

Prepare for Business Intelligence (BI) Dashboard Reporting

Business intelligence is a data analysis process aimed at boosting business performance by helping executives and other end users make decisions that are more informed.

Centralize around your jobs and quotes and focused in three areas; revenue, process and technician, the BI dashboards provide you the information necessary to make financial decisions, improve processes, and identify trends with jobs and job leads. Get the reporting foundation you need to guide your daily actions as well as your overall strategy. BI Dashboard Reports provide answers to key performance indicator (KPI) drivers or business questions such as:

- Have I invoiced all my jobs?
- Do I have missed opportunities?
- Which technicians do I need to reward or provide training?
- Can I improve my internal business processes to increase the number of jobs that that are performed on a daily, weekly or monthly basis?

This document contains suggestions to prepare your company for the activation of BI Dashboard reports. Consider the following:

- What do you want to measure?
- Do I currently have Job custom fields to gather data on job type or job region?
- Do I want to have a User custom field to group users?

What Do You Want to Measure? Setting KPIs might be an answer.

Does your company have service KPIs or an established baseline for what you expect?

If you answer no, here are some tips to create effective key performance indicators (KPIs).

Key performance indicators (KPIs) are powerful tools to affect change within an organization. Effective KPIs often exhibit the following 12 characteristics:

- **Aligned** with corporate strategies and objectives
- **Owned** by an individual or group who is accountable for their outcome
- **Predictive** measures or leading indicators of performance desired by the organization
- Contain **Actionable**, timely data so that users can intervene to improve performance
- Focus on a **Few** high-value tasks and measures
- Straightforward and **Easy To Understand**
- **Balanced and Linked** to reinforce each other
- **Trigger Action** of positive change when measures dip below an acceptable standard
- Built on **Standardized** definitions, rules and calculations so they can be integrated across dashboards
- Put performance in **Context** by applying targets and thresholds to gauge trends over time
- Are **Reinforced** with incentives
- Indicate **Relevant** impact to the organization

Define Custom Fields

The flexibility of the BI Dashboards provide for the mapping of three custom fields to the dashboard filters. Two custom fields are in the Jobs and Quotes and the third is a User custom field.

Customer defined custom fields in CUSTOM FIELDS → Job/Quote and User areas.

| Filter | Custom Field Description |
|-------------------|--|
| Job Type | User-defined field for the categories of jobs. Create a selection for 'Quote' if customer requires quotes are removed from the job data. |
| Job Region | User-defined field for service areas or location grouping |
| Supervisor | User-defined field for individual responsible for one or more Job Leads or employees |

When a custom field that would correspond or map to the report filters does not exist, the data has not been collected and will not be available for reporting.

When requesting BI Dashboard activation identify which of the possible three custom fields you have defined so that they will be selected for mapping to the dashboards.

Tips and Techniques

Consider the following tips and techniques when you implement BI Dashboards.

- Custom fields must exist on Jobs/Quote or User areas. Absence of a custom field in any area will invalidate the corresponding filter type.
- Set custom field job type to be able to filter out quickly options that do not apply.
- Decimal point on any averages will calculate to one decimal point.
- Each Job Type percentage value is based off all of the Job Type
- Percentages will calculate to two decimal places.
- Data is refreshed every evening.
- Job Lead will receive full credit for all time on job. (Job Lead time + Crew time)
- Filter Names cannot be changed to match their custom field name.
- Job searches will include jobs and quotes in the account. Use the Job/Quote filter to view only jobs or quotes.
- Browser pop-up blockers will prevent drill-down functionality. Disable the pop-up blocker to be able to view the direct link from the detailed granular report into FieldAware.
- BI Dashboard is currently only enabled to your Admin and Manager level role.
- Any new user that you add to the account, excluding existing user will take up to 4 hours before they can be able to view the dashboard.

Note: Additional information on creating and managing custom fields can be found on the support site available from the 'help' button found in the upper right hand corner of FieldAware.