



Advanced Reporting and **Gen BI**

AWS Quicksight Hands-on Session



Speaker Introduction



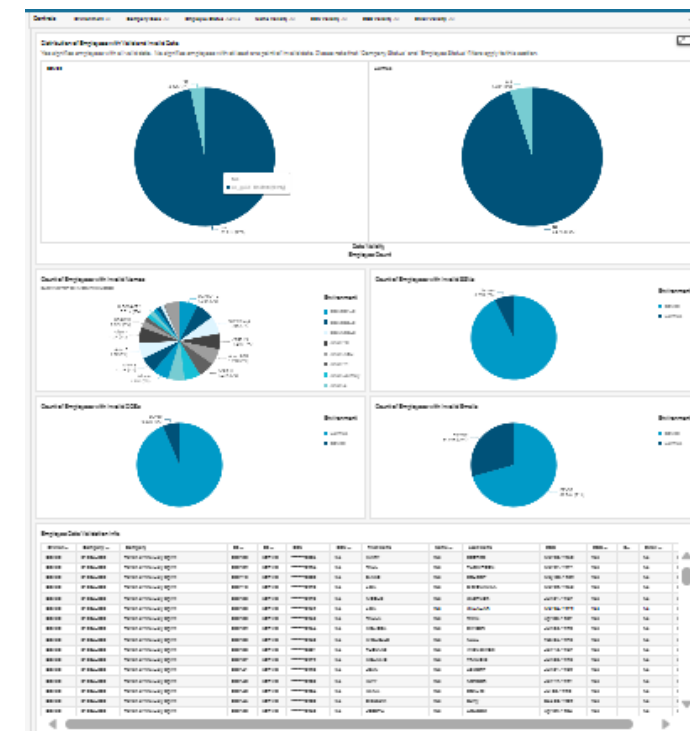
John Canada

Vice President, Engineering



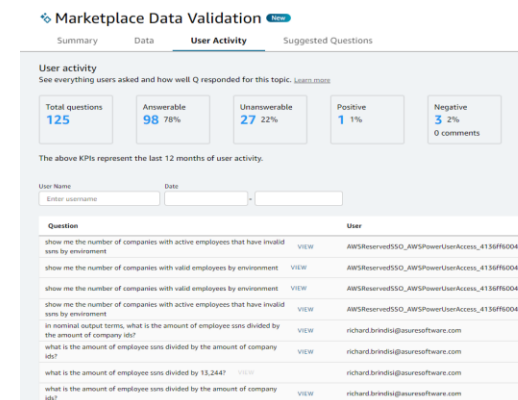
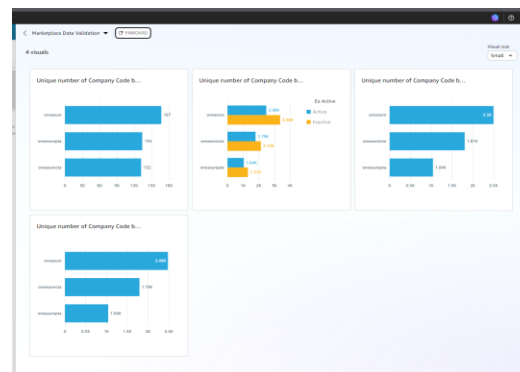
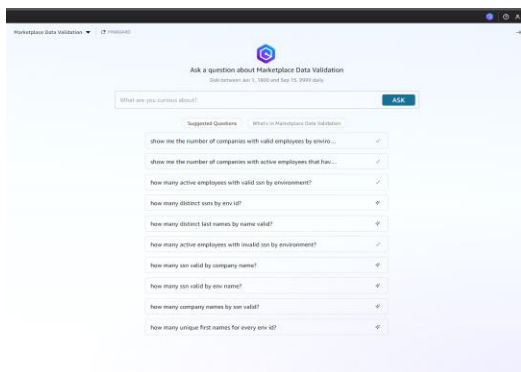
Quicksight Overview

- Quicksight is Amazon's cloud-native serverless Business Intelligence product, with built-in Generative AI capabilities.
- Asure is leveraging Quicksight to modernize reporting & data discovery in future products, through embedded dashboards and built-in data export capabilities.
- Dashboards provide users at-a-glance insights into their data, quickly recognizing important details without having to read through pages after pages of reports.
- Quicksight's SPICE data caching stores pre-calculated dashboard data, permitting nearly instantaneous results.
- All data used in dashboards can be exported in electronic format, including reporting grids.



Q Overview

- Q is Quicksight's Generative BI module, which harnesses the power of AI to interpret natural language questions and generate visuals as answers.
- Q "topics" are created by administrators, in which data and definitions are provided to the Gen BI engine, and then users can ask Q questions on the topics for which they have access.
- Multiple feedback and administration tools are provided that permit admins to "teach" the Gen BI engine to better answer questions, such as by reviewing feedback and approving answers that are more insightful.



Asure Dashboards

Employee Portal Data Validation Dashboard

Used to facilitate preparation for Portal onboarding, ensuring all necessary EE fields are valid (Name, Email, etc.)

Validation Rating Dashboard

Similar to the above, but at a company level to show companies that have enough valid employees to meet a given threshold (for example, 90%)

Portal Ineligibility Dashboard

Provides insights as to why companies are not eligible for Employee Portal (Opted out, etc.)

APTM Quarter End Filing Dashboard

Provides visual representation of QE filing progress for Tax Operations teams

Security

- Security is of the highest importance to Asure Software, and this dedication to safeguarding data is reflected in Quicksight and our implementation.
- Quicksight contains a robust Row-Level Security feature which effectively prevents users to access data they are not supposed to in multi-tenant data sources.
- Additionally, Asure's implementation of Quicksight in our products will maximize data isolation, with each tenant using their own copies of every asset (Dashboards, Datasets, etc.) that is hardcoded so they only see their own data.



Hands-On Session

- <https://us-east-1.quicksight.aws.amazon.com/>
- AWS Account: asure-sandbox
- Username: asure.quicksight.demo**1** to asure.quicksight.demo**10**
- Password: asur3QD!
- Dashboards & Q Topics
 - Data Warehouse Employee Data Validation
 - Employee level dashboard used to identify employees who need their SSNs, Names, Emails, and Birth Dates updated in order to enroll in Asure Portal
 - Data Warehouse Validation Rating
 - Company level dashboard used to identify companies whose employees meet a desired threshold of validity, so they may be enrolled in Asure Portal