

# Job Aid: Report Extraction in Aspire

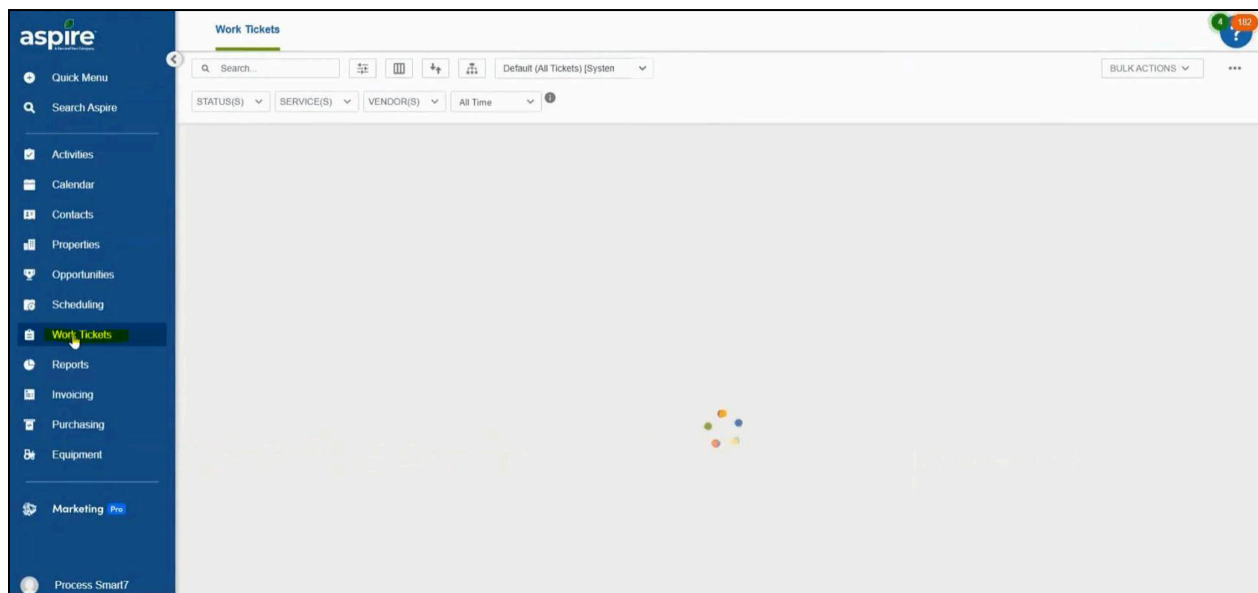
## Introduction

This job aid guides you through the process of extracting reports in Aspire, enabling you to access, format, and analyze critical data for insightful decision-making. Aspire's report extraction process is essential for obtaining valuable insights into landscaping services, including opportunities, work tickets, and property data. By following these steps, you can efficiently generate reports tailored to various divisions, such as Design and Build, Enhancement, Lighting, and Sound.

## Step-by-Step Instructions for Report Extraction in Aspire

### 1. Login and Access the Report Tool

- First, log in to Aspire.
- Start by clicking on the work tickets.



## 2. Filter the Required Data

- In the filter bar, search for the report you want to extract.

The screenshot shows the Aspire Work Tickets interface. A search filter is applied to the 'System' column, resulting in 2,500 results. The table displays the following data:

EST HRS	OCCUR #	MATERIAL CO...	ACT HRS	MATERIAL COST A...	EARNED REVEL...
15,316.76		\$8,173.60	5,347.29	\$8,349.29	\$314,917.91
0.00	1	\$0.00	0.00	\$0.00	\$0.00
0.00	2	\$0.00	0.00	\$0.00	\$0.00
0.00	1	\$0.00	0.00	\$0.00	\$0.00
0.00	5	\$0.00	0.00	\$0.00	\$0.00
0.00	6	\$0.00	0.00	\$0.00	\$0.00
0.00	4	\$0.00	0.00	\$0.00	\$0.00
0.00	3	\$0.00	0.00	\$0.00	\$0.00
0.00	7	\$0.00	0.00	\$0.00	\$0.00
0.00	8	\$0.00	0.00	\$0.00	\$0.00
0.00	9	\$0.00	0.00	\$0.00	\$0.00
0.00	10	\$0.00	0.00	\$0.00	\$0.00
0.00	11	\$0.00	0.00	\$0.00	\$0.00
0.00	12	\$0.00	0.00	\$0.00	\$0.00
0.00	13	\$0.00	0.00	\$0.00	\$0.00
0.00	14	\$0.00	0.00	\$0.00	\$0.00

## 3. Export Data to Excel

- Click on the three dots menu (typically in the top-right of the filtered results).
- Select "Export to Excel" to download the data in Excel format.
- Open the downloaded Excel file, copy all content, delete the existing data, and paste again to ensure data consistency.

The screenshot shows the Aspire Work Tickets interface with a search filter for 'Warranty' applied. The table displays the following data:

EST HRS	OCCUR #	ACT HRS	MATERIAL COST A...	M
4,439.75		6,258.85	\$174,096.74	
6.67	1	8.97	\$257.56	
0.00	1	0.00	\$0.00	
2.57	1	4.35	\$283.10	
0.00	1	0.37	\$0.00	\$18.00
1.00	1	12.96	\$283.25	\$28.33
31.60	1	0.00	\$0.00	\$48.05
0.00	1	0.00	\$0.00	\$52.50
0.00	1	0.00	\$0.00	\$70.00
2.00	1	0.00	\$0.00	\$0.00
18.41	1	32.73	\$2,180.25	\$2,688.30
7.67	1	6.24	\$152.67	\$152.67
3.75	1	2.37	\$56.65	\$141.63
7.20	1	8.58	\$152.00	\$720.73

The 'Export to Excel' button is highlighted in the screenshot.

## 4. Format the Excel Report

- Change the font of the data to “Calibri” and align all text to the center for a uniform appearance.
- Select the “All Other Sales” tab at the bottom to view various sales categories.

