

Field Service

Configuring and Using Reports

F75104-05

Copyright © 2003, 2023, Oracle and/or its affiliates. All rights reserved

Authors: The Field Service Information Development Team

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display in any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

The business names used in this documentation are fictitious, and are not intended to identify any real companies currently or previously in existence.

Contents

Preface	i
<hr/>	
1 Overview of Dashboards and Reports	1
The Dashboard	1
Reports	18
Dashboard Charts and Reports	22
2 Dashboard Reports	33
Completion Progress By Volume Report	33
View the Completion Progress Report	34
View the Capacity by Category Report	35
Average Productivity by Activity Report	37
View the Average Productivity by Work Type Report	38
View the Resources by Statuses Report	39
View the Comparing Resources by Number of Activities Report	41
View the Comparing Resources Productivity Report	43
View the Auto-Routing Results Dashboard Chart	44
View the Routing Errors Reasons Report	46
View the Mean Time to Deliver Report	48
View the Percentage of Activities Met Report	49
View the Percentage of Customer Expectations Met Report	51
View the Average Travel Time Per Resource Report	53
View the Activities by Status Report	55
View the Mobile App Usage by Versions Report	57
View the Usage of the Mobile App Old Versions Report	59
View the Offline Synchronization Report	61
3 Routes and Activities Reports	63
About Routes and Activities Reports	63
View the InTime/Late/Early Activity Report	63
View the Notification Summary Report	64

Search the Messages Report With Work Order Number	65
Print the Route of a Single Resource	68
View the Route Statistics Report	69
View the Route Time Parameters Report	70
View the Routing Report	71
Manual Assignment Reports	72
View Scheduled Reports	76
How do I view the changes made to the Configuration pages?	77

4 Communication and Post Activity Survey Reports 81

About Communication and Post Activity Survey Reports	81
View the Average Number of Calls Per Customer Report	81
View the Percent of Accurate Last Messages Report	82
View the Percent of Contacted Customers Report	83
View the Last Message Window Size Report	83
View the Transferred Calls Report	84
View the Messages Report	84

5 Statistical and Administrative Reports 87

About Statistical and Administrative Reports	87
View the Average Travel Time Report	87
View the GPS Alerts Per Resource Report	88
View the Inactive Users Report	89
View the Number of Active Users Report	92
View the Inventory Report	92
View the Travel Statistics Report	93
View the Work Order Statistics Report	94
View the Work Statistics Report	96

6 Troubleshooting Reports 99

Report Words and Header Translations	99
Time-Out Messages	99

Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the [Oracle Help Center](#).

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program website](#).

Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we're working to remove insensitive terms from our products and documentation. We're also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Contacting Oracle

Access to Oracle Support

Customers can access electronic support through Oracle Support. For information, visit [My Oracle Support](#) or visit [Accessible Oracle Support](#) if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides. Please take one of the following surveys:

- For web-based user guide, [Web-based User Guide Survey](#)
- For tutorial feedback, [Tutorial Survey](#)

1 Overview of Dashboards and Reports

The Dashboard

You can use the Dashboard, a handy tool to view the reports in a clear graphical representation. Dashboard displays real-time reports in the form of charts that show the status of resources and help you to track their activities. For example, you can view Technician's productivity by work type chart

You can access the Dashboard by selecting Dashboards in the navigation menu.

You can use the **Actions** menu to drag and drop a dashboard chart to your personal Dashboard quickly and easily.

Dashboard Details

Dashboard reports are not configured the first time you access the application.

If you are accessing for the first time, your dashboard is empty, and displays the 'Use drag and drop to create reports' message.

The Actions menu shows icons for the available reports. Each icon consists of a graphical image of the chart corresponding to the report and the report name. A hint appears when you hover on the icon to display the type of data presented in the report.

Drag the icon from the menu and drop it. The Dashboard displays the details of the report accordingly.

Click any slice in a pie chart or bar in a bar graph to view the details in the dashboard.

Redwood Style for Dashboards Page

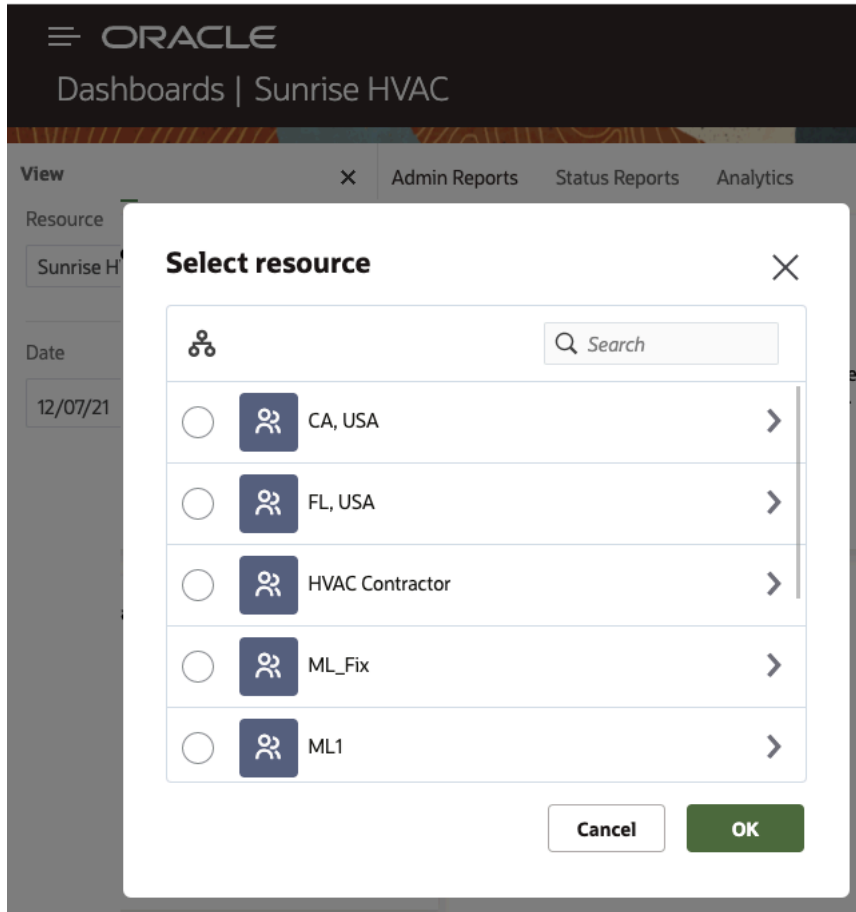
Starting with Update 22A, the Dashboards page.

Here is the list of Dashboard page user experience improvements:

- The style of the resource and date filter sidebar is unified with the Resource screen user interface. Now, the resource and date filter sidebar is evident, intuitive, and open by default when navigating to the Dashboard page.

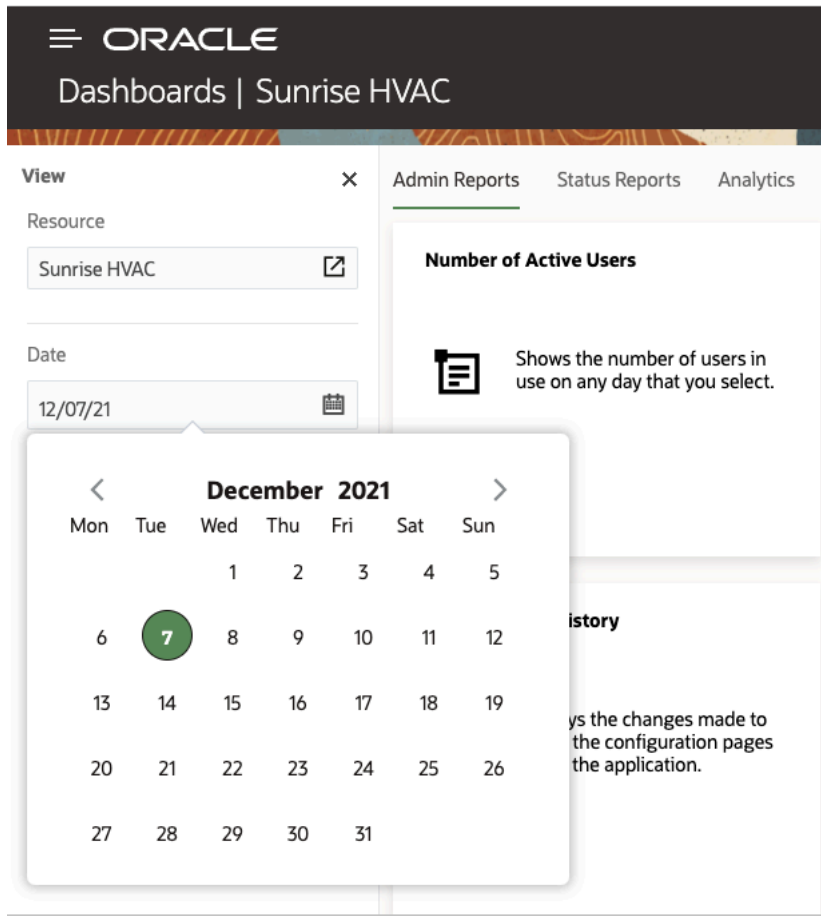
- You can filter the dashboard charts or reports using the selections within resource dialog box. A resource can be either an organization unit, bucket or field resource.

This image shows the Select resource dialog box:



- You can select a date from the date picker and filter the dashboard charts or reports in the Dashboard page accordingly.

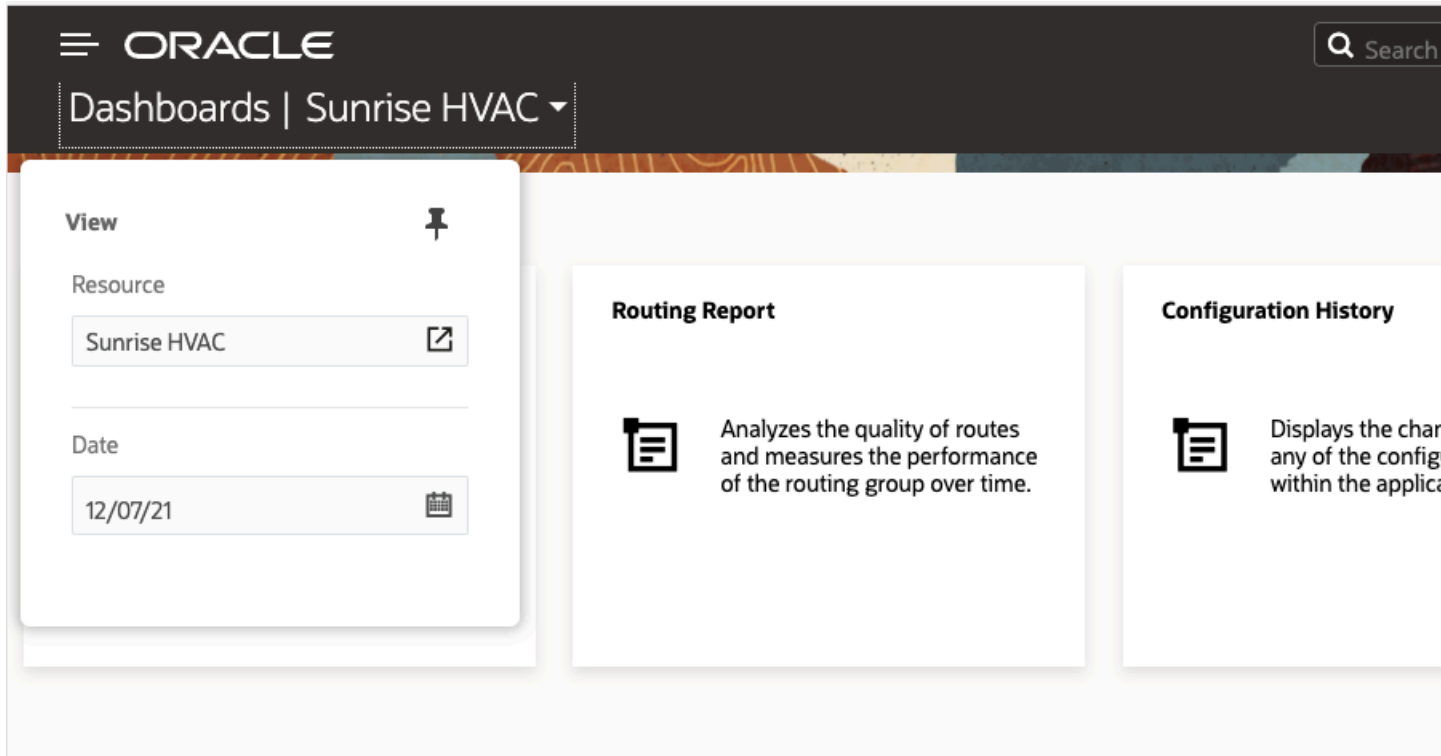
This image shows the Date Picker:



- The filter sidebar can be kept closed or opened, based on how you want to manage the space in the Dashboard page.

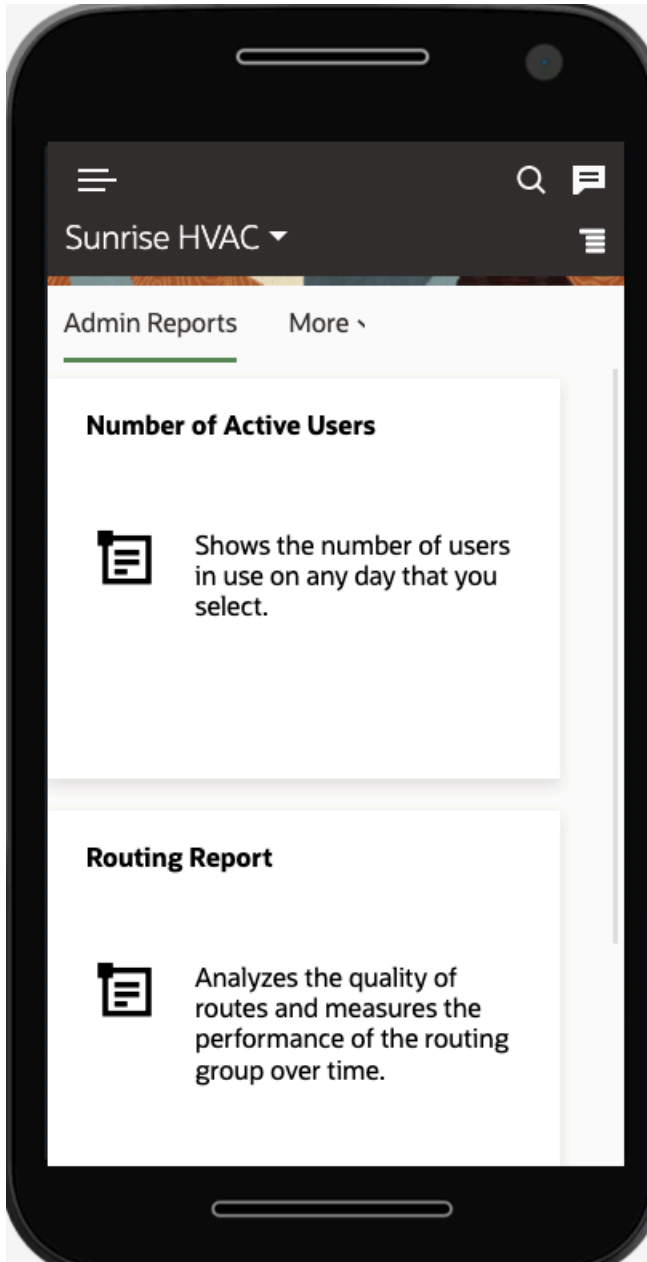
- You can select the user type from the header to see the filter in its closed mode. You can use the pin icon to keep the sidebar open on the Dashboard page.

This image shows the Dashboard page with View sidebar:

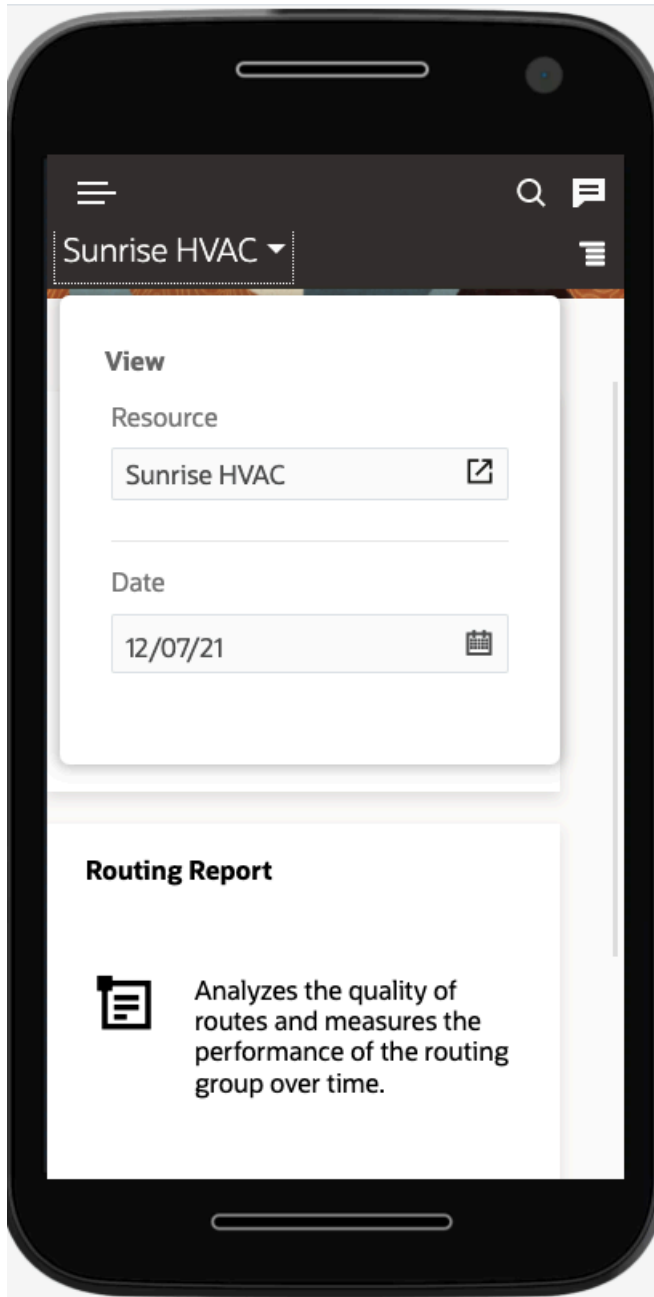


- The resource and date filters are automatically closed in small devices (those with resolution below 600 pixels) and appear as an overlay on top of the Dashboard page. The pin icon is available on screens upto 600 pixel resolution.

This image shows the Dashboard page with closed View sidebar:



This image shows the Dashboard page with View sidebar:



- You can select the resource or date from the filter.:

This image shows the Select resource page:

- The resource and date filter will be viewed in full screen on small devices in the range of 320 - 375 pixels resolution.

Note: Starting with Update 22A, the resource and date filter option are not available for Dashboard pages when accessed from configuration screens. For example: Configuration, Dashboards.

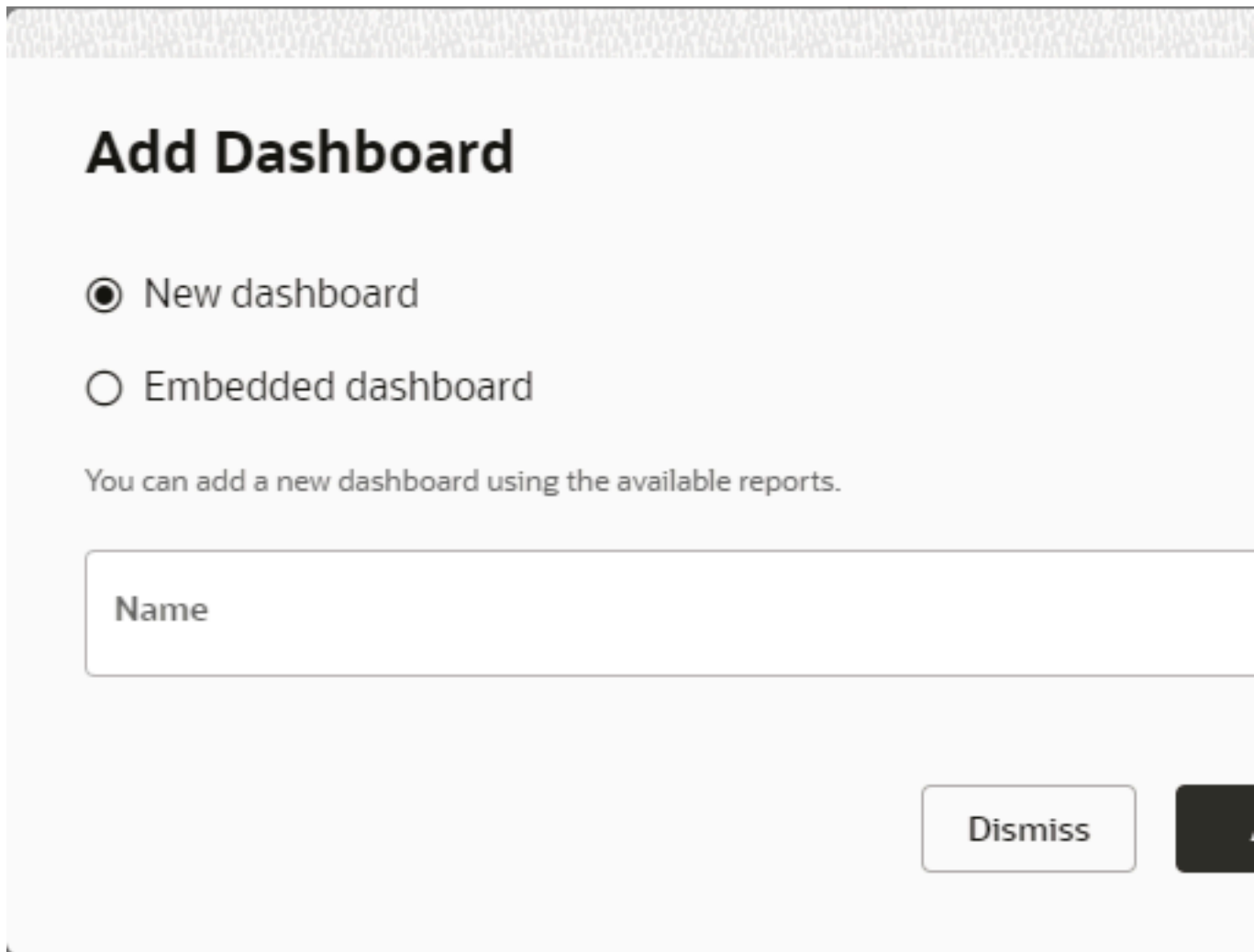
Dashboards Page User Experience Improvements

Starting Update 22C, the Dashboards page has Redwood style to provide better user experience. It provides the same look and feel as other pages in Oracle Field Service.

The Dashboards page includes these changes:

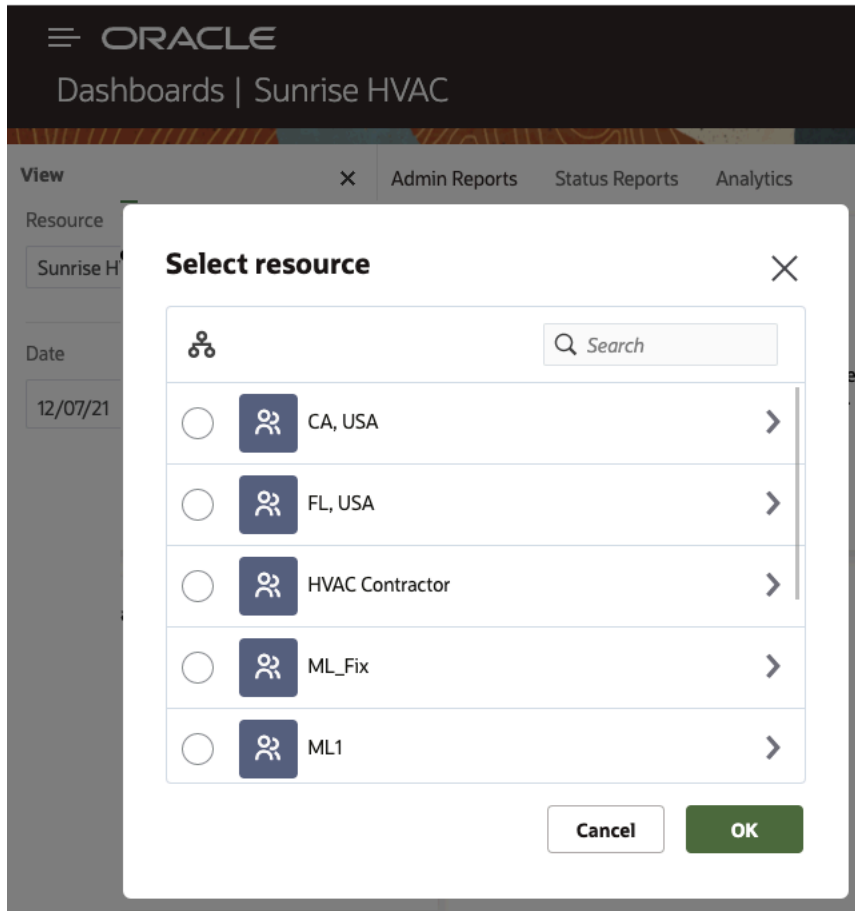
- The input text fields, radio buttons, check box, and buttons (such as Add, Dismiss, Select and Rename) follow the standard Redwood style.
 - Add Dashboard Dialog Box

This image displays the Add dashboard dialog box.



