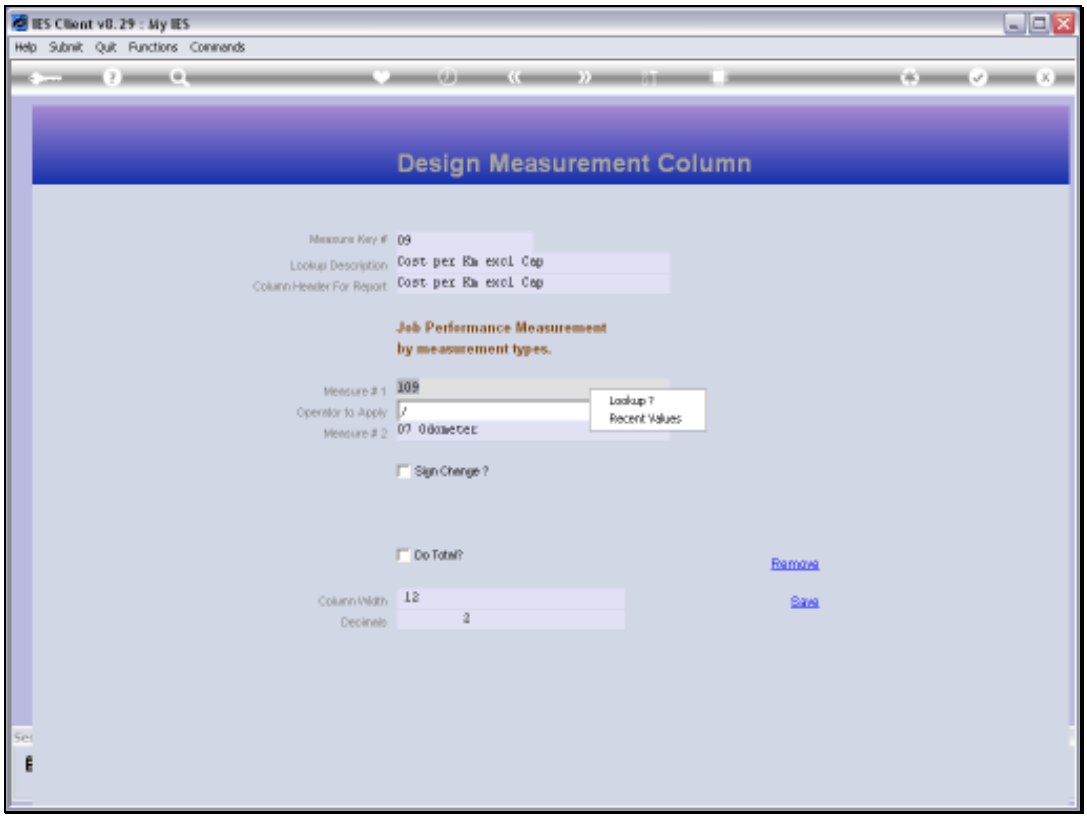
Slide 65

Slide notes: So for this type of Measurement, we always use 2 established Measurements, and apply an Operator to the 2 Values to yield the Value we are looking for.



