

Analytics: Building & Operationalizing Reports

Spare Connect 2026 · Track 1

Your Co-Hosts



Pat Gregory

Senior Product Manager, Analytics

- Owns the analytics platform: reports, dashboards, Scout
- Spends his days helping agencies turn raw data into operating decisions



Peter Redpath

Senior Partner Success Manager

- Works hands-on with agencies launching and scaling Spare
- Spends his days helping transit teams operationalize their reports

Here's what we're covering in this session – from data fundamentals to decisions.

1

Why data matters

What you need to get good data – the foundations before anything else.

2

Report building

4 different ways to access data and pull the information you need.

3

Dashboard building

Turning building blocks into a complete, coherent service view.

4

From data to decisions

Reporting best practices and open Q&A to close out the session.

Getting Started Checklist

1

Laptop is on and/or charging.

2

Connected to the Wi-Fi.

Network: TWGroup

Password: Event5500!

3

Logged into your organization in
Spare.

Before we start — a few questions for the room

**Who runs a report at
least weekly?**

**Who reads a report
weekly?**

**Who makes a decision
based off of a report
weekly?**

Bad data = bad outcomes

The reports you build are the foundations of everything that matters. They need to be **rock solid** — and you need to understand how they work, end-to-end.

These reports drive:

Funding

Accurate data is what secures your next round of support.

Service optimization

Know what's working and where to improve.

Provider billing

Every trip record must be correct before a dollar moves.

Team performance

Track your team against the metrics that matter most.

Rider outcomes

Delivering on your mission starts with reliable data.

Themes of Reports

1

Performance → Service Optimization

How are my services performing, where are my operations falling short and how do I optimize.

2

Billing

What was delivered, when, and to whom? Accurate data means accurate invoices.

3

Compliance & Transparency

Regulatory reporting, NTD submissions, and audit trails all depend on clean, consistent data.

What you'll leave with

An understanding as how Spare handles data

A real report

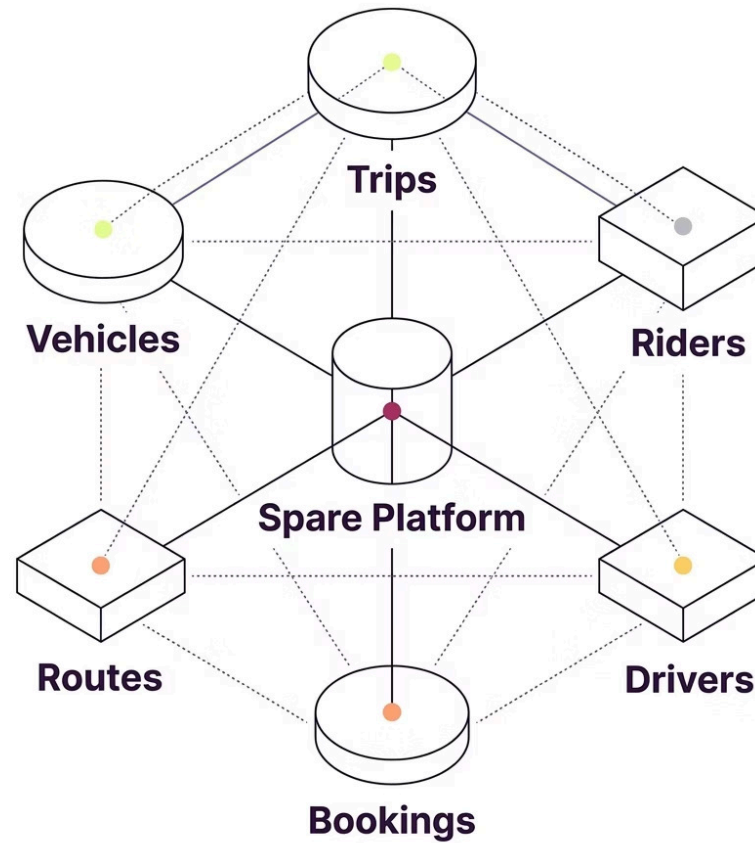
A real dashboard

A point of view on Scout

Reporting Best Practices



Data at Spare - it's all connected



Start with the question, not the data.