Property	Service Abr	Ticket #	Opportunity #	Scheduled	Anticipated	Status	Est Hrs	Occur #	Act Hrs	Material Cost Act	Material Cost Est	Total Material Quantity	Earned Revenue	Invoiced Amount	Revenue	Sales Type	Division	
99731	Landscape Project	11060324	05/01/24	05/01/24	Complete	6.67	1	8.97	257.56	470.84	9.98	1340.31	1340.31	1340.31	0	Enhancements	Fixed	
99732	DB Softscapes	1074106124	06/01/24	06/01/24	Complete	0	1	0	0	0	0	0	0	0	0	Design & Build	Fixed	
99733	Lighting Project	10741051424	05/01/24	05/01/24	Complete	2.57	1	4.35	283.1	155.76	4	550	550	550	0	Lighting & Sound	Fixed	
110454	EN - Warranty Work	19445100324	09/01/24	09/01/24	Complete	0	1	0.37	0	0	0	18	0	0	0	Enhancements	Fixed	
80215	Mulch Installation	6566052324	05/01/24	05/01/24	Complete	1	1	12.96	283.25	28.33	10	1638.72	1638.72	1638.72	0	Enhancements	T&M	
20054111524	HD Roofline	20054111524	10/01/24	10/01/24	Scheduled	31.6	1	0	0	0	0	0	0	0	0	2314 New Sale	Fixed	
20054111524	Winter Decor - Garla	20054111524	10/01/24	10/01/24	Scheduled	0	1	0	0	0	0	52.5	0	0	0	114 New Sale	Holiday Decor	
20054111524	Winter Decor - Wreath	20054111524	10/01/24	10/01/24	Scheduled	0	1	0	0	0	0	70	0	0	0	152 New Sale	Holiday Decor	
20054111524	Winter Decor - Remov	20054111524	10/01/24	10/01/24	Scheduled	2	1	0	0	0	0	0	0	0	0	700 New Sale	Holiday Decor	
106411	DB Softscapes	15520080824	08/15/24	08/15/24	Complete	18.41	1	32.73	2180.25	2688.3	52.48	8400	8400	8400	0	8400 New Sale	Design & Build	
106412	DB Softscapes	15520080824	08/15/24	08/15/24	Complete	7.67	1	6.24	152.67	152.67	30.56	1000	1000	1000	0	1000 New Sale	Design & Build	
79720	Mulch Installation	7662040824	04/01/24	04/01/24	Complete	3.75	1	2.37	56.65	141.63	2	600	600	600	0	600 Renewal	Enhancements	
80007	Annuala-Spring	8275041524	04/10/24	04/10/24	Complete	7.2	1	8.98	152	720.73	36.01	1200	1200	1200	1200	0	1200 Renewal	Per S
80008	Annuala-Summer	8275052424	05/01/24	05/01/24	Complete	13.8	1	8.86	1471.05	1132.9	306.78	1800	1800	1800	1800	0	1800 Renewal	Per S
80009	Annuala-Fall	8275092424	09/01/24	09/01/24	Complete	15.83	1	29.58	663.2	802.47	663.2	1200	1200	1200	1200	0	1200 Renewal	Per S
80010	Winter Planters	8275110124	11/01/24	11/01/24	Open	6	1	0	0	1437.83	0	0	0	0	0	1600 New Sale	Enhancements	
106592	Landscape Project	14582060724	06/01/24	06/01/24	Complete	120.43	1	97.4	4560.94	2322.85	3260.03	12450	12450	12450	0	12450 Renewal	Enhancements	
106593	Site Preparation, Re	14582060724	06/01/24	06/01/24	Complete	28.16	1	22.2	705.17	1058.26	50.9	4370	4370	4370	4370	0	4370 New Sale	Design & Build
106794	Landscape Project	16337061224	06/12/24	06/12/24	Complete	3	1	0	0	0	0	198	198	198	198	0	198 New Sale	Enhancements
102314	Mulch Installation	11812061724	12/31/24	12/31/24	Complete	1	1	9.99	283.25	28.33	10	1529.37	1529.37	1529.37	0	1529.37 Renewal	Enhancements	
101894	Mulch Installation	8297052324	04/01/24	04/01/24	Complete	8	1	11	226.6	226.6	8	1200	1200	1200	1200	0	1200 Renewal	Enhancements
96887	EN - Warranty Work	10620060424	05/01/24	05/01/24	Complete	0.4	1	0.75	80.28	92.78	2.24	0	0	0	0	0	0	Enhancements
100982	Landscape Project	11073060424	05/15/24	05/15/24	Complete	6.9	1	10.48	274.92	364.65	8.34	1250	1250	1250	1250	0	1250 Renewal	Enhancements
110821	Core Aerate & Over S	18572100124	09/01/24	09/01/24	Complete	0.42	1	1.29	123.87	123.88	0.78	195	195	195	195	0	195 Renewal	Per S
110822	Top Dress	18572100124	09/01/24	09/01/24	Complete	1.02	1	1.74	14.95	14.95	0.56	125	125	125	125	0	125 Renewal	Per S
108076	Landscape Project	17866090524	09/01/24	09/01/24	Complete	35.5	1	34.67	168.75	168.75	15	2850	2850	2850	2850	0	2850 Renewal	Enhancements
70267	Mulch Installation	7479032624	03/01/24	03/01/24	Complete	50	1	60.5	1614.53	1416.25	57	5235	5235	5235	5235	0	5235 Renewal	Enhancements
100241	Landscape Project	5905060624	06/01/24	06/01/24	Complete	8.65	1	18.99	1708.4	2055.24	13.52	4900	4900	4900	4900	0	4900 Renewal	Enhancements
105026	EN - Warranty Work	1401072324	07/15/24	07/15/24	Complete	0.75	1	2.14	297.34	302.45	2.4	0	0	0	0	0	0	Enhancements
78131	Mulch Installation	6567041224	04/01/24	04/01/24	Complete	1	1	10.98	311.98	28.33	11	1681.74	1681.74	1681.74	1681.74	0	1681.74 Renewal	T&M
102648	EN - Warranty Work	13007061524	06/15/24	06/15/24	Complete	0	1	0	0	0	0	650.44	650.44	650.44	650.44	0	650.44 Renewal	Enhancements
56236	Mulch Installation	6649051324	05/01/24	05/01/24	Complete	1	1	9	226.6	28.33	8	1233	1233	1233	1233	0	1233 Renewal	Enhancements
51717	Mulch Installation	5988051324	05/01/24	05/01/24	Complete	1	1	9	198.28	28.33	7	1143	1143	1143	1143	0	1143 Renewal	Enhancements
100406	Mulch Installation	11412051024	05/01/24	05/01/24	Complete	15	1	17.01	481.53	424.88	17	2550	2550	2550	2550	0	2550 New Sale	Enhancements
82999	Annuala-Spring	8289041624	04/10/24	04/10/24	Complete	1.2	1	2.34	25.35	120.12	6.01	320	320	320	320	0	320 Renewal	Per S
82900	Annuala-Summer	8289052424	05/01/24	05/01/24	Complete	2.3	1	0	243.03	188.7	51.13	530	530	530	530	0	530 Renewal	Enhancements