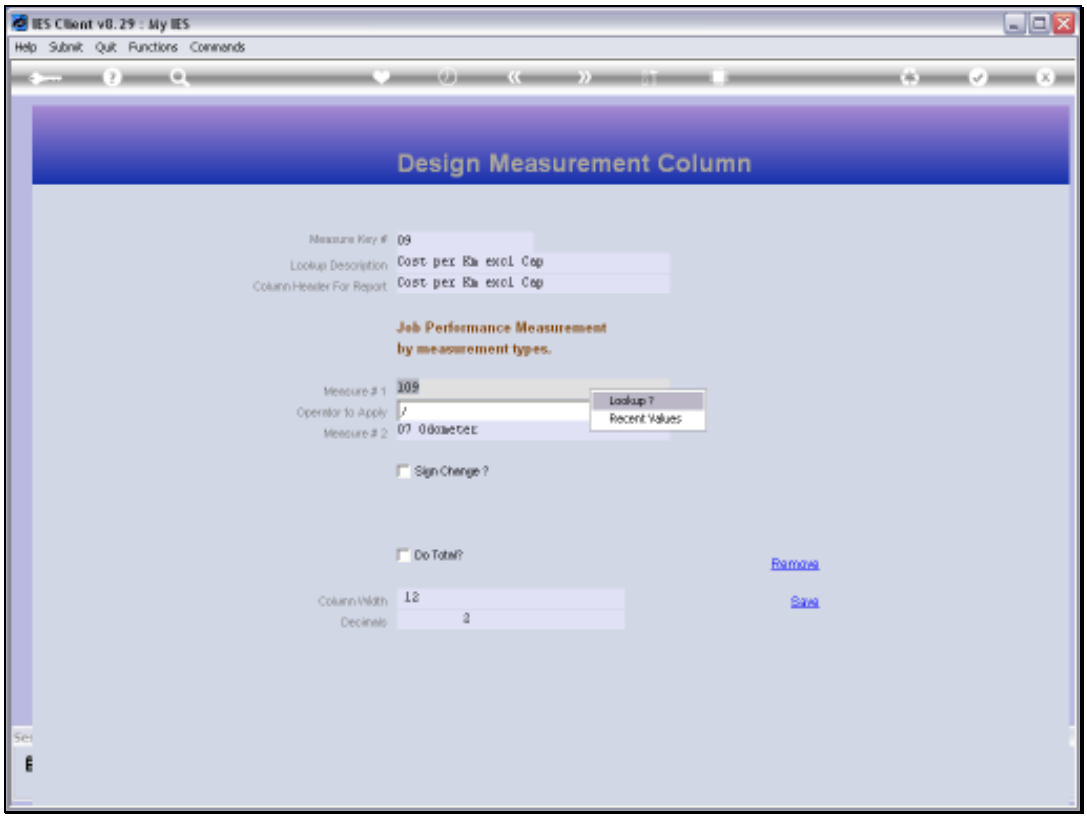
Slide 66

Slide notes:



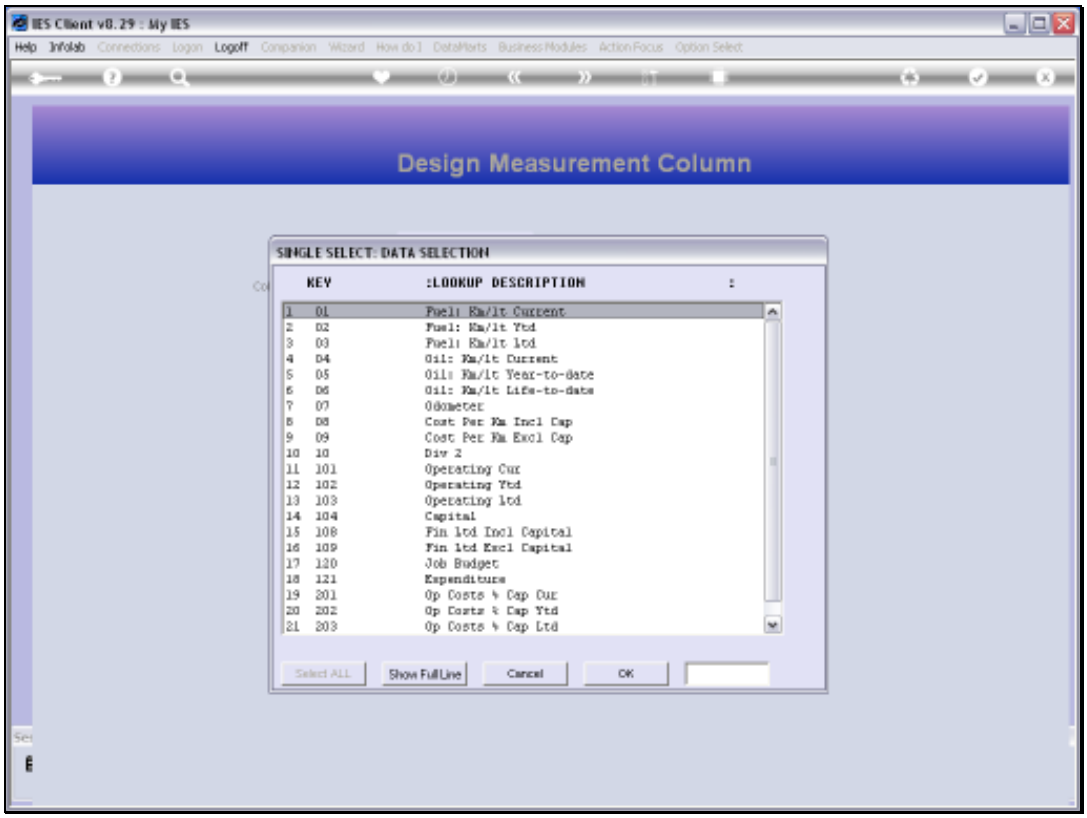
Slide 67

Slide notes:



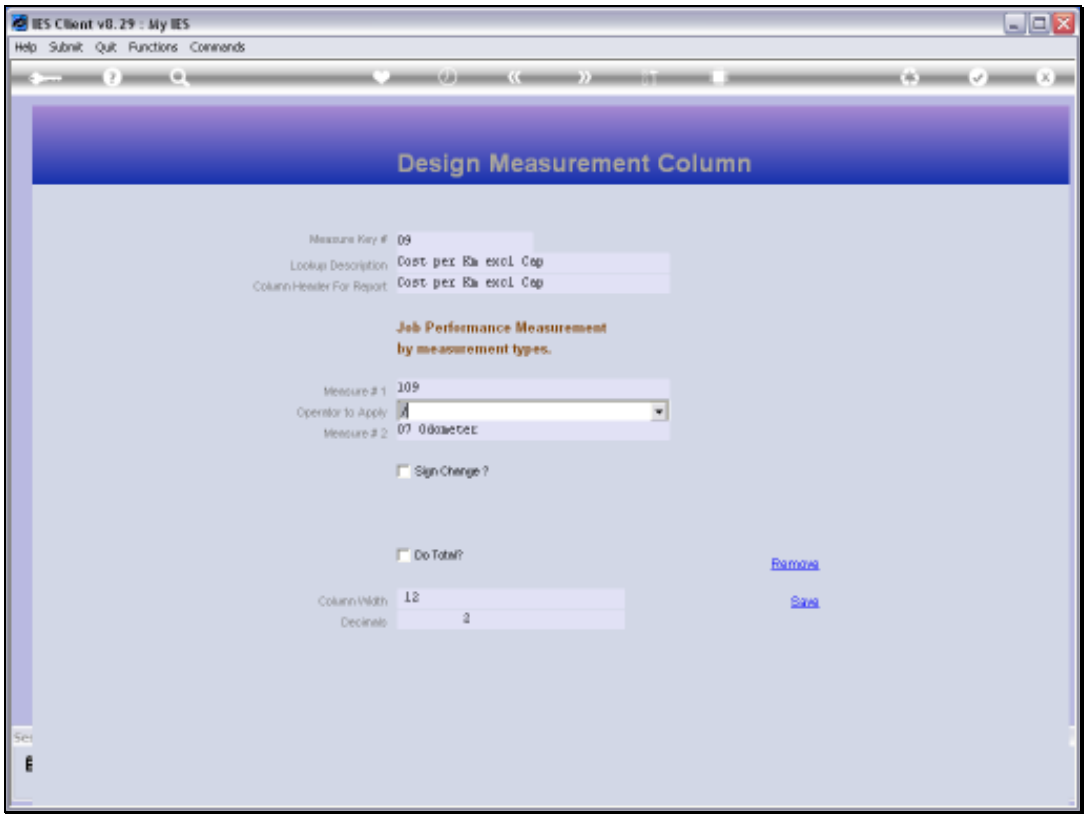
Slide 68

Slide notes:



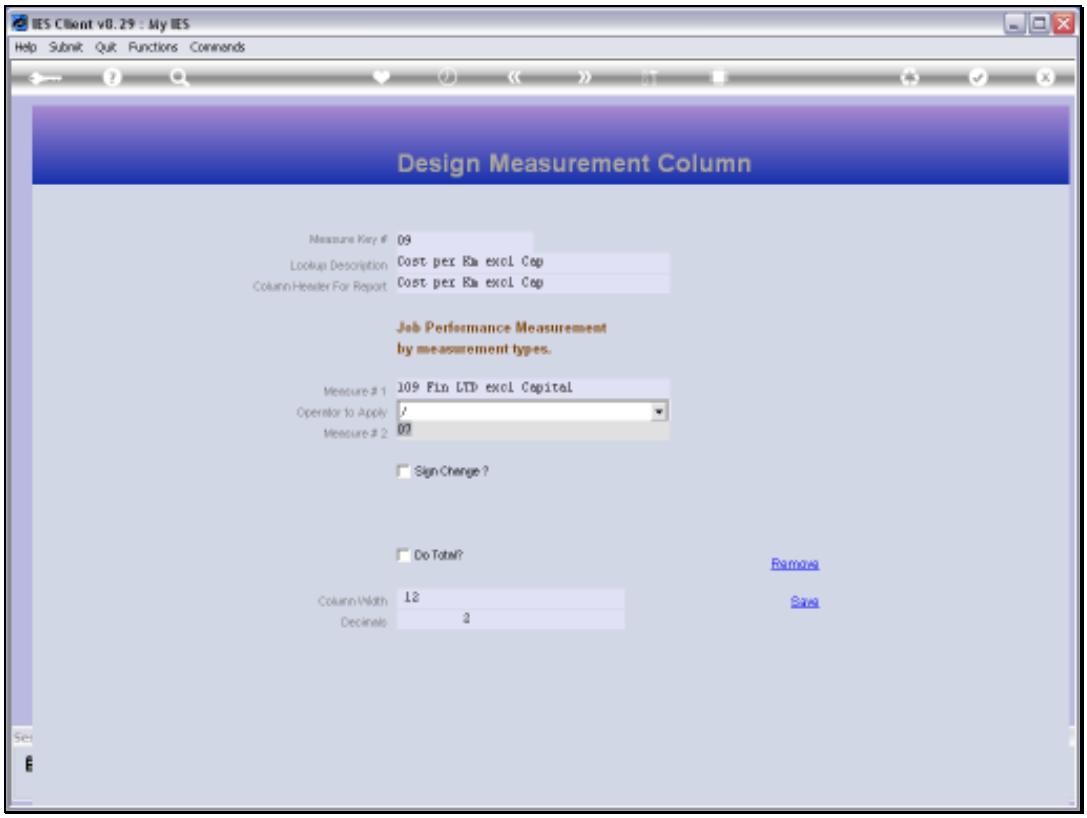
Slide 69

Slide notes:



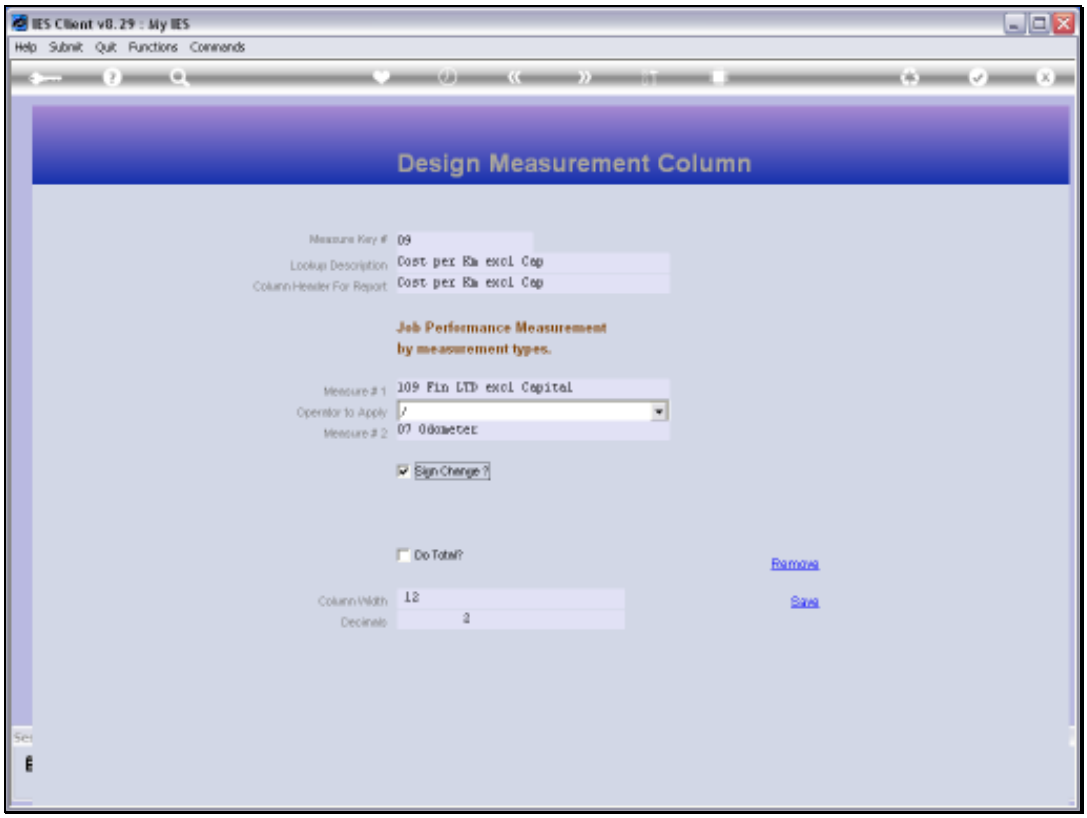
Slide 70

Slide notes:



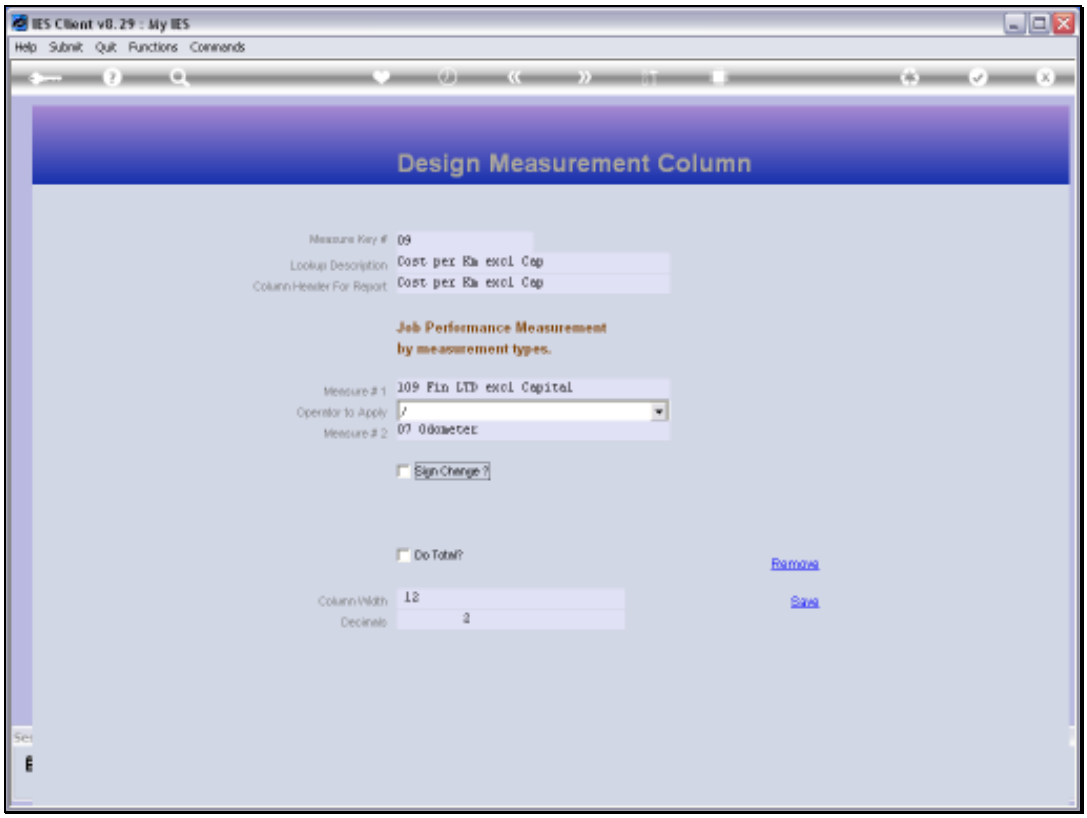
Slide 71

Slide notes:



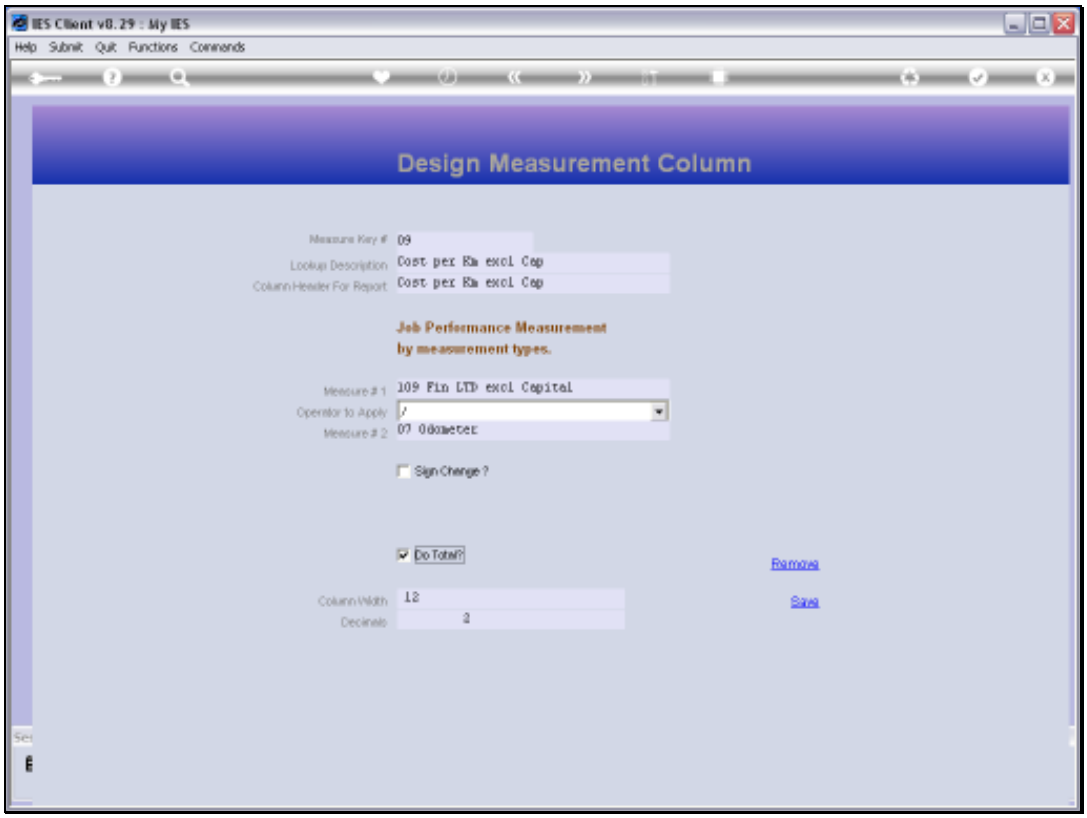
Slide 72

Slide notes: This Measurement Type has a 'Sign Change' option which we can use for those cases where the answer is always a negative but we wish to display a positive, or vice versa.



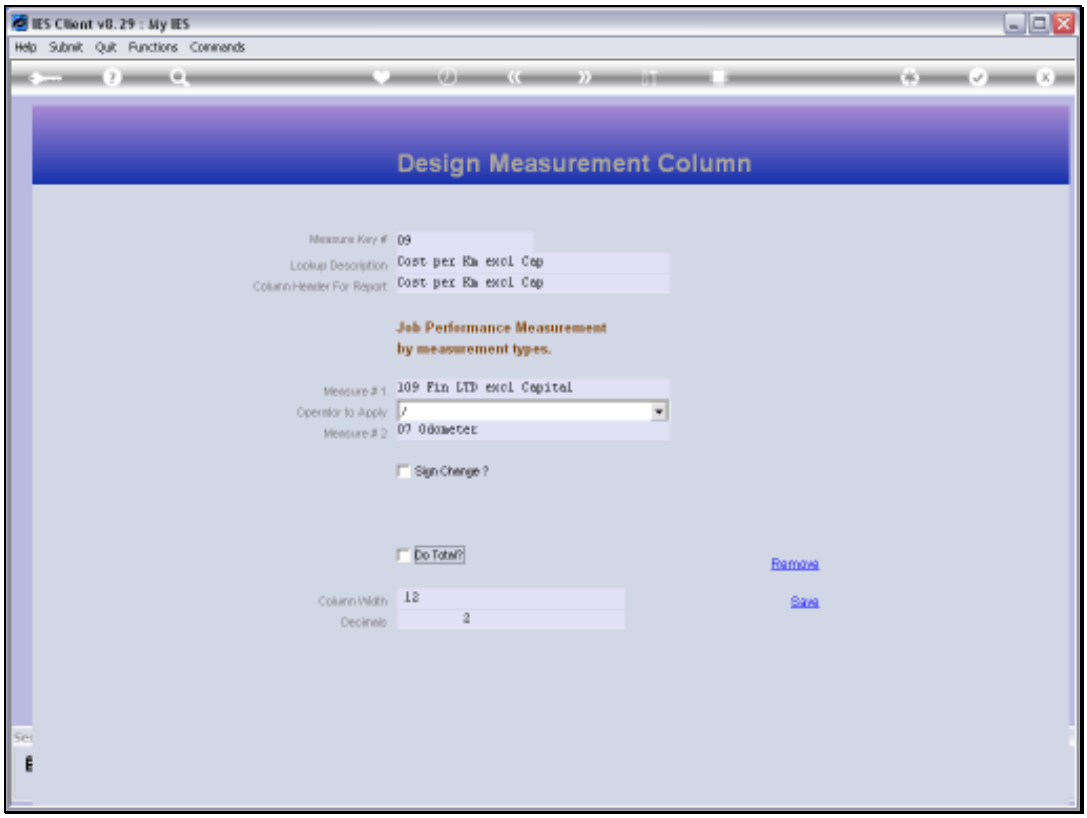
Slide 73

Slide notes: And we have the usual Total, Column width and Decimals settings.



