



DashBoard Reports
for



Version 4.5
Part Number E62405-01

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1 Introduction

1.1 Document Purpose

The document is designed as a description and instruction on using the DashBoard functionality of ETAdirect. It is assumed that the reader is familiar with the ETAdirect functionalities and operating principles.

1.2 Scope of the Document

The document describes the configuration of DashBoard charts and the principles of interpretation of data shown in the charts. All standard charts used in DashBoard are described in detail.

1.3 Target Audience

The document itself and examples it includes do not contain any company-specific information and are intended for users working with ETAdirect reports (dispatchers, managers, etc.).

1.4 Glossary

The glossary below contains the basic ETAdirect terms used in this document.

Term	Description
Activity	Entity of the ETAdirect system that represents any time-consuming activity of the resource
API	Application Programming Interface – a particular set of rules and specifications that software programs follow to communicate and interact with each other
Bucket	Entity appearing on the resource tree which can contain resources of a defined type and be assigned activities
Capacity	Workforce possessing the necessary work skills available at a certain moment of time
Capacity bucket	Bucket used for Quota management
Capacity category	Predefined set of work skills, work skill groups and time slots within which they are considered by the Capacity API
Company	1) Legal entity, using ETAdirect 2) Entity that represents a Client in ETAdirect system; company is created by TOA Technologies during the process of implementation
Customer	End-customer, entity that benefits from the activity
Group	Resource of the Resource Tree which represents a group of resources and cannot execute activities
PAS	Post Appointment Survey
Pre-work	Work necessary to perform a specific activity
Quota	Number of minutes allocated by the company to perform activities of a specific capacity category within specific time period by resources of a specific bucket and date
Resource	Element of the resource tree, defined company asset
Resource Tree	Hierarchy of company resources, showing "parent-child" relationships
Route	List of activities assigned to a resource for a specific date, or a list of non-

	scheduled activities assigned to a resource
Routing	Process of assigning activities to resources (usually automated)
Service Window	Time frame expected by the customer for an activity as scheduled by the company
Teamwork	Feature allowing resources to assist each other in an activity or on an on-going basis
Time Slot	1) Fixed service window, defined with a name and label, specifying when certain types of activities can be performed 2) Service Window (if the activity type does not support time slots)
User	1) Person using ETAdirect 2) Entity used for authentication and authorization allowing people or external software to access ETAdirect
Work Skill	1) Activity that a resource is qualified to perform (resource property) 2) Qualification required to perform an activity (activity property)

2 What is Dashboard

The Dashboard is a handy tool allowing to view the company reports in a clear graphical representation. It shows real-time reports (e.g. technicians productivity by work type, comparison between resources by number of work orders, etc.) in the form of charts.

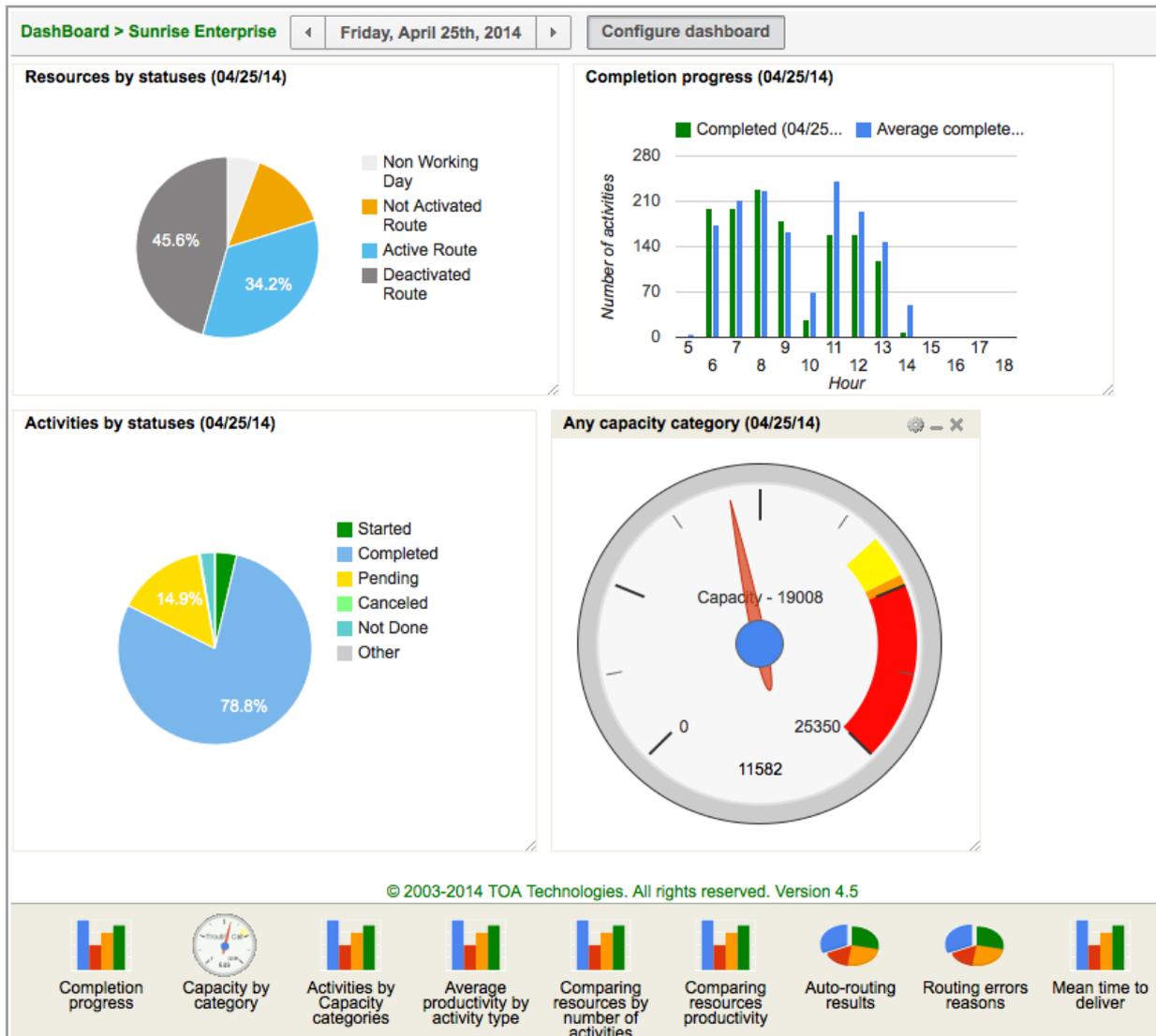
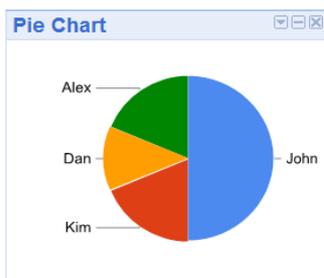


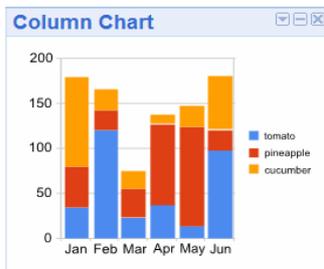
Figure 1: Dashboard screen

The user-friendly interface allows creating charts from the predefined list of chart templates. The ETAdirect Dashboard functionality uses Google Visualization API as the source of charts. The following five types of Google charts are used in ETAdirect:

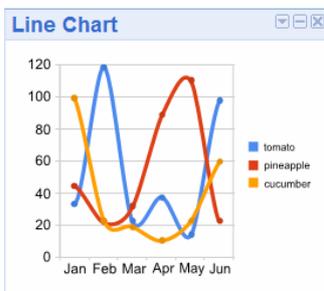
- Pie Chart



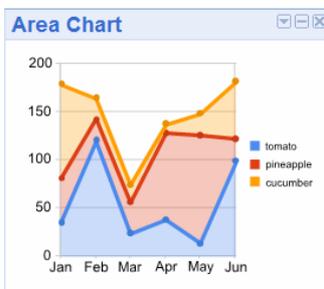
- Column Chart



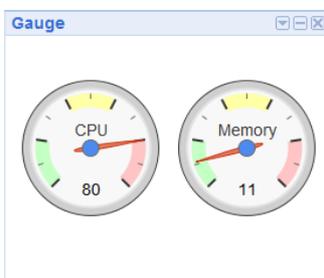
- Line Chart



- Area Chart



- Gauge



Note: ETAdirect supports five types of charts listed above. However, in the current standard configuration of DashBoard reports only Pie Chart, Column Chart and Gauge are used. Line Chart and Area Chart can be used in custom report creation which is not included in the scope of this document. Therefore, the specifics of Line Chart and Area Chart behavior will not be described here.

Note: Considering that the Dashboard uses Google Visualization Library (stored on the www.google.com server), the reports can be unavailable if www.google.com has any problems.

3 Using Dashboard

3.1 Getting Started

The Dashboard is available in the Manage Application under the 'Dashboard' menu item.

When the user first accesses the Dashboard, no reports are configured. The screen is empty with the Dashboard configuration menu in the bottom. The configuration menu is a horizontal bar with icons representing the available reports. The prompt in the center of the screen reads 'Use drag and drop to create reports' advising the user how to proceed with the Dashboard configuration.

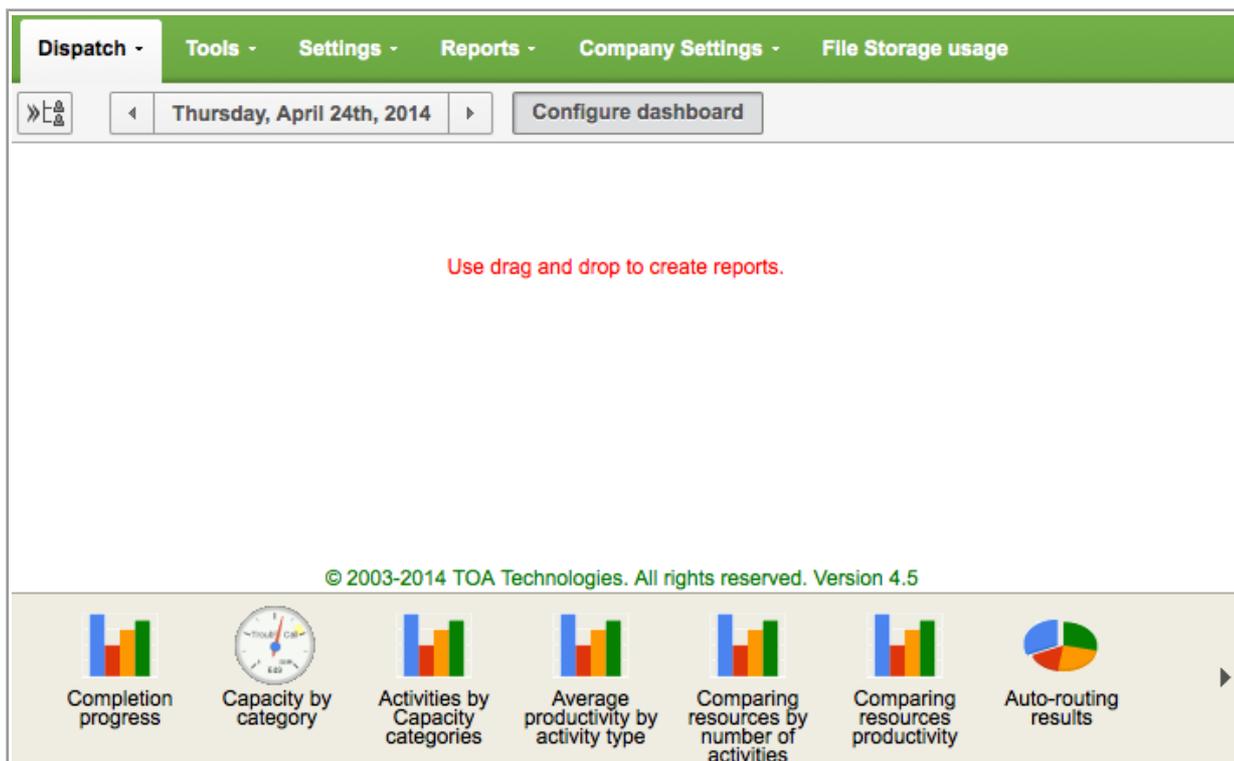


Figure 2: Initial Dashboard screen

The Dashboard configuration menu can contain more report icons than fit into a page. The configuration menu can be scrolled left or right using the '▶' or '◀' icons.