## 5. Analyze Using Pivot Tables

- Click on any sales type, then navigate to the “Pivot Table Analyze” option in the Excel header.
- Choose “Change Data Source” and confirm by clicking “OK.”
- Click “Refresh” to update all pivot tables with the latest data.

The screenshot displays the Microsoft Excel interface with the PivotTable Analyze ribbon selected. The PivotTable is structured as follows:

Month	Design & Build	Enhancements	Holiday Decor	Irrigation	Lighting & Sound	Snow	Grand Total
August, 2020		\$0			\$550		\$1,890
September, 2020			\$0				\$0
October, 2020			\$1,839				\$1,839
November, 2020				\$3,280			\$3,280
December, 2020		\$9,400					\$9,400
January, 2021			\$6,400				\$6,400
February, 2021		\$4,370	\$12,648				\$17,018
March, 2021			\$1,529				\$1,529
April, 2021			\$1,200				\$1,200
May, 2021			\$0				\$0
June, 2021			\$1,250				\$1,250
July, 2021			\$320				\$320
August, 2021		\$5,235					\$5,235
September, 2021			\$4,900				\$4,900
October, 2021			\$0				\$0
November, 2021			\$1,682				\$1,682
December, 2021			\$650				\$650
January, 2022			\$1,233				\$1,233
February, 2022			\$1,143				\$1,143
March, 2022			\$2,550				\$2,550
April, 2022			\$1,840				\$1,840
May, 2022			\$6,700				\$6,700
June, 2022			\$1,800				\$1,800
July, 2022			\$3,310				\$3,310
August, 2022			\$810				\$810
September, 2022			\$0				\$0
October, 2022			\$2,750				\$2,750
November, 2022			\$810				\$810
December, 2022			\$163	\$163			\$163
January, 2023			\$2,875				\$2,875
February, 2023			\$200				\$200

The PivotTable Fields task pane on the right shows the following configuration:

- Filters:** Sales Type, Status
- Columns:** Division
- Rows:** Property, Month
- Values:** Sum of Revenue

This job aid provides a structured approach to report extraction in Aspire, helping you obtain insights into properties, work tickets, and other landscaping service data. Following these steps ensures accurate and well-organized reports, assisting stakeholders in making data-driven decisions across various landscaping divisions.