The old way

What data do I have?

Leads to reports built around available fields,
not real decisions.



The new way

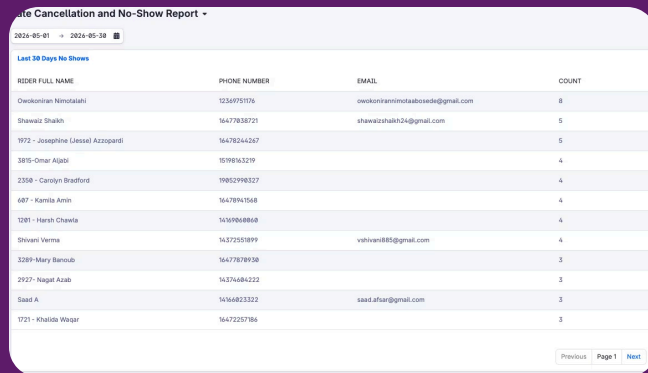
What question do I need answered?

Leads to reports that drive action, built from the
answer back.

Reports, Dashboards, and Scout

Reports

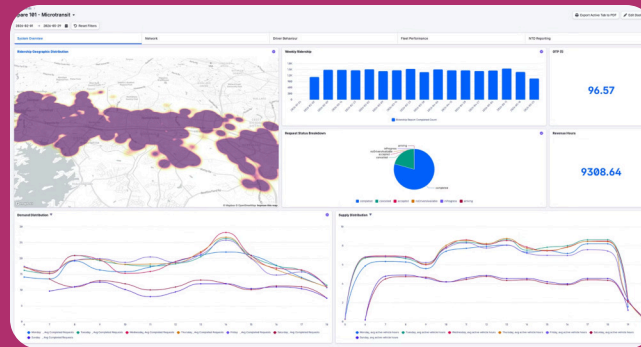
One question, precisely answered.
A query plus a visual. The atomic unit.



RIDER FULL NAME	PHONE NUMBER	EMAIL	COUNT
Owosintoni Nimotakali	1236979176	owosintonimotabosede@gmail.com	8
Shawaz Sheikh	16477938721	shawazsheikh24@gmail.com	5
Y972 - Josephine Lesell Azzopardi	16478244267		5
SB15-Omar Aljazi	15198163219		4
2358 - Carolyn Bradford	19892998327		4
687 - Kamila Amin	16478941568		4
1281 - Harsh Chavla	1616968866		4
Shivani Verma	16372551899	vshivan185@gmail.com	4
3289-Mery Benoub	16477878938		3
2927- Nagel Azab	16176484222		3
Saad A	16166823322	saad.aftan@gmail.com	3
1721 - Khalid Waqar	16472257186		3

Dashboards

A curated set of reports for a recurring decision. The meeting agenda made of data.



Scout

Ask a question in plain English. Get a draft report you can refine. The explorer's tool.

Analytics Home

Track your performance, identify trends, and make data-driven decisions

Your new reporting partner in crime{

View Dashboards

Browse Templates

Recent Reports

Completed duties last week
Created 12 days ago

On-time performance rate
Created 12 days ago

Which tool, which person, which moment

Analyst, mid-week deep-dive

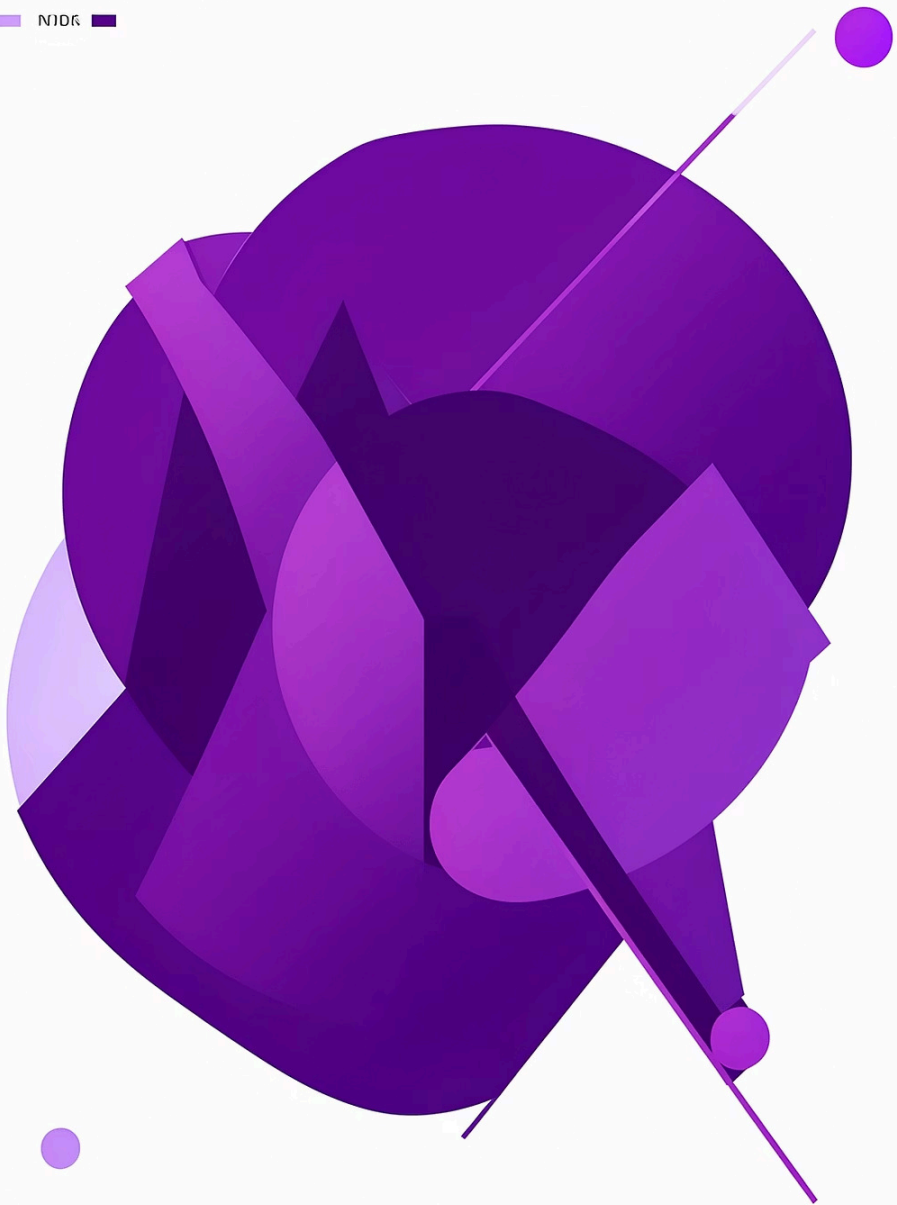
Scout to explore, then **Report** to lock the answer in.

Ops lead, Monday 7am

Dashboard. Pre-built. Glance, act, move on. **Scout** for ad-hoc.

Executive, monthly review

Dashboard built from your most-trusted Reports. Few numbers, well chosen.



PART 1

Creating Reports

20 minutes · 1 demo · 1 build along

Your Options for Creating Reports

From quick questions to deep dives, choose the right tool for the job.



Scout

Ask a question in plain English. Get an instant, editable draft report. Ideal for quick exploration or finding a starting point.



Report Builder

Build custom reports from scratch using a visual drag-and-drop interface. Offers full control over data selection and visualization.



From Template

Leverage pre-defined reports for common metrics. Fast and consistent, ensuring standard definitions are always used.



SQL Query

For advanced users, write direct SQL queries for maximum flexibility and performance, bypassing the visual builder entirely.

Every report is five decisions

1 Data source

What slice of the platform you're asking about

Trips & scheduling data

2 Measure

The number you actually care about

% trips on time (within 5 min)

3 Dimensions

How you want it sliced

By route, by week

4 Filters

What to leave out

Last 8 weeks · exclude cancellations

5 Visualization

The shape of the answer

Line chart, one line per route

What if you can't find what you're looking for?

Sometimes your questions demand a level of detail beyond standard reports. That's when you build a custom measure — tailoring the analytics precisely to your operational needs.

Example: Combined Accessibility Bookings → "Wheelchair" Trips

Build a single measure that combines **Scooter + Powered wheelchair + Wheelchair** bookings, mapped to wheelchair-accessible vehicle (WAV) trips.

BEGINNER



Scout — Ask a question, get a report

When to use

- You don't yet know exactly what you're looking for
- You want a fast first pass before committing to a full build
- You're exploring a new data area for the first time
- You need a starting point you can hand off to the Report Builder

How it works

Type your question

Ask in plain English — "How many trips were completed last week by service?"

Get a draft report

Scout generates a report with fields, filters, and a chart type pre-selected

Refine or hand off

Tweak it in Scout, or open it in the Report Builder to lock it in

BEGINNER



From Template – Fast, consistent, validated

When to use

- You need a standard metric that every agency tracks (on-time performance, ridership, etc.)
- You want to be sure you're using Spare's validated data definitions
- You're new to reporting and want a reliable starting point
- You need to get something on a dashboard fast

Template categories

Ridership & service

Trip volumes, on-time performance, no-shows

Operations

Driver hours, vehicle utilization, cancellations

Compliance

NTD-aligned outputs and reporting bundles

INTERMEDIATE



Report Builder – Custom reports, full control

When to use

- You know the question and need a precise, repeatable answer
- You need custom filters, groupings, or date ranges not covered by templates
- The report will live on a dashboard or be shared with others
- You're building on top of a Scout draft and want to lock it in

Key concepts

Data source

Choose the right slice of Spare data (trips, riders, drivers, etc.)

Measures & dimensions

Pick what you're counting and how you're grouping it

Filters

Narrow the data to the time range, service, or route that matters

ADVANCED



SQL Query – Maximum flexibility, for power users

When to use

- You need a metric or combination that the Report Builder can't express
- You're joining across multiple data sources
- You're building a one-off analysis for a specific operational question
- You know Spare's schema and want maximum performance and precision

What you need to know first

Spare's data model

Understand the key tables – trips, riders, bookings, drivers

SQL fundamentals

Aggregations, filters, GROUP BY, date functions

Your question

SQL rewards precision – know exactly what you're asking before you write a line

Your turn – 10 minutes

✔ Build a report showing **weekly on-time performance per fleet for the last 4 weeks.**

1 Choose your tool

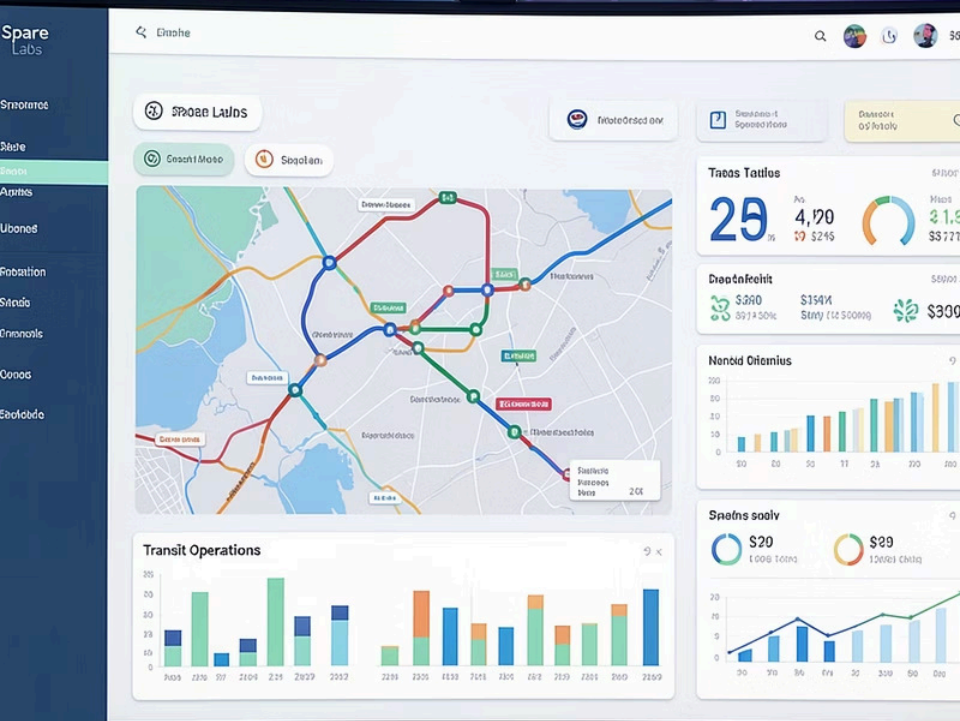
Scout, report builder, SQL

2 Choose your visualization

Table, chart, line

3 Validate

Check your work



Part 2 – Creating Dashboards

Four rules for dashboards

1

One goal per dashboard

If two dashboards answer the same question, kill one.

2

Filters at the top

Date, service, and operator – always reachable in one click.

3

Archive ruthlessly

A stale or misleading dashboard is worse than no dashboard.

Your turn – 10 minutes

✔ Build a dashboard for a **weekly ops review**, using the report you just built plus one other.

→ Drop in your OTP report

The one you built in the last hands-on block

→ Add one more report

Pick from templates – on-time performance or cancellations work well

→ Add a date filter and share

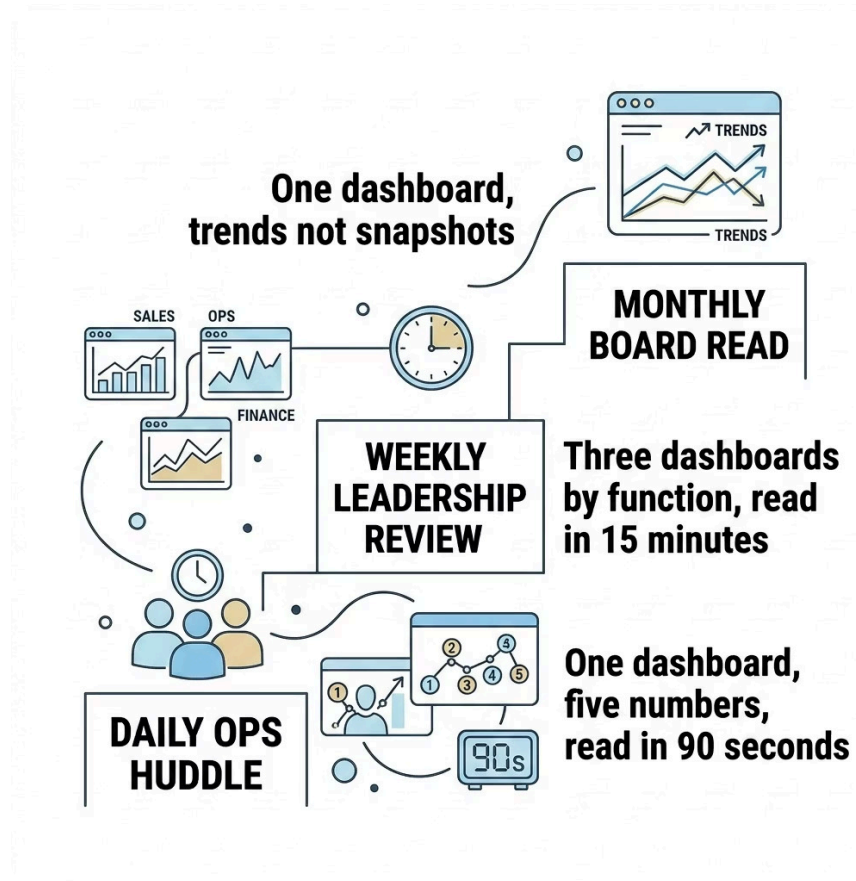
Confirm the filter inherits across both reports

Part 3 – From data to decisions



Dashboards should be tied to a goal

Not reporting, for reporting's sake!



Daily – Ops huddle

One dashboard. Five numbers. Read it in 90 seconds.

Weekly – Leadership review

Three dashboards by function. Read in 15 minutes.

Monthly – Board read

One dashboard. Trends, not snapshots.

The three mistakes that quietly kill reports

1. No naming convention

If you can't find it in 10 seconds, you'll rebuild it. Now there are two.

2. Remember your goal

Half-finished views that nobody owns. Build the atoms first.

3. No owner, no review date

A report without an owner is a rumour with a chart attached.

What you left with

An understanding as how Spare handles data ✓

A real report ✓

A real dashboard ✓

A point of view on Scout ✓

Reporting Best Practices ✓



Q&A

Pat Gregory

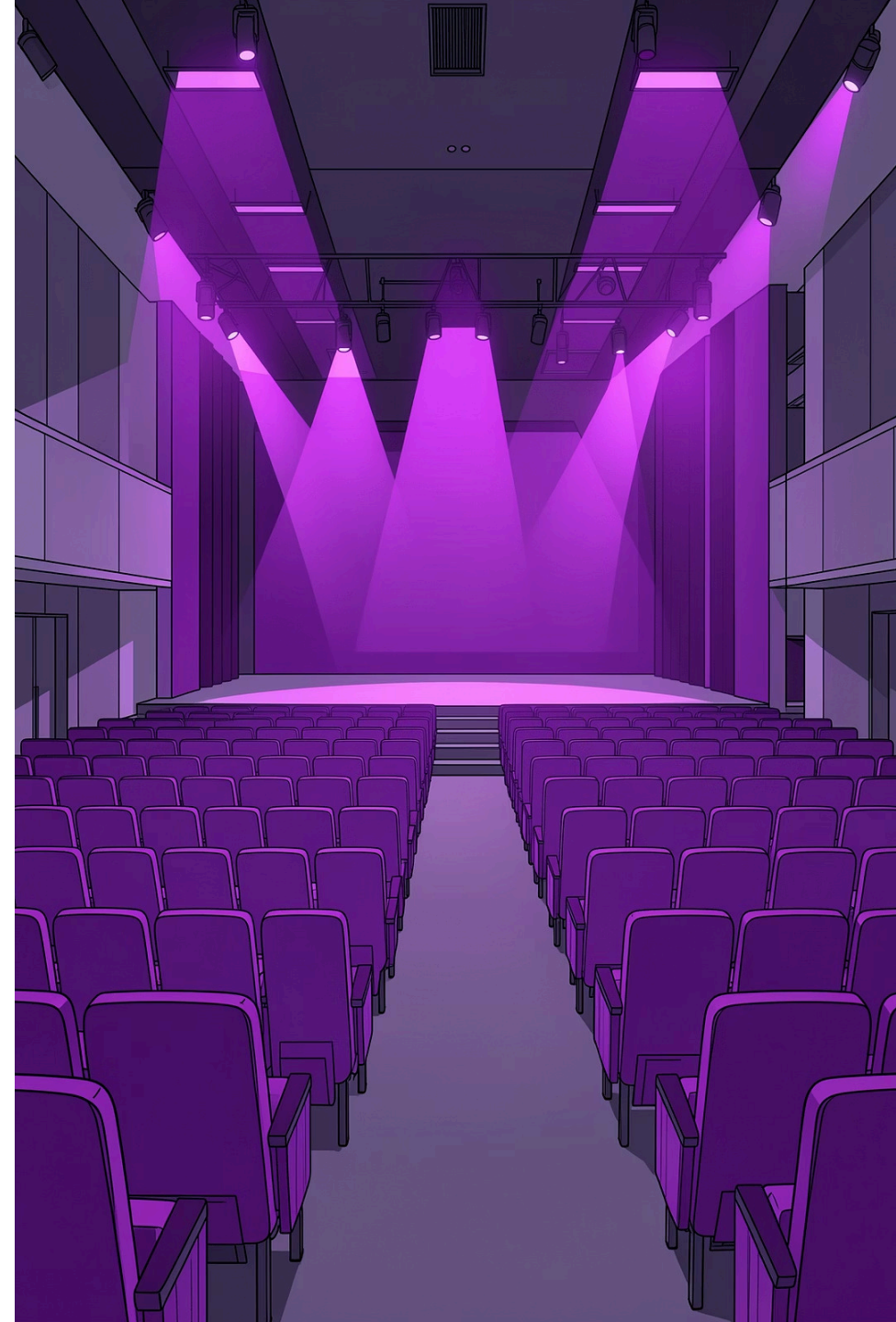
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Other Resources

- [Analytics documentation](#)
- [Template library](#)
- [Scout quickstart guide](#)
- This deck (link)