Each icon consists of the graphical image of the chart corresponding to the report and the report name. If the mouse hovers over any icon, a hint appears describing briefly the type of data presented in the report.



Figure 3: Hint describing Dashboard report in more detail

3.2 Configuring Reports

All DashBoard reports show data related to resources' performance. Therefore, any report and the corresponding chart must be associated with a resource. For that purpose, the DashBoard screen has a Resource Tree similar to that in other ETAdirect screens. The Resource Tree shows the hierarchical structure of all resources in the company with the root resource on top. When the DashBoard screen is first opened, the root resource is selected automatically. The Resource Tree can be displayed by clicking or hidden by clicking .

To create a new report, the user has to select the resource from the Resource Tree, drag a report icon from the configuration menu and drop it in the DashBoard screen.

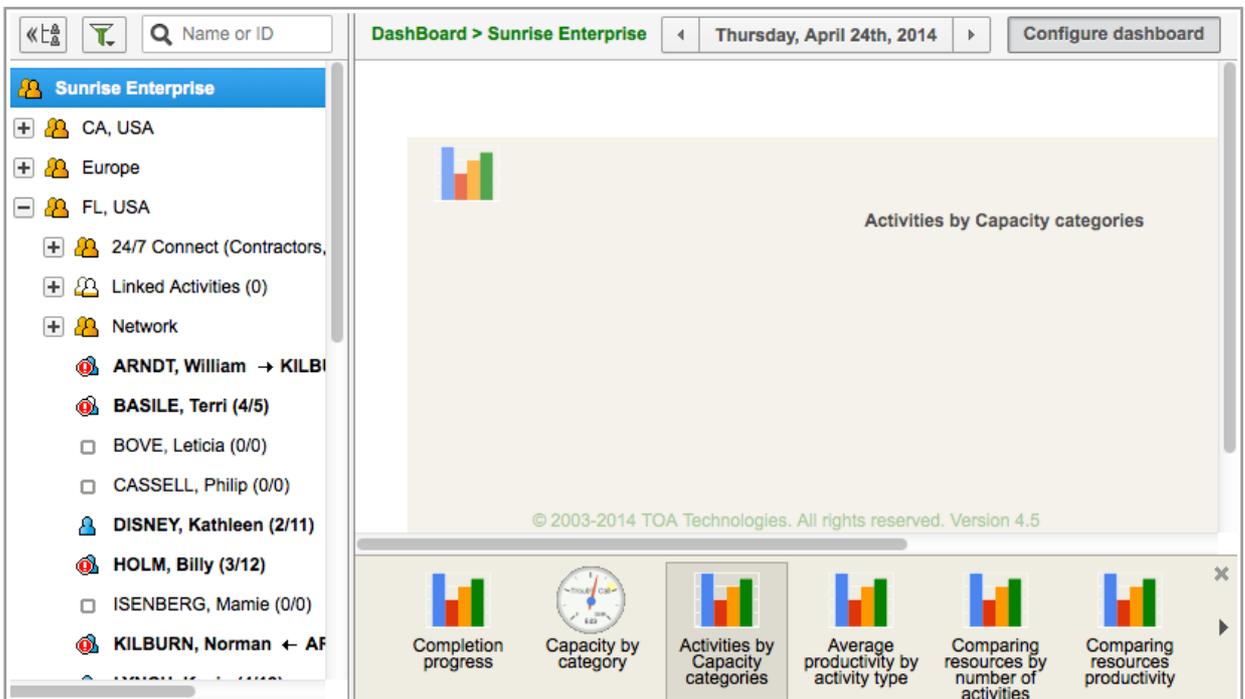


Figure 4: Creating reports

As soon as the chart icon is dropped in the screen, the corresponding chart appears in the DashBoard screen.

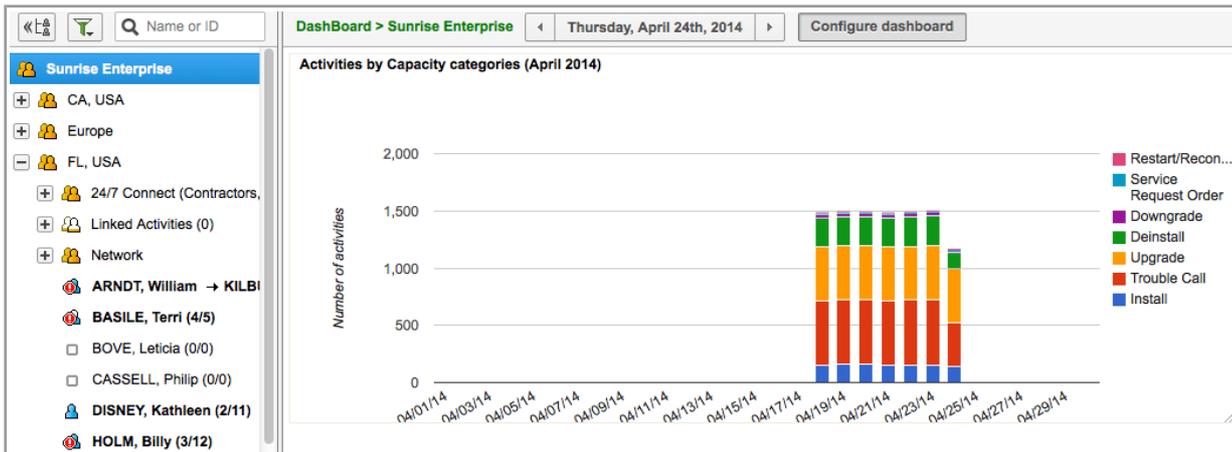


Figure 5: Report added to screen

More reports can be added to the DashBoard screen in the similar manner. If, after creating the charts, the user quits the DashBoard, the charts are saved and will be shown on the screen the next time the user accesses the DashBoard.

The DashBoard configuration menu can be closed by clicking the 'Configure dashboard' button.

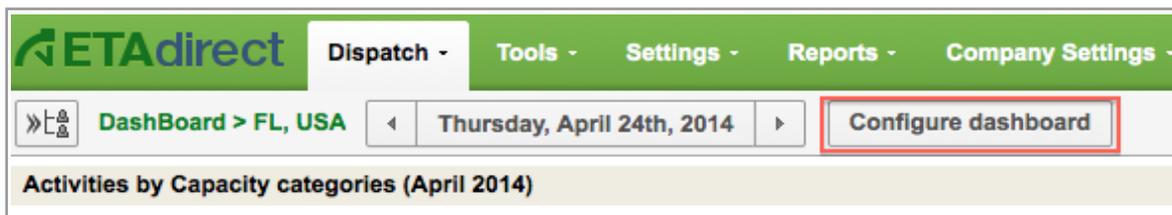


Figure 6: 'Configure dashboard' button

Note: the DashBoard configuration menu cannot be hidden when no charts have been created yet and the DashBoard screen is empty.

All charts currently configured in the screen show data for the resource currently selected in the Resource Tree. As soon as a different resource is selected, all charts are updated with the data related to the new resource. It is not necessary to configure the whole set of charts for each resource.

3.3 Charts Management

3.3.1 Minimizing, Restoring, Customizing and Removing Charts

Each chart is located within a separate window. When the mouse hovers over a chart window, its title is highlighted with three icons appearing in the top right corner.

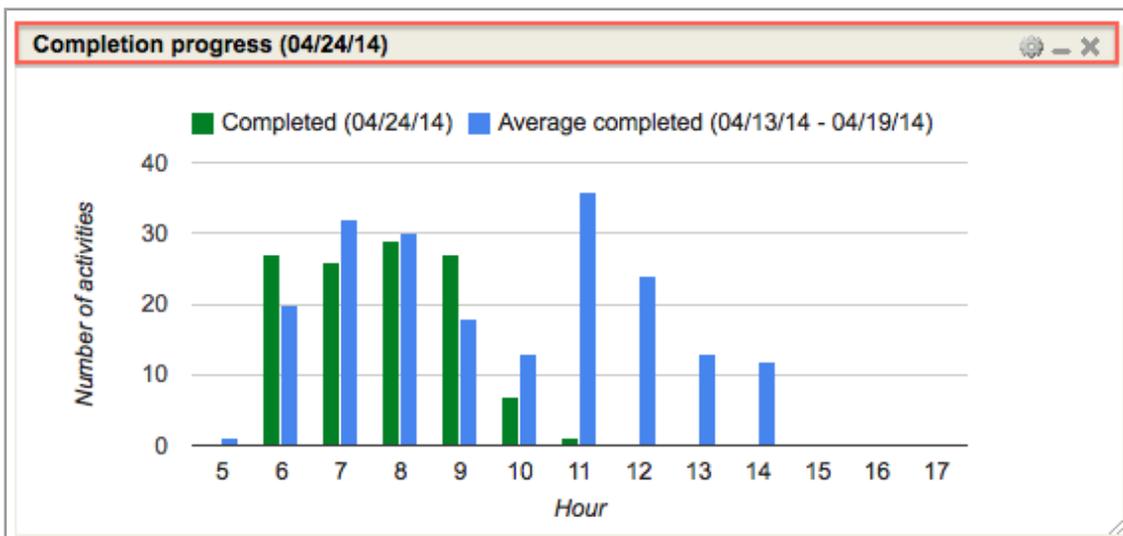


Figure 7: Chart management buttons

-  'options' icon
-  'minimize' icon
-  'remove' icon

When the 'options' icon is clicked, a window where the chart settings can be defined is opened.

