



REPORTING & DASHBOARDING PROVEN PROCESS

WHY REPORTING & DASHBOARDING?

Your data needs to work for you. Having a clear visual of the most important information for your business helps you make smarter decisions, and Interstates can get you there. With expert programming and easy-to-use dashboards and reports, we give you graphical representations of data, important process information, and data aggregation that makes spotting trends and pulling out specific information simple. Whether you need reports on machine status or a deep dive through objective comparisons of plant floor performance variables, Interstates' reporting and dashboarding programming experts are ready to help.

REPORTING & DASHBOARDING PROVEN PROCESS

YOUR GUIDE TO A SUCCESSFUL PROJECT



Questions? Contact us at bdev@interstates.com

WHAT TO EXPECT

YOUR GUIDE TO A SUCCESSFUL PROJECT

YOUR ROLE

> Your involvement keeps the project moving. Here are a few things we'll need from you as we move through the process:

1. Share your current data systems so that we can evaluate the best industrial analytics solution for you
2. Share process documents and data that operators use in their day-to-day operations
3. Review the proposal before approving
4. Provide necessary network access and software privileges to our analytics team
5. Approve invoices when submitted
6. Attend and participate during kickoff and review meetings
7. Provide feedback on the reporting and/or dashboarding as the project progresses if it does not meet your needs
8. Save final documents for future use

Note: We may have additional requests or roles for your team if there is a specific technology-related need.

WHAT YOU WILL RECEIVE

> Over the course of your project, you can expect to receive:

1. Proposal with project scope
2. Progress reports
3. Monthly invoices based on the project's progression
4. Specified dashboard and reporting solution
5. Project documentation or other project deliverables

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YOUR GUIDE TO A SUCCESSFUL PROJECT

Your involvement throughout the reporting and dashboarding process is important! Projects have the best outcomes when both parties are involved.

DISCOVERY PHASE > You'll receive a proposal for your analytics report.

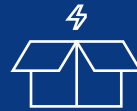


CLIENT REQUEST

KEY STEPS

- | Request Quote
- | Share Business Goals

Your facility is unique, so don't settle for out-of-the-box data solutions. Once we receive your analytics project request, our team will reach out to learn about your business/facility's goals. We'll need to understand your facility's data reporting systems.



PROJECT SCOPE

KEY STEPS

- | Scope Project
- | Draft Proposal

Once we understand the best reporting solution for your facility, you'll connect with our analytics experts to scope your project and meet our team. For multi-site projects, we'll meet with the key contacts at each facility to develop a tailored proposal.



PROPOSAL

KEY STEPS

- | Review Proposal
- | Approve Funding

Our analytics team will send you the proposal for review. Contact us at any time with questions or to make changes throughout the review process. When you're ready to move forward, please notify us. We look forward to working with you!

DEVELOPMENT PHASE



You'll receive a progress report with details of the project scope.



KICKOFF

KEY STEPS

- | Hold Kickoff Meeting
- | Share Project Details

Once the project is approved, our team will meet to develop the project logistics. When our team has a clear idea of the project's direction, you'll be invited to a kickoff meeting to discuss its timeline, design, and phases.



PLAN

KEY STEPS

- | Develop Process
- | Share Progress Report

After the project details are finalized, our team will develop our agile process, driving improvements and increasing efficiency. We'll send progress reports to keep you updated as we complete this step.

DELIVERY PHASE You'll receive your requested dashboard and/or report.



SETUP

KEY STEPS

- | Install Software
- | Configure Database

Our team begins by installing software and configuring a relational staging database identified in the design phase. This helps us with efficient data calculations and report responsiveness.



DESIGN

KEY STEPS

- | Design Dashboard & Report Elements
- | Program Calculations

As we begin designing, we want your feedback. We'll design your report or dashboard in a test environment so you can test and review it. As we program the calculations, you'll see the data and KPIs requested during project development.



FINALIZE

KEY STEPS

- | Validate Data
- | Train & Document Process

After the database and report are built, our team will validate that the data is accurate and in a proper format. If included in the project scope, our team will document processes and procedures and train your team on these standards.

RESULTS PHASE You'll receive a final invoice and report.



REVIEW

KEY STEPS

- | **Hold Review Meeting**
- | **Gather Project Feedback**

We'll meet with you to review the project and ensure we achieved your expectations. This meeting is a great time to provide us with your feedback to apply it to future projects.



REPORT

KEY STEPS

- | **Approve Final Invoice**
- | **Receive Final Documents**

After the review meeting, our analytics team will finalize the report and send it to your team. You also will receive the final invoice for the project.