- Select Resource Dialog Box

This image displays the Select resource dialog box.



- o Redwood Style Drop-Down List in a Dialog Box

The drop-down input field or check box has a new style in chart tiles.

This image displays the Activities by statuses dialog box showing a drop-down list.

Activities by Statuses

(06/07/22, Best Regression Check)

Shows the number of activities by statuses for the specified day.

Always show report for resource: **Best Regression Check**

Activity type group
Any activity type ▼

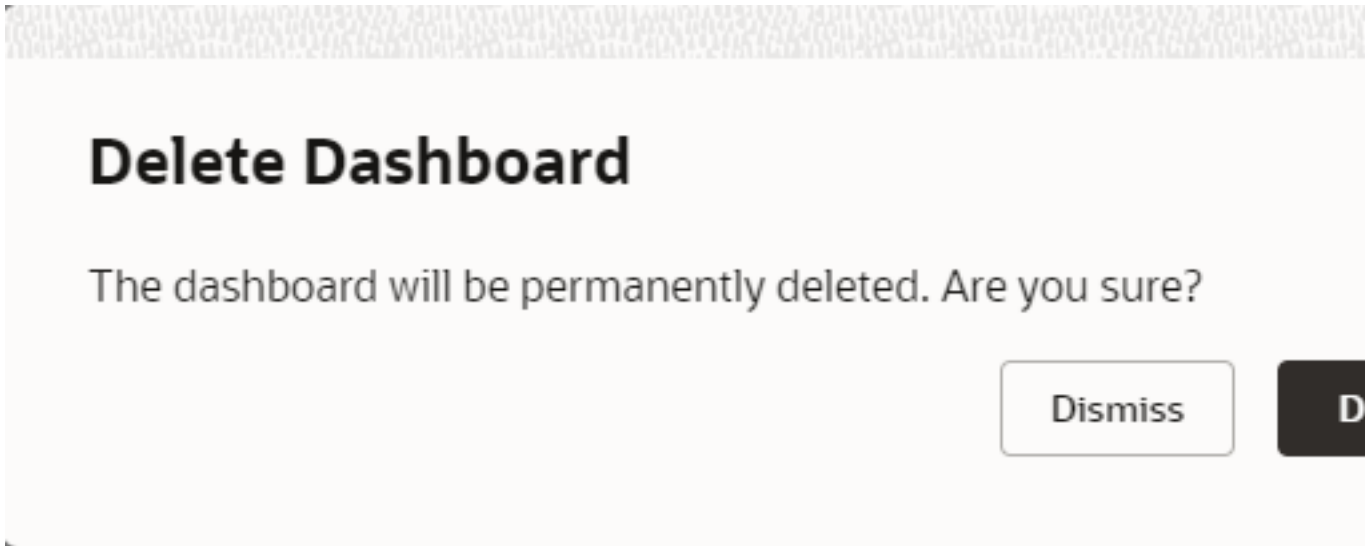
Date
Selected day ▼

Close

Save

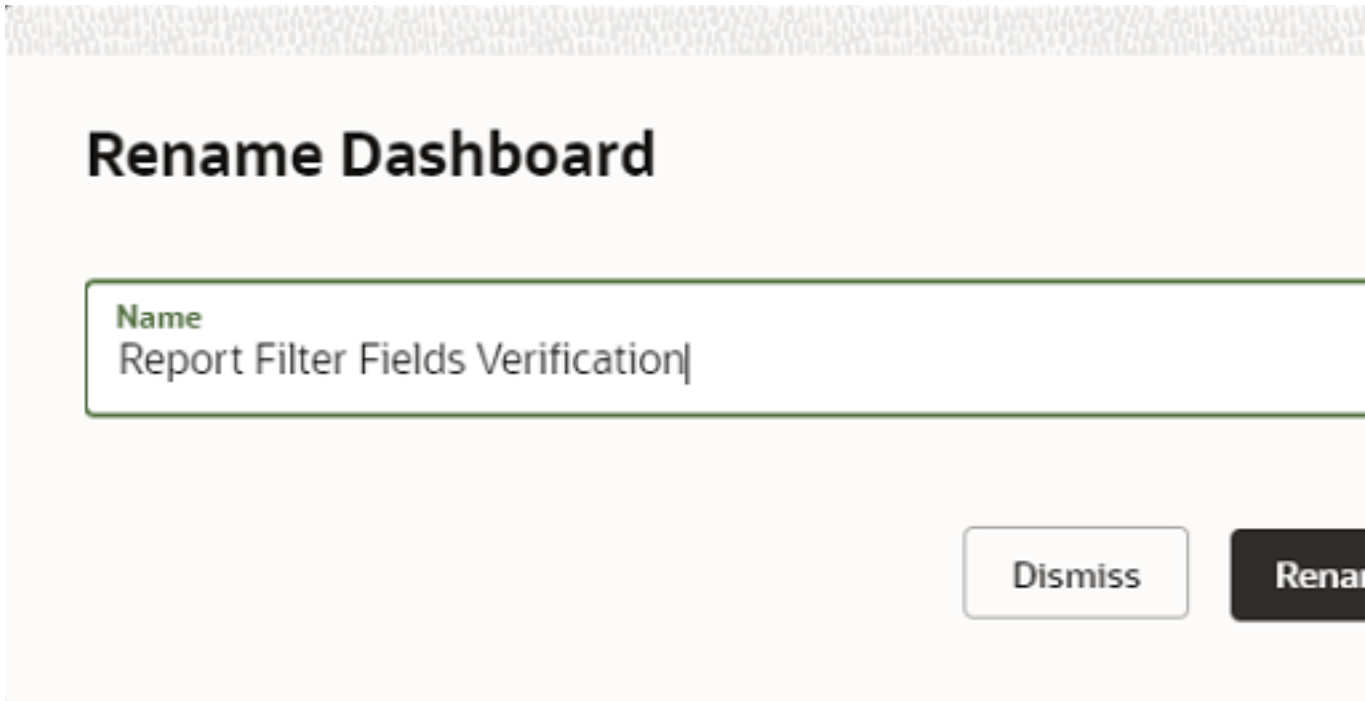
- The dialog box on the Dashboards page follows the Redwood style providing a unified experience across the application.
 - Delete dashboard dialog box

This image shows the Delete dashboard dialog box:



- Rename dashboard dialog box

This image shows the Rename dashboard dialog box:



Add Dashboard Charts

Dashboard charts graphically represent the status of resources and help you to track the activities of resources. You can add dashboard charts to your personal Dashboard using the **Actions** menu.

The **Actions** menu shows icons that represent the reports that are available to you. You can configure your Dashboard to view the charts that interest you most.

To add Dashboard charts:

1. Click **Dashboard** to open the Dashboard.
2. Click **Actions > Configure Current Dashboard**.
You can see a set of icons that represent the reports available to you. Each icon consists of the graphical image of the chart corresponding to the report and the report name.
3. Hover your mouse over any icon.
A hint appears describing the type of data presented in the report.
4. In the **View** pane, select the resource and the date for the report you want to view.
5. Drag the appropriate report icon to your work area.
A chart is automatically created based on the resource and date selected in the **View** pane.
6. Repeat the above steps to add more reports to the Dashboard.
If you quits the Dashboard after creating the charts, the layout of the charts is saved and displayed the next time you access the Dashboard.
7. Click X to hide the Dashboard configuration menu.

Note: You cannot hide the Dashboard configuration menu when the Dashboard is empty.

All charts currently configured in the Dashboard show data for the resource that is currently selected in the **View** pane. Whenever you select a different resource, all charts are updated with the data related to the new resource immediately. It is not necessary to configure the whole set of charts for each resource.

Navigate the Dashboard

Use the navigation icons in the screen to navigate the Dashboard.

To navigate the Dashboard:

1. Click the navigation button and click **Dashboards**.
2. Open a report.
3. Click the **Preferences** icon.
You can see the options to set the report to open with the selected resource, organization, or bucket.

4. Optionally, set values for these fields.
 - a. Click **Always show report for resource** check box to ensure that the most current chart data displays whenever you open the Dashboard.
 - b. Select a date from the drop-down list.

By default, the chart displays statistics for the current day. This screenshot shows the **Always show report for resource** setting:

Activities by Statuses
(07/09/23, FL, USA, Customer)

Shows amount of appointments by statuses

Always show report for resource: **FL, USA**

Activity Type Group
Customer

Date
Selected day

Close Save

- c. Click **Save**.

This chart always displays in your Dashboard for the selected resource, bucket, or organization, regardless of the entity you selected in the resource tree.
5. Click the **Minimize** icon to hide the chart from view.

See [Modify Dashboard Reports](#) for details about minimizing charts.
6. Click the **Close** icon to close the Dashboard.

Modify Dashboard Charts

You can modify the display of a chart by modifying the chart properties such as minimizing, restoring, configuring and deleting.

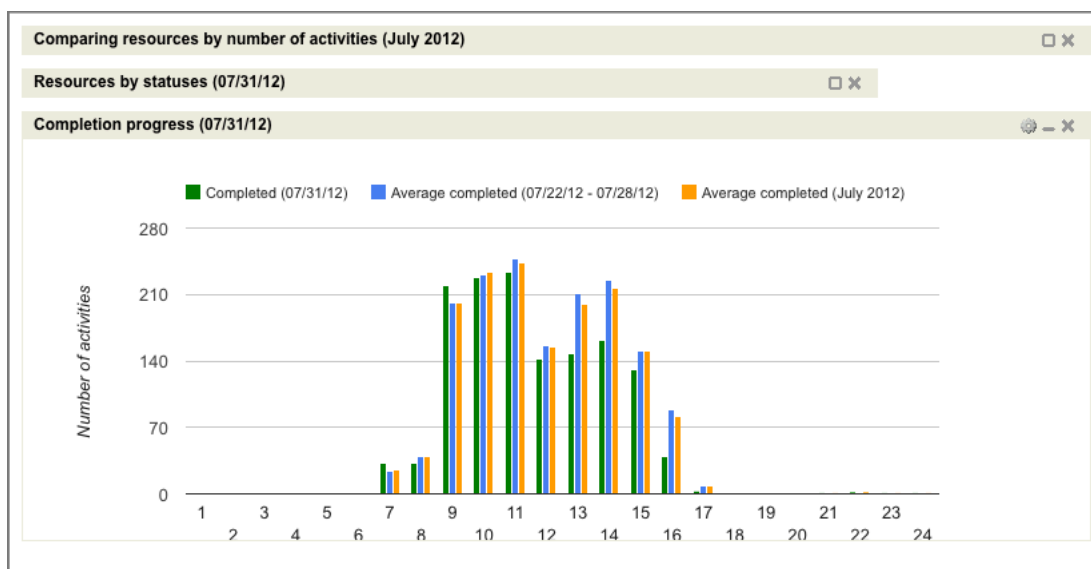
Minimize Dashboard Charts

To minimize Dashboard charts or reports:

1. Click the **minimize** icon.
The chart setting window collapses into a single title bar with two icons – maximize and 'remove.
2. Click the **Minimize** icon to hide the chart from view.

A minimized Dashboard floats to the top of the Dashboard page, where it appears with other minimized dashboards.

This figure shows how minimized dashboards appear in the Dashboard page.



3. Click the **maximize** icon to restore the chart to its original size.
4. Click the **Close** icon on the title bar to remove the chart from the Dashboard.

Maximize Dashboard Charts

The size of a chart displayed on the Dashboard page can be increased or decreased according to the user's preferences.

To maximize a chart on the Dashboard page:

1. Locate the resizing tool in the bottom right corner.
2. Drag the corner of the chart window to resize the chart as necessary.
3. The chart content (diagrams and legend) is resized accordingly.

Animated Highlighting in Charts

Discusses the animation actions that occur when data is highlighted in charts.

All reports (except Gauge) have legends describing the data shown in the charts.

When the mouse hovers over a legend item, the corresponding section of the chart is highlighted. The same effect occurs when the mouse hovers over the chart itself.

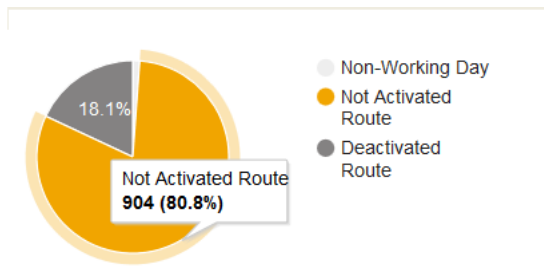
If a chart legend item is clicked, the corresponding chart section remains highlighted even when the mouse is removed. This gives the user a clearer view of the data shown on the chart.

To remove the highlighting, the user has to click the same legend item again or click a different item to have it highlighted instead.

Chart Hints

A set of hints displayed to assist the user working on charts. All charts (except Gauge) have hints containing the details of the data used in the chart. The hints appear when the mouse is hovered over the chart sections. Depending on the type of the chart and the type of the report, the hint content may vary.

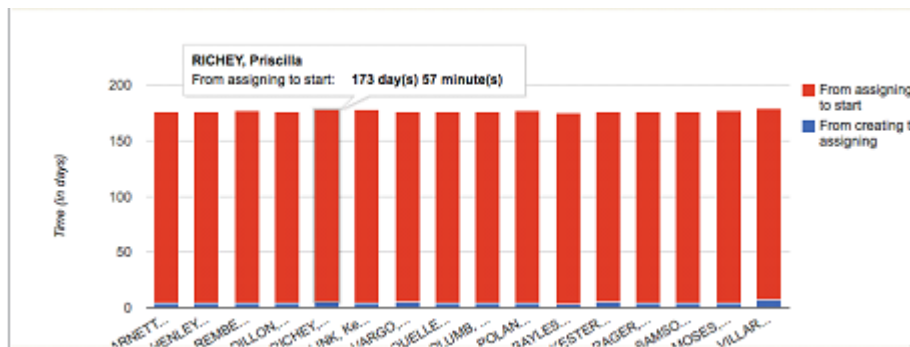
This figure shows the dashboard window for Resource by statuses report. The dashboard window displays a pie chart with chart hints for a selected slice.



In pie charts, the hints contain the description of the data to which the selected 'slice' corresponds, the absolute value of the slice and its percentage value.

In column charts, the hints contain the description of the data to which the selected column corresponds and its absolute value.

This figure shows the dashboard window for Mean time to deliver report. The dashboard window displays a column chart with chart hints for a selected resource.



Dashboard Calendar

Selecting a date opens a calendar showing the three-month period around the selected date.

Depending on the report type, the chart displays data for a certain date or for a date range. In any case, the data displayed in the chart is related to a date selected by the user. Initially, the charts are created for today's date which can be changed if necessary. The date is displayed in the calendar window which has a left and right arrow to switch the currently selected date one day earlier or later.

Clicking the calendar window opens the calendar for a three-month period with the currently selected month in the middle.

A different date can be selected by clicking it in the calendar. The left and right arrows shift the calendar one month earlier or later. When the date is clicked, the calendar is hidden and all charts in the dashboard are immediately updated with the data corresponding to the selected date.

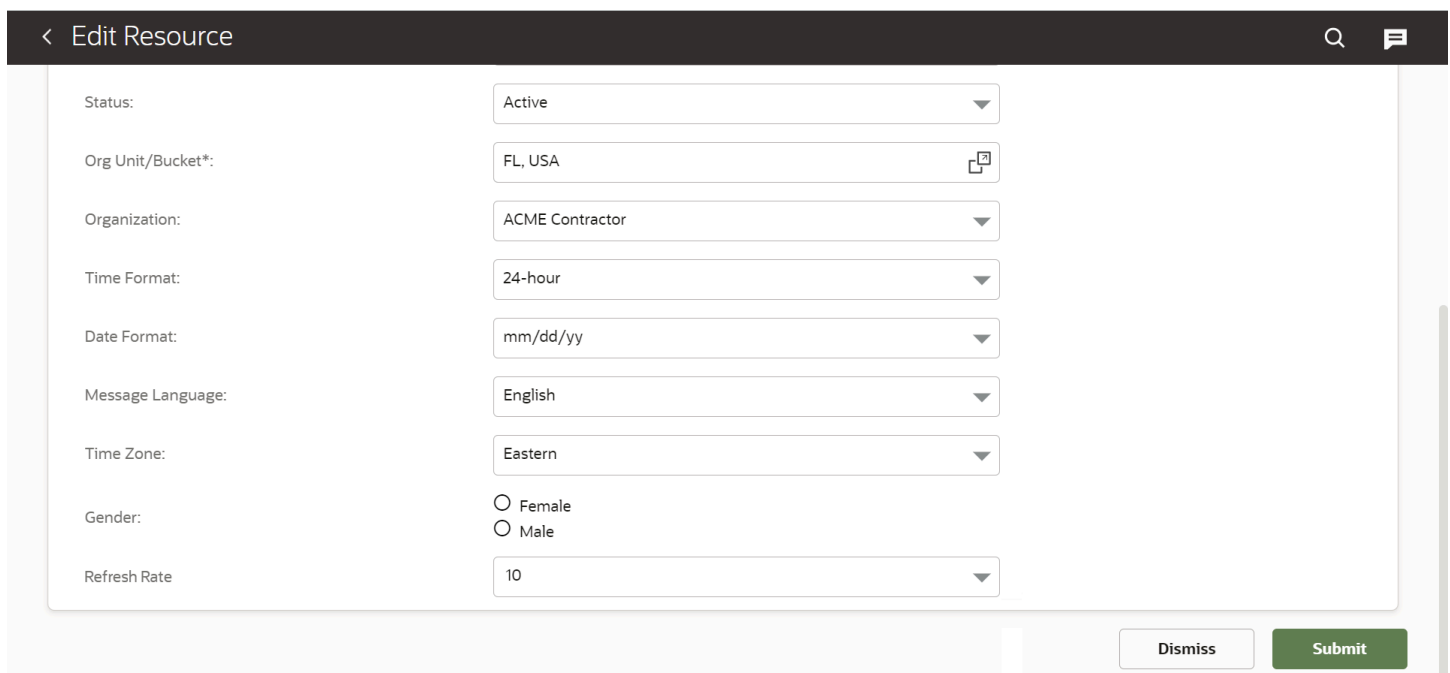
Auto Refresh Dashboard Charts

Dashboard charts are refreshed automatically based on the refresh rate configured at the resource level.

You can configure the refresh rate in the minutes field in the Edit Resource screen. The dashboard gets automatically refreshed based on the duration set for the resource.

1. Click the navigation button and select **Resources**.
2. In the Resources screen, select a resource.
3. In the Resource Info screen, click the Properties icon and select Edit from the drop-down list.
4. In the Edit Resource screen, type a value in the Refresh rate field.

This image displays the Edit Resource screen showing the Refresh rate.



The screenshot shows the 'Edit Resource' screen with the following fields and values:

Field	Value
Status:	Active
Org Unit/Bucket*:	FL, USA
Organization:	ACME Contractor
Time Format:	24-hour
Date Format:	mm/dd/yy
Message Language:	English
Time Zone:	Eastern
Gender:	<input type="radio"/> Female <input type="radio"/> Male
Refresh Rate	10

At the bottom right, there are two buttons: 'Dismiss' and 'Submit'.

Results:

In case no refresh rate duration has been set for the resource, the default refresh rate of the chart will be taken into account for automatic data refresh.

Report	Delay
Routing Errors Reasons	1h
Resources by Statuses	10m
Percent of Customer Expectations Met	1h
Percent of Activities Met	1h
Mean Time to Deliver	1h
Completion Progress by Volume	10m
Completion Progress	10m
Comparing Resources Productivity	1h
Comparing Resources - Number of Activities	1h
Capacity by Category	5m
Average Travel Time per Resource	1h
Average Productivity by Activity Type	1h
Autorouting Results	1h
Activities by Statuses	10m
Activities by Capacity Categories	1 h

Set a Date Filter

You can view date and resource as a generic filter for all the charts or reports configured in a dashboard page. You can select a date from the calendar. The selected date will be applicable for all the dashboards on the Dashboards page. You can choose to see data for the selected day or for the day before selected from the dashboard.

Date Filters

You can select a date from the calendar. The selected date will be applicable for all the dashboards on the Dashboards page. You can choose to see the data for the selected day or for the day before selected from the dashboard.

To set a date filter

1. Click the Calendar icon and select a date.
2. Charts will display data for the selected month / month before selected/ selected day/ Day before selected

When the user drills down a report from the Dashboard page, report details page will displayed based on the selected date. Report details page will display both From date and To date as the date selected from this page by default. You can change these dates from the filter in the Report details page.

Resource Filters

Resource filter can be used for displaying the data of charts at buckets or organizations or at individual resource level. When the user drills down a report tile, the Report Details page will be displayed based on the resource or resource group selected in this page.

My Dashboard

Existing Dashboard charts selected in the legacy Manage application will be displayed as a new tab "My Dashboard" in Oracle Field Service application:

My Dashboard tab will display only existing charts available in legacy Manage application. New charts added to legacy Manage application after upgrade will not be displayed in the My Dashboard tab.

The user can configure more charts or reports into this tab from the Core application.

Reports

You can display a report by clicking the Navigation button and directly selecting the name/title of the report from the navigation pane.

You must have a user name and password to log in to the application. If you do not know your user name or password, contact your system administrator.

You can view the following categories of standard reports:

- Routes and activities reports
- Statistical and administrative reports

Note: Report column names are available only in English and cannot be modified.

Grant Permissions to View Reports

You can use **User Types** page to set the permissions for users to view the reports.

To grant permissions to view a report:

1. Click **Configuration**.
2. In the Configuration page, click **User Types**.
The **User Types** page appears.
3. Select a user type and then select **Screen Configuration** tab.
4. Click **Main Menu Items** to open the Permissions screen for commands displayed on the main menu.
5. To select the reports with default permissions, click the **Click to Add** button.
6. In the **Add Action** dialog box, click the check boxes next to each report to add it and click **OK**.

7. Click the profile under the **Actions** column to add each profile.
8. Select a profile and click **Modify**. Select the access mode you want to use for the profile selected and click **Save**.
Note: If the Modify dialog box displays Read-only access, you cannot specify any conditions to validate access to the report.
9. Click **Close**.

Associate a Report With a Resource

All the dashboard reports show the data related to the performance of a resource. Therefore, any report and the corresponding chart must be associated with a resource.

The Dashboard window has a resource tree similar to other screens. The resource tree shows the hierarchical structure of all resources in the company with the root resource on top. When the Dashboard window is first opened, the root resource is selected automatically. This step must be performed to associate the report to any resource other than the root resource.

To add a dashboard chart to the dashboard:

1. Click **Dispatch**.
2. Select **Dashboard** from the drop-down menu to open your Dashboard.
The **Dashboard** screen appears with a resource tree. The resource tree shows the hierarchical structure of all resources in the company with the root resource on the top.
3. Select a resource from the resource tree.
4. Drag a report icon from the configuration menu and drop it in the **Dashboard** window.
The corresponding chart appears in the **Dashboard** window.
5. To display the chart, click the **Show** icon.
6. To hide the chart, click the **Hide** icon.
The charts are saved automatically when you quit the dashboard and displays on the screen when you access the dashboard again.
7. Click **Configure dashboard**.
The Dashboard configuration menu is closed. You cannot hide the configuration menu if the Dashboard is empty without any charts.
The chart configured for the selected resource in the resource tree is displayed on the dashboard window. If you select another resource, the charts are updated with the resource's data.

Refresh a Report

You can refresh a report either automatically or manually. This task discusses how to manually refresh reports.

Automatic refreshing of reports:

Each report has its own auto-reloading interval, after which it is recalculated and redrawn. For example, some reports refresh automatically after 10 minutes and some after one hour. At the same time, the general reloading timer that affects all application windows affects the Dashboard page. This setting is found in the **My Display** settings.

Note: Short refresh intervals may slow down the system. The recommended refresh interval is 5 minutes or longer.

Manual Refreshing

A report is refreshed when:

- the browser window is refreshed
- a different resource is selected in the resource tree (if the report is not set to display data for a single resource only)
- the report settings are changed
- the date is changed in the calendar
- the user starts the application in another browser tab and returns to the tab where the Dashboard is open

Only those reports that have new data are refreshed after one of these actions.

To refresh the tables manually:

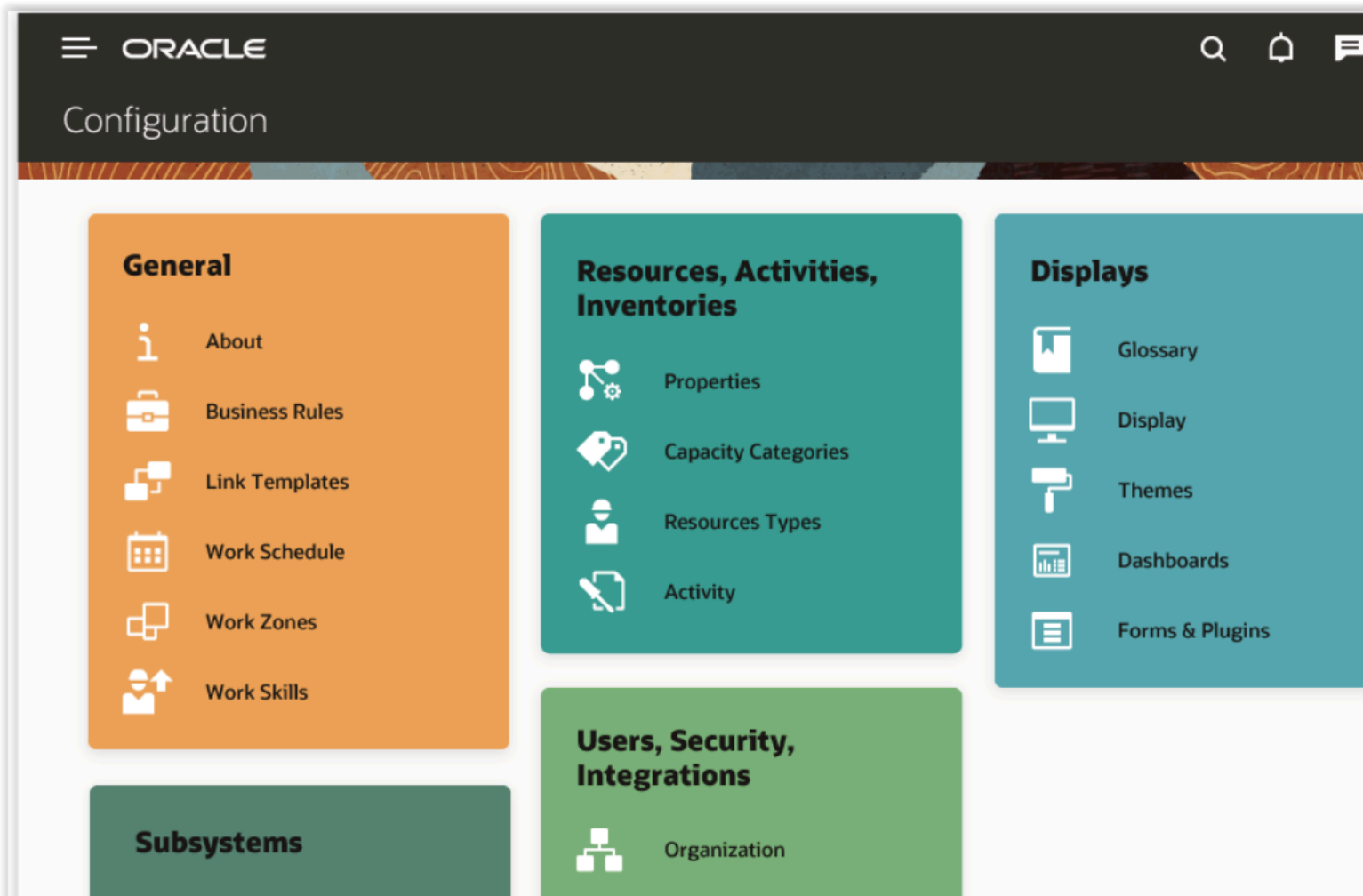
1. Click **Refresh** in the report.
2. Choose another bucket/resource in the Resource Tree (if report is not fixed for a certain resource/bucket).
3. Change the fixed resource (if the resource was fixed).
4. Change report settings.
5. Change the report date.
6. Open the application in another browser tab, and return to the **Dashboard**.

Redesigned Configuration Page

The Configuration page has been redesigned and now adopts the Redwood user experience. The links to other screens are logically grouped in the order in which the system should be configured.

The main screen area of the Configuration page has been redesigned and adopts the Redwood user experience. The links to other screens are logically grouped into sections following the order that the system should be configured. Each section appears in a specific color, and now users can find the links on the screen easily, by visually associating section colors with content within each section.

Select Navigation, Configuration to display the Configuration page



A redesigned configuration page follows a responsive format and mirrors content on desktops, tablets, and mobile phones.

Export a Report

Any report can be exported as a **.csv** file. You can download and use the data in any reporting tool. When you print or export a report, it's printed or exported in the language set in the **Company language** field of the **Display** page.

The **Export** option is available for all reports in the work area.

To export a report:

1. Open **Dashboard**.
2. Open the report that you want to want to export and click **Export**.
The **Open Report** dialog box appears for the selected report.
3. Select **Open with** and then choose any application from the list to view the report.

4. Optionally, select **Save File** to save the report to the default application, Microsoft Excel.
The file name of the saved file is displayed in the language set in the operating system.
5. Optionally, click the **Do this automatically for files like this from now on** check box to save the export settings as default.
6. Click **OK**.
The file is saved in **.csv** format. The exported report includes all the columns that are shown in the user interface.

Dashboard Charts and Reports

This section discusses the overview of dashboard charts and reports in the Oracle Field Service Mobile for Android and iOS app.

You can perform the following on dashboards and reports in Mobility:

- Configure dashboards in the Oracle Field Service Mobile app. The Main menu Dashboards in the mobile app serves as the single location to access Oracle Field Service reports, Oracle Field Service dashboards, and other application dashboards embedded in Oracle Field Service.
- Add Dashboard pages. You can now customize dashboard pages by arranging the available reports and dashboard in multiple tabs based on your preferences.
- Configure predefined dashboards. Predefined dashboards are ready to use dashboards for a user configured by another user. You can now configure predefined dashboards for a specific user type so that all the users in that user type can view this dashboard pages by default in dashboards.
- Configure available reports for a user type: You can now configure available reports or dashboards for a user type. Based on the configuration users in that user type will be able to see reports and dashboards in their available reports.

Dashboard Charts

Dashboard charts are graphical representation of a report. You can configure a dashboard tab and drag the required chart icon from the Available reports menu and drop it inside a dashboard tab. The chart displays the details of the report accordingly.

You can remove a chart from a dashboard page using the X button in the upper right corner of the report.

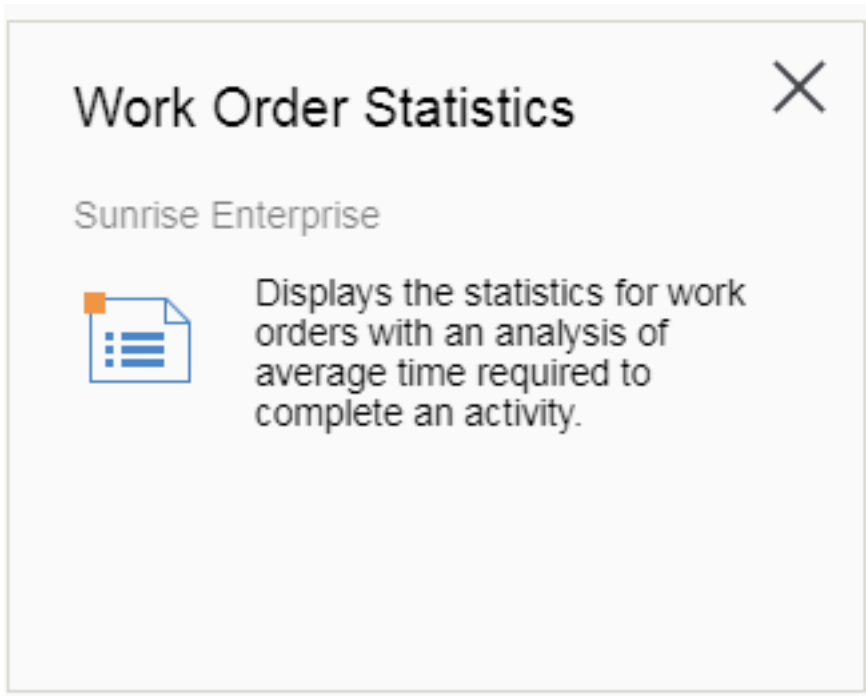
In case of predefined dashboards charts, administrators configure the settings at the time of creating the charts. Users who view the predefined dashboards cannot modify these settings.

Standard Reports

Standard reports are represented as a tile in a dashboard tab. You can configure a dashboard tab and drag the report icon from the Available reports menu and drop it inside a dashboard tab. Reports are represented with a standard report icon and a name in the Available reports menu.

The report is displayed with a description of that report in the dashboard tab with a standard icon as follows:

This image shows a standard report.



While configuring a dashboard tab, you can add or remove the report tile from a tab. The Close button is available while configuring a dashboard. Clicking this button removes the report from dashboard tab. If the Available reports menu is hidden, you cannot remove or add reports to the dashboard tab.

Note that the following functionality is not available in the Core Application Dashboards:

- Reports export option
- Print the route option
- Schedule report option
- Report Resource-User association

Configure Predefined Reports

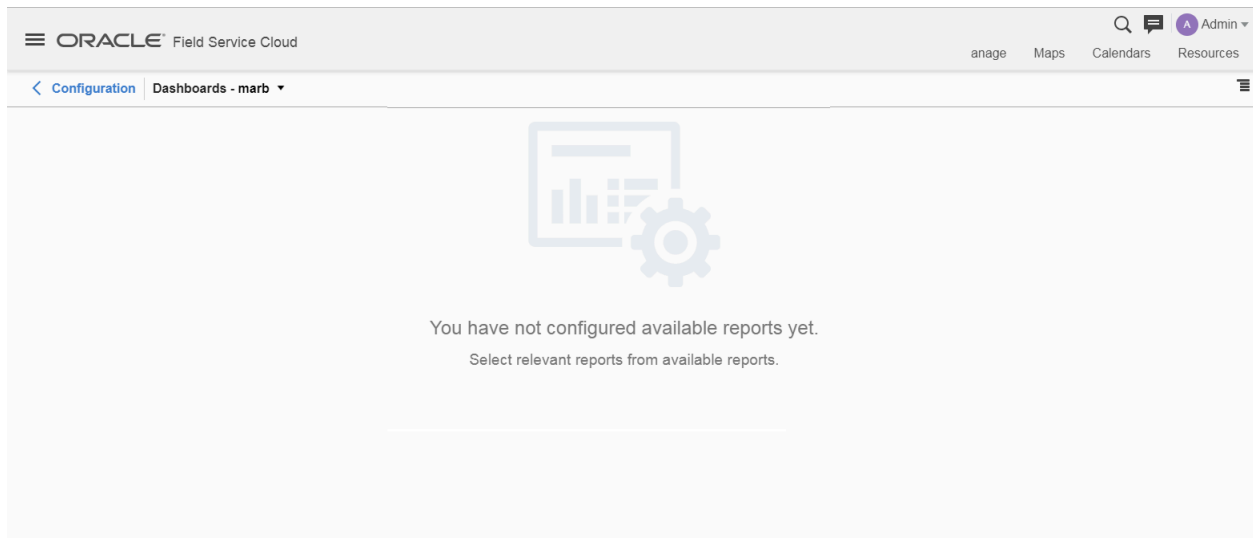
Predefined dashboards are dashboards created for a specific user type - all the users in that user type will be able to see this dashboard tab by default. User types control the access to configure predefined dashboards in Core Application. The user (preferably, Administrator with configuration permission) can grant permissions to configure predefined dashboards for a user type.

To configure predefined dashboards:

1. Make sure that the user has permission to access dashboards from configuration page.
2. Navigate to the Dashboards page from the Configuration menu.
3. If the Available Reports pane does not appear, click the properties icon and select Configure current dashboard from the drop-down menu.

- When you open the Dashboards page for the first time, dashboards will not be configured.

This screenshot displays the default Dashboards page.



- You can either click the New Dashboard button or select the menu item to add a predefined dashboard to create a new predefined dashboard.
- You can select the user type from the page header and add relevant reports or dashboard charts to the dashboard to create a predefined dashboard for that user type.
- Users in that user type will be able to view the predefined dashboard now.

This screenshot displays the Dashboards page with predefined dashboard.



What to do next

Only those users that have permission to create predefined dashboard will be able to configure, rearrange, rename or delete predefined dashboards.

With predefined dashboards configured for that user type, users can view the dashboard. To view the parameters configured for a dashboard chart, you can click the options icon.

Options configured while creating the predefined dashboard will remain the same for all the users in that user type.

Configure Available Reports for a User Type

User types control the access to configure available reports for a user type in Core Application. The user (preferably, Administrator with configuration permission) can grant permissions to configure available reports in Dashboards. To configure available reports for a user type, you require permissions to access Dashboards from the Configuration page.

To set up Dashboards as a menu item for a user type configuration page for a user type:

1. Click the Navigation button and select **Configuration**.
2. In the Configuration page, select **User Types**.
3. In the User Types page, select **Screen Configuration**.
4. In the Application screens section, select the configuration menu item:
5. In the configuration menu context layout, click **Add action**. The Add menu item dialog box is displayed.
6. In the Add menu item dialog box, select the **Dashboards** check box and click OK
The Dashboards menu item is now added to the Navigation pane. Users can access dashboards and reports from this Dashboards page.
7. To configure available reports for a user type, click the Navigation button and select Dashboards from the Configuration menu.
When the user opens the Dashboards page for the first time, reports or dashboard charts will not be available for the selected user type.
8. You may add available reports to the Dashboards page.

Set Up Dashboards as a Menu Item for a User Type

User types control the access to Dashboards in Core Application. The user (preferably, Administrator with configuration permission) can grant permissions to access dashboards for a particular user type, so that all users in that user type can access the Dashboards menu.

To set up Dashboards as a menu item for a user type:

1. Click the Navigation button and select **Configuration**.
2. In the Configuration page, select **User Types**.
3. In the User Types page, select **Screen Configuration**.
4. In the Screen Configuration page, select the **Main menu** item:
5. In the Main Menu context layout, click **Add action**. The Add menu item dialog box is displayed.
6. In the Add menu item dialog box, select the **Dashboards** check box and click OK

Results:

The Dashboards menu item is now added to the Navigation pane. Users can access dashboards and reports from this Dashboards page. To navigate to the Dashboards page, click the Navigation button and select Dashboards. When you access the dashboards menu for the first time, you may not see any predefined dashboards in the Dashboards page.

Add a Dashboard

You can add Dashboards page in Context Layout for Mobility. You can create multiple tabs in dashboards screen and arrange reports or dashboards so that information can be displayed in different tabs on a single screen. Options are available to rename or rearrange these tabs based on their preference of view. You can also delete these tabs at any point in time. You can configure the reports/ charts based on their preference.

When you access the dashboards menu for the first time, you may not see any predefined dashboards in the Dashboards page.

Note: Add dashboard action will work only if the Available Reports pane is open.

To set up multiple Dashboard tabs:

1. Log into Oracle Field Service Mobile App.
2. Navigate to the Dashboards page.
3. In the Dashboards page, click the Properties icon.
4. Select **Add Dashboard** from the drop-down menu.
The Add Dashboard dialog box is displayed.
5. Select the **New dashboard** option.
6. In the **Name** field, enter the dashboard tab name and click OK.
The Dashboards page shows the newly added tab.

Results:

The Dashboard will be in configure mode by default. You can drag and drop reports or dashboard charts from the Available reports pane.

Edit a Dashboard

You can select and edit a dashboard from the Dashboards page.

1. Navigate to the **Dashboard** tab.

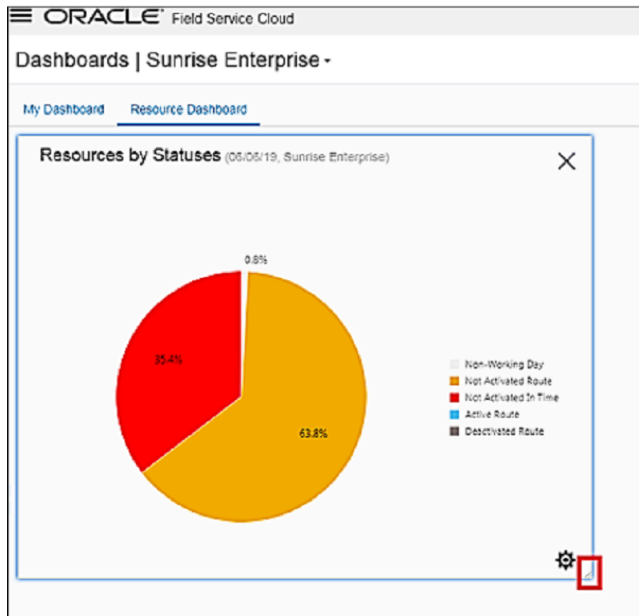
Note: You cannot edit a dashboard tab, and add or remove dashboard charts or reports, if the **Available reports** pane is hidden.

2. In the Dashboards page, click the properties icon and select **Configure Current Dashboard**.
The Available Reports pane appears.
3. To add a new dashboard chart or report, drag-and-drop the chart or report from the Available reports pane to the dashboard tab layout.
The selected chart or report appears in the dashboard tab.
4. To remove a dashboard chart or report, drag-and-drop the chart or report from the dashboard tab layout.

Dashboard Tiles — Re-size Option

You can resize the dashboard tiles using the resize handler at tiles level in the dashboard.

You can use the resize handler to increase or decrease the size of dashboard tiles based on the requirement.



You will find this option only when the dashboard page is in Configure current dashboard mode. When you resize the chart tile, all the dashboard components like chart, icons, legends, titles & other labels will be resized accordingly.

Delete Current Dashboard

You can delete dashboards or reports on the **Dashboards** page.

CAUTION: Be careful when deleting dashboards. Deleted dashboards cannot be retrieved from Oracle Field Service.

To delete a dashboard tab:

1. Navigate to the **Dashboards** page.
2. Select the dashboard tab.
3. Click the properties icon and select **Delete current dashboard** from the drop-down menu.
The **Delete Dashboard** dialog box appears.
4. Click **OK** to confirm deletion.
The deleted dashboard tab is removed from the **Dashboards** page.

Rename a Dashboard

You may rename a dashboard to any name you wish to use.

To rename a dashboard:

1. Navigate to the Dashboards page .
2. Click the Properties icon and select **Rename Dashboard** from the drop-down menu.
3. In the Rename Dashboard dialog box, edit the **Name** field to the dashboard name you wish to use.
4. Click OK

Results:

The Dashboards page refreshes to display the modified dashboard tab name.

Filter Resource-Specific Data for Dashboards

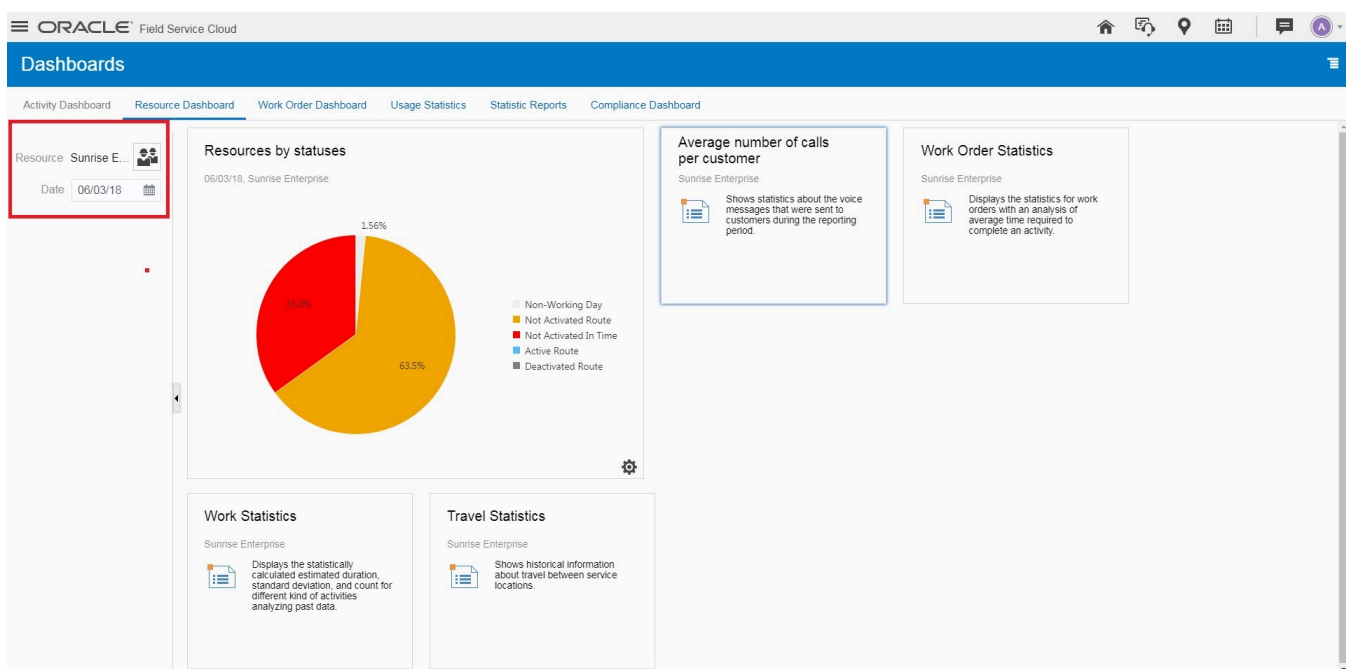
You can view date and resource as a generic filter for all the charts or reports configured on the **Dashboards** page. You can set filters for all the dashboard charts or reports. Data is displayed based on the filter selection.

You can use the resource filter to display the data of dashboard charts at buckets (or organizations) or at the individual resource level.

1. Navigate to the **Dashboards** page.
2. In the Left pane, select the resource to filter.

The **Dashboards** page refreshes to show the data relevant to the selected resource.

This screenshot shows the **Dashboards** page showing resource-specific data.



Filter Resource-Specific Data for a Selected Report

You can filter resource-specific data for a selected report.

To filter resource-specific data for a particular report:

1. Open the dashboard tab in the Dashboards page.
2. In the Left pane, select the resource to filter.
3. In the Left pane, select the report.

The selected report opens in the detail view to show the data relevant to the selected resource.

Drag and Drop Reports and Charts in Mobile Devices

You can drag and drop a selected report or chart on the **Dashboards** page anytime, provided the **Available Reports** pane appears on the **Dashboards** page.

1. Open the tab on the **Dashboards** page.
2. Ensure that the **Available Reports** pane is open. If not, click the properties icon and select **Configure Current Dashboard** to open it.
3. Select the dashboard item (chart or report). Drag and drop it to the new location.

You may need to press the icon for some time. You cannot drag and drop the icon to the tab page. The selected dashboard chart or report appears on the dashboard tab.

How do I embed an external report in the Dashboard?

You can embed reports from external applications in Oracle Field Service using the **Embedded dashboard** option.

You can select the user type from the page header and add relevant reports or dashboard charts to the dashboard to create a predefined dashboard for that user type. Or, you can use the following procedure to embed a predefined dashboard as a dashboard tab.

To embed a dashboard:

1. Navigate to the **Dashboards** page from the Configuration menu.
2. On the **Dashboards** page, click **Actions > Add Dashboard**.
3. In the **Add Dashboard** dialog box, select **Embedded dashboard** option.
4. In the **Name** field, enter the name that you want to be displayed on the new dashboard tab.
5. In the **URL** field, provide the URL for the Oracle Analytical Cloud, Oracle Business Intelligent Cloud Services, or Oracle Integrated Cloud Services report, or any report from an external application.

The embedded reports are presented as a new dashboard tab on the Dashboards page.

Note: You cannot configure embedded dashboards.

Set Permissions for a List of Reports

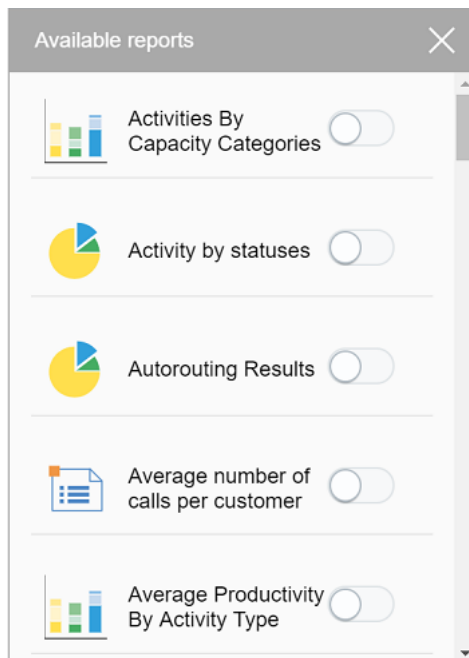
You can set the Available reports configuration option to enable reports.

To set the necessary permissions for a list of reports:

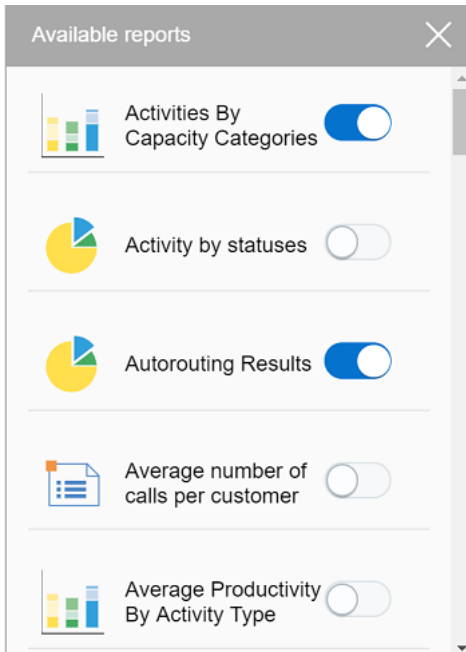
1. Navigate to the Dashboards page.
2. Click the properties icon and select **Configure current dashboard** from the drop-down list.

The Available reports pane appears as follows:

This screenshot shows the default view of Available reports pane before setting permissions.



3. Select the progress icon placed next to each report under the Available reports pane to enable it.
This screenshot shows the Available Reports pane after setting permissions for the user type.



Results:

The selected reports or dashboard charts will be added to the available reports list of that user type.

2 Dashboard Reports

Completion Progress By Volume Report

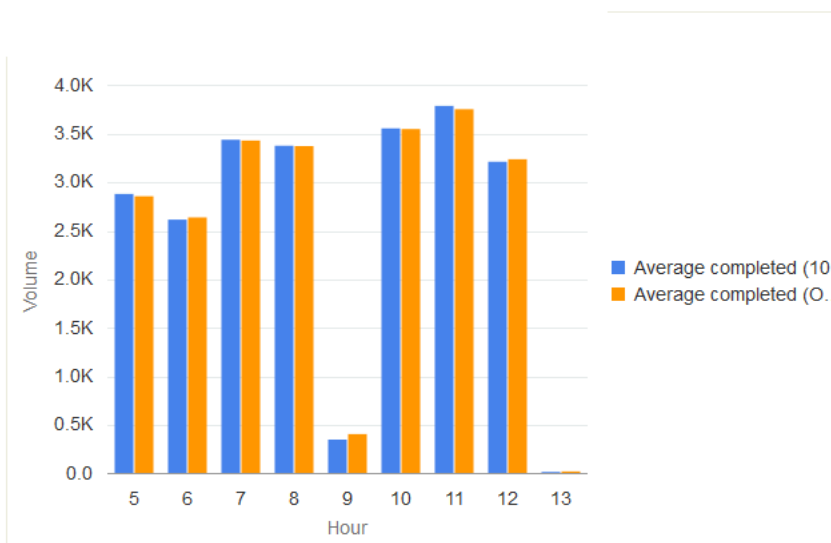
The Completion Progress by Volume report shows the total volume of activities completed in minutes or points per hour for a selected date in comparison with the average number of activities completed in the previous week and previous month. Only the regular and reopen activities are considered to generate this report.

The completion progress dashboard report is displayed to the following user categories:

- buckets/organizations
- individual resources

The Completion progress by volume chart lets you to select a date and add filter to display the data by activity type group. You also need to select the units of measurement to represent the completed activities volume. If the company does not use points according to its 'Business Rules' settings, data is not displayed when 'Points' are selected. The Completion progress by volume report is represented with a column chart.

This figure shows the Completion Progress by Volume report column chart displaying the volume of completion for each hour.



This table displays the elements in the Completion progress by volume report and their description:

Element	Description
Header	Displays the report name and date in the header.
Columns	There can be up to three columns per hour representing the following data: <ul style="list-style-type: none"> • the volume of activities completed by a resource in an hour on the selected date.

Element	Description
	<ul style="list-style-type: none"> the average number of activities completed by the same resource at the same time in the previous week. the average number of activities completed by the same resource at the same time in the previous month. <p>Note: If the previous week/month statistics is not available, the corresponding column is not show.</p>
Legend	Type of data represented by the chart: <ul style="list-style-type: none"> Completed (date), Units of measurement Average completed (week), Units of measurement Average completed (month), Units of measurement
Axes	horizontal: Hour vertical: Volume
Hint	Each activity displays a hint pop-up with Hour, data corresponding to the selected column, column representing the volume of activities and the units of measurement.

View the Completion Progress Report

The **Completion progress by volume** report shows the number of activities completed per hour for a selected date in comparison with the average number of activities completed in the previous week and previous month. Only the regular and reopen activities are considered to generate this report.

The completion progress dashboard report is displayed to the following user categories:

- buckets/organizations
- individual resources

To view the Completion Progress report:

- Click **Dashboard** to open the Dashboard.
- Select the **Completion progress by volume** chart.
The title bar of the chart displays a set of icons.
- Click the **Options** icon to display the options for the chart.
See *Navigate the Dashboard* for more details.
- Select the following **Date** options from the drop-down list:
 - Selected Day**– Reports for the day selected in the calendar
 - Day before selected**–Reports for the day before the day selected in the calendar

The **Completion progress by volume** chart refreshes to display the data based on your selection.

View the Capacity by Category Report

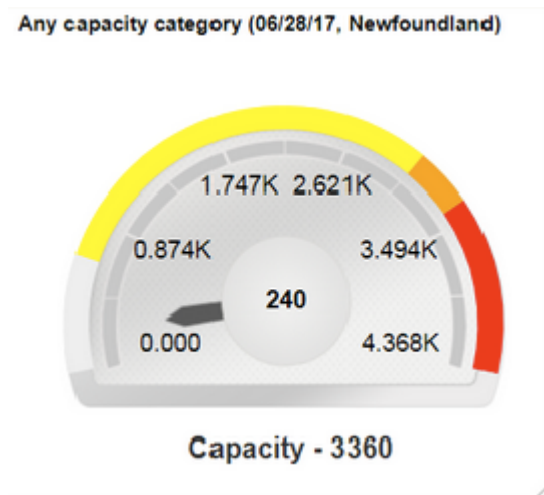
The **Capacity by category** report shows the expected duration in minutes and the quota (amount of work performed) for a specific work type and time slot. You can view this report only when selecting a quota enabled bucket.

To view the Capacity By Category report:

1. Click **Dashboard** to open the Dashboard.
2. Select a quota enabled bucket.
3. Select the **Capacity by category** chart from the Dashboard.
The title bar of the chart displays a set of icons.
4. Click the **Options** icon to display the options for the chart.
See *Navigate the Dashboard* for more details.
5. Select the following **Date** options from the drop-down list:
 - o **Selected Day**– Reports for the day selected in the calendar
 - o **Day before selected** – Reports for the day before the day selected in the calendar
6. Select the following **Capacity category** type from the drop-down list:
 - o **Any Capacity Category**– Average values for all work types will be calculated
 - o **Specific Capacity Category**– Values for any specific work type that applies to this Resource will be calculated
7. Do one of the following
 - a. In the **Time slots** field, select a time-slot option from the drop-down list:
 - **All**– Average values for all time slots will be calculated
 - **Specific time slot**– Values for any specific time slot can be calculated
 - b. In the **Booking intervals** field, select an option from the drop-down list.

8. Modify the following values, if necessary
 - o **Major Capacity Usage**
 - o **Critical Capacity Usage**

This figure shows the Capacity by category report that appears as a gauge.



The gauge shows in minutes the anticipated total activity duration (based on work orders) and the amount of quota assigned for each specific time slot and work type:

- o The gauge is set up with 0 in the lower left quadrant.
- o The hand of the gauge sweeps from left (0) to right as capacity is used, pointing to the current amount of capacity that has been consumed.
- o The higher value is determined automatically by multiplying Capacity and 1.3 shown in the lower right quadrant.
- o The space between capacity and the higher value represents the point at which the number of work orders for that work type has exceeded quota. If the hand moves into this area (as a result of those additional minutes being consumed) the area will be highlighted in red. Apart from differentiating the capacity change in colors, you can also view the capacity value as text.

9. The minute hand in the Capacity by category report changes with higher capacity.

Consider an example where the gauge shows the following information:

- Time Slot is 8-10.
- Date is 06/18/09.
- Capacity (based on available resources and their calendars) is 1100 minutes and is shown as a tic mark highlighted in yellow at the outer edge. Apart from highlighting the capacity in yellow color, the capacity is also shown as text in the center of the gauge.

The hand points to the current capacity that has been consumed (415 minutes). The current capacity value is also shown at the bottom of the gauge.

Average Productivity by Activity Report

The Average Productivity by Activity report displays the average number of activities by each activity type per day for selected resource(s) and month. The report does not consider teamwork and pre-work.

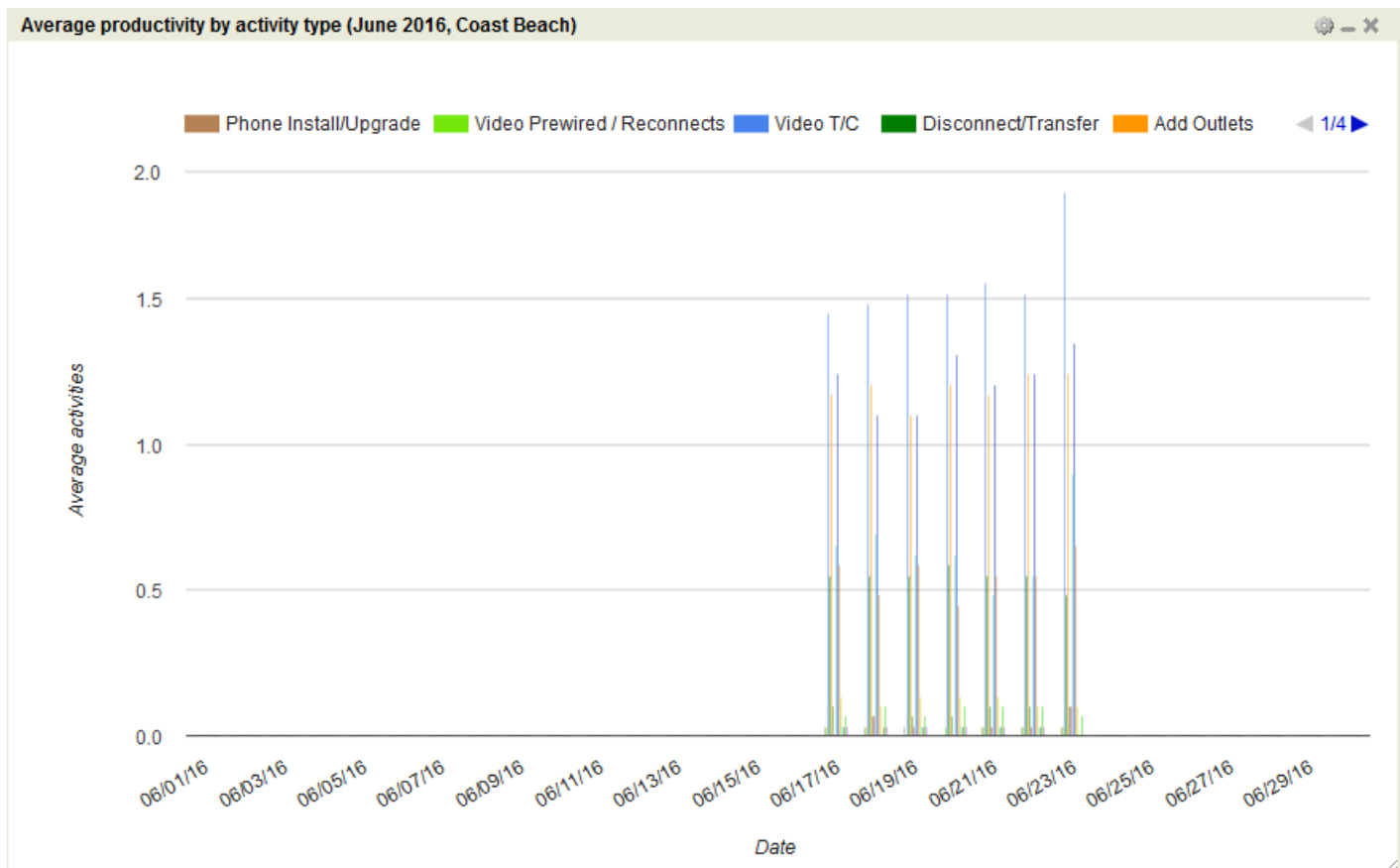
If there are no activity types in the system, the report will show the whole number of activities. The report is calculated by grouping the number of activities of each type and dividing the resulting sums by the number of working resources. This is done for each day of a month. For example, if 20 upgrades were performed, and 4 resources worked, the average will be 5 upgrades per resource. The 'Average productivity by activity type' Dashboard report can be displayed for:

- buckets/organizations
- individual resources

Note: Teamwork is not displayed in the Dashboard. This has to be taken into account when monitoring the performance of resources having a lot of teamwork activities in their routes.

The Average Productivity by Activity report is represented with a column chart.

This figure shows the Average Productivity by Activity column chart with average activities and date.



This table displays the elements in the Average Productivity by Activity report and their description:

Element	Description
Header	Displays the report name and the reported period in parentheses
Columns	The average number of completed activities of each type. The chart contains as many different color columns as there are activity types in the legend.
Legend	Activities performed by: <ul style="list-style-type: none"> the selected individual resource (if an individual resource is selected in the Resource Tree), or all resources in the selected bucket/organization (if a bucket or organization is selected) If the selected resource performs only some of the activity types existing in the system, the chart and the legend will contain only the activity types performed by the resource.
Axes	horizontal: date vertical: average activities
Hint	Date, activity type and the average number of activities of the particular type performed by the resource

View the Average Productivity by Work Type Report

The **Average productivity by work type** report displays the average number of activities per day for the month by work type.

This report has the following characteristics:

- It refreshes automatically every hour
- Selecting a set of resources enables you to view the organization
- Selecting an individual resource enables you to view only that resource's productivity
- The average is calculated as the total number of work orders of the selected type divided by the average number of working resources
- The report does not include teamwork, non-customer activities, or pre-work

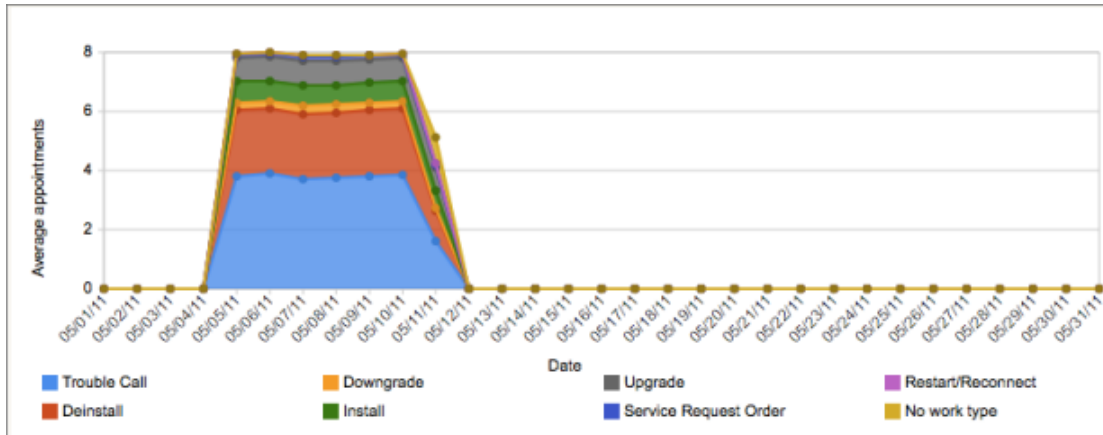
To view the Average Productivity By Work Type report:

1. Open the **Average productivity by activity type** report.
2. Select the following month options from the drop-down list:
 - Selected – Reports for the month selected in the calendar
 - Before selected – Reports for the month before the one selected in the calendar

Results:

The horizontal axis shows the days of the month; the vertical shows the average number of activities. The ranges represent the average number of completed activities of each type on that day. The colors in a range match the work types described in the chart. Apart from differentiating the work types in colors, you can also view them as text in the chart hints.

This figure shows the Average productivity by work type report displaying the average productivity for each day.



View the Resources by Statuses Report

The **Resources by statuses** report shows at a glance the proportion of resources that have activated their routes compared to those who did not activate in time and those who are not working today. This report shows status of activities such as percentage of non-working day, not activated route and active route for a selected date in the calendar.

The Resources by Statuses report is represented with a column chart. The chart options allows you to select a date from the calendar. The number of resources and statuses are listed against statuses for the selected date.

This table displays the elements in the Resources by Statuses report and their description:

Element	Description
Header	Displays the report name and date.
Columns	The chart displays all the resources in the selected bucket or organization for the specified date. Each slice represents the percentage of the route status in the whole number.
Legend	The following statuses are available: <ul style="list-style-type: none"> • Non Working Day • Non Activated Route • Non Activated in Time • Activate Route • Deactivated Route If resources of the selected bucket or organization have routes of only some of the statuses, the slices and the legend will contain only such statuses.

Element	Description
Hint	Each activity displays a hint with route status, number of resource routes of such status in the bucket or organization and their percentage share in the whole number of resources.

This report has the following characteristics:

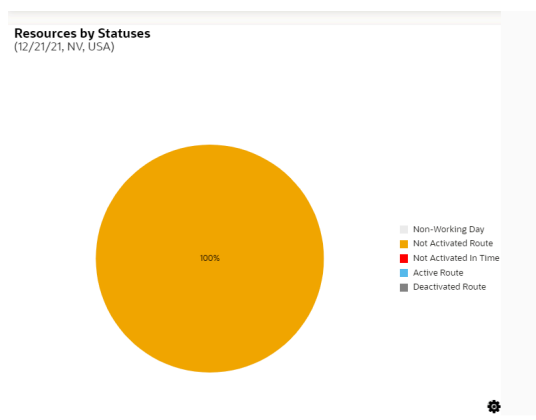
- It depicts the number of resources for each status for the date that you select
- You can run it for any bucket or organization
- If you select an individual resource in the Resource Tree, the chart will be configured for the parent bucket
- It refreshes automatically every 10 minutes

To view the Resources By Statuses report:

1. Click **Dashboard** to open the Dashboard.
2. Select the **Resources by statuses** chart.
The title bar of the chart displays a set of icons.
3. Click the **Options** icon to display the options for the chart.
See *Navigate the Dashboard* for more details.
4. Select one of the following date options from the drop-down list:
 - Selected day– Reports for the day selected in the calendar
 - Day Before selected – Reports for the day before the one selected in the calendar

The whole pie chart represents the total number of resources in a bucket or organization. The status of each resource can be represented by a "slice."

This figure shows the Resources by statuses as a pie chart displaying the number of resources in a bucket.



5. The report shows the number of resources for the following statuses:
 - **Non Working Day** – The resource is not scheduled to work on this day
 - **Not Activated Day** – The resource has not activated his/her queue (route) for the day
 - **Not Activated in Time** – The resource activated the route outside the required activation time set by the client. For example, if the client decides all resources must activate no later than 15 minutes after the shift start time, then anyone outside of that time did not activate on time.
 - **Active Queue** – The resource has activated his or her route for the day
 - **Deactivated Queue** – The resource has deactivated his or her route for the day

View the Comparing Resources by Number of Activities Report

The **Comparing resources by number of activities** report displays the number of completed activities for each work skill by resource and by job type or all direct children of a chosen bucket/aggregator for the selected month.

This report has the following characteristics:

- You can run it for buckets/aggregators. If you select an individual resource in the Resource Tree, the report will be configured for the parent bucket/aggregator.
- It refreshes automatically every hour
- The report does not include teamwork, non-customer activities, or pre-work

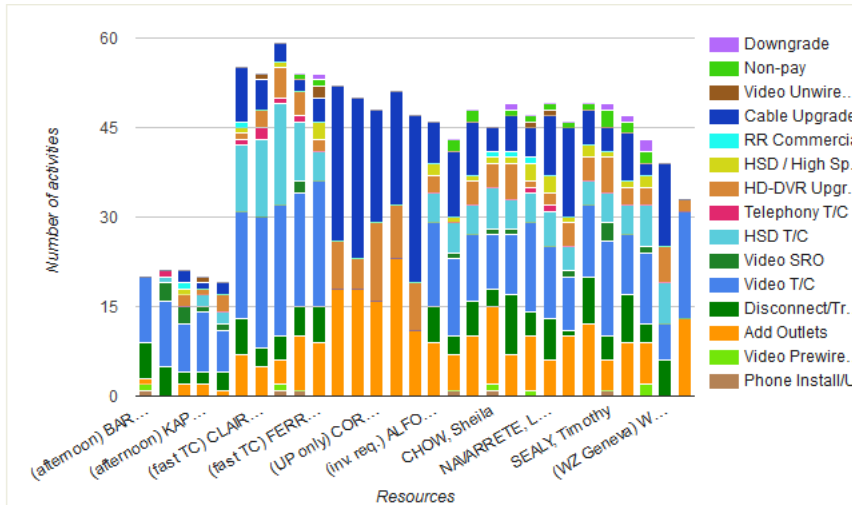
To view the Comparing Resources By Number of Activities report:

1. Click **Dashboard** to open the Dashboard.
2. Select the **Comparing resources by number of activities** chart
The title bar of the chart displays a set of icons.
3. Click the **Options** icon to display the options for the chart.
See *Navigate the Dashboard* for more details.
4. Select the following **Month** options from the drop-down list:
 - **Selected**– Reports for the month selected in the calendar
 - **Before selected** – Reports for the month before the one selected in the calendar

Results:

The Comparing resources by number of activities is represented with a column chart. The chart options allows you to choose a month to display the data for the corresponding period. You can filter the display data by an activity type group or activity type represented in the list of activities in the selected bucket or organization. You can also define the number of resources and the number of activities to display on the chart. You can select from 20, 40, 50 or all resources.

This figure shows the Comparing resources by number of activities report as a column chart with number of activities for each resource.



The horizontal axis lists individual resources by name; the vertical axis shows average activities. Each column represents the number of work orders completed by one resource during the month. The colors correspond to the work skills defined in the legend. Apart from differentiating the work skills in colors, you can also view them as text in the chart hints.

This table displays the elements in the Comparing resources by number of activities report and their description:

Element	Description
Header	Displays the report name, the reported period and the number of resources in the header.
Columns	Each column represents the number of activities of each type completed by a resource during the specified month. The chart columns contains several sections marked with different colors representing various types of activities. Apart from differentiating the activity types in colors, you can also view them as chart hints.
Legend	Denotes the type of activity performed by the resources in the selected bucket/organization. If the resources in the selected bucket/organization perform only some of the activity types existing in the system, the columns and the legend displays only the activities performed.
Axes	horizontal: Resources vertical: Number of activities
Hint	Each activity displays a hint pop-up with Resource name, activity type and the number of activities of such type.

View the Comparing Resources Productivity Report

The **Comparing Resources by Productivity** report displays the average number of completed work orders by work skill per resource/day. The report calculates data for all direct children of a chosen bucket/aggregator. The **Comparing Resources by Productivity** report shows the average number of activities completed for an activity type per resource per day for all the resources in a bucket/organization. Activities collaborated based on the teamwork and pre-work are not considered for generating this report.

Productivity is calculated as the total number of work orders completed by a resource during the month divided by the number of working days. This chart is often used along with the **Comparing resources by number of activities** report.

This report has the following characteristics:

- You can run it for buckets/aggregators. If you select an individual resource in the Resource Tree, the report will be configured for the parent bucket/aggregator.
- It refreshes automatically every hour
- The report does not include teamwork, non-customer activities, or pre-work

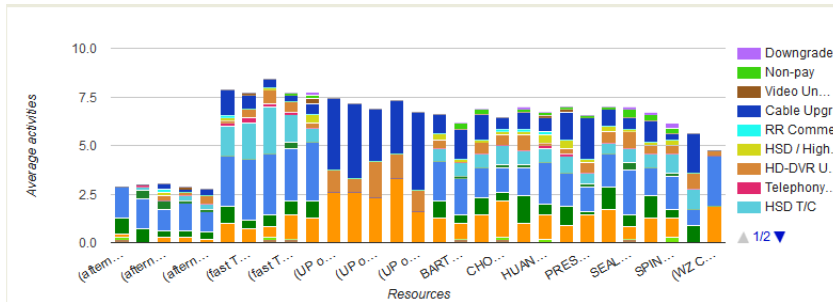
To view the Comparing Resources Productivity report:

1. Click **Dashboard** to open the Dashboard.
2. Select the **Comparing resources productivity** chart.
The title bar of the chart displays a set of icons.
3. Click the **Options** icon to display the options for the chart.
See *Navigate the Dashboard* for more details.
4. Select the following **Month** options from the drop-down list:
 - **Selected**– Reports for the month selected in the calendar
 - **Before selected** – Reports for the month before the one selected in the calendar

Results:

The **Comparing Resources by Productivity** report is represented with a column chart. The chart options allow you to choose a month to display the data for the corresponding period. You can filter the display data by activity type group or activity type represented in the list of activities in the selected bucket or organization. You can also define the number of resources and the number of activities to display on the chart. You can select from 20, 40, 50 or all resources.

This figure shows the dashboard window for Comparing Resources by Productivity column chart displaying average activities for each resource.



The horizontal axis lists individual resources by name; the vertical axis represents the number of work orders. Each column represents the number of work orders completed by one resource during the month. The colors correspond to the work types defined in the legend. Apart from differentiating the work types in colors, you can also view them as text in the chart hints.

This table displays the elements in the Comparing Resources by Productivity report and their description:

Element	Description
Header	Displays the report name, the reported period and the number of resources in the header.
Columns	Each column represents the average number of activities for each activity type completed by a resource during the specified month. The chart columns contains several sections marked with different colors representing various types of activities.
Legend	Denotes the type of activities performed by the resources in the selected bucket/organization. If the resources in the selected bucket/organization perform only some of the activity types existing in the system, the columns and the legend displays only the activities performed.
Axes	<ul style="list-style-type: none"> horizontal: Resources vertical: Average activities
Hint	Each activity displays a hint pop-up with Resource name, activity type and the number of activities for each activity type.

View the Auto-Routing Results Dashboard Chart

The **Auto-Routing Results** chart displays the number of auto-routed, manually routed, and not-routed activities in the selected bucket on the selected day.

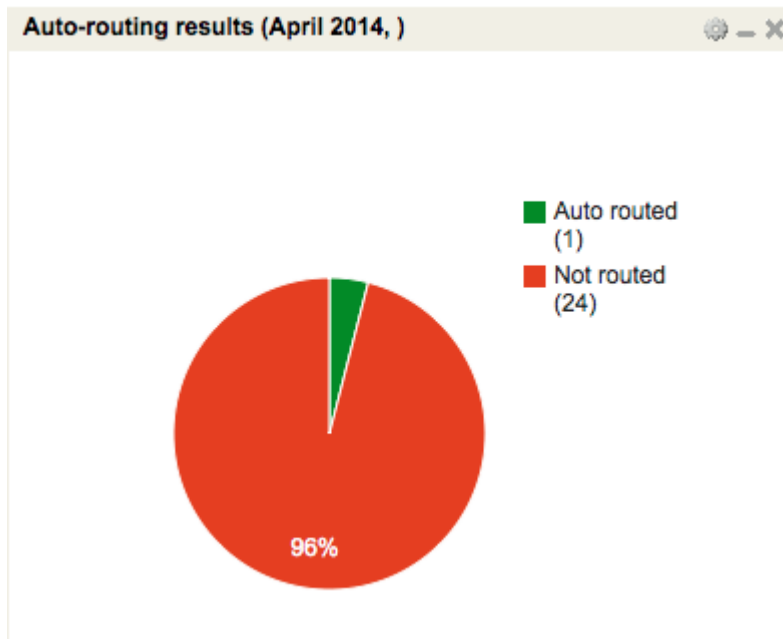
This report has the following characteristics:

- You can run this report for buckets or organizations. If you select an individual resource or organization in the Resource Tree, the report will be configured for the parent bucket.
- It displays the share or auto-routed, manually routed or not-routed activities as a percentage of the whole number of activities in the selected bucket, which is assumed to be 100%. Breaks are not included.

- If you have not run Routing, the report shows the message, 'No Data'.
- The report calculates data for all child resources of the selected bucket (not only direct child resources but also their child resources, and so on).

The Auto-Routing Results report is represented with a pie chart.

This figure shows the Auto-routing results dashboard report that calculates data for all child resources of a selected bucket.



To view the Auto-Routing Results Dashboard chart:

1. Click **Dashboard** to open the Dashboard.
2. Select the **Auto-Routing Results Dashboard** report.
The title bar of the report displays a set of icons.
3. Click the **Options** icon to display the options for the chart.
See *Navigate the Dashboard* for more details.
4. Select an **activity type group** from the drop-down list.
5. Select the following **Date** options from the drop-down list:
 - **Selected day**—Reports for the day selected in the calendar
 - **Day before selected**—Reports for the day before the one selected in the calendar
6. Click **Save**.

View the Routing Errors Reasons Report

The **Routing errors reasons** report shows the number of work orders that were not analyzed or processed by Oracle Field Service Routing and the reasons why such work orders could not be routed. This report displays the reasons for Not-routed activities by activity type for a selected date. Only the planned activities are considered for creating this report.

This report has the following characteristics:

- You can run the report for buckets/aggregators. If you select an individual resource in the Resource Tree, the chart will be configured for the parent bucket/aggregator.
- The report refreshes automatically every hour.

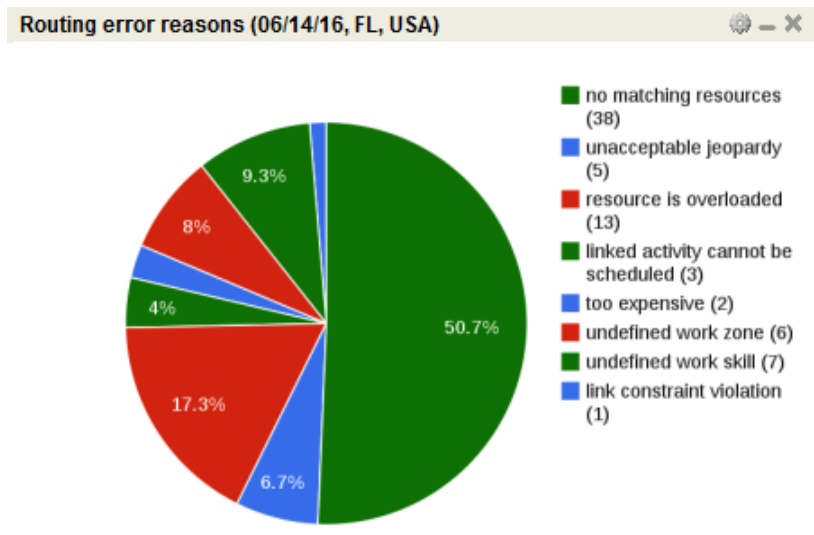
To view the Routing Errors Reasons report:

1. Click **Dashboard** to open the Dashboard.
2. Select the **Routing errors reasons** report.
3. Click the **Options** icon to display the options for the chart.
See *Navigate the Dashboard* for more details.
4. Select the following date options from the drop-down list:
 - Selected – Reports for the day selected in the calendar
 - Before selected – Reports for the day before the one selected in the calendar
5. Optionally, filter the chart by selecting a work-type option from the drop-down list.

Results:

The pie chart represents the total number of work orders to be routed; the color of the "slices" indicate the reason why the work orders could not be routed: Work Zone errors, Work Skill errors, and other reasons such as missing address. Apart from differentiating the slices in colors, you can also view the details of the slice as text in the chart hints.

This figure shows the Routing errors reasons report displaying the number of work orders that were not analyzed or processed.



The chart options allow you to select a date from the calendar. You can also filter the display data by the activity type group for a selected bucket. The Routing errors reasons report is represented with a pie chart.

This table displays the elements in the Routing errors reasons report and their description:

Element	Description
Header	Displays the report name and date.
Columns	<p>The chart represents all the not-routed activities in the selected bucket on a specified day and is assumed to be 100%.</p> <p>Each slice represents the percentage share of the activities not-routed for a specific routing error reason.</p> <p>The chart may contain as many slices as there are routing error reasons.</p>
Legend	<p>Type of data represented by the chart:</p> <ul style="list-style-type: none"> Routing error reasons. The slices and the legend contain only the routing error reasons used in the selected bucket routing results.
Hint	Each activity displays a hint pop-up with Routing error reason, number of activities not routed for that reason and percentage share.

View the Mean Time to Deliver Report

The **Mean time to deliver** report displays the average time it takes to assign a work order to a resource, or reassigned to another resource, and from the moment it is assigned until it is started by the resource. The report calculates data for all direct children of the chosen bucket/aggregator. If an individual resource is selected from the Resource Tree, the report will be configured for the parent bucket/aggregator of that resource. This report includes all the resources of a bucket/organization. Activities collaborated with teamwork and pre-work are not considered for generating this report.

This report has the following characteristics:

- You can run it for buckets/aggregators. If you select an individual resource in the Resource Tree, the chart will be configured for the parent bucket/aggregator.
- It refreshes automatically every hour
- The report does not include teamwork, non-customer activities, non-ordered activities, or pre-work

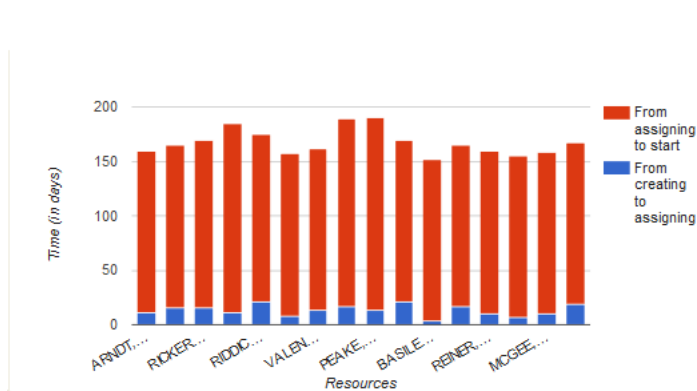
To view the Mean Time to Deliver report:

1. Click **Dashboard** to open the Dashboard.
2. Select the **Mean time to deliver** report.
3. Click the **Options** icon to display the options for the chart.
See *Navigate the Dashboard* for more details.
4. Select the following month options from the drop-down list:
 - Selected – Reports for the month selected in the calendar
 - Before selected – Reports for the month before the one selected in the calendar
5. Select a **capacity category** from the drop-down list, for example IN - Install.
6. Select an **Activity Type Group** from the drop-down list.

Results:

The chart options lets you to choose a month and add a filter to display data for a particular activity type group. You can also setup the chart to show data for a particular capacity category assigned to the selected bucket or organization and define the number of resources whose activities is to be shown on the chart. you can select from 20, 40, 50 or all resources. The Mean time to deliver dashboard report is accessible only in the buckets/organizations. If an individual resource is selected in the resource tree, the report is configured for the entire parent bucket or organization. The Mean time to deliver report is represented with a column chart.

This figure displays the Mean Time to deliver report that calculates data for all direct children of a selected bucket.



The horizontal axis lists resources by name; the vertical axis shows the time in days. Each column of the chart shows the time that passed from the creation of a work order until it is assigned (blue) and from assignment until it is started (red). Apart from differentiating the assignment status of work orders in colors, you can also view the status as text in the chart hints.

This table displays the elements in the Mean time to deliver report and their description:

Element	Description
Header	Displays the report name, the reported period and the number of resources is displayed in the header.
Columns	Each column shows the time elapsed from the activity creation to its assigning, and from assigning to start. Each column consists of two colors representing time from activity creation to assignment (blue color) and time from activity assignment to start (red color)
Legend	From assigning to start, From creating to assigning
Axes	horizontal: Resources vertical: Time (in days)
Hint	Each activity displays a hint pop-up with resource name, description of time corresponding to the selected column part and the time in days, hours and minutes.

View the Percentage of Activities Met Report

The **Percentage of activities met** report displays the percentage of work orders completed by the resources that were started within the service window during a selected month.

This report displays the percent of activities that were started earlier than the activity service window end during the selected month. Activities collaborated with teamwork, pre-work and not-ordered activities are not considered during generating this chart.

This report has the following characteristics:

- You can run it for buckets/aggregators. If you select an individual resource in the Resource Tree, the chart will be configured for the parent bucket/aggregator.
- It refreshes automatically every hour
- The chart does not include teamwork, non-customer activities, non-ordered activities, or pre-work

To view the Percentage of Activities Met report:

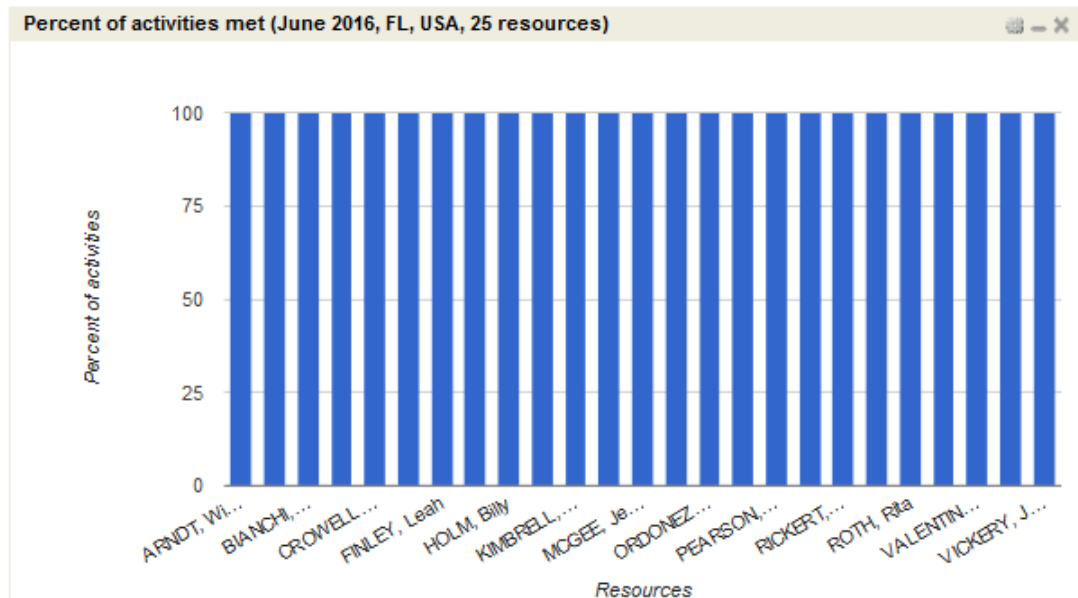
1. Click **Dashboard** to open the Dashboard.
2. Select the **Mean time to deliver** report.
3. Click the **Options** icon to display the options for the chart.
See *Navigate the Dashboard* for more details.
4. Select the following month options from the drop-down list:
 - Selected – Reports for the month selected in the calendar
 - Before selected – Reports for the month before the one selected in the calendar
5. Select a **capacity category** from the drop-down list, for example IN - Install.
6. Select an **Activity Type Group** from the drop-down list.

Results:

The Percent of Activities Met is displayed as a column chart in the Dashboard.

The horizontal axis lists individual resources by name; the vertical axis shows the percentage of work orders completed within the service window. Each column represents the work of one resource.

This figure shows the Percentage of activities met chart displaying the percent of completed work orders by a resource.



This table displays the elements in the Percent of Activities Met chart and their description:

Element	Description
Header	Displays the report name, reported period and the number of resources whose data is displayed on the chart.
Columns	Denotes the percentage of activities started by each resource before the service window end.
Legend	The chart uses only one color to display data, therefore the chart has no legend.
Axes	<ul style="list-style-type: none"> horizontal: Resources vertical: Percent of activities
Hint	Resource name and the percent of activities met.

View the Percentage of Customer Expectations Met Report

The **Percentage of customer expectations met** report the number of activities started early, in time and late in a delivery window of a bucket/organization messaged to the customer. This report shows the percentage of activities (without teamwork and pre-work) that were started within the service window during a selected month. The total number of work orders that were completed by a resource is taken as 100%.

This report has the following characteristics:

- You can run it for buckets/aggregators. If you select an individual resource in the Resource Tree, the chart will be configured for the parent bucket/aggregator.
- It refreshes automatically every hour
- The report does not include teamwork, non-customer activities, non-ordered activities, or pre-work
- You can enter a value from 0 to 80 to define the interval during which any work orders started are considered “started on time”. (This is also known as “allowable lateness”.)

To view the Percentage of Customer Expectations Met report:

1. *Navigate the Dashboard.*
2. Select the **Percentage of customer expectations met** chart
The title bar of the chart displays a set of icons.
3. Click the **Options** icon to display the options for the chart.
See *Navigate the Dashboard* for more details.
4. Select an **activity type group** from the drop-down list.

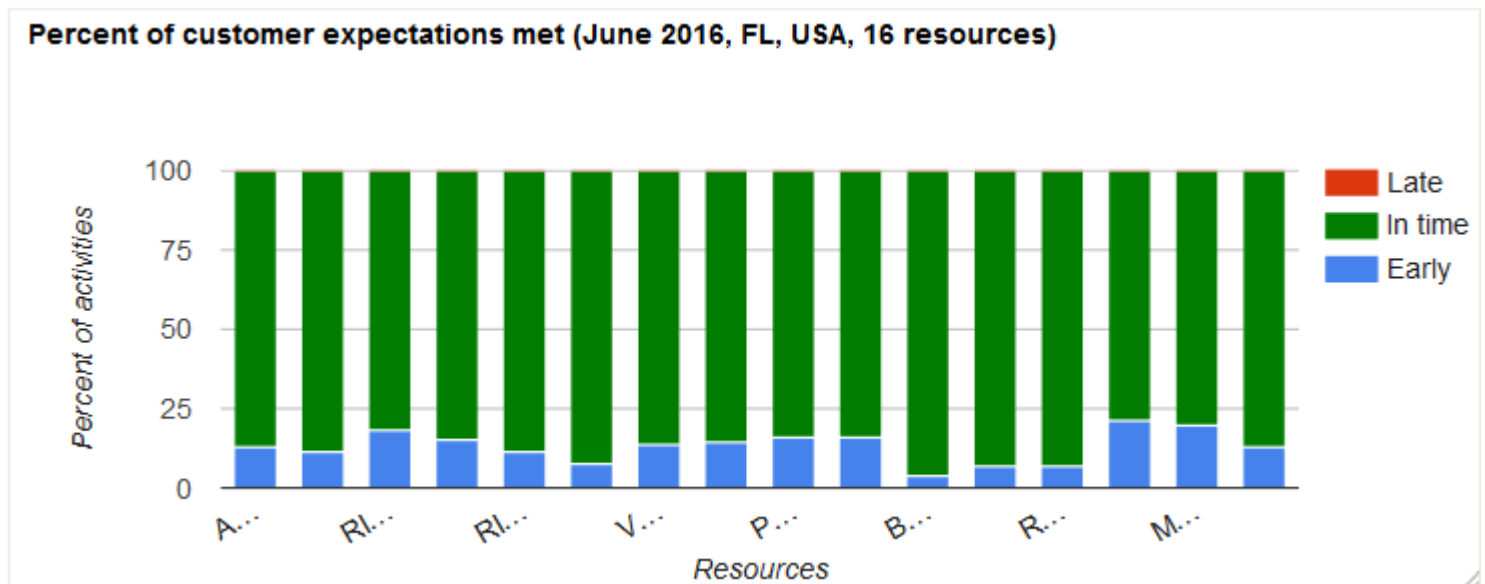
5. Select the following **Month** options from the drop-down list:
 - o **Selected**–Reports for the month selected in the calendar
 - o **Before selected**–Reports for the month before the one selected in the calendar
6. Provide a value to specify **Allowable lateness** limit.
7. Select an option from the **Number of resources to show** drop-down list to specify the number of rows to be displayed in the work area.

Results:

The total requirement is considered as 100 percent. Only the completed and not-done activities are taken into account. If an activity has no specified service window start and service window end data, it is not included in the report. The chart options lets you to select a date and add filter to display the data by display data for a particular activity type group or for any activity types represented in the list of activities in the selected bucket or organization. When you select a date from the calendar, the chart displays data for the period from the 1st of the month till the last date of the same month.

The Percent of Customer Expectations Met report is represented with a column chart.

This figure shows the Percent of Customer Expectations Met column chart displaying percentage of activities assigned to resources. Late, In time and Early activities are denoted in the chart.



This table displays the elements in the Percent of Customer Expectations report and their description:

Element	Description
Header	Displays the report name, the reported period and the number of resources whose data is displayed on the chart.
Columns	Each column represents 100% of the resource's not-done and completed activities.

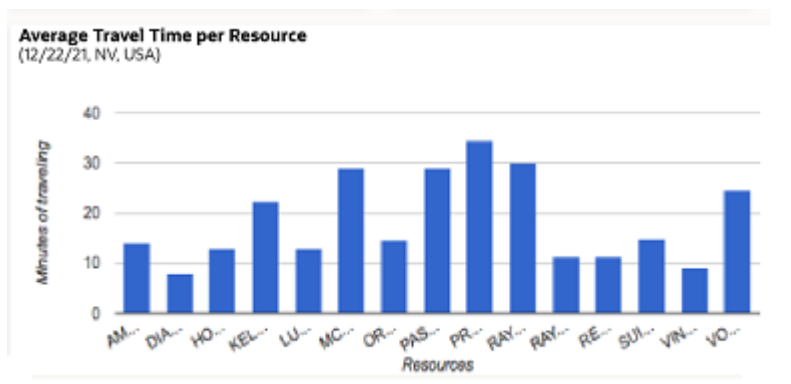
Element	Description
	Each column may consist of the maximum of three parts marked in different colors representing the percentage share of activities started before the delivery window, in time and after the delivery window. Apart from differentiating the percentage share of activities in colors, you can also view them as text in the chart hints.
Legend	Type of data represented by the chart: <ul style="list-style-type: none"> • Late • In time • Early
Axes	horizontal: Resources vertical: Percent of activities
Hint	Each activity displays a hint pop-up with resource name and their percent of activities met.

View the Average Travel Time Per Resource Report

The **Average travel time per resource** report displays the average time spent by resources traveling to customers on any day that you select.

The Average Travel Time Per Resource is displayed as a column chart that can be drilled down to detailed report tabular view. The chart shows data for all direct children of a selected bucket or aggregator. In the detailed tabular view, you can see data for all children under the chosen bucket/ aggregator.

This image shows the Average Travel Time Per Resource column chart displaying the minutes of traveling per resource.



This report has the following characteristics:

- You can run it for buckets/aggregators. If you select an individual resource in the Resource Tree, the chart is configured for the parent bucket/aggregator.
- You can configure the refresh rate in the Edit resource page of that resource. If the refresh rate is not available then the default value set in the database is used.

To view the Average travel time per resource report:

1. Click **Dashboard** to open the Dashboard.
2. Select the **Average travel time per resource** report.

The **Average travel time per resource** report shows data for the day selected in the calendar. The chart options allow choosing the selected date or the date before it. Additionally, the chart can be filtered to display data for a particular activity type group or for any activity types represented in the list of activities in the selected bucket. The third option allows defining the number of resources whose travel time is to be shown on the chart. The user can select 20, 40, 50 or all resources to be displayed. The Average Travel Time Per Resource report is represented with a column chart.

3. Click the **Options** icon to display the options for the chart.

See *Navigate the Dashboard* for more details.

4. Select the following date options from the drop-down list:
 - **Selected** – Reports for the day selected in the calendar
 - **Before selected** – Reports for the day before the one selected in the calendar

Results:

The Average Travel Time Per Resource report displays the following information.

- **Resource name** – Displays the name of resource that belongs to the organization unit or bucket.
- **Average Travel Time, minutes** – Displays the average travel time for the resource.

This table displays the elements in the Average Travel Time Per Resource report and their description:

Element	Description
Header	Displays the Report name, the reported period and the number of resources whose data is displayed on the chart.
Columns	Average travel time of each resource is shown as a column
Legend	The chart uses only one color to display data, therefore, the chart has no legend
Axes	horizontal: Resource vertical: Minutes of traveling
Hint	Resource name and their average travel time in minutes

View the Activities by Status Report

The **Activities by Status** report shows the status of each activity within the reporting period. This report displays the number of activities assigned to the selected resource (or resources grouped by their type and final status within selected dates. This report does not include deleted activities.

The Activities by Statuses Dashboard report is displayed for:

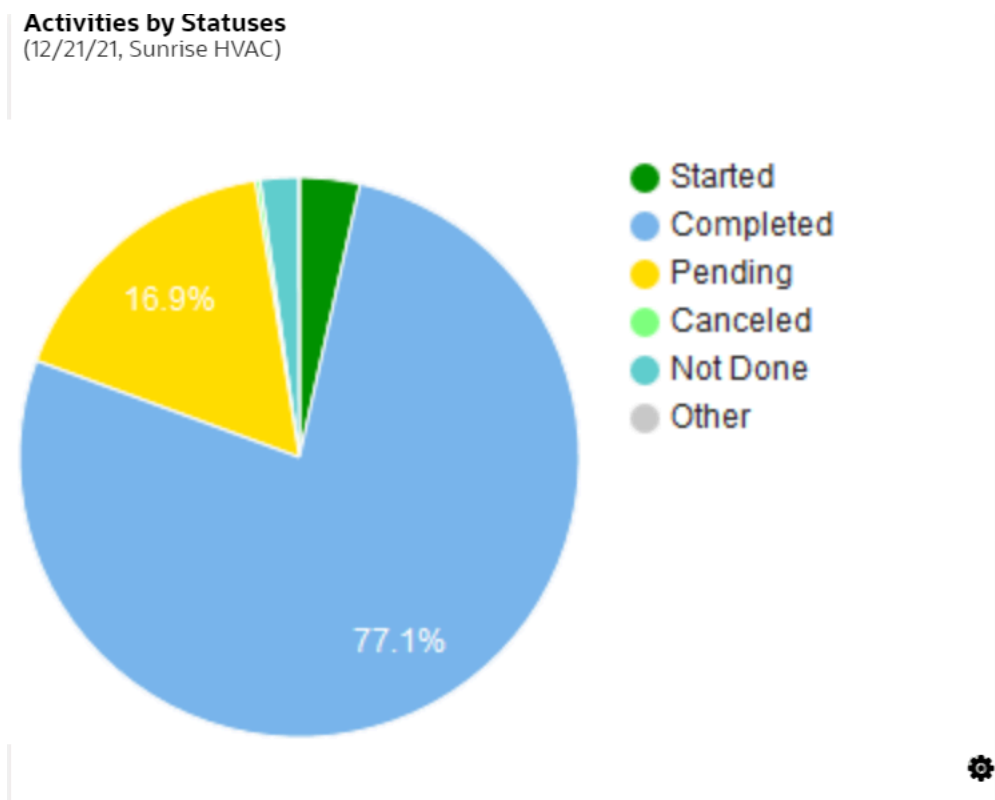
- buckets/organizations
- individual resources

You can either view the report details as a pie chart or in a table.

To open the dashboard report, click **Dispatch** and then select **Dashboard** from the drop-down menu. The Activities by statuses dashboard report is represented with a pie chart.

The Activities by statuses dashboard report shows data for the day selected in the calendar. The chart options allow choosing the selected date or the date before it. You can filter to display data for a particular activity type group or for any activity types represented in the list of activities assigned to the selected resource.

This figure shows the Activities by statuses report as a pie chart. The list of statuses are displayed in the Legend.



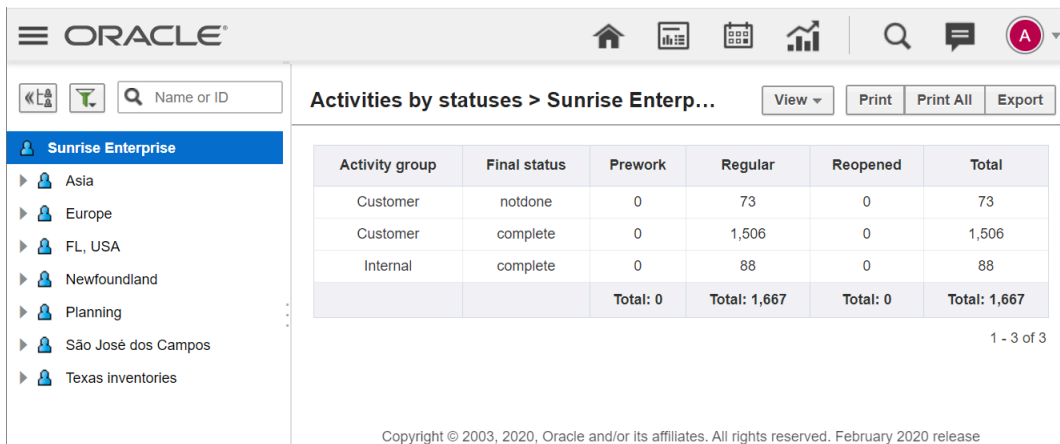
To view the Activities By Status report:

1. Select the **Navigation** button.

2. Select **Activities by Status** from the navigation pane to display the report. There are four types of activities: regular, reopen, activities or pre-work. The **Activities by Status** report displays the following information:
- **Activity group:** Indicates the name of the activity group and decides the number of rows in the report. For example, if there are less number of final statuses in an activity group, the report will have few rows (one for each final status).
 - **Final status**—Shows the final status of the job or activity in the current activity group.
 - **Pework**—Indicates the number of prework activities for the current activity group and the final status.
 - **Regular**—Indicates the number of regular activities for the current activity group and the final status.
 - **Reopened** —Indicates the number of reopened activities for the current activity group and the final status.
 - **Total:** —Shows the total number of activities for the current activity group and the final status

Results:

This figure shows the Activities by Status report showing the activity group, final status and the total count of prework, regular, and reopened activities.



This table displays the Activities by statuses elements and their description.

Element	Description
Header	Displays the report name and date in parentheses.
Slices	The entire diagram represents all activities assigned to the selected resource on the specified day and is assumed to be 100%. Each colored slice represents the activities of a certain status showing the percentage share of such activities in the whole number. Apart from differentiating the activity statuses in colors, you can also view them as text in the chart hints.
Legend	Statuses of the activities assigned to: <ul style="list-style-type: none"> • the selected individual resource (if an individual resource is selected in the Resource Tree), or • all resources in the selected bucket/group (if a bucket or group is selected) If activities assigned to the selected resource belong only to some of the statuses existing in the system, the slices and the legend will contain only the statuses of the activities assigned to the resource.
Hint	Activity status, the number of such activities assigned to the resource and their percentage share in the whole number of activities.

View the Mobile App Usage by Versions Report

You can identify users who use older versions of the mobile application through the new standard reports that you can add to a dashboard. With these standard reports, you have better visibility about the devices and versions of the Oracle Field Service mobile applications used by your mobile workers.

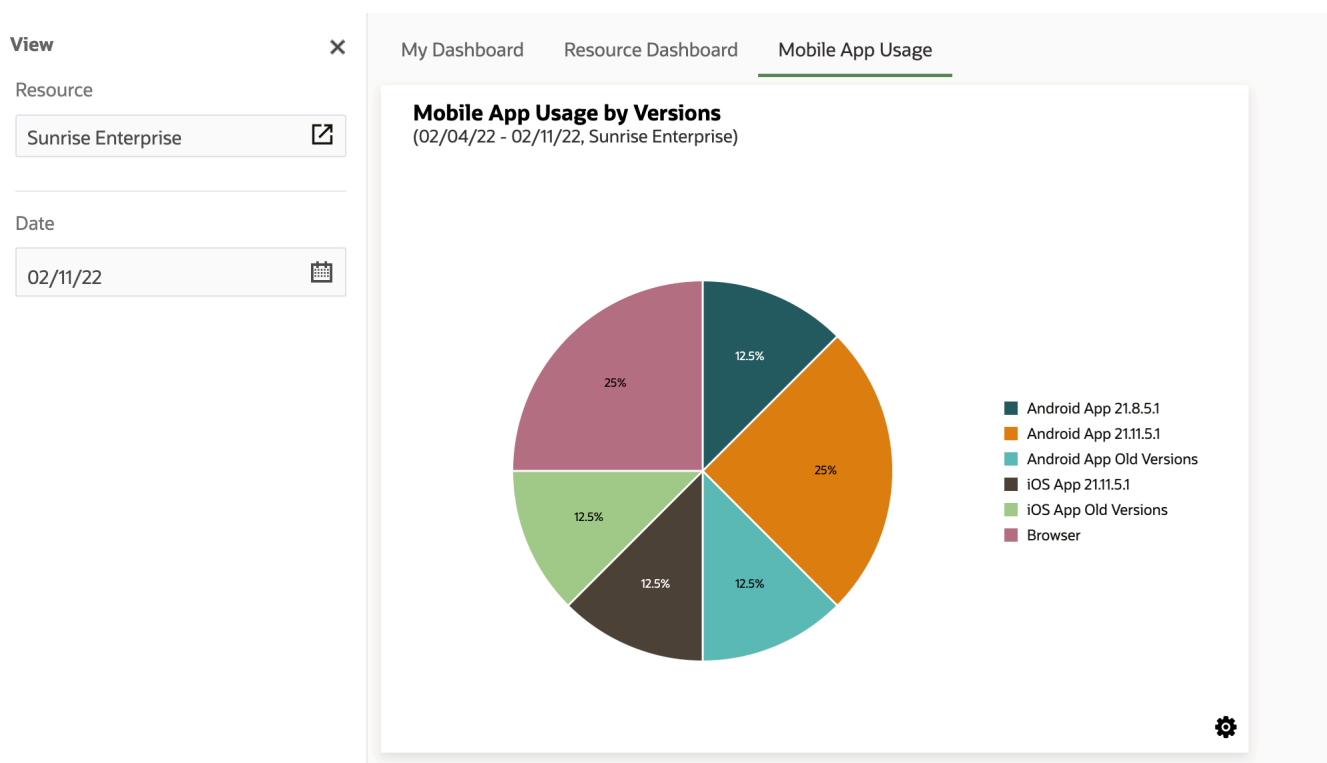
A new report, Mobile App Usage by Versions is available on the Dashboards page. The chart shows the percentage of users using each version of the Android or iOS apps based on logins for the last seven days.

To view the Mobile App Usage by Versions report:

1. Click **Dashboard** to open the Dashboard.
2. Select the **Mobile App Usage by Versions** chart from Available Reports.

Note: Administrators can control the availability of this chart for a user type by enabling the chart from the user type's available reports list.

This image shows the Mobile App Usage by Versions chart::



The chart shows the percentage of users that logged into Oracle Field Service through browsers within the last seven days. The application treats the same user that logged in through different applications as different users and track them separately within the chart.

3. You can filter the chart using the resource or date filters available on the View filters section. If you want to keep the chart fixed for a specific resource type, you can configure that from the Settings page of the chart. This image shows the Mobile App Usage by Versions chart options:

The screenshot shows a configuration window for the 'Mobile App Usage by Versions' chart. On the left, a 'View' sidebar contains filters for 'Resource' (Sunrise Enterprise) and 'Date' (02/11/22). The main panel shows the chart title, a description, and a checked checkbox for 'Always show report for resource: Sunrise Enterprise'. 'Close' and 'Save' buttons are at the bottom.

4. Navigate to Configuration, Dashboards, Available Reports. Administrators can control the availability of this chart for a user type by enabling the chart from the user type's available reports list.
5. For a selected bucket, the chart displays information for all direct and indirect children of the bucket, If single resources are selected, the chart shows that user's information. The chart shows the past seven days data from the selected date.
6. Administrators can control the availability of this chart for a user type by enabling the chart from the user type's available reports list.

View the Usage of the Mobile App Old Versions Report

You can identify users who use older versions of the mobile application through the new standard reports that you can add to a dashboard. With these standard reports, you have better visibility about the devices and versions of the Oracle Field Service mobile applications used by your mobile workers.

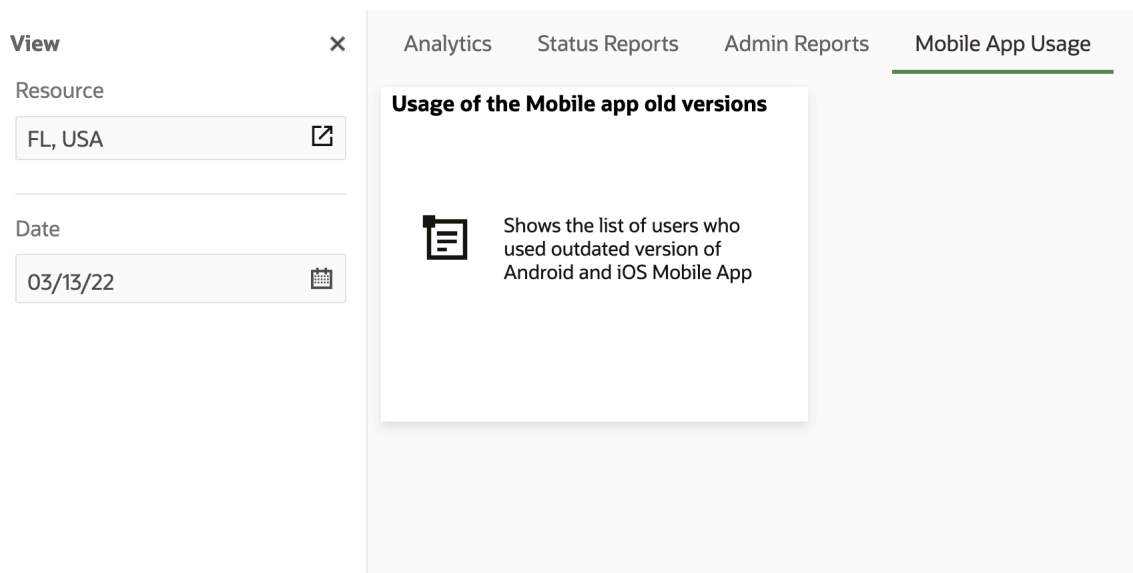
A new report, Usage of the Mobile app old versions is available through the Dashboards page. This report helps you to identify those users that are still using older versions of the Android or iOS mobile applications..

To view the Usage of the Mobile app old versions report report:

1. Click **Dashboard** to open the Dashboard.
2. Select the **Usage of the Mobile app old versions** report from Available Reports.

Note: Administrators can control the availability of this chart for a user type by enabling the report from the user type's available reports list.

This image shows the default view of the Usage of the Mobile app old versions report::



3. Double-click to open the report.

This image shows the Usage of the Mobile app old versions report;:

User Name	User Type	Type Of Mobile App	Native App Version	Last
HUANG, Regina	Technician	android	21.2.5.1	2022-0
HUPP, Leonard	Technician	ios	21.8.5.6	2022-0

This report provides information about who is using older versions of the Android or iOS applications with their last login times. The data is based on user logins within the last seven days. The application treats the same user that logged in through different applications as different users and tracks them separately within the report. You can filter the chart using the resource or date filters. For a selected bucket, the report displays information for all direct and indirect children of the bucket. You can also print, print all, and export the report.

4. These new reports enable you to identify the overall mobile application usage and users that are still on the older versions. It is always recommended that you download the latest versions of the Oracle Field Service Mobile apps, so that they can enjoy the design improvements and new features, along with a better user experience.

- Administrators can control the availability of this chart for a user type by enabling the chart from the user type's available reports list.

View the Offline Synchronization Report

You can use the Offline Synchronization Report to resolve any conflict between the data you added while working offline and the data that is available in Oracle Field Service Core Application. You can accept or reject the changes to synchronize the data.

- Log in to Oracle Field Service Core Application.
- Click **Dashboard** and then click dashboard in which you have configured the Offline Synchronization report.
- In the **View** pane (left pane), select the resource and the date for which you want to view the report.
- Click **Offline Synchronization**.

The **Offline Synchronization** report is displayed. If there are no conflicts, the message, No conflicts found is displayed. If there are any conflicts, the conflicts are displayed in a table.

- Review the information in the conflict data table.

Column	Description
Type	The icon for the entity in which conflict has occurred: <ul style="list-style-type: none"> ○ Route ○ Activity ○ Inventory ○ Service request
Identifier	The activity identifier in which the conflict has occurred.
Rejected action	The failed action.
Field Value	The list of fields with corresponding values in which conflict has occurred.
Time	The time at which the operation was rejected.
User	The user that performed the activity.
Reason	The reason for which conflict has occurred.

- [Optional] To filter conflicts, use the **View** drop-down list and specify the filter.
- Resolve the conflict manually by adding the appropriate details either in Oracle Field Service or in your external application such as CRM, Billing, or Provisioning.
- After the conflict is resolved, select the check box in the first column and click **Mark resolved**.

3 Routes and Activities Reports

About Routes and Activities Reports

These reports provide the information necessary to manage routing, schedule activities, and respond to customer demand. The reports listed on the Dashboards page in your configuration may vary from the ones discussed here.

You can directly access the following reports from the **Dashboards** menu.

- Inventory Report
- Messages Report
- Print Route
- Scheduled Report
- File Storage usage

The other reports cannot be accessed directly.

Note: Report column names are available only in English and cannot be modified.

View the InTime/Late/Early Activity Report

The **In Time/Late/Early Activity** report shows you the percentage of activities that were started on time and those that were started late, started early, not started or cancelled for either the individual resource or the bucket.

Activities started on time, late, or early are calculated by comparing the actual start time to the Service Window. This report can be used to measure on time performance.

To view the In Time/Late/Early Activity report:

1. Select the **Navigation** button.
2. Select **In Time/Late/Early Activity** from the navigation pane. The report displays the following information:
 - **Resource**—The resource or bucket that you selected from the Resource Tree
 - **Total number of activities**—The total number of regular activities assigned to resources within the reporting period
 - **% of Started In Time**—The percent of regular activities that were started within the service window, as well as the activities that have an indefinite service window (that is, the service window start/end **is null**). The search option for this field was set to 100% in order to return all start time statistics.
 - **% of Started Late**—The percent of regular activities started late. This includes activities with a **not null** service window and an actual start time that occurs after the end of the service window. The search option for this field was set to 100% in order to return all start time statistics.
 - **% of Started Early**—The percent of regular activities that were started early. This includes activities with a **not null** service window and an actual start time that occurs earlier than the start time of the service window. The search option for this field was set to 100% in order to return all start time statistics.

- **% of Not Started**—The percent of regular activities that were not started, indicated by a final status of **Pending**. The search option for this field was set to 100% in order to return statistics for all activities that were not started.
- **% Canceled**—The percent of regular activities that were canceled without having been started. The search option for this field was set to 100% in order to return statistics for all canceled activities.

This figure shows the In Time/Late/Early Activity report with the percentage of activities started, not started, or canceled.

Resource	Total number of activities	% of Started In Time	% of Started Late	% of Started Early	% of Not Started	% of Canceled
Arndt, William	77	6.49	0.00	88.31	5.19	0.00
Holm, Billy	77	9.09	0.00	87.01	3.90	0.00
Rickert, Peter	76	9.21	0.00	88.16	2.63	0.00
Disney, Kathleen	76	6.58	0.00	90.79	2.63	0.00
Riddick, Mike	68	5.88	0.00	91.18	2.94	0.00
Lynch, Kevin	69	7.25	0.00	88.41	4.35	0.00
Valentino, Dennis	78	7.69	0.00	89.74	2.56	0.00
Ordonez, Allison	77	5.19	0.00	92.21	2.60	0.00
Peake, Lynda	63	3.17	0.00	93.85	3.17	0.00
Pearson, Kay	75	4.00	0.00	92.00	4.00	0.00
Total: 736						
Grand Total: 1,655						

3. Use the **Print** or **Export** options to print the report or to export it in **.csv** format.

View the Notification Summary Report

The **Notification Summary** report summarizes the status of the messages sent to customers during the reporting period.

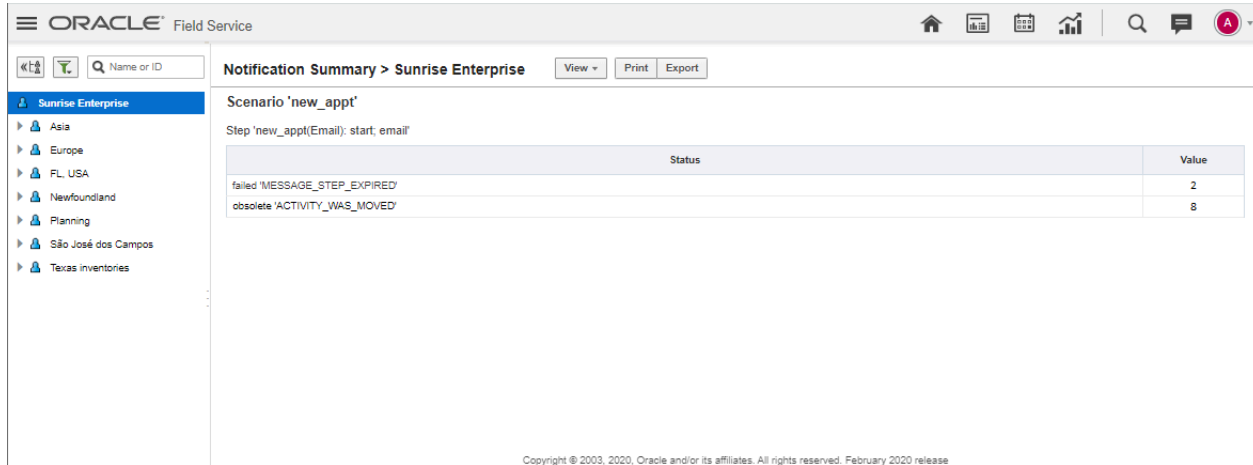
To view the Notification Summary report:

1. Select the **Navigation** button.

2. Select **Notification Summary** from the navigation pane.

The **Notification Summary** reports include all messages of any status excluding **new** and **sending** that were sent by any method available (voice, e-mail, external system, manual, etc.).

This figure shows the Notification Summary report displaying the summary of message statuses sent to customers.



3. Click **View** and set filters to view messages sent on a certain day or under a particular scenario.

Search the Messages Report With Work Order Number

The Messages report for Message Scenarios has been improved for better customer experience.

To view the Messages report:

1. Click **Dashboard** to open the Dashboard.
2. Click **Notification Summary**.

Results:

The Messages report has been improved with these enhancements

- A Work Order column has been added showing the number (appt_number) associated with the activity and message scenario. Now you can identify the message scenario

associated with a work order. Messages report shows the Work Order number column:

The screenshot shows the Oracle Field Service interface. At the top, there is a navigation bar with the Oracle logo and the text 'Dashboards | Notification Summary'. Below this is a sidebar with a search box and a list of navigation items. The main content area displays a 'Messages Report' table.

Work Order	Customer Name	Address	Delivery channel	Status	Description	Misc.	Scenario
WO_1234	Installation	auto10@mail.blr.oracle.com	Email	failed	-	-	Create Appt
WO_1234	Installation	auto10@mail.blr.oracle.com	Email	failed	-	-	Create Appt
WO_1234	Installation	auto10@mail.blr.oracle.com	Email	failed	-	-	Create Appt
WO_1234	Installation	auto10@mail.blr.oracle.com	Email	failed	-	-	Create Appt
WO_1234	Installation	auto10@mail.blr.oracle.com	Email	failed	-	-	Create Appt
WO_1234	Installation	auto10@mail.blr.oracle.com	Email	failed	-	-	Create Appt
WO_1234	Installation	auto10@mail.blr.oracle.com	Email	failed	-	-	Create Appt
WO_1234	Installation	auto10@mail.blr.oracle.com	Email	failed	-	-	Create Appt
WO_1234	Installation	auto10@mail.blr.oracle.com	Email	failed	-	-	Create Appt
WO_1234	Installation	auto10@mail.blr.oracle.com	Email	failed	-	-	Create Appt
WO_1234	Installation	auto10@mail.blr.oracle.com	Email	failed	-	-	Create Appt
WO_1234	Installation	auto10@mail.blr.oracle.com	Email	failed	-	-	Create Appt
WO_1234	Installation	auto10@mail.blr.oracle.com	Email	failed	-	-	Create Appt
WO_1234	Installation	auto10@mail.blr.oracle.com	Email	failed	-	-	Create Appt

- The Messages report is searchable by work order number. You can now search using the work order number.

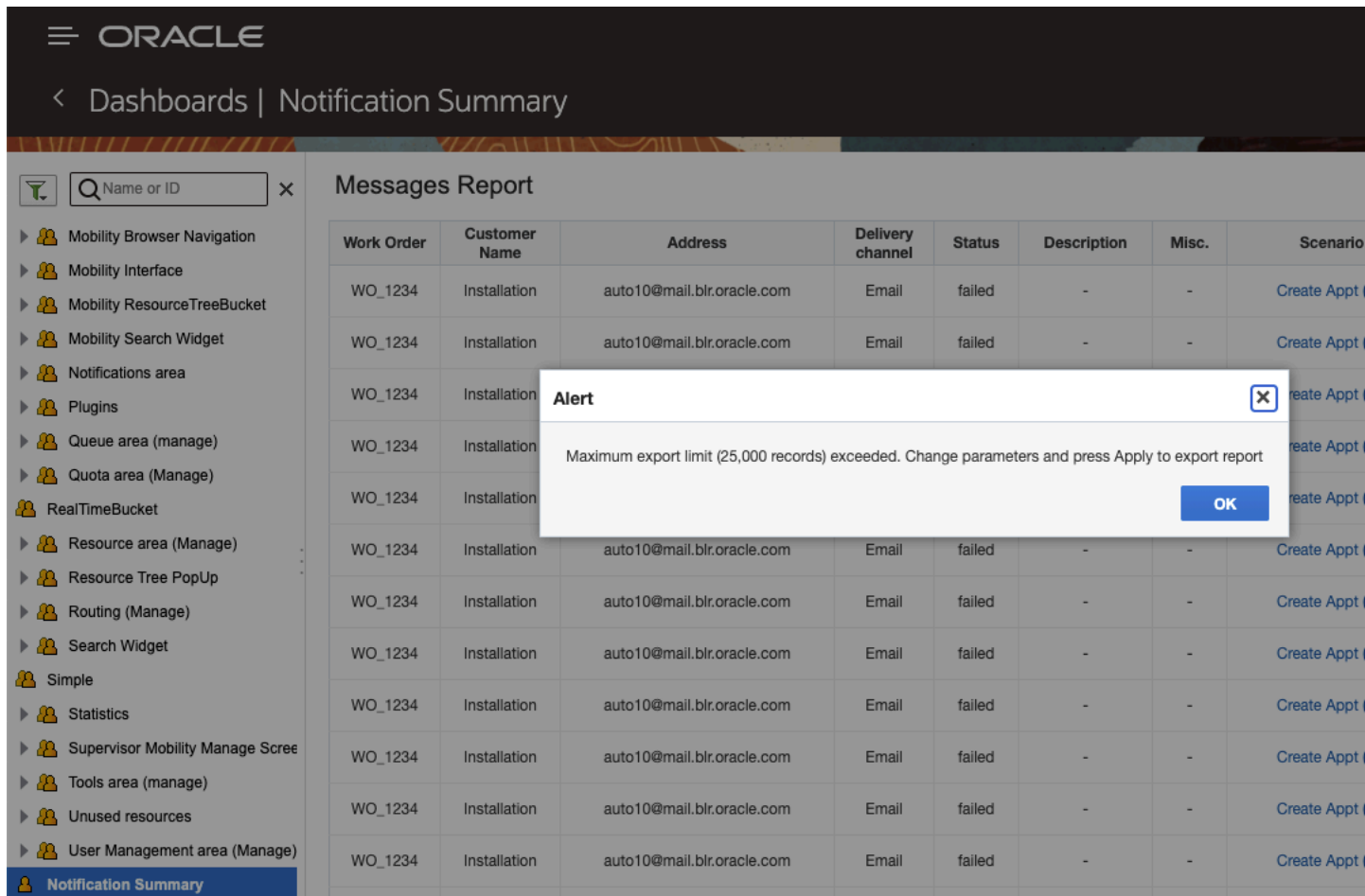
This image displays the Messages Report showing Search Pane:

The screenshot shows the Oracle Field Service interface. At the top, there is a navigation bar with the Oracle logo and the text "Dashboards | Notification Summary". Below this, a search pane is open, displaying a list of navigation items on the left and a "Messages Report" table on the right. The search pane includes a search input field with the placeholder "Q Name or ID" and a magnifying glass icon. The navigation items on the left include "Mobility Browser Navigation", "Mobility Interface", "Mobility ResourceTreeBucket", "Mobility Search Widget", "Notifications area", "Plugins", "Queue area (manage)", "Quota area (Manage)", "RealTimeBucket", "Resource area (Manage)", "Resource Tree PopUp", "Routing (Manage)", "Search Widget", "Simple", "Statistics", "Supervisor Mobility Manage Scree", "Tools area (manage)", "Unused resources", and "User Management area (Manage)". The "Notification Summary" item is highlighted in blue. The "Messages Report" table has the following data:

Work Order	Customer Name	Address	Delivery channel	Status	Description	Misc.	Sc
WO_567	Installation	-	Email	falsemethod	CUSTOMER_EMAIL_IS_NOT_AVAILABLE	-	Create

- If you get the message "Maximum export limit (25,000) records exceeded, change the parameters and press apply to export report." when you try to export more than 25,000 records.

This image shows the Notification Message:



Print the Route of a Single Resource

The **Print** option enables you to print the route of a single resource, and provides a summary of the resource's day.

To print the route of a single resource:

1. Click the navigation button and click **Dispatch Console**.
2. Select the resource in the resource tree whose route you would like to print.

3. Click **Actions > Print**.

The Print Queue report is displayed.

The route report displays in the **Work** area.

This screenshot shows the Print Route report displaying the route of a selected resource for a day.

Print Route > (UP only) ROPER, Viola ◀ Wednesday, May 31st, 2017 ▶ Print Export

Start	Activity type	Work Order	Service Window	Account Number	Name	Address	ZIP/Postal Code	
05:56 AM	Add Outlets	137155987	08 AM - 10 AM	019895335	Shavone Bruns	1015 BRIELLE AVE OVIEDO FL	327655406	555
06:41 AM	Add Outlets	137155955	08 AM - 10 AM	019895280	Hector Pierre	989 N LAKE CLAIRE CIR OVIEDO FL	327659148	555
07:33 AM	HD-DVR Upgrade	137155819	10 AM - 12 PM	019894995	Terrika Wren	209 BANYAN CT WINTER SPRINGS FL	327082935	555
10:05 AM	HD-DVR Upgrade	137155767	01 PM - 03 PM	019894905	Greta Zerkel	21 S CORTEZ AVE WINTER SPRINGS FL	327082945	555
11:25 AM	Cable Upgrade	137156143	01 PM - 03 PM	019893045	Adrian Hutchings	9900 CAROLINA ST OVIEDO FL	327658646	555
12:21 PM	Cable Upgrade	137156158	03 PM - 05 PM	019893070	Jose Ortiz	3760 BRANTON DR OVIEDO FL	327658606	555

4. Review the following information in the report:

- **Start** – Indicates the estimated time of arrival for the pending work order or the time that the job is scheduled to begin
- **Activity Type** – Displays the type of job or work to be performed, such as install, trouble call, and so on, as well as any non-customer facing activities, such as warehouse, break, and so on.
- **Service Window** – Specifies the time boundaries for this work order, as scheduled by the company and expected by the customer.
- **Account Number** – Displays the primary identifier for ownership of an account.
- **Name** – Displays the name of the customer receiving the service.
- **Address** – Displays the customer’s service location.
- **Zip** – Displays the postal code of the service location.
- **Phone** – Displays the telephone number of the customer receiving the service.

5. Use the **Print** or **Export** links to print the report or to export it in `.csv` format.

View the Route Statistics Report

The **Route Statistics** report shows you the percentage of activated routes, the percentage of completed routes, the average number of activities per route, and a summary of the time spent on actual activities.

To view the Route Statistics report:

1. Select the **Navigation** button.
2. Select **Route Statistics** from the navigation pane.
The Route Statistics report is displayed.

3. Filter the information in the report by resource or by bucket depending on the selection you make in the Resource Tree.
4. Review the following information in the report:
 - o **Resource name**—Displays only those resources, groups, or buckets that had at least one route assigned during the reporting period
 - o **Total Routes**—Displays the total number of routes assigned (day of work) to a given resource/bucket/group within the reporting period. Routes with activities and/or deleted activities only are not taken into account.
 - o **% of Activated**—Specifies the percent of routes that were activated during the reporting period. Routes with activities and/or deleted activities only are not taken into account.
 - o **% of Complete**—Specifies the percent of routes that were completed (activated routes that include only activities with the following statuses: *Completed*, *Canceled*, *Suspended*, and *Not done*) during the reporting period. Routes that contain deleted activities or routes that do not contain any activity are not taken into account.
 - o **Average number of activities per route**—Specifies the average number of regular activities (activities) per route. Reopened activities and pre-work are not taken into account.
 - o **Summary time spent on activities, hrs**—Displays the summary time spent processing activities (in hours) during the reporting period. All activities that have been started and have a NOT NULL length are included as is time spent on reopened activities and pre-work.
5. Use the **Print** or **Export** options to print or export the report in **.csv** format.

View the Route Time Parameters Report

The **Route time parameters** report calculates the average time parameters, in hours, for one route.

To view the Route Time Parameters report:

1. Select the **Navigation** button.
2. Select **Route time parameters** from the navigation pane.

The Route time parameters report is displayed.

This figure shows the Route Time parameters report that calculates the average time parameters, in hours, for one route.

Resource	Average activation time	Day length	Time spent on activities	Time spent on travel	Number of completed activities
Newfoundland	5.20	7.74	4.40	3.34	8.7
CA, USA	5.23	6.68	3.95	3.03	8.0
São José dos Campos	5.86	5.85	3.23	2.82	6.8
Planning	5.42	7.50	4.07	3.43	6.8
FL, USA	5.07	7.44	4.28	3.16	8.4

3. Review the following information in the report:

- **Resource**—The resource or bucket that you selected from the Resource Tree. If you selected a Bucket that includes multiple resources, statistics will be broken down by resource. If you select a bucket that includes other buckets, the statistics will be broken down by bucket like the report above.
- **Average activation time**—The average time in decimal format (for example, 08:40 will be displayed as 8.66) of route activation for the resource or bucket per day over the reporting period.
- **Day length**—The average number of hours between the start of the first job or activity and the end of the last job or activity for the selected resource or bucket during the reporting period.
- **Time spent on activities**—The average number of hours spent on individual Activities over the reporting period. (An appointment is sometimes made up of more than one activity.)
- **Time spent on travel** —The average number of hours spent on Travel and Idle time over the reporting period.
- **Number of completed activities** —The average number of completed activities for the selected technician or bucket per day over the reporting period.

Note: The term *average* is used because a date range can be selected when running the report.

View the Routing Report

The routing report analyzes the quality of routes and measures the performance of the routing group over time. The routing report provides route statistics, such as travel time, work time, and number of completed jobs, and is used to measure both productivity and drive time.

To view the Routing report:

1. Select the **Navigation** button.
2. Select the Routing report from the navigation pane.
3. Review the routing report. It presents a summary of each route, planned or actual, in terms of minutes of travel, work, job fit %, overtime and idle time. It presents the current view at the time it is run as follows:
 - If run before the start of the day, the report represents the planned route
 - If run after the end of the day (or days later), the report represents what actually happened
 - If run mid-day, the report will be part actual and part planned
4. Select a resource bucket or organization in the Resource Tree to run the routing report .

A single total line is provided for all the resources included in the report. Some buckets contain resources while others govern a hierarchy of buckets or organizations. The report will be broken down either by individual resource or by bucket or organization, depending on the hierarchy.

5. Review the following information in the report:

- **Aggregator**—Either a bucket or an organization
- **Technician**— Name of the selected resource
- **Date**—The date of Route in day/month/year format
- **Jobs**—The number of jobs on route for that day, filtered by status and work type conditions. Status can be any of the following:
 - Pending
 - Started
 - Complete
 - Suspended

The total number of jobs includes jobs that meet the **status** and **work type** conditions above, including jobs that were on the resource's route within the specified day and jobs with no service window (**all day** jobs).

- **Travel, minutes**—The number of minutes used for travel. If the route has not yet been completed, this will show the estimated travel time.

Note: Travel time represents total travel time from and to known locations. If an activity (such as lunch) is not a known location, Oracle Field Service will not represent that time in travel time. Similarly, time spent on activities (meetings or lunch) is not represented in the routing report.

- **Work, minutes**—The total minutes of work-duration time in a technician's route for a specified day in the defined date range. If the route has not been started or completed yet, this will show the estimated work time.
- **Job Fit %** – The average skill level for jobs on a route. This metric is based on the Oracle Field Service work skill %. If a technician does not have a corresponding work skill for an activity (or doesn't have any work skills), then the work skill for the activity is considered to be 0.
- **Overtime, minutes**—The number of overtime minutes for the day. Overtime is calculated as [End of the last job performed] - [Schedule shift end time]. If a resource has no overtime, the report will display a "0" value.

Note: Oracle Field Service considers overtime to be any time outside the resources's shift for that day. This does not influence the Oracle Field Service overtime calculation. If the technician has a 10 hour day scheduled or has worked 35 hours earlier in the week, Oracle Field Service just looks at time within or outside the shift represented in that day's working calendar.

- **Idle Time, minutes**—The time within a route when a technician is waiting to begin traveling to the customer's location in order not to arrive before the service window starts. In other words, it is the time that is not filled with travel time, work time, or an activity.

Manual Assignment Reports

The Manual assignment reports let you to understand at-a-glance why you should make manual changes instead of utilizing routing and optimization features and how you can use the collected information to make improvements in operations and routing plans accordingly. The Manual Assignment reports help improve efficiency and productivity, reduce the need of manual assignments and create optimal routes and schedules.

These internal reports are available:

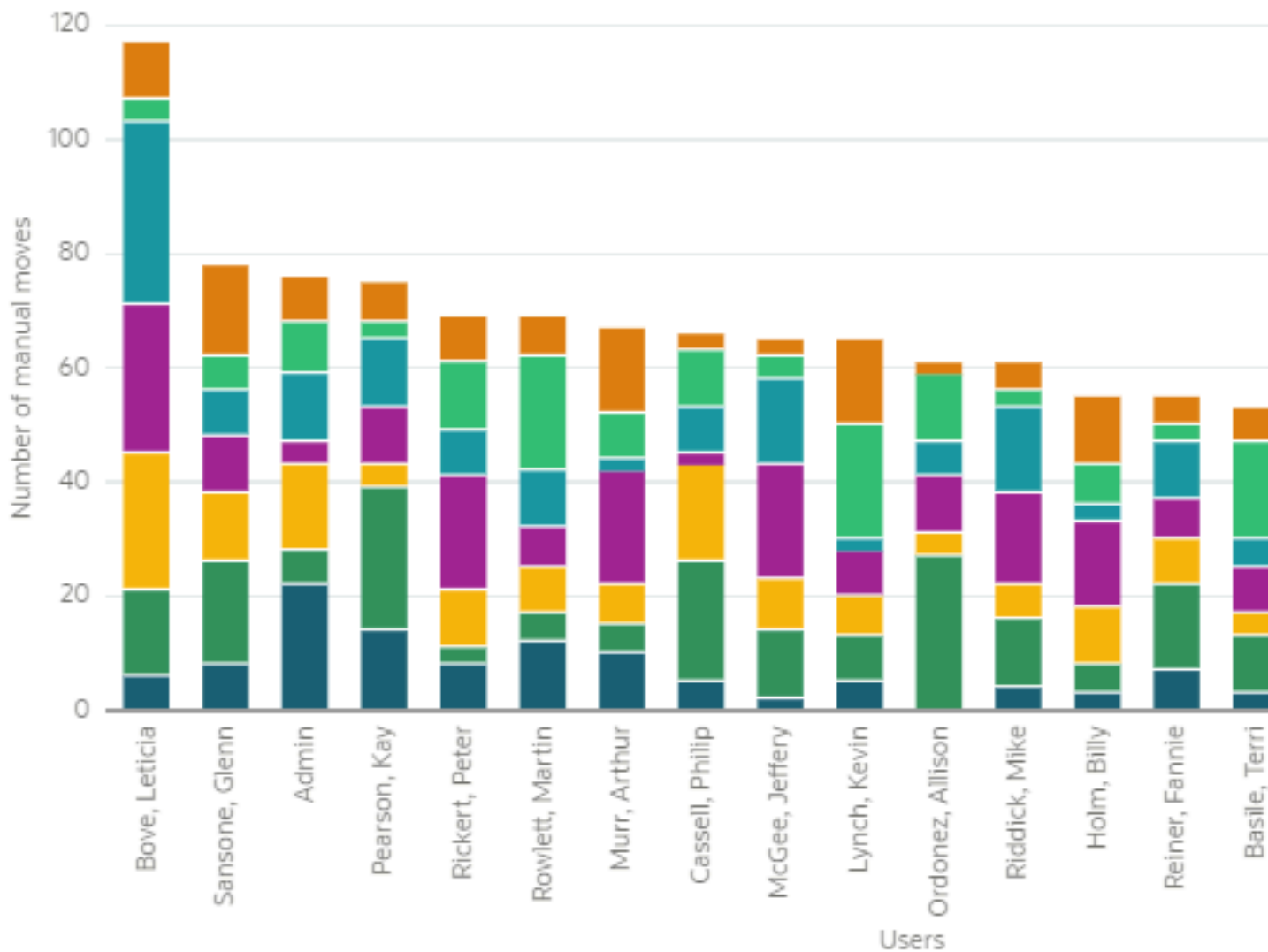
- Manual Assignment by Users

- Manual Assignment Trends

Manual Assignment by Users

The report is based on the number of manual moves - how many activities were manually moved by each user for the selected period. The Top 20 users with max number of moved activities are displayed in the chart. This image displays the Manual Assignment by Users page.

Manual Assignment by Users (August 2021, Sunrise Enterprise)



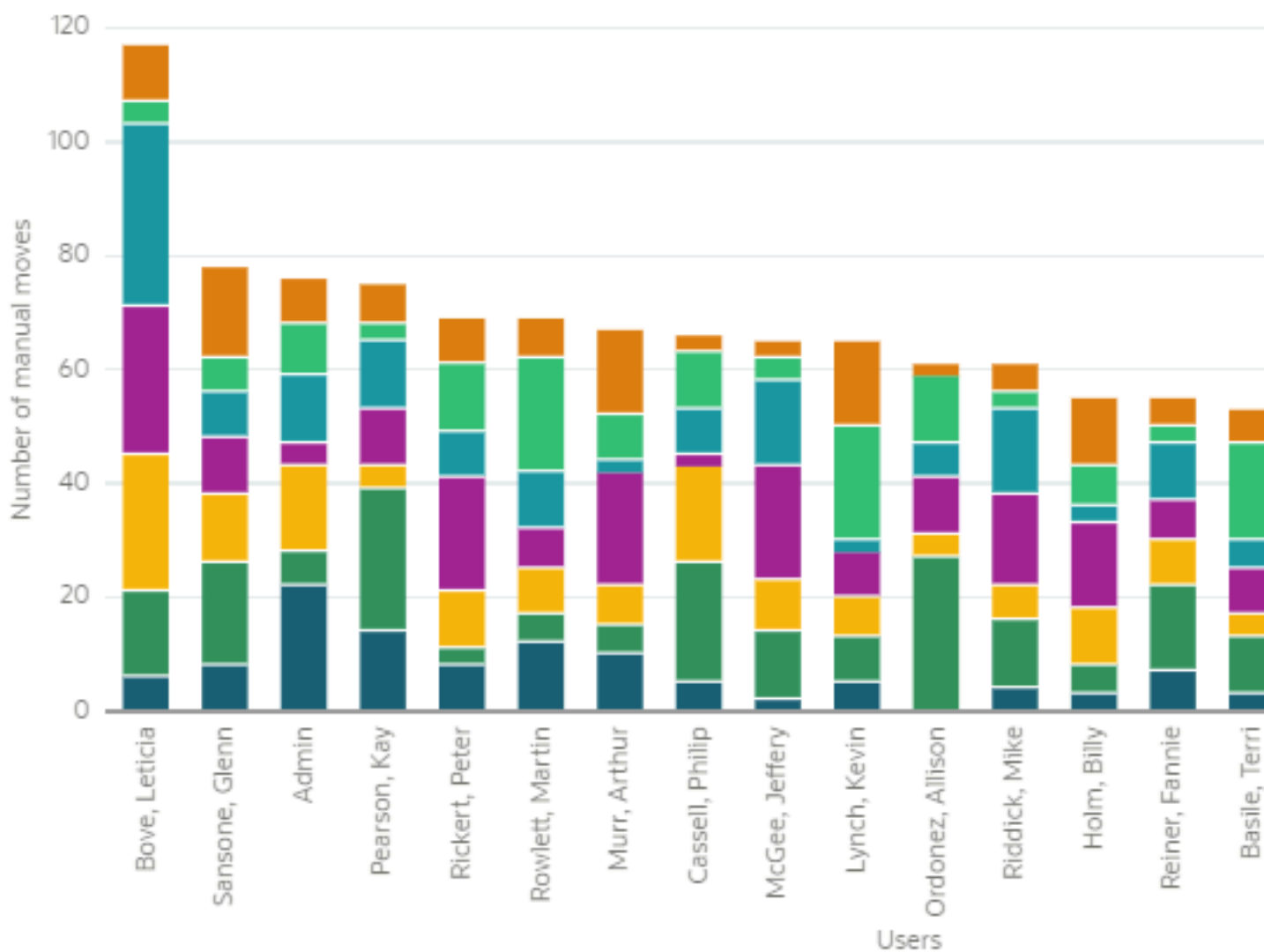
Each bar represents a user, and they are colored by Move Reasons. Move Reasons with associated colors are displayed in the legend on the right.

Manual Assignment Trends

The report is based on the number of manual moves - how many activities were manually moved per day for the selected period.

This image displays the Manual Assignment Trends page.

Manual Assignment by Users (August 2021, Sunrise Enterprise)



Each bar represents a date, colored by Move Reasons. Move Reasons with associated colors are displayed in the legend on the right.

View Scheduled Reports

The **Schedule Report** option enables you to view a list of reports that have been set up to run on a specified schedule.

Before you start

Users for whom the Schedule Report option is selected can access the Schedule Report option from Core Application. Note that you cannot provide access privileges for users in a new user type.

Be aware of these points:

- There is a limit based on the file size that can be sent through emails (The email size cannot exceed 2MB). If the configured report causes this size to go above the limit, the report is truncated so that the size is within the limit.
- If the report is truncated due to size, the email also contains a note stating that the size exceeded. The note also suggests that the type of report be changed and/or the filters applied can be modified so that the size of the report is within the limit.
- If a scheduled report is deleted, the changes are updated only on the following day.

These improvements were made:

- Schedule report functionality for existing users
- Removal of the survey reports as the survey functionality is not available for users

Schedule report functionality for existing users

Existing users configured with schedule report in legacy manage can now access schedule reports from Core application.

1. Click Configuration. In the Configuration window, select Dashboards. This image shows the Configuration window:
2. Click **Schedule Reports** from the Actions menu. This image shows the Configuration window. The Schedule Reports window is displayed.
3. Make sure users who have privilege to access schedule report also have access to Dashboards from the Configuration window.

Note: You cannot configure view or edit access privilege for a new user type in Update 21A. Existing user types that have access to scheduled reports will have the same access privilege in Update 21A. However, new users cannot modify the existing privilege in Update 21A

Initial report scheduling is handled by your system administrator.

To view scheduled reports:

Here's what to do

1. Select the **Navigation** button.
2. Select **Schedule Report** from the navigation pane.

A list of the reports that have been scheduled to run on a recurring basis by the system administrator appears. This screenshot displays the Schedule Reports page showing the list of all scheduled reports.

ID	Report name	Start Date	End Date	Report Type	Time	Recurrence	Action
3	Activities by Statuses	12/09/20	12/09/20	csv	01:00 Eastern Time	everyday	Modify
4	Average Number of Calls per Customer	12/09/20	12/09/20	csv	00:00 Eastern Time	everyday	Modify

Results:

This table provides the elements in the Scheduled Report and their description:

Column	Description
ID	The unique identifier for this report.
Report name	The name of the report.
Start Date	The start date of the reporting period.
End Date	The end date of the reporting period.
Report Type	The format of report to be sent or saved (CSV, HTML, XML, PDF).
Time	The time that the report was run.
Recurrence	How often this report is run. You cannot run or modify any recurring reports.
Action	To view the details of the settings for an individual report (View).

How do I view the changes made to the Configuration pages?

The Configuration History report displays the changes made to any of the Configuration pages within the application.

Note: Whenever a PATCH API is used to update a value for an Activity Duration or Travel Duration, the **Configuration History** report has an entry showing the number of records that were updated in addition to the Activity duration or Travel duration key.

To view the Configuration History report:

1. Select the **Navigation** button.
2. Select **Configuration History** from the navigation pane.
The Configuration History report is displayed.
3. Review the following information in the report:
 - a. **Action Time**—Specifies the date and time in the time zone and desired format of the user viewing the page when the change in Configuration was made.
 - b. **Action**—Specifies either an Insert, Update or a Delete based on the operation carried out by the user.
 - c. **Old value**—Displays the previous value of the fields related to the element in case of a Delete or an Update operation.
 - d. **New value**—Displays one of the following:
 - In case of an Update operation, this column displays the modified value of fields related to the element.
 - In case of an Insert operation, this column displays the set value of the fields.
 - e. **Element**—Displays the element or object that has been added, deleted or modified.
 - f. **User**—Displays the user name of the user who made the modification. On mouse hover, the user name and the user ID are displayed.
4. To filter the report, click **View**.
 - a. **Start Date** and **End Date**—Select the date range to filter the data.
 - b. **Find** —Enter a string to search within the Old value and New value columns in the report.
 - c. **Search Category**—Select an action to filter the report based on a category for example message type.
 - d. **Rows**—Specify the number of rows to be displayed on each page of the report.

Results:

Changes made to these pages in the application are included in the Configuration History report:

- Business Rules
- Link Templates
- Work Schedules
- Work Zones
- Work Skills
- Properties
- Capacity Categories
- Time Slots
- Resource Types
- Activity Types

- Inventory Types
- Glossary
- Action Management
- Display
- Filters
- Organizations
- Login Policies
- User Types
- Oracle Knowledge
- Statistics
- Applications
- Message Scenarios
- Holidays
- Resource Info
- Resource Calendars
- Locations
- Resource Work Zones
- Users (Except for Collaboration and Helpdesk groups)
- Daily
- Routing
- My Display
- Themes (only when default Theme is changed)
- Applications (limited to changes in the context of APIs)

Known Behaviors:

- The 'Find' option within 'View' is applicable only for the Old value and New value columns, it is not available for the Identifier column.
- You can search only Old value and New value columns using the value of the field and not the field name. For example: for the entry 'Activity Type: Install', you can search the word 'Install', but not on 'Activity Type'. You can search Users using the *User ID* ; you cannot search using the *User Name*.
- Some fields may display the IDs of the values, instead of the actual values. For example: Design Theme: 2 or Time Slots can have values like 2, 3.
- The Identifier column, in some cases may display IDs instead of or in addition to values. For example: 'Display Profile: UT16_DISPLAY_PROFILE/**26**' instead of 'Display Profile: UT16_DISPLAY_PROFILE' ID: 15497
- The Identifier may display just the Company name when the Business Rules screen is modified.
- In entries related to the Statistics page, the value of the Type displays the label instead of the text. For example: 'Type: appt_duration' instead of 'Type: Activity duration stats fields'
- The Context Layout displayed within the Identifier column shows the label instead of the text. For example: 'Display Context Layout: web_menu manage/540'

- In some cases, the number of rows displayed on the screen may be less than the configured number of rows. For example: The page may display only 18 rows on the screen though the user has set 20 as the number of rows.
- Sorting is only available using the Action Time and Operation columns.
- Values of sensitive information like passwords, client secrets, and certificates are masked using * characters.
- Collaboration and Helpdesk groups are not shown in the Configuration History.
- Changes done to the SAML login policy using "Upload Metadata XML" are not logged.

Note: Configuration History Log information will be available for the past 90 days; information beyond 90 days is automatically removed.

4 Communication and Post Activity Survey Reports

About Communication and Post Activity Survey Reports

The reports in this category document the company's performance in communicating with customers, delivering service on time and meeting customer expectations.

Note: Report column names are available only in English and cannot be modified.

View the Average Number of Calls Per Customer Report

The **Average Number of Calls per Customer** report provides statistics about the voice messages that were sent to customers during the reporting period.

To view the Average Number of Calls Per Customer report:

1. Select **Average Number of Calls per Customer** from the navigation pane. The report contains the following information:
 - **Message Type:**—Indicates the following types of messages based on message triggers:
 - day_before
 - reminder
 - today_%
 - call_ahead
 - complete
 - **Number of sent messages:** —Shows the total number of voice messages (of all types) that were sent to customers within the reporting period. It displays the total number of successfully sent voice messages with a final status of **Sent** or **Delivered**.
 - **Average Number of Calls per Customer** shows the average number of calls (of all types) that one customer received within the reporting period.

The **Average Number of Calls per Customer** report shows the Average number of calls successfully sent to one customer. This number is calculated as [The total number of successfully sent calls] *Divided by*: [The number of customers who received at least one voice message of any type, with a status of **Sent** or **Delivered**].

2. Use the **Print** or **Export** links to print the report or to export it in .csv format.

View the Percent of Accurate Last Messages Report

The **Percent of accurate last messages** report shows the percentage of Last Notification calls in which the service window boundaries communicated to the customer were accurate.

An **accurate** call is one where the actual start time of the activity appears to be within the boundaries of the time window specified by the call (± 10 minutes). A **last notification call** is the last voice message that the customer received before the activity was started.

To view the Percent of Accurate Last Messages report:

1. Select the **Percent of accurate last messages** report from the navigation pane.
2. Click **View**

The **Percent of accurate last messages** report is displayed:

This image shows the Percent of accurate last messages report that displays the percent of last notification calls.

Date	Percent of accurate last calls
03/14/19	80.6
03/15/19	71.4
03/16/19	71.6
03/17/19	70.8
03/18/19	71.0
03/19/19	54.9
03/20/19	32.1
04/08/19	9.2
Average: 57.7	

1 - 8 of 8

Copyright © 2003, 2019, Oracle and/or its affiliates. All rights reserved. May 2019 release

3. To select the time duration, select the calendar icons in the **Start Date** and **End Date** fields and click **Apply**.
The **Percent of Last Accurate Message** report displays the percentage of Last Notification calls in which the service window boundaries communicated to the customer were accurate.
 - o **Date**—Indicates the notification date.
 - o **Percentage of Accurate Last Calls**—Shows the ratio between the number of accurate last customer notification calls and the total number of work orders that have at least one customer notification call with the *Sent* or *Delivered* result.

The following activities are taken into account:

- o Activities that have been started
- o Notification calls containing the estimated service or delivery window

View the Percent of Contacted Customers Report

The **Percent of Contacted Customers** report shows the total number and percentage of customers who received at least one message containing either a service or delivery window.

To view the Percent of Contacted Customers report:

1. Click **Dashboard** to open the Dashboard.
2. Select the **Percent of Contacted Customers** report.

Results:

This table provides the elements in the Percent of Contacted Customers report and their description:

Option	Description
Date	The notification date
Number of Contacted Customers	The total number of customers contacted during a given date.
Percent of Contacted Customers	The percent of contacted customers.

The following equation is used to determine this percentage:

The quotient of **number of customers** divided by the **total number of customers who should have been contacted**.

View the Last Message Window Size Report

The Last Message Window Size report shows the percentage of customers whose last successfully sent notification included an estimated delivery time window of a specific duration.

To view the Last Message Window Size report:

1. Select the **Navigation** button.
2. Navigate to the **Last Message Window** from the navigation pane. The Last Message Window Size report contains the following information:
 - o **Size of Window (min):** Estimated time window for service or delivery as transmitted (in minutes) to the customer in the last successfully sent notification (with a status of Sent or Delivered).
 - o **Percent of Calls:** Percent of customers who were given an estimated window of time for delivery.

View the Transferred Calls Report

The **Transferred Calls** report shows the number of voice calls that were transferred to the Call Center (when a customer selected the corresponding automatic option).

To view the Transferred Calls reports:

1. Select the **Navigation** button.
2. Navigate to the **Transferred Calls** report from the navigation pane. The **Transferred Calls Report** contains the following information:
 - o **Date**—Notification Date.
 - o **Before Route Start**—The number of voice calls transferred to the Call Center before the route was activated.
 - o **After Route Start**—The number of voice calls transferred to the Call Center after the route had been activated.
 - o **Inactive Route**—The number of voice calls transferred to the Call Center for routes that were not activated.
 - o **Total**—Total number of voice calls transferred to the Call Center.

View the Messages Report

The Messages report details the results of messages sent out through the Notification Engine. This report shows only those messages that use set property delivery channel (method) if they were generated in less than one hour. The only exception from this rule: Messages with failed status. Such messages are important for troubleshooting therefore they do not have the one-hour expiration time.

To view the Messages report:

1. Select the subject of your report from the resource tree.
This could be a bucket or organization, such as XYZ contractors, or one or more resources.
2. Click the **Navigation** button.
3. Select **Messages Report** from the navigation pane.
4. Click **View** to display the filtering options for this report.

5. Select your options.

- a. **From/To Date:** Use the calendar icons to select the desired dates.
- b. **Trigger:** Select a trigger from the drop-down menu. The trigger is the action taken within Oracle Field Service that triggers the message. For example, if you would like to run a report showing all messages triggered when an order is canceled, select **Cancel**.
- c. **Find:** Use this field to search for a certain term, word, or character (such as the name of a resource) within the results.
- d. **Rows:** Enter the number of rows you want to see at one time. The default value is 20.

The Messages report details the results of messages sent out through the Notification Engine.

Field	Description
Method	How the message was sent. For example, internal process or external system.
Status	The status of the message at the time the report was run.
Description	Additional information about the message status.
Miscellaneous	Other information
Scenario (Step)	The scenario or step referenced in the message.
Trigger	The event or reason why the message was sent.
Call Day	The day the call was placed.
Day Created	The date and time that the message could be seen in the system.

5 Statistical and Administrative Reports

About Statistical and Administrative Reports

These reports display data based on statistics collected in the Oracle Field Service system. All statistical reports use the main database.

Note: Report column names are available only in English and cannot be modified.

Time Calculations

Overtime and travel time are addressed differently when you are calculating times.

Oracle Field Service considers overtime to be any time outside the resource's shift for that day. This does not influence overtime calculation. If the resource has a 10 hour day scheduled or has worked 35 hours earlier in the week, the application just looks at time within or outside the shift represented in that day's working calendar.

Travel time represents total travel time from and to known locations. If an activity (such as lunch) has no known location, the application will not include that time in travel time. Similarly, time spent on activities (meetings or lunch) is not included in the routing report.

View the Average Travel Time Report

The **Average Travel Time** Report shows you the average travel time between activities for an individual resource or an entire bucket during any reporting period that you select.

Travel time is determined by subtracting the end time of one activity or appointment with a known location from the start time of the next activity, provided this location is also known. Events such as lunch breaks are not included as those events do not have a destination.

If resources do not create activities in the application for things like fuel stops, special parts runs or meetings, then travel time as represented will be inflated. Resources should be encouraged to create an activity for any time between activities that is longer than 10 minutes and is not travel time.

To view the Average Travel Time report:

1. Select the Resource or Bucket in the resource tree that is the subject of your report.
2. Select the **Navigation** button.
3. Select the **Average Travel Time** from the navigation pane.
4. Click **View** to display the settings for this report.
 - o **From/To Date**—Use the calendar icons to select the desired dates.
 - o **Travel Time**—Use this field to search for travel times over a certain number of minutes. By default this is set at 0 to return all travel time statistics. (This field can be useful when searching for long average travel times.)

- **Find...in: <resource name>**—Enter a name or portion of a name to search for results for a particular resource.

Results:

This figure shows the Average Travel Time report listing the average travel time for resources.

Resource name	Average Travel Time (minutes)
CA USA	10.7
CA USA - OLD	10.1
FL USA	12.8
Newburyport	12.8
Planning	10.7
NY NJ Commercial HVAC	17.6
Average	14.4

This report lists the average travel time for each individual resource or organization that you select.

View the GPS Alerts Per Resource Report

The **GPS alerts per resource** report shows the number of activities with 'started outside the location', 'completed outside the location' or 'resource left the activity location' alerts.

To view the GPS Alerts Per Resource report:

1. Select the **Navigation** button.
2. Select **GPS alerts per resource** from the navigation pane. Click **View** and then click the calendar icon to select a date, and then click **Apply**.

The **GPS alerts per resource** report shows how many activities have such alerts as 'started outside the location', 'completed outside the location' or 'resource left the activity location'.

3. Review the following fields:
 - **Resource:** Displays the name of the resource.
 - **Total number of activities:** Displays the number of activities assigned to the resource (which have GPS tracks).
 - **Activity started outside the location, %:** Displays the percentage of activities which were started outside the planned work location.
 - **Activity completed outside the location, %:** Displays the percentage of activities which were completed outside the planned work location.
 - **Resource left the activity location, %:** Displays the percentage of times when the resource left the work zone.
 - **Idles, %:** Displays the percentage of idle statuses
4. Use the **Print** and **Export** options to print or export the report in the .csv format.

View the Inactive Users Report

The Inactive Users Report lists the users that have been inactive for a designated period of time. Administrators can use this report to monitor system use.

To view Inactive Users report:

1. Select **Inactive Users** from the navigation pane.

The View settings determine the period during which users were inactive. If you want to view the number of inactive users for a particular date, click **View** and then click the calendar icon below **Last login** to select a date, and then click **Apply**.

The **Inactive Users** report provides details about inactive users such as user names, status, user type, and the number of days since their last login.

The Inactive Users Report lists the users that have been inactive for a designated period of time.

This figure shows the Inactive users report.

Resources

All Org Units/Buckets

View

×

- Contractor +16
- Organization Unit +12
- Bucket +4
- Network Tech +2

[Show more \(2\)](#)

User type

- Technician 207

Status

- Active +52
- Inactive 224

All

BJ (afternoon) BARRAGAN, James
Coast Beach

HL (afternoon) HARTWIG, Luis
Coast Beach

HG (afternoon) HEUER, Gladys
Coast Beach

KC (afternoon) KAPP, Carrie
Coast Beach

OB (afternoon) OLANDER, Blanca
Coast Beach

BR (fast TC) BAPTIST, Roger
Coast Beach

2. Use the **Print** and **Export** options to print or export the report in the .csv format.

View the Number of Active Users Report

The **Number of Active Users** report enables you to view the number of users with Active status for each user type in the selected org unit or bucket.

To view the number of active users:

1. Click the navigation button and select **Dashboards**.
2. Go to **Admin Reports** and select **Number of Active Users**.

The Number of Active Users report is displayed for the selected org unit or bucket.

This screenshot shows the number of individual users for each user type.

User Type	Active users
Dispatcher	9
Administrator	3
Technician	117
Manager	10
Privileged Administrator	1

3. The number of active users report displays these fields:
 - **User Type**—Displays the name of the user type which has at least one active user. One user will have only one user type.
 - **Active users**—Displays the number of active users with a given profile.

View the Inventory Report

The the Inventory Report displays the statistics of inventory for the selected resource and date.

To view the Inventories report:

1. Click **Dashboard** on the main menu.
2. If you have multiple Dashboards, open the Dashboard which contains the Inventory Report.
3. In the **View** pane, select a resource and the date for which you want to view the report.

4. Click **Inventory Report**.

The Inventory Report opens:

Model ▲	Type	Required	Installed	Overuse	Available	Missing
	Catalog	0	0	0	1	0
	Equipment	0	0	0	2	0

1 - 2 of 2

The report includes these columns:

- **Model:** Indicates the model number of the inventory.
- **Type:** Indicates the type of inventory as described by your organization.
- **Required:** Indicates the quantity of the inventory that is required to complete the current route.
- **Installed:** Indicates the quantity of the inventory that is installed for customers.
- **Overuse:** Indicates the quantity of the installed inventory, which is more than the inventory shown as available. This happens in rare cases when the inventory catalog is not updated, or when a resource borrows the inventory from another resource manually.
- **Available:** Indicates the quantity of the inventory that is available with the resource.
- **Missing:** Indicates the quantity of the inventory that is required to complete the current route.

5. Use the **Print** or **Export** options to print the report or to export in .csv format.

View the Travel Statistics Report

The Travel Statistics report provides you with historical information about travel to and from service locations.

To view the Travel Statistics report:

1. Select the **Navigation** button.
2. Select **Travel Statistics** from the navigation pane to display the report.
3. In the Travel Statistics report, click **View** to display the drop-down menu, specify the following values and then click **Apply**.
 - a. **Start Key/End Key:** Optionally, enter a start and end key. These are based on the activity keys set up for your configuration in the **Statistics Parameters** screen.
To open this screen, click **Configuration** and select **Statistics Parameters** in the **Subsystems And Integrations** section.
 - b. **Find...in:** Enter values to search for results for a particular location based on a **To/From Activity Key** or portion of a key that you enter here.
 - c. **Rows:** Enter the number of rows you want to see at one time.

4. The **Travel Statistics** report provides you with historical information about travel to and from service locations:
 - **Activity Key From/Activity Key To**—Displays the Start and Finish indicators developed for your configuration under Statistics Parameters.
 - **Avg**—Indicates the average travel time in minutes.
 - **Override**—Displays the override value, if an override is added via an API.
 - **Dev**—Indicates the standard deviation from the travel time.
 - **Count**—Displays the quantity of averaged samples in the current category.
 - **Level**—Indicates whether statistics were gathered at the company, organization or individual resource level.
5. Click **Print** to print the report or **Export** to export the report as a .csv file.

View the Work Order Statistics Report

This report displays the statistics for work orders.

To view the Work Order Statistics report:

1. Select a resource from the resource tree
2. Select the **Navigation** button.

3. Select **Work Order Statistics** from the navigation pane to display the report.

This figure shows the Work Order Statistics report.

Resource	Work type	Total number of activities	% of Completed	Average time to complete, minutes
CA, USA	HD-DVR Upgrade	34	88.24	35.5
CA, USA	Inv Pick up	37	89.19	25.4
CA, USA	Phone Install/Upgrade	16	81.25	21.2
CA, USA	HSD / High Speed Data install	42	85.71	31.1
CA, USA	Maintenance	35	85.71	36.7
CA, USA	RR Commercial Install/Upgrade	27	92.59	25.7
CA, USA	PC Trouble Call	20	90.00	26.9
CA, USA	Telephony Direct Sales	29	82.76	28.8
CA, USA	HSD Direct Sales	21	80.95	27.6
CA, USA	Cable Direct Sales	21	61.90	37.6
CA, USA	Multi-type Direct Sales	30	83.33	18.1
CA, USA	Telephony Telemarketing	50	72.00	32.9
CA, USA	HSD Telemarketing	28	96.43	9.5
CA, USA	Cable Telemarketing	8	87.50	23.4
CA, USA	Multi-type Telemarketing	14	78.57	38.2
CA, USA	Telephony Seasonal	22	81.82	21.5
CA, USA	HSD Seasonal	21	85.71	24.6
CA, USA	Cable Seasonal	26	92.31	38.0
CA, USA	Multi-type Seasonal	27	88.89	38.0
CA, USA	PAC Installs	37	67.57	28.1
		Total: 545		Average: 28.4
		Grand Total:11,766		Grand Average:29.8

<< Previous 1 2 3 4 5 6 7 8 9 10 Next >>

Copyright © 2003, 2020, Oracle and/or its affiliates. All rights reserved. February 2020 release

4. Review the following information in the report:

- **Resource**—Displays only those resources that have at least one activated route with regular not deleted activities within the given dates.
- **Work type**—Displays the work types of activities assigned to a given resource within the selected date. If several activity work types are available then the table will have several rows for this resource – one row per each work type.
- **Total number of activities**—Provides the total number of regular activities of a specific work type by a selected resource within the selected date.
- **%Completed**—Displays the percentage of completed activities on which the work order statistics are based.
- **Average time to complete**—Displays the average time required to complete a regular activity of a specific work type by a selected resource within the selected date. Only completed activities are taken into account.

5. To filter the report, click **View** and enter one of the following values in the **Work type filter** field:

- * (default value)—The report displays the data related to all activities of all work types within the selected date.
- a label of a specific work type—The report displays the data related to activities of only that work type.

6. Use the **Print** or **Export** options to print the report or to export in .csv format.

View the Work Statistics Report

This report displays the statistically calculated estimated duration, standard deviation, and count for different kind of activities based on past data. Work statistics can be based on work performed by a single resource or a set of resources selected from the resource tree.

To view the Work Statistics report:

1. Select the **Navigation** button.
2. Select **Work Statistics** from the navigation pane to display the report.
3. Use the **Find** and **in** fields to search for appointment keys by entering a term, word, or character in the **Find** field. (What you enter here depends on the convention your company uses to name activity keys.)
Appointment keys are defined in the **Statistics** screen within **Configuration** in the **Subsystems** section.
4. Select a resource from the resource tree to display the **Work Statistics** report for the selected resource.

This figure shows the Work Statistics report for a selected resource.

Activity Key	Average	Override	Deviation	Count	Level Info
62	48.60		15	7,531	company
63	48.60		15	7,541	company
64	48.60		15	7,552	company
65	48.00		14	7,635	company
66	48.40		15	7,553	company
67	48.40		15	7,563	company
68	48.20		14	7,644	company
69	48.60		15	7,623	company
71	48.20		14	7,650	company
72	48.70		15	7,650	company
70	48.50		15	7,650	company

1 - 11 of 11

Loading...

5. Review the Work Statistics report:
 - **Activity Key**—Keys or standards defined by your company for specific work types and working conditions under **Statistics Parameters**.
 - **Average**—Displays the average number of minutes that is estimated statistically for a task.
 - **Override**—Displays the override value, if an override is added via an API.
 - **Deviation**—Provides the standard deviation from the estimated duration in minutes.
 - **Count**—Displays the number of completed activities on which the work statistics are based.
 - **Level Info**—Indicates whether the statistics are at the company level, bucket level, or the resource level. Company level statistics are based on the entire company, while resource level statistics are based on the work of one resource.
6. Use the **Print** or **Export** options to print the report or to export in `.csv` format.

6 Troubleshooting Reports

Report Words and Header Translations

Some report words and headers are not available in translated languages.

Time-Out Messages

If a particular report is not loaded, there might be a problem with setting the filters in the View drop-down list correctly.

Following message is displayed:

- **Unable to load data. Change parameters and press apply to view report**

Reports taking longer the 30 seconds to load will receive the above time-out message. When this occurs, you should change the values in the filters or update the position in the resource tree hierarchy.

Revision History

This document will continue to evolve as existing sections change and new information is added.

Date	What's Changed	Notes
May 2022	<ul style="list-style-type: none">• These sections were added:<ul style="list-style-type: none">◦ View the Mobile App Usage by Versions Report◦ View the Usage of the Mobile App Old Versions Report	
February 2022	<ul style="list-style-type: none">• Minor updates	