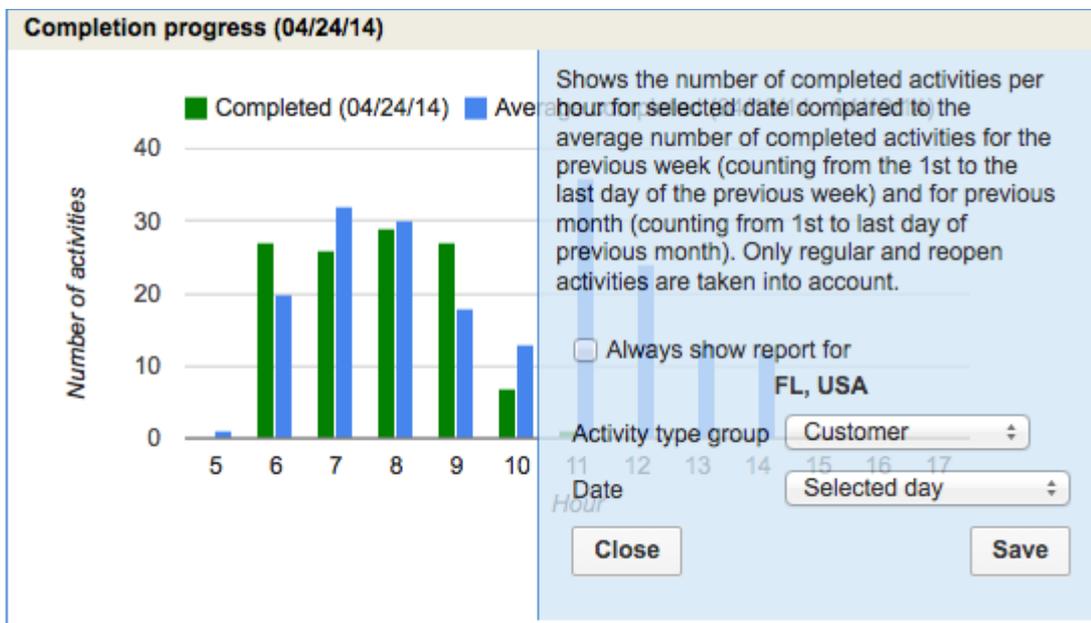


Figure 8: Chart settings

This window contains the description of data shown on the chart as well as the chart settings. This window shows the resource currently selected in the Resource Tree and the 'Always show report for' checkbox (unchecked by default). If this checkbox is checked, the current chart will always show data for this resource. Otherwise, the chart is updated each time a new resource is selected in the Resource

Tree. If a chart is set to always show report for a certain resource, such chart header, in addition to its name and date, will show the name of the resource for which the chart is displayed.

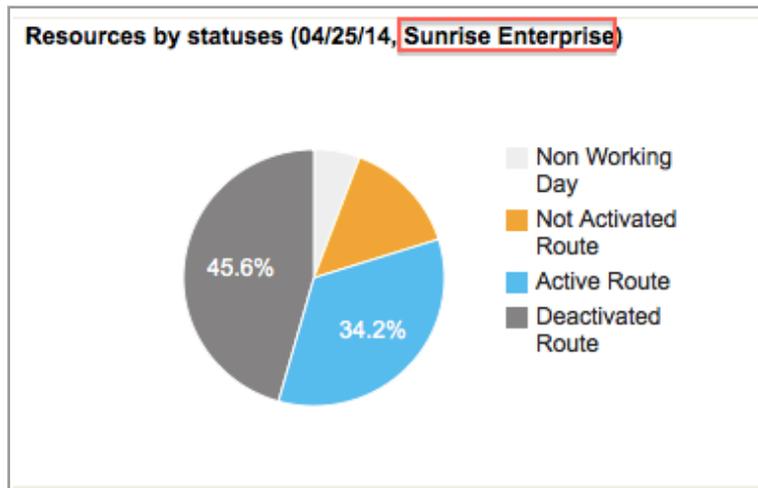


Figure 9: Chart set to show report for single resource

Other chart settings vary depending on the type of report as they are specific for the type of data used in the report. Please refer to the 'DashBoard Reports Description' section.

Clicking 'Save' saves the chart settings, clicking 'Close' closes the 'Options' window without saving the changes.

The 'minimize' icon collapses the chart into a single title bar with two icons – 'maximize' and 'remove'.

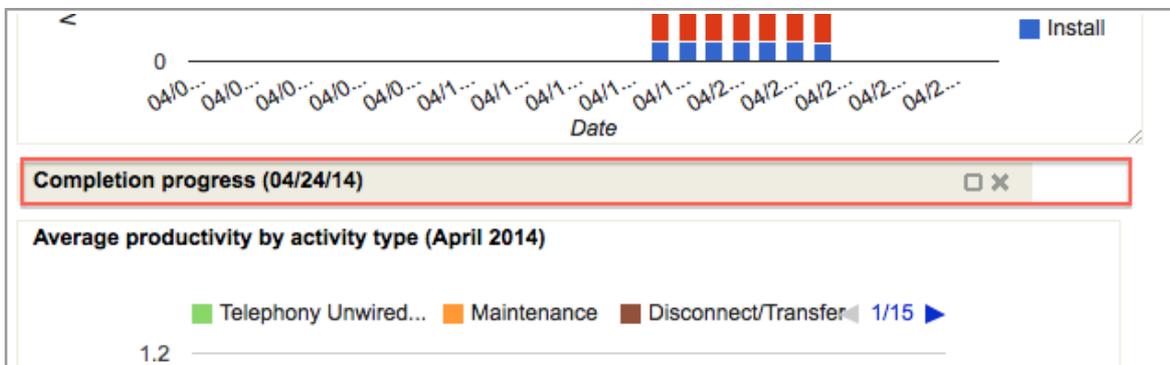


Figure 10: Minimized chart

The 'maximize' icon restores the chart to its original size.

The 'remove' icon removes the chart from the DashBoard. It can be restored by dragging its icon and dropping it to the DashBoard screen again. However, the settings defined before the chart removal will be lost.

3.3.2 Resizing

The size of a chart displayed on the DashBoard screen can be increased or decreased according to the user's preferences. For that purpose each chart window has a resizing tool in the bottom right corner.

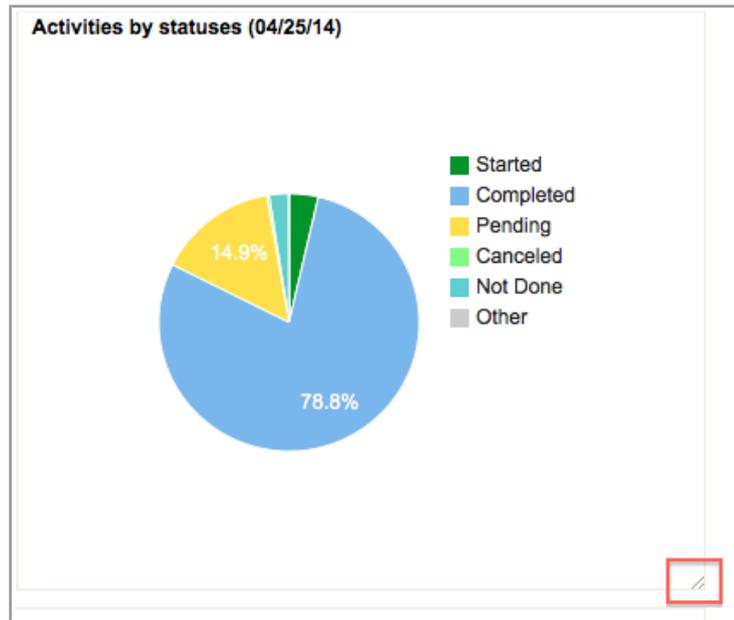


Figure 11: Chart resizing tool

By dragging the corner of the chart window the chart can be resized. The chart content (diagrams and legend) is resized accordingly.

3.3.3 Animated Highlighting

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

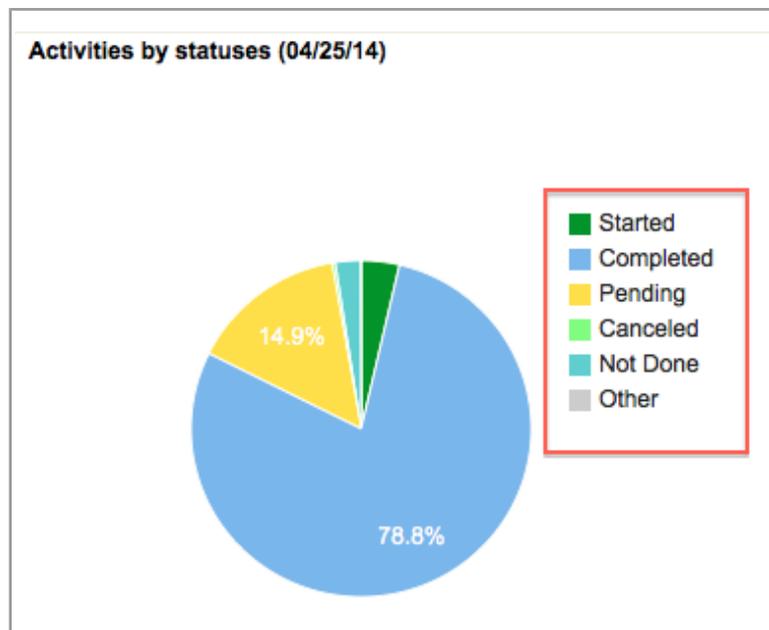


Figure 12: Chart with legend

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.

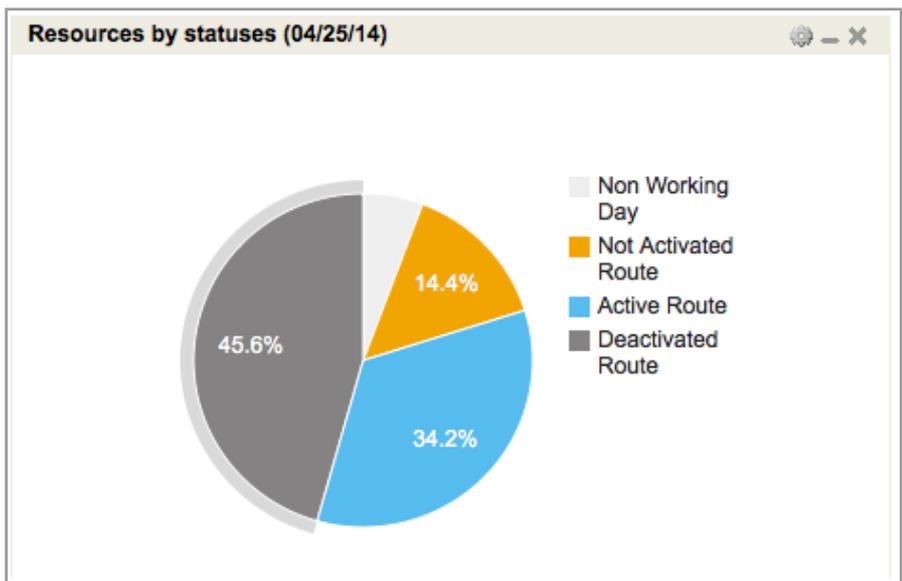


Figure 13: Chart section highlighted

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.

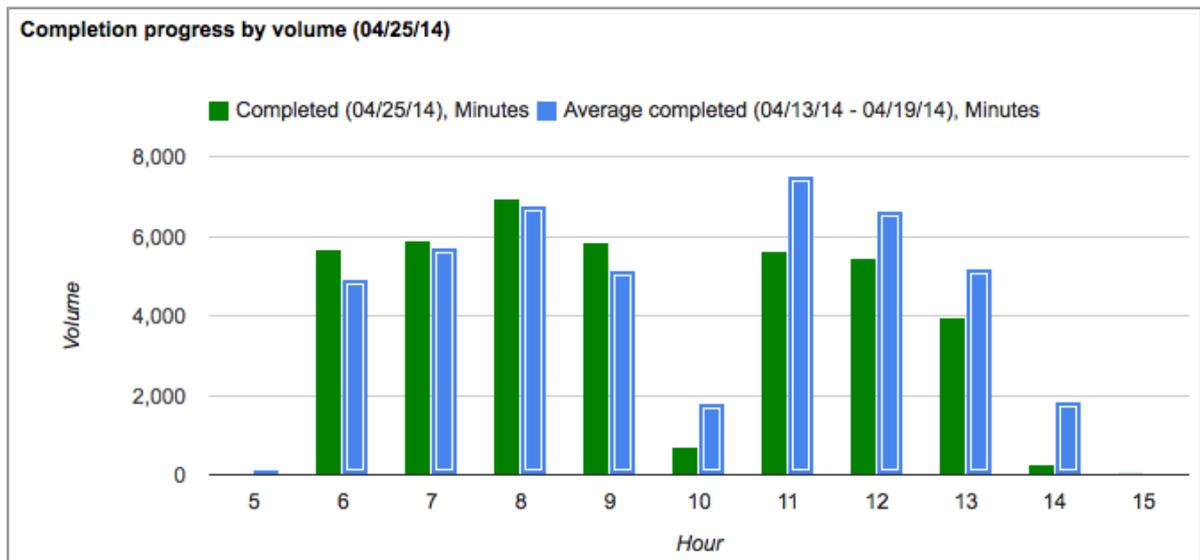


Figure 14: Chart section highlighted on mouse click

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

3.3.4 Chart Hints

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.

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.

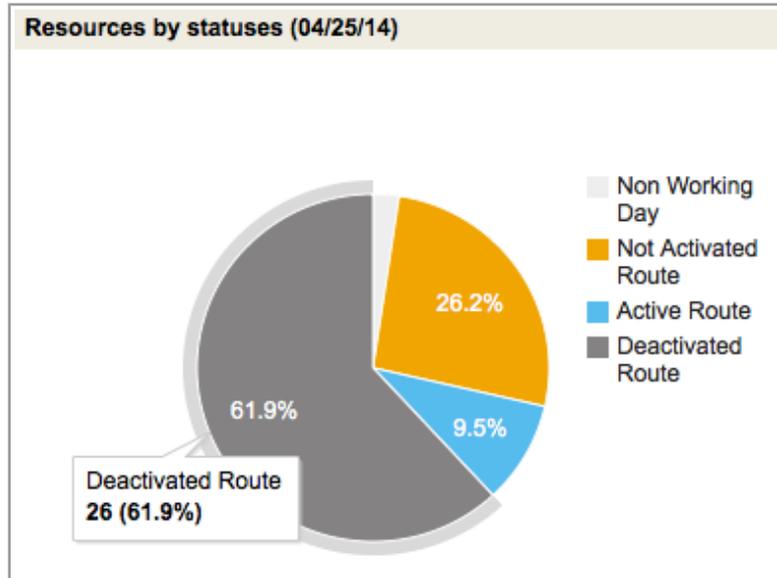


Figure 15: Pie chart hint

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

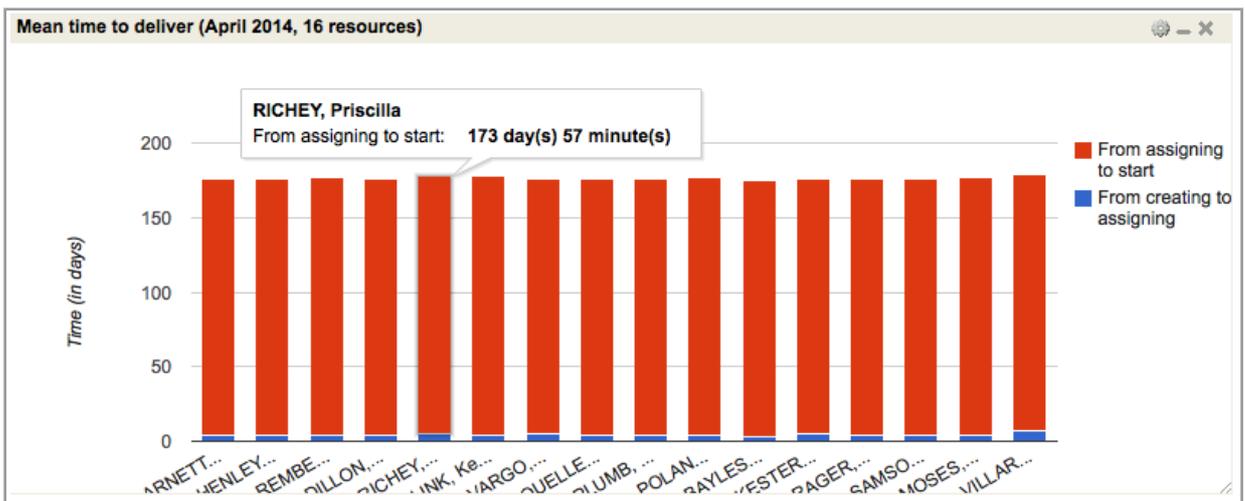


Figure 16: Column chart hint

3.3.5 DashBoard Calendar

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.

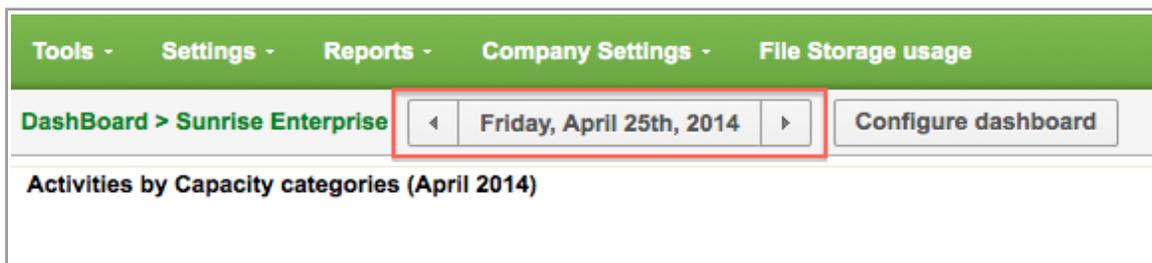


Figure 17: Calendar window

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

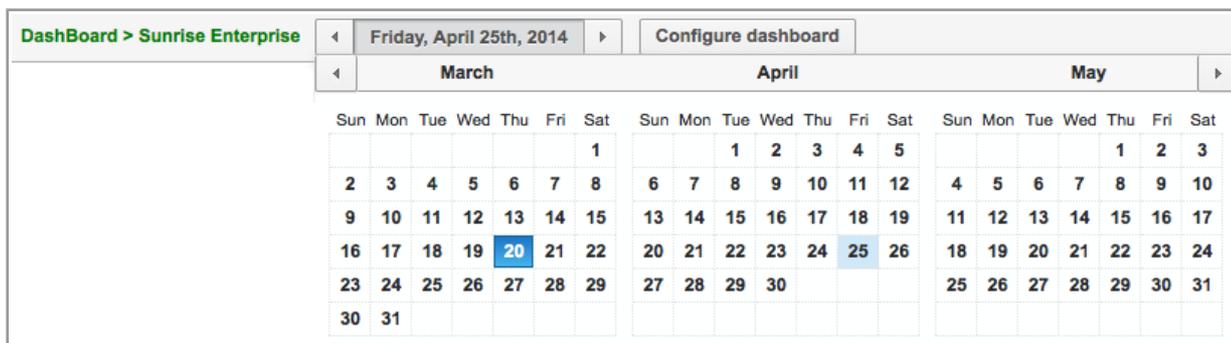


Figure 18: DashBoard calendar

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 screen are immediately updated with the data corresponding to the selected date.

3.4 Report Refresh

There are two ways to refresh a report: automatically and manually.

3.4.1 Auto-Refreshing

The DashBoard reports, together with all other auto-refreshable ETAdirect screens, are affected by the general refresh timer. The auto-refresh rate is defined as part of the user's display settings in the 'My Display' screen.

My Display

User name	Admin
Registered	02/03/06 05:20 AM
Last login	04/25/14 09:21 AM
Last password change	07/18/12 01:22 PM

User Attributes

Display profile	Administrator
Time zone	Eastern
Language	English
Time format	12-hour
Date format	mm/dd/yy
Long date format	weekday, month day, year
Week start	[Use company settings]

Other

* Refresh rate	0
Show placeholder ID	<input type="checkbox"/>
Default export format	Comma-separated (csv)
Design theme	Default
Sound	Loud

Figure 19: Refresh rate settings in 'My Display' screen

The default value is '0' which means that the auto-refresh is disabled.

The same parameter can be also defined in the 'User' screen as part of the user's settings.

User	
* User name	German Engineer
Status	Active
Login policy	Default policy
Force password change at next login	<input type="checkbox"/>
Registered	02/08/08 01:21 PM (GMT+2 Central Europe)
Last login	01/14/09 12:15 PM (GMT+2 Central Europe)
Last password change	02/08/08 01:21 PM (GMT+2 Central Europe)
Language	German
Refresh rate	0
Phone number	

Figure 20: Refresh rate settings in 'User' screen

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

3.4.2 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 ETAdirect in another browser tab and returns to the tab where the DashBoard is open

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

3.5 DashBoard Permissions

Access to the DashBoard functionality is controlled by permissions. The permission to use DashBoard can be found in the 'Permissions' screen under 'Manage' → 'Reports' → 'DashBoard'.

ID	Profile Name ↑	Denied from level	Status	<input type="radio"/> Show	<input type="radio"/> Hidden
71	Admin		✓	<input checked="" type="radio"/>	<input type="radio"/>
69	CSR		✓	<input type="radio"/>	<input checked="" type="radio"/>
66	Dispatcher		✓	<input checked="" type="radio"/>	<input type="radio"/>
72	File upload	Manage, Reports	✓	<input type="radio"/>	<input checked="" type="radio"/>
70	Manager		✓	<input checked="" type="radio"/>	<input type="radio"/>
115	Routing Manager		✓	<input checked="" type="radio"/>	<input type="radio"/>
68	soap	Manage, Reports	✓	<input type="radio"/>	<input checked="" type="radio"/>
67	Technician	Reports	✓	<input type="radio"/>	<input checked="" type="radio"/>
73	Users Admin	Reports	✓	<input type="radio"/>	<input checked="" type="radio"/>

Figure 21: Dashboard permission

In addition, each report can be shown or hidden for a particular user. Permissions exist for each of the 16 Dashboard reports and can be set in 'Manage' → 'Reports' → 'Dashboard'.

ID	Profile Name ↑	Denied from level	Status	<input type="radio"/> Show	<input type="radio"/> Hidden
71	Admin		✓	<input checked="" type="radio"/>	<input type="radio"/>
69	CSR	Dashboard	✓	<input type="radio"/>	<input checked="" type="radio"/>
66	Dispatcher		✓	<input checked="" type="radio"/>	<input type="radio"/>
72	File upload	Manage, Reports, Dashboard	✓	<input type="radio"/>	<input checked="" type="radio"/>
70	Manager		✓	<input checked="" type="radio"/>	<input type="radio"/>
115	Routing Manager		✓	<input checked="" type="radio"/>	<input type="radio"/>
68	soap	Manage, Reports, Dashboard	✓	<input type="radio"/>	<input checked="" type="radio"/>
67	Technician	Reports, Dashboard	✓	<input type="radio"/>	<input checked="" type="radio"/>
73	Users Admin	Reports, Dashboard	✓	<input type="radio"/>	<input checked="" type="radio"/>

Figure 22: Dashboard report permissions

4 DashBoard Reports Description

ETAdirect DashBoard supports 16 standard graphical reports to be shown on the DashBoard screen:

- Activities by Capacity categories
- Activities by statuses
- Auto-routing results
- Average productivity by activity type
- Average travel time per resource
- Capacity by category
- Comparing resources by number of activities
- Comparing resources productivity
- Completion progress
- Completion progress by volume
- Mean time to deliver
- PAS responses per resource
- Percent of activities met
- Percent of customer expectations met
- Resources by statuses
- Routing errors reasons

Each report will be described in detail below.

4.1 Activities by Capacity Categories

- Data Shown on Report:**

The total number of completed activities by capacity categories on selected month per day. Teamwork and pre-work are not taken into account.

Note: Teamworks are 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.

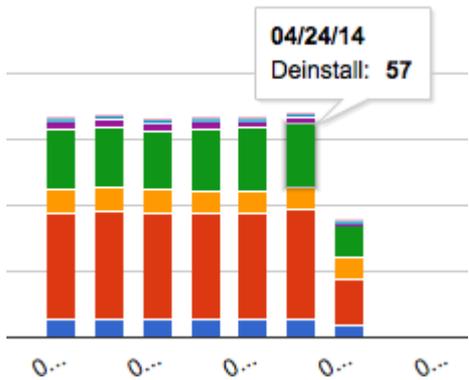
The 'Activities by Capacity categories' DashBoard report can be displayed for:

- buckets/groups
- individual resources

- Visualization:**

<p>Column Chart</p>	
<p>Header</p>	<p>Report name and the reported period in parentheses</p>
<p>Columns</p>	<p>Each column represents the whole number of completed activities per day. Columns may consist of several sections marked by different colors – each color matches a certain capacity category (described in the chart legend). Note: If there are no work skills in the system, the report will show the whole number of activities.</p>
<p>Legend</p>	<p>Capacity categories containing the activities performed by:</p> <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) <p>If the selected resource performs only some of the capacity categories existing in the system, the columns and the legend will contain only the capacity categories performed by the resource.</p>
<p>Axes</p>	<p>horizontal: date vertical: number of activities</p>

Hint



Date, name of the Capacity Category and the number of activities performed by the resources in such Capacity Category

• **Chart Options**

The 'Activities by Capacity categories' report shows data for one month. When any date is selected in the Calendar, the chart will display data for the period from the 1st of the month till the last date of the same month. The chart options allow choosing the selected month or the month before it and the chart will display the data for the corresponding period.

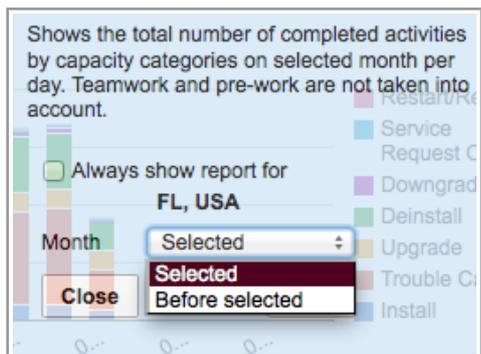


Figure 23: Options of 'Activities by Capacity categories' chart

4.2 Activities by Statuses

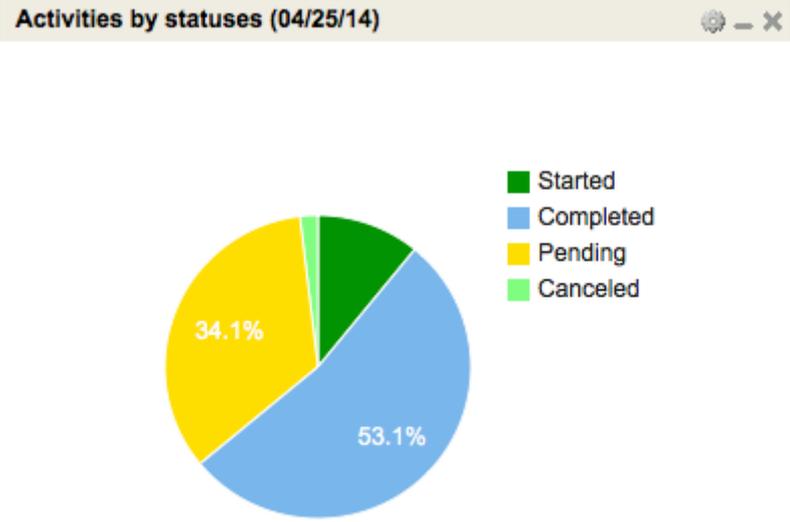
- **Data Shown on Report**

The number of activities by statuses for the specified day.

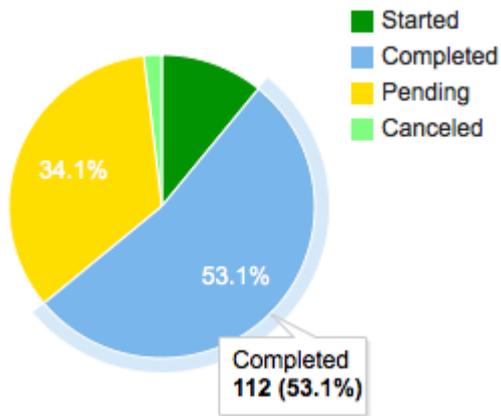
The 'Activities by statuses' Dashboard report can be displayed for:

- buckets/groups
- individual resources

- **Visualization:**

<p>Pie Chart</p>	 <p>The pie chart displays the distribution of activity statuses for a specific resource on 04/25/14. The largest slice is 'Completed' at 53.1%, followed by 'Pending' at 34.1%. There are also smaller slices for 'Started' and 'Canceled'.</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Completed</td> <td>53.1%</td> </tr> <tr> <td>Pending</td> <td>34.1%</td> </tr> <tr> <td>Started</td> <td>(Small slice)</td> </tr> <tr> <td>Canceled</td> <td>(Small slice)</td> </tr> </tbody> </table>	Status	Percentage	Completed	53.1%	Pending	34.1%	Started	(Small slice)	Canceled	(Small slice)
Status	Percentage										
Completed	53.1%										
Pending	34.1%										
Started	(Small slice)										
Canceled	(Small slice)										
<p>Header</p>	<p>Report name and date in parentheses</p>										
<p>Slices</p>	<p>The entire diagram represents all activities assigned to the selected resource on the specified day and is assumed to be 100%. Each slice represents the activities of a certain status showing the percentage share of such activities in the whole number.</p>										
<p>Legend</p>	<p>Statuses of the activities assigned to:</p> <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) <p>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.</p>										

Hint



Activity status, the number of such activities assigned to the resource and their percentage share in the whole number of activities

• **Chart Options**

The 'Activities by statuses' 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 assigned to the selected resource.

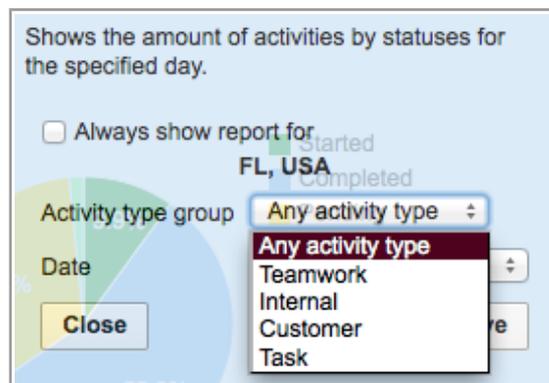


Figure 24: Options of 'Activities by statuses' chart

4.3 Auto-Routing Results

- Data Shown on Report**

The number of auto-routed, manually routed and not-routed activities in the selected bucket on the selected day.

The 'Auto-routing results' Dashboard report can be displayed for:

- buckets

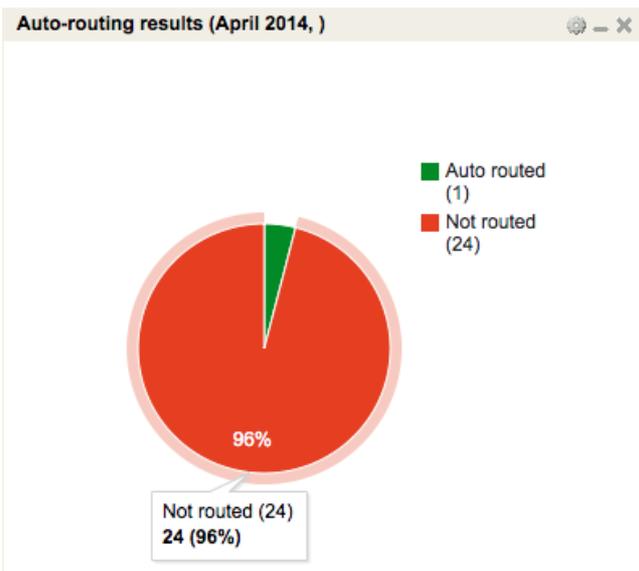
If a group or an individual resource is selected in the Resource Tree, the report will be configured for its parent bucket.

The 'Auto-routing' results' report displays the share of auto-routed, manually routed or not-routed activities as percentage of the whole number of activities in the selected bucket which is assumed to be 100%. Breaks are not included. If Routing has not been run, the report shows a 'No Data' message. 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).

- Visualization:**

<p>Pie Chart</p>	<p>The pie chart displays the distribution of activities. A small green slice represents 'Auto routed' activities (1), and a large red slice represents 'Not routed' activities (96%). The legend on the right side of the chart lists 'Auto routed (1)' and 'Not routed (24)'. The percentage '96%' is displayed on the red slice.</p>
<p>Header</p>	<p>Report name and date in parentheses</p>
<p>Slices</p>	<p>The entire diagram represents all activities in the selected bucket and is assumed to be 100%. The diagram can have the maximum of three slices representing the share of auto-routed, manually routed and not-routed activities in the selected bucket on the selected day.</p>
<p>Legend</p>	<p>Auto-routed (activities assigned by Routing and remaining so assigned at time of the report creation) Manually routed (activities assigned by Routing and later moved manually) Not routed (activities not assigned by Routing) If activities in the selected bucket belong only to one or two of the above-mentioned classes, the diagram and the legend will contain only data for such classes.</p>

Hint



Description of activity assignment method (auto-routed, manually routed, not routed), the number of such activities in the bucket and their percentage share in the whole number of activities

- **Chart Options**

The 'Auto-routing results' 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.

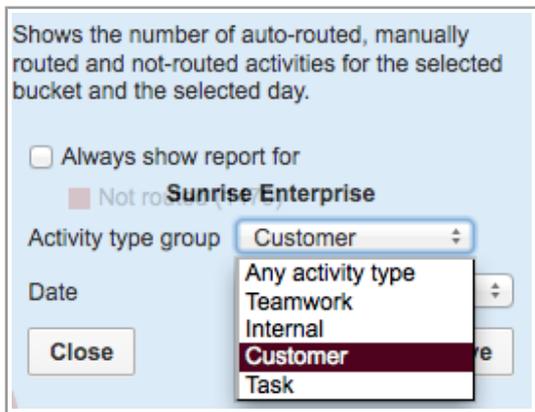


Figure 25: Options of auto-routing results report

4.4 Average Productivity by Activity Type

- Data Shown on Report:**

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.

Note: Teamworks are 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.

If there are no activity types in the system, the report will show the whole number of activities.

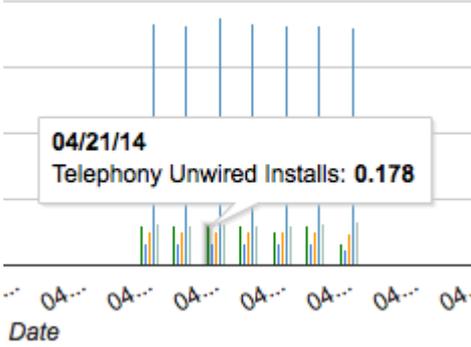
The report is calculated by grouping the number of activities of each type and dividing the resulting sums by the number of working resources. This is done for each day of a month. For example, if 20 upgrades were performed, and 4 resources worked, the average will be 5 upgrades per resource.

The 'Average productivity by activity type' DashBoard report can be displayed for:

- buckets/groups
- individual resources

- Visualization:**

<p>Column Chart</p>	<p>Average productivity by activity type (April 2014)</p>
<p>Header</p>	<p>Report name and the reported period in parentheses</p>
<p>Columns</p>	<p>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.</p>
<p>Legend</p>	<p>Activity types performed by:</p> <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) <p>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.</p>
<p>Axes</p>	<p>horizontal: date</p>

	<p>vertical: average activities</p>
<p>Hint</p>	<div style="text-align: center;">  </div> <p>Date, activity type and the average number of activities of the particular type performed by the resource</p>

• **Chart Options**

The 'Average productivity by activity type' report shows data for one month. When any date is selected in the Calendar, the chart will display data for the period from the 1st of the month till the last date of the same month. The chart options allow choosing the selected month or the month before it and the chart will display the data for the corresponding period.

Additionally, the chart can be filtered to display data for a particular activity type group or for any activity types performed by the selected resource in the selected period.

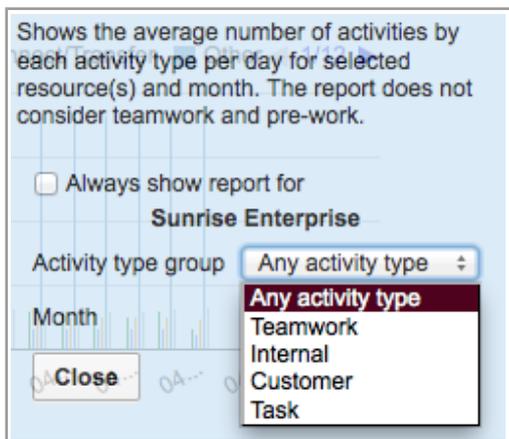


Figure 26: Options of 'Average productivity by activity type' chart

4.5 Average Travel Time per Resource

- Data Shown on Report:**

The average time used by the resource to travel to the customer on the specified day for all direct children of the chosen bucket/group.

The 'Average travel time per resource' DashBoard report can be displayed for:

- buckets/groups

If an individual resource is selected in the Resource Tree, the report will be configured for its parent bucket or group.

- Visualization:**

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

- Chart Options**

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.

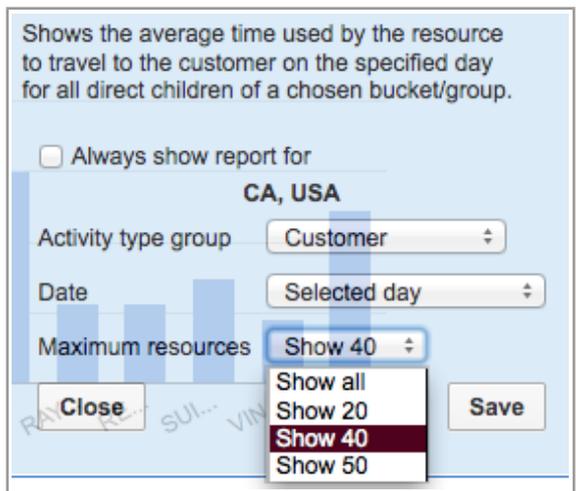


Figure 27: Options of 'Average travel time per resource' report

4.6 Capacity by Category

- Data Shown on Report:**

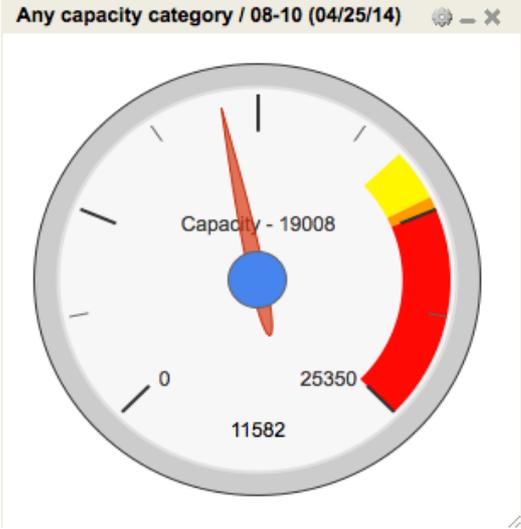
The expected activities duration time + travel in minutes and quota (amount of work that can be performed) for the specified capacity category and time slot.

The 'Capacity by category' DashBoard report can be displayed for:

- capacity buckets (buckets with the 'Quota management' option enabled)

If any resource other than capacity bucket is selected in the Resource Tree, the report shows the 'No data' message. When a parent resource of the capacity bucket is selected, the report shows the data of such capacity bucket.

- Visualization:**

<p>Gauge</p>	
<p>Header</p>	<p>Capacity category / time slot and the report date in parenthesis. When no time slot is specified in the report options, the header shows only the capacity category for which data is displayed.</p>
<p>Pointer</p>	<p>Currently used capacity in minutes (corresponding to the figure at the bottom of the chart).</p>
<p>Gauge dial</p>	<p>The dial is marked with five dashes:</p> <ul style="list-style-type: none"> - the first dash is always the zero ('0') point - the fourth dash is always the quota value in minutes defined for the capacity bucket - the second and third dashes correspond to 1/3 and 2/3 of Quota, respectively - the fifth dash is the maximum value of the chart calculated on the basis of the Quota value

	The dial contains the Quota value (in the top part of the dial, the 'Used' capacity value (at the bottom of the dial) and the maximum chart value.
Warnings	<p>According to the 'Major' and 'Critical' capacity settings, the chart includes the areas of 'Major' and 'Critical' capacity usage.</p> <p>The Major Capacity Usage is marked with yellow.</p> <p>The Critical Capacity Usage is marked with orange.</p> <p>The area beyond the fourth dash (the 100% Quota mark) is marked with red meaning that the Quota is exceeded.</p>

• Chart Options

The 'Capacity by category' 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 capacity category and/or time slot. The choices include all capacity categories and time slots assigned to the selected capacity bucket. The chart options also allow setting the 'Major Capacity Usage' and 'Critical Capacity Usage' values which influence the 'Warnings' areas of the chart.

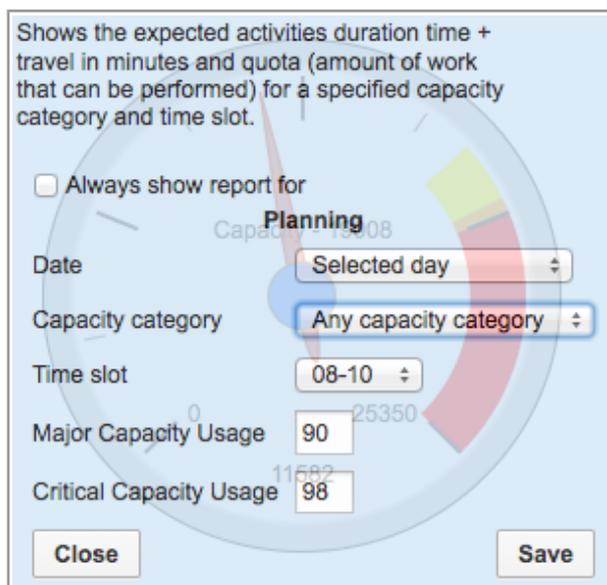


Figure 28: Options of 'Capacity by category' report

4.7 Comparing Resources by Number of Activities

- Data Shown on Report:**

The number of activities of each type completed by each resource for all direct children of the chosen bucket/group for the selected month. Teamwork and pre-work are not taken into account.

The 'Comparing resources by number of activities' DashBoard report can be displayed for:

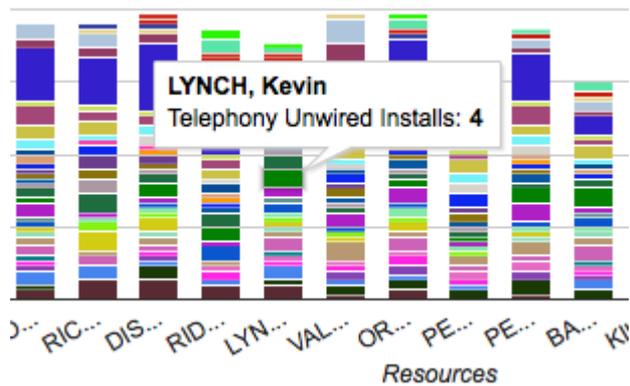
- buckets/groups

If an individual resource is selected in the Resource Tree, the report will be configured for its parent bucket or group.

- Visualization:**

<p>Column Chart</p>	
<p>Header</p>	<p>Report name, the reported period and the number of resources whose data is displayed on the chart</p>
<p>Columns</p>	<p>Each column represents the number of activities of each type completed by a resource during the specified month. Columns may consist of several sections marked by different colors – each color matches a certain activity type (described in the chart legend).</p>
<p>Legend</p>	<p>Activity types performed by the resources in the selected bucket or group. If the resources in the selected bucket/group perform only some of the activity types existing in the system, the columns and the legend will contain only the activity types performed by the resource.</p>
<p>Axes</p>	<p>horizontal: Resources vertical: Number of activities</p>

Hint



Resource name, activity type and the number of activities of such type.

• **Chart Options**

The 'Comparing resources by number of activities' report shows data for one month. When any date is selected in the Calendar, the chart will display data for the period from the 1st of the month till the last date of the same month. The chart options allow choosing the selected month or the month before it and the chart will display the data for the corresponding period. 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 or group. The third option allows defining the number of resources whose number of activities is to be shown on the chart. The user can select 20, 40, 50 or all resources to be displayed.

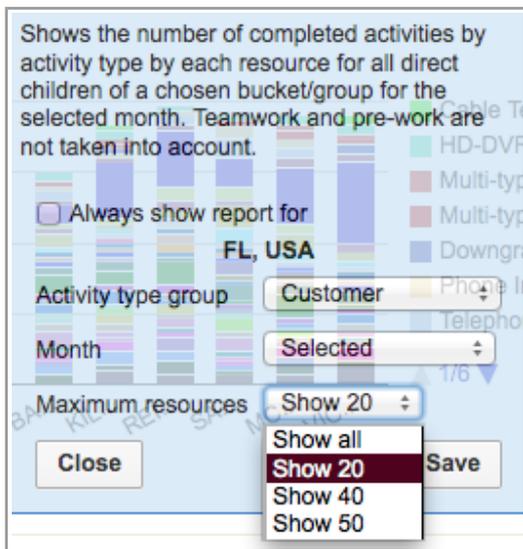


Figure 29: Options of 'Comparing resources by number of activities' report

4.8 Comparing Resources Productivity

- Data Shown on Report:**

The average number of completed activities by activity type per resource per day for all direct children of the chosen bucket/group. Teamwork and pre-work are not taken into account.

The data for this report is calculated by dividing the total number of activities of a particular type completed by the resource divided by the number of working days in the month.

The 'Comparing resources by number of activities' DashBoard report can be displayed for:

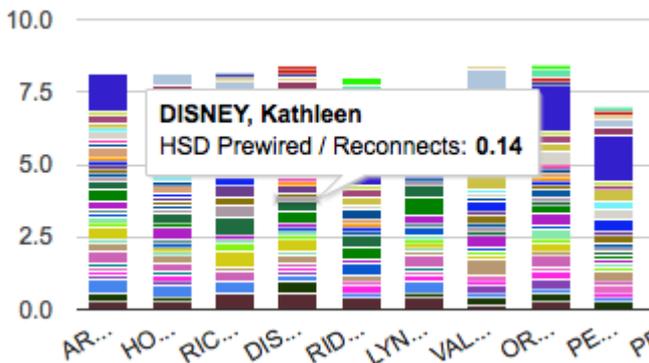
- buckets/groups

If an individual resource is selected in the Resource Tree, the report will be configured for its parent bucket or group.

- Visualization:**

<p>Column Chart</p>	
<p>Header</p>	<p>Report name, the reported period and the number of resources whose data is displayed on the chart</p>
<p>Columns</p>	<p>Each column represents the average number of activities of each type completed by a resource during the specified month.</p> <p>Columns may consist of several sections marked by different colors – each color matches a certain activity type (described in the chart legend).</p>
<p>Legend</p>	<p>Activity types performed by the resources in the selected bucket or group.</p> <p>If the resources in the selected bucket/group perform only some of the activity types existing in the system, the columns and the legend will contain only the activity types performed by the resource.</p>
<p>Axes</p>	<p>horizontal: Resources</p> <p>vertical: Average activities</p>

Hint



Resource name, activity type and the average number of activities of such type.

• **Chart Options**

The 'Comparing resources productivity' report shows data for one month. When any date is selected in the Calendar, the chart will display data for the period from the 1st of the month till the last date of the same month. The chart options allow choosing the selected month or the month before it and the chart will display the data for the corresponding period. 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 or group. The third option allows defining the number of resources whose number of activities is to be shown on the chart. The user can select 20, 40, 50 or all resources to be displayed.

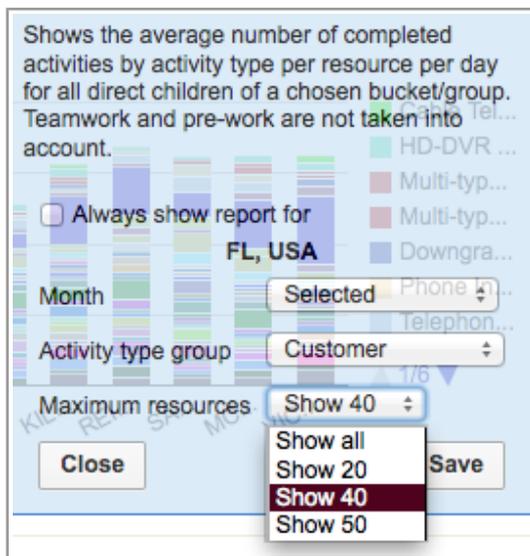


Figure 30: Options of 'Comparing resources productivity' report

4.9 Completion progress

- Data Shown on Report:**

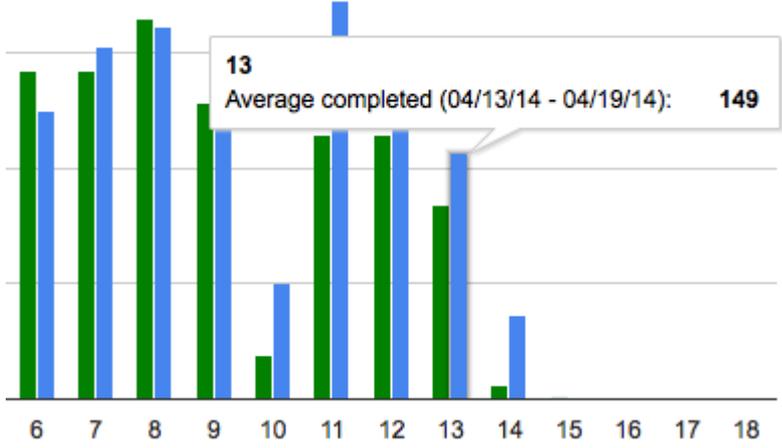
The number of completed activities per hour for the selected date compared to the average number of completed activities for the previous week (counting from the first to the last day of the previous week) and for previous month (counting from the 1st of the month to the last day of the previous month). Only regular and reopen activities are taken into account.

The 'Completion progress' DashBoard report can be displayed for:

- buckets/groups
- individual resources

- Visualization:**

<p>Column Chart</p>	<p>Completion progress (04/25/14)</p> <table border="1"> <caption>Estimated data from the bar chart</caption> <thead> <tr> <th>Hour</th> <th>Completed (04/25/14)</th> <th>Average completed (04/13/14 - 04/19/14)</th> </tr> </thead> <tbody> <tr><td>5</td><td>0</td><td>0</td></tr> <tr><td>6</td><td>200</td><td>160</td></tr> <tr><td>7</td><td>190</td><td>210</td></tr> <tr><td>8</td><td>220</td><td>220</td></tr> <tr><td>9</td><td>180</td><td>150</td></tr> <tr><td>10</td><td>30</td><td>70</td></tr> <tr><td>11</td><td>150</td><td>240</td></tr> <tr><td>12</td><td>150</td><td>200</td></tr> <tr><td>13</td><td>100</td><td>140</td></tr> <tr><td>14</td><td>10</td><td>50</td></tr> <tr><td>15</td><td>0</td><td>0</td></tr> <tr><td>16</td><td>0</td><td>0</td></tr> <tr><td>17</td><td>0</td><td>0</td></tr> <tr><td>18</td><td>0</td><td>0</td></tr> </tbody> </table>	Hour	Completed (04/25/14)	Average completed (04/13/14 - 04/19/14)	5	0	0	6	200	160	7	190	210	8	220	220	9	180	150	10	30	70	11	150	240	12	150	200	13	100	140	14	10	50	15	0	0	16	0	0	17	0	0	18	0	0
Hour	Completed (04/25/14)	Average completed (04/13/14 - 04/19/14)																																												
5	0	0																																												
6	200	160																																												
7	190	210																																												
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9	180	150																																												
10	30	70																																												
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18	0	0																																												
<p>Header</p>	<p>Report name and date in parentheses</p>																																													
<p>Columns</p>	<p>There may be up to three columns per hour representing the following data:</p> <ul style="list-style-type: none"> - the number of activities completed by the resource at such hour on the selected date - the average number of activities completed by the same resource at the same hour in the previous week (when available) - the average number of activities completed by the same resource at the same hour in the previous month (when available) <p>Note: When certain data is not available (for example, the previous month statistics), the corresponding column is not show.</p>																																													

<p>Legend</p>	<p>Type of data represented by the chart:</p> <ul style="list-style-type: none"> - Completed (date) - Average completed (week) - Average completed (month)
<p>Axes</p>	<p>horizontal: Hour</p> <p>vertical: Number of activities</p>
<p>Hint</p>	 <p>Hour, data corresponding to the selected column and the number of activities represented by the column</p>

• **Chart Options**

The 'Completion progress' 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.

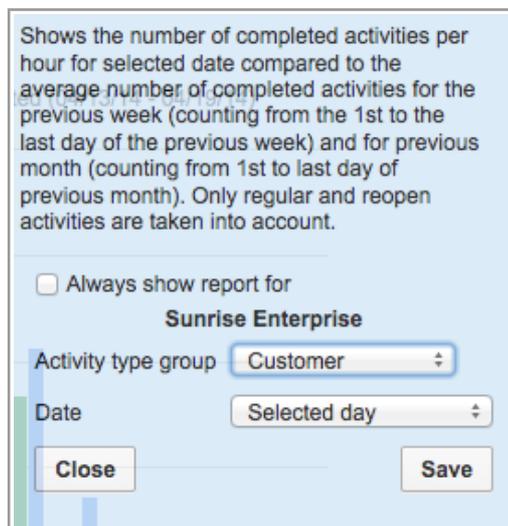


Figure 31: Options of 'Completion progress' report

4.10 Completion Progress by Volume

- Data Shown on Report:**

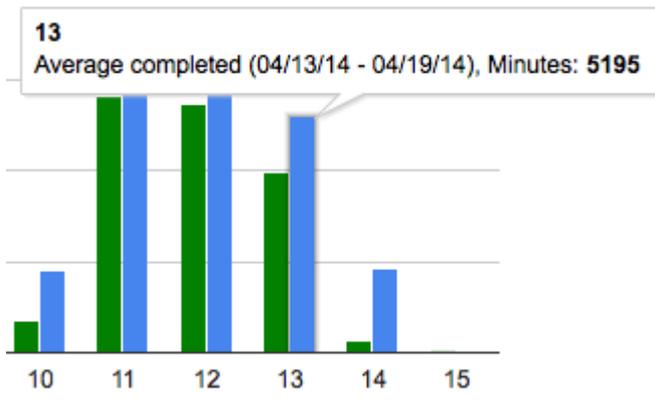
The total volume of completed activities in minutes or points per hour for the selected date compared to the average number of completed activities for the previous week (counting from the first to the last day of the previous week) and for previous month (counting from the 1st of the month to the last day of the previous month). Only regular and reopen activities are taken into account.

The 'Completion progress by volume' DashBoard report can be displayed for:

- buckets/groups
- individual resources

- Visualization:**

<p>Column Chart</p>	<p>Completion progress by volume (04/25/14)</p> <table border="1"> <caption>Estimated Data from Chart</caption> <thead> <tr> <th>Hour</th> <th>Completed (04/25/14), Minutes</th> <th>Average completed (04/13/14 - 04/19/14), Minutes</th> </tr> </thead> <tbody> <tr><td>5</td><td>0</td><td>0</td></tr> <tr><td>6</td><td>5500</td><td>4800</td></tr> <tr><td>7</td><td>5800</td><td>5500</td></tr> <tr><td>8</td><td>6800</td><td>6500</td></tr> <tr><td>9</td><td>5800</td><td>5000</td></tr> <tr><td>10</td><td>800</td><td>1800</td></tr> <tr><td>11</td><td>5500</td><td>7500</td></tr> <tr><td>12</td><td>5200</td><td>6500</td></tr> <tr><td>13</td><td>3800</td><td>5000</td></tr> <tr><td>14</td><td>300</td><td>1800</td></tr> <tr><td>15</td><td>0</td><td>0</td></tr> </tbody> </table>	Hour	Completed (04/25/14), Minutes	Average completed (04/13/14 - 04/19/14), Minutes	5	0	0	6	5500	4800	7	5800	5500	8	6800	6500	9	5800	5000	10	800	1800	11	5500	7500	12	5200	6500	13	3800	5000	14	300	1800	15	0	0
Hour	Completed (04/25/14), Minutes	Average completed (04/13/14 - 04/19/14), Minutes																																			
5	0	0																																			
6	5500	4800																																			
7	5800	5500																																			
8	6800	6500																																			
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10	800	1800																																			
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12	5200	6500																																			
13	3800	5000																																			
14	300	1800																																			
15	0	0																																			
<p>Header</p>	<p>Report name and date in parentheses</p>																																				
<p>Columns</p>	<p>There may be up to three columns per hour representing the following data:</p> <ul style="list-style-type: none"> - the volume of activities completed by the resource at such hour on the selected date - the average volume of activities completed by the same resource at the same hour in the previous week (when available) - the average volume of activities completed by the same resource at the same hour in the previous month (when available) <p>Note: When certain data is not available (for example, the previous month statistics), the corresponding column is not show.</p>																																				
<p>Legend</p>	<p>Type of data represented by the chart:</p> <ul style="list-style-type: none"> - Completed (date), Units of measurement 																																				

	<ul style="list-style-type: none"> - Average completed (week), Units of measurement - Average completed (month), Units of measurement
Axes	<p>horizontal: Hour</p> <p>vertical: Volume</p>
Hint	 <p>Hour, data corresponding to the selected column, the volume of activities represented by the column and the units of measurement</p>

• Chart Options

The 'Completion progress by volume' 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 selecting the units of measurement to be used to display the completed activities volume (minutes or points). If the company does not use points according to its 'Business Rules' settings, no data will be displayed when 'Points' are selected.