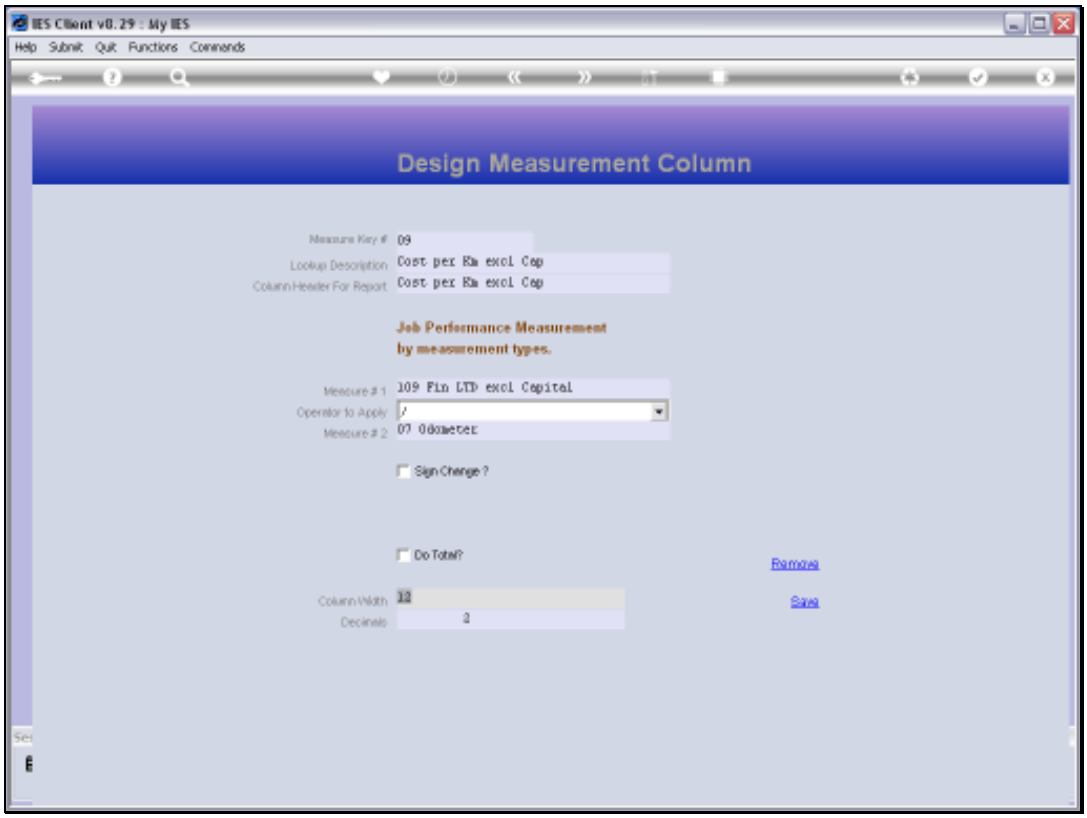
Slide 74

Slide notes:



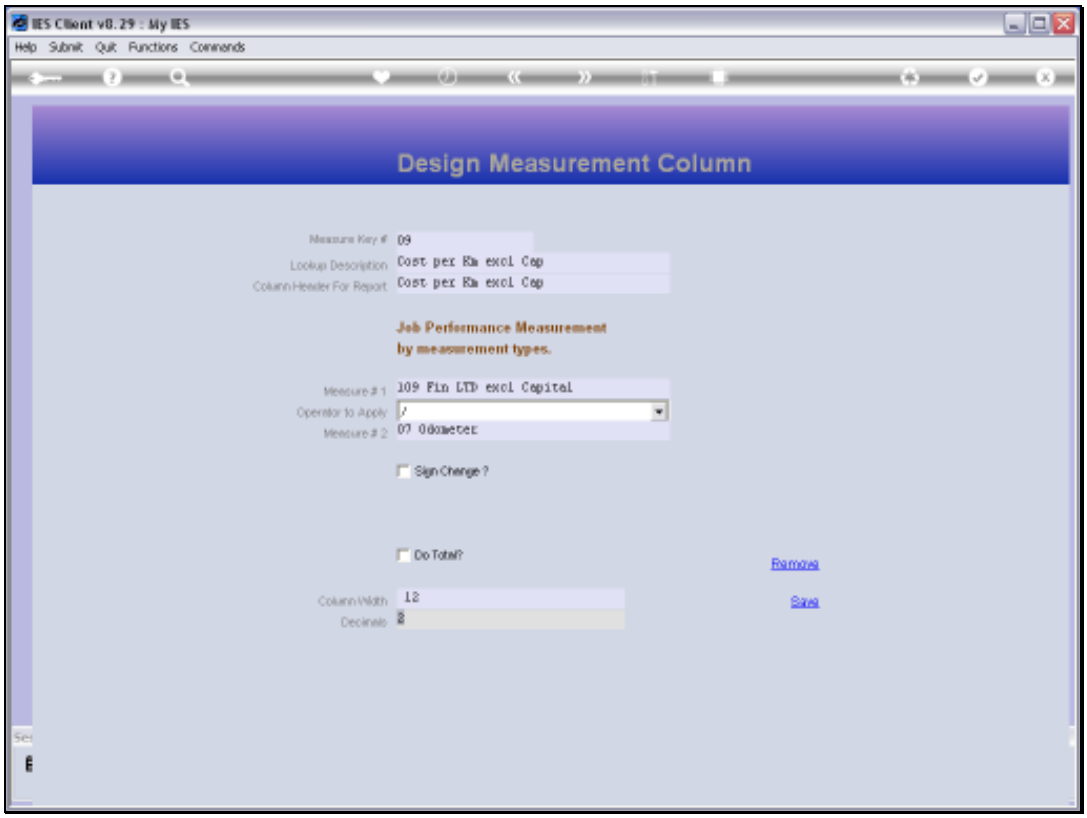
Slide 75

Slide notes:



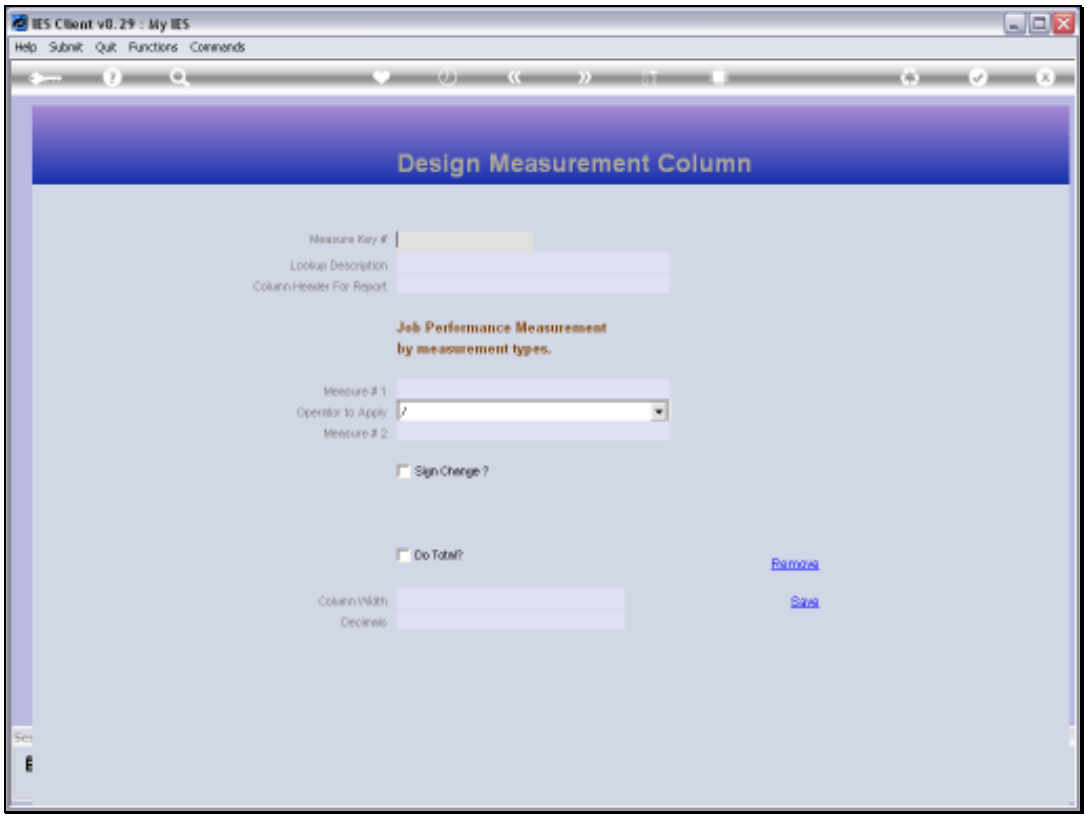
Slide 76

Slide notes:



Slide 77

Slide notes: After making changes, we choose SAVE to update the latest version of the Measurement Type.



Slide 78

Slide notes:

Slide 79

Slide notes: The Measurement Types are truly powerful and can provide all kinds of Values that we would like to measure from our Jobs. Once a Measurement is defined, it can be used on Job Performance reports as well as Data Queries on Jobs and other Jobs Reports. The Measurements are also automatically integrated to the Job Business Intelligence.

Slide 80

Slide notes: