



Ascente

Enhanced Business Intelligence

Report & Dashboard Creation Solution

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www.compusource.com

<http://www.servicecontractorsoftware.com/>



Enterprise BI

Enhanced Business Intelligence

The *Ascente – Enterprise Business Intelligence* application make it possible for you to create your own reports and dashboards using the Ascente & Traverse databases specifically as you need them to be.

When viewing a report or dashboard using the Ascente EBI app, you will be able to interactively filter, sort or edit as necessary.



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Overview

Ascente EBI is a stand alone application. While it does access the Ascente and Traverse databases, neither the Ascente or Traverse clients are required to run Ascente EBI on a workstation.

Ascente EBI has *Business Categories* that are groupings of common *Data Sources*. The *Data Sources* determine the SQL databases and tables that Ascente EBI users will have access to in order to create reports and dashboards. Each *Data Source* references an SQL View.



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Features

- The *Business Categories* allow you to easily select groupings of related *Data Sources* from the Ascente and Traverse SQL databases for your reports and dashboards. Users will be assigned the *Data Sources* that they can access for their reports and dashboards.
- Report Types
 - *Standard – Rows and Columns*
 - *Drilldown* - Allows for up to three levels of drilldown information (*IE: Service Order -> Work Order -> Work Order lines*)
 - *Matrix* - Allows users to drill through summary to underlying detail information from a single data cell
- You can add calculated columns (*IE: Sell – Cost = Profit*)
- You can add many types of graphs to visually present the information. (*IE: Pie, Bar, Column, Area ...*)



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Features *(continued)*

- You can sort and subtotal the data as you need.
- You can customize the field descriptions so they are called what you want them to be.
- The reports can easily be exported to a pdf or an Excel spreadsheet file.
- You can view the dashboards and reports on a mobile device using the *Jonas Enterprise BI* app. This will allow you to have immediate access to your current key business information from anywhere your device can access the internet.



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Remote Access Requirements

You will need:

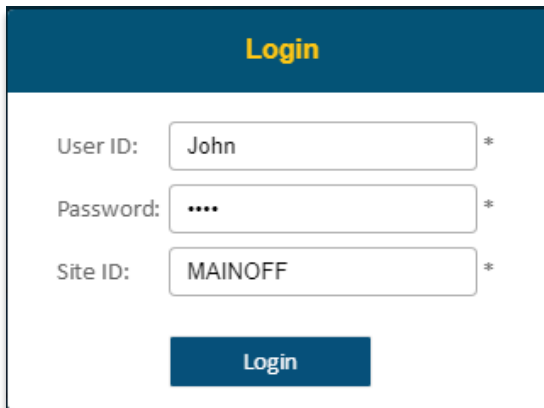
- The Ascente EBI program installed on your server
- A firewall port opened for Ascente EBI
- User logins and passwords setup in Ascente EBI
- The Jonas Enterprise BI client app installed on your pc, android or iOS device
- An internet connection



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Security

- User access requires a valid user id, password and site id
- Your data access is secured with user security roles that will be determined and assigned to each user.
- Remote access will require that the EBI app be installed.



The screenshot shows a login interface with a dark blue header containing the word "Login" in yellow. Below the header, there are three input fields: "User ID:" with the value "John", "Password:" with masked characters "****", and "Site ID:" with the value "MAINOFF". Each field has a small asterisk to its right. At the bottom of the form is a dark blue button with the text "Login" in white.



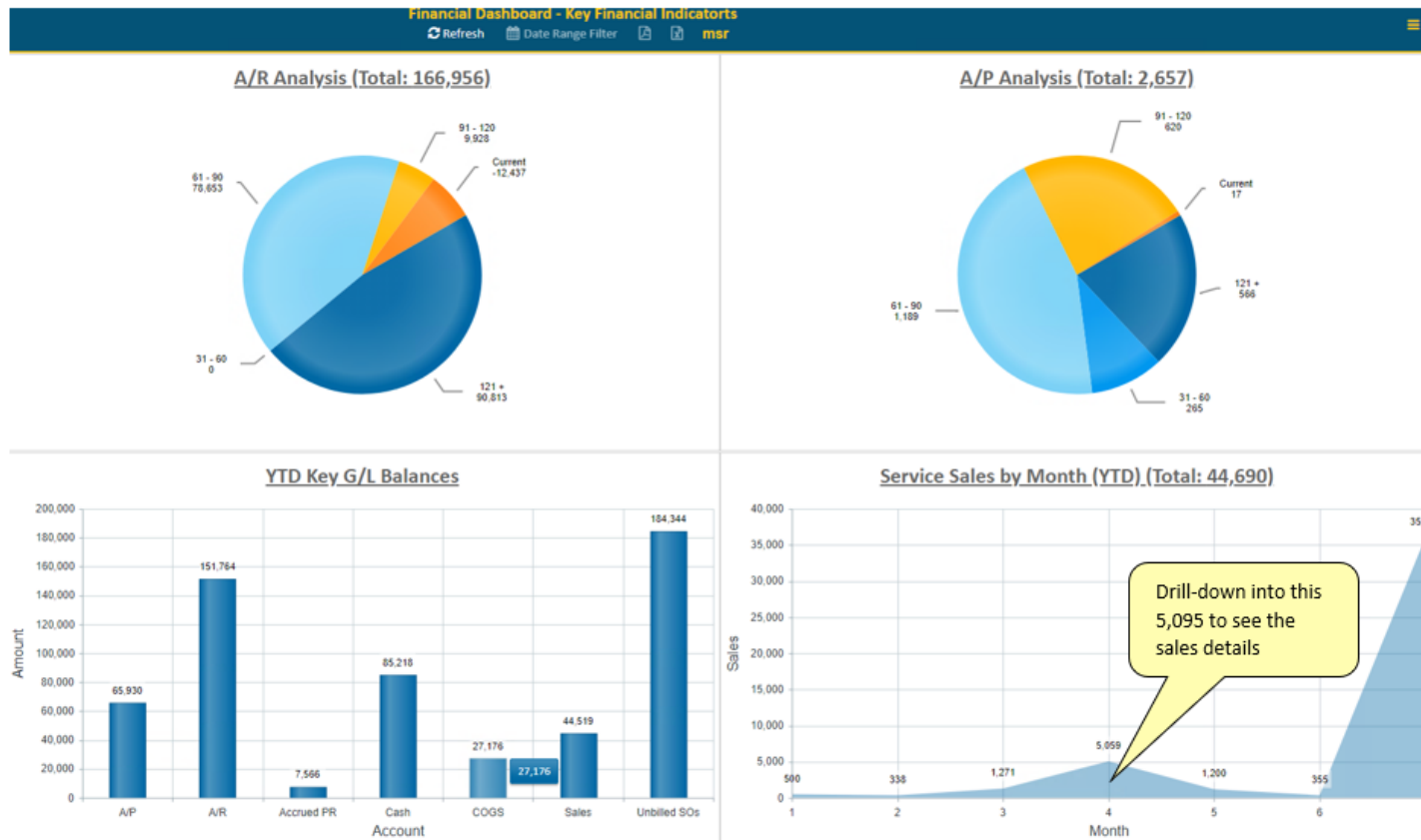
Android App



Desktop Icon



Enhanced Business Intelligence Dashboard Example



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Dashboard Drill-Down Example

Drag a column header and drop it here to group by that column

CustomerID	JobsiteName	InvoiceNumb...	Sales	Profit	Month
AustinCox	Austin Cox	LAM008-0452	100	100	4
AustinCox	Austin Cox	LAM008-0456	100	100	4
AustinCox	Austin Cox	LAM008-0457	100	100	4
AustinCox	Austin Cox	LAM008-0503	100	100	4
AustinCox	Mary Hwang	GAM00172	100	26	4
AustinCox	Mary Hwang	jeremy2	1,709	380	4
Dale Johns	Dale Johnson	LA010471	1,650	968	4
JDupri	Jermaine Dupri	LAM008-0513	1,200	1,200	4

			Total: 5,059	Total: 2,974	
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Matrix Report Example

SO's by Type - Service Orders by Type

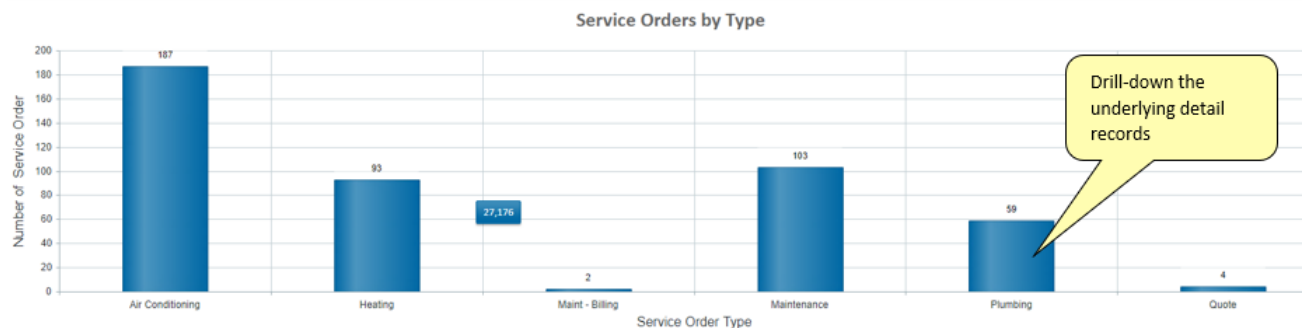
Refresh Date Range Filter msr

Drag a column header and drop it here to group by that column

Service Order Type	Construction	Heating	Maintenance	Service	Water (Cool)	Total
Air Conditioning		11	6	0	168	187
Heating		16	34	0	43	93
Maint - Billing		0	0	1	1	2
Maintenance		0	0	13	90	103
Plumbing		0	1		36	59
Quote		2	0		2	4
	29	41	33	340	5	448

Graph Type: Column

Drill-down the underlying detail records



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3 Level Reporting Example

By Jobsite by Component by Detail History for the Jobsite & Component

Jobsite / Comp / Detl Hst - Jobsite / Components / Detail History									Refresh	Date Range Filter	msr
Drag a column header and drop it here to group by that column											
Jobsite	Jobsite Name	Maintenance Contract ...	First Sale Date	Last Sale Date	Total Service Sales	YTD Service Sales	AddressLine1				
▶ [Mobile Default]	Mobile Default Customer	None			0.00	0.00	123 Park Way				
▶ 1 Park Ave	Adam Anderson	Expired	2017-01-01	2017-09-12	2,676.74	0.00	1 Park Ave				
▶ 1 Peachtree Rd	George Country Farm	None			0.00	0.00	1 Peachtree Rd				
▶ 10195 Teachder Lane	Steve Shea	None	2017-03-24	2017-03-24	1,005.00	0.00	10195 Teachder Lane				
▶ 111 Frank Street	Tom Hill	None			3,026.88	0.00	1111 Frank St.				
▼ 1111 Frank St.	Tom Hill	Active	2015-08-18	2018-07-24	63,933.04	5,661.01	1111 Frank St.				
Drag a column header and drop it here to group by that column											
Component	Component Description	Manufacturer	Model	Serial Number							
▶ Test	10 ton AC	Carrier	201354	132412lkjlkj							
▼ AC1											
Drag a column header and drop it here to group by that column											
Invoice	Service Order	Invoice Date	Part	Part Desc	Part Adndl Desc	Bill Type					
ACES	ACES	2016-08-07	10101Z	REPAIR CONNECTION MINOR AFTER HOURS	AFTER HOURS MINOR REPAIR	Material					
ACES	ACES	2016-08-07	Copper90	Copper Elbow	1/4 Inch 90 degrees	Material					
ACES	ACES	2016-08-07	T1000	Install 40 Gal Gas Water Heater	Install a 40 Gallon gas Water Heater. Includes Earthquake strap, pressure relief valve and permits.	Misc					
ACES	ACES	2016-08-07	WH40	Water Heater 40 Gal	ProMax® Power Vent Higher EF 40-Gallon Gas Water Heater	Material					



Thank You!

We thank you for attending or watching this webinar and for choosing Ascente.

Please let us know if you have any questions or would like a follow-up call to discuss this in more detail.

More training videos like this are available on our website www.compusource.com

<http://www.servicecontractorsoftware.com/>