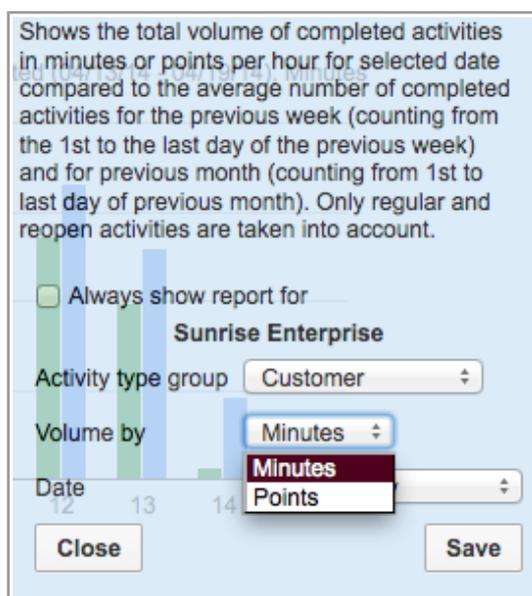


Figure 32: Options of 'Completion progress by volume' report

4.11 Mean Time to Deliver

- Data Shown on Report:**

The average time from the moment an activity was created, to the moment it was (re)assigned to a resource, and to the moment it was to be started by a resource. The report includes all direct children of the chosen bucket/group. Teamwork and pre-work are not taken into account.

The 'Mean time to deliver' DashBoard report can be displayed for:

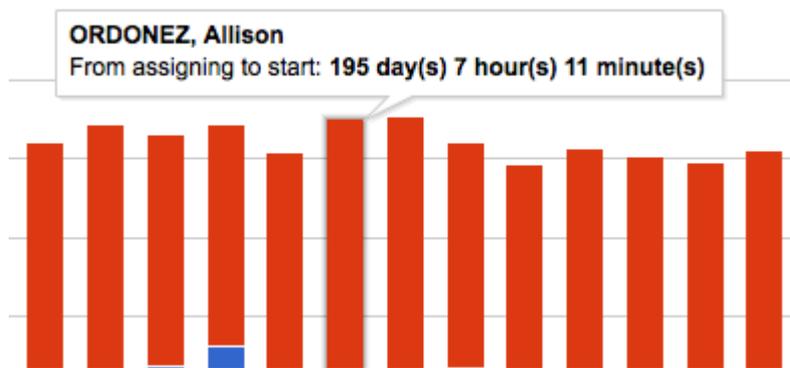
- buckets/groups

If an individual resource is selected in the Resource Tree, the report will be configured for its parent bucket or group.

- Visualization:**

<p>Column Chart</p>	<p>Mean time to deliver (April 2014, 16 resources)</p> <table border="1"> <caption>Approximate data from the Mean Time to Deliver chart</caption> <thead> <tr> <th>Resource</th> <th>From creating to assigning (blue)</th> <th>From assigning to start (red)</th> </tr> </thead> <tbody> <tr><td>ARN</td><td>10</td><td>170</td></tr> <tr><td>HOL</td><td>10</td><td>170</td></tr> <tr><td>RICK</td><td>10</td><td>170</td></tr> <tr><td>DISN</td><td>10</td><td>170</td></tr> <tr><td>RIDD</td><td>10</td><td>170</td></tr> <tr><td>LYNC</td><td>10</td><td>170</td></tr> <tr><td>VALE</td><td>10</td><td>170</td></tr> <tr><td>ORD</td><td>10</td><td>170</td></tr> <tr><td>PEA</td><td>10</td><td>170</td></tr> <tr><td>PEA</td><td>10</td><td>170</td></tr> <tr><td>BASI</td><td>10</td><td>170</td></tr> <tr><td>KILB</td><td>10</td><td>170</td></tr> <tr><td>REIN</td><td>10</td><td>170</td></tr> <tr><td>SAN</td><td>10</td><td>170</td></tr> <tr><td>MCG</td><td>10</td><td>170</td></tr> <tr><td>VICK</td><td>10</td><td>170</td></tr> </tbody> </table>	Resource	From creating to assigning (blue)	From assigning to start (red)	ARN	10	170	HOL	10	170	RICK	10	170	DISN	10	170	RIDD	10	170	LYNC	10	170	VALE	10	170	ORD	10	170	PEA	10	170	PEA	10	170	BASI	10	170	KILB	10	170	REIN	10	170	SAN	10	170	MCG	10	170	VICK	10	170
Resource	From creating to assigning (blue)	From assigning to start (red)																																																		
ARN	10	170																																																		
HOL	10	170																																																		
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DISN	10	170																																																		
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SAN	10	170																																																		
MCG	10	170																																																		
VICK	10	170																																																		
<p>Header</p>	<p>Report name, the reported period and the number of resources whose data is displayed on the chart</p>																																																			
<p>Columns</p>	<p>Each column shows the time elapsed from the activity creation to its assigning, and from assigning to start.</p> <p>Each column consists of two parts marked by different colors representing time from activity creation to assignment (blue color) and time from activity assignment to start (red color).</p>																																																			
<p>Legend</p>	<p>From assigning to start</p> <p>From creating to assigning</p>																																																			
<p>Axes</p>	<p>horizontal: Resources</p> <p>vertical: Time (in days)</p>																																																			

Hint



Resource name, description of time corresponding to the selected column part and the time in days, hours and minutes

• **Chart Options**

The 'Mean time to deliver' report shows data for one month. When any date is selected in the Calendar, the chart will display data for the period from the 1st of the month till the last date of the same month. The chart options allow choosing the selected month or the month before it and the chart will display the data for the corresponding period. 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 or group. Also, the chart can be set to show data for a particular capacity category assigned to the selected bucket or group or for all such capacity categories. The fourth option allows defining the number of resources whose number of activities is to be shown on the chart. The user can select 20, 40, 50 or all resources to be displayed.

Shows the average time from the moment an activity was created, to the moment it was (re)assigned to a resource, to the moment it was about to be started by a resource. Applies to all direct children of a chosen bucket/group. Teamwork and pre-work are not taken into account.

Always show report for CA, USA

Month: Selected

Capacity category: Any capacity category

Activity type group: Customer

Maximum resources: Show 40

Legend:
From assigning to start (red bar)
From creating to assigning (blue bar)

Buttons: Close, Save

Figure 33: Options of 'Mean time to deliver' report

4.12 PAS Responses per Resource

- Data Shown on Report:**

PAS statistics for the question chosen per resource for the selected date. The data used in the report is taken from the Daily Extract 'PAS answers' file.

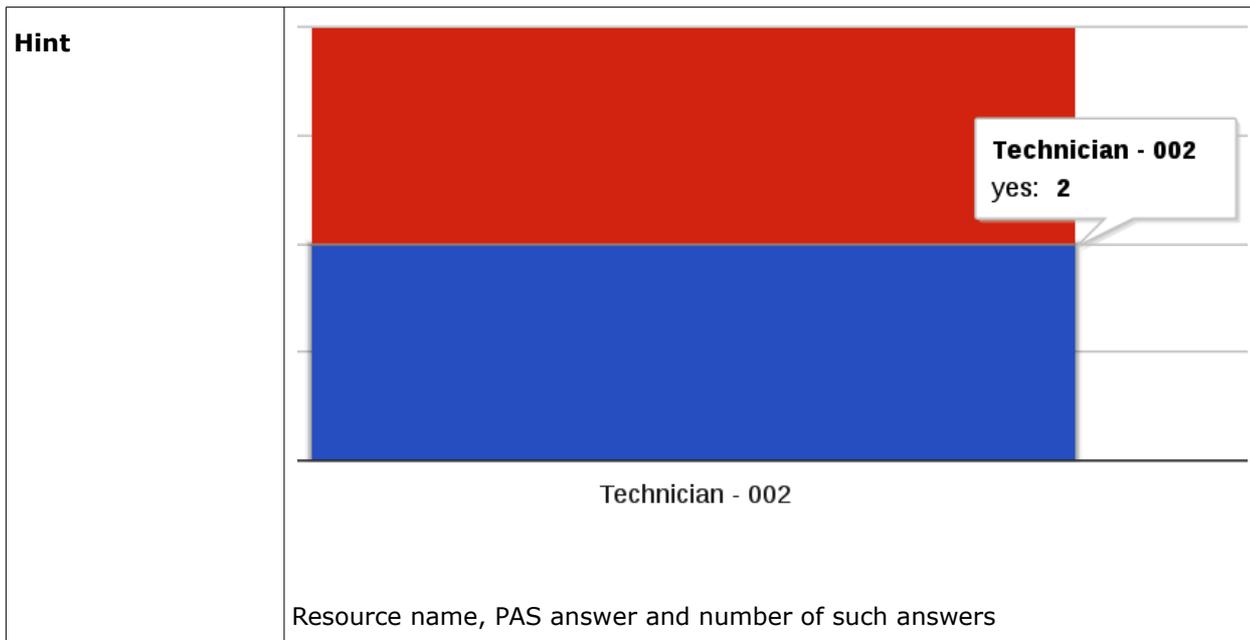
The 'PAS responses per resource' Dashboard report can be displayed for:

- buckets/groups

If an individual resource is selected in the Resource Tree, the report will be configured for its parent bucket or group.

- Visualization:**

<p>Column Chart</p>	<p>PAS responses per resource (05/05/14, Testers1, 1 resources)</p> <table border="1"> <caption>Data for Column Chart</caption> <thead> <tr> <th>Resource</th> <th>yes</th> <th>no</th> </tr> </thead> <tbody> <tr> <td>Technician - 002</td> <td>2</td> <td>2</td> </tr> </tbody> </table>	Resource	yes	no	Technician - 002	2	2
Resource	yes	no					
Technician - 002	2	2					
<p>Header</p>	<p>Report name, date, resource name, number of resources</p>						
<p>Columns</p>	<p>Each column shows the number of answers per individual resource. Each column may consist of up to three parts marked by different colors representing the answers received to the selected question: yes, no or no answer.</p>						
<p>Legend</p>	<p>Answers as they are defined in the voice script:</p> <ul style="list-style-type: none"> - no - yes - - (no answer) 						
<p>Axes</p>	<p>horizontal: resources</p> <p>vertical: Number of answers</p>						



• **Chart Options**

The 'PAS responses 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. For the chart to display the required data, the PAS question needs to be selected in the corresponding field. Additionally, the chart options allow defining the number of resources whose data is to be shown on the chart. The user can select 20, 40, 50 or all resources to be displayed.

Shows PAS statistics for the question chosen per resource for selected date.

Always show report for
BASILE, Terri

Date: Selected day

PAS Question: Choose question

Maximum resources: Show 40

Close Save

Figure 34: Options of 'PAS responses per resource' report

4.13 Percent of Activities Met

- Data Shown on Report:**

The percent of activities that were started earlier than the activity service window end during the selected month. Teamwork, pre-work and not-ordered activities are not taken into account. The whole number of activities is assumed to be 100%.

The 'Percent of activities met' Dashboard report can be displayed for:

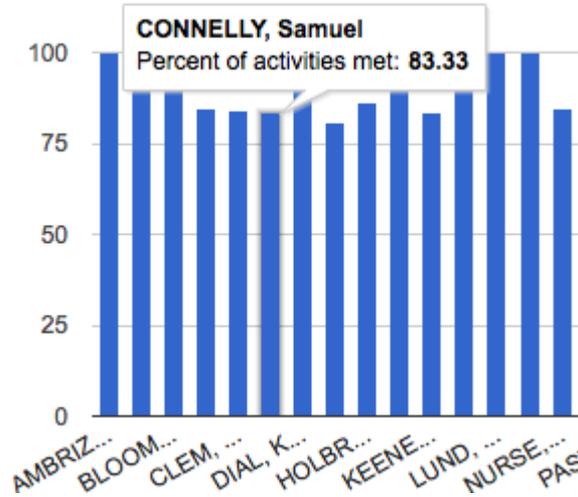
- buckets/groups

If an individual resource is selected in the Resource Tree, the report will be configured for its parent bucket or group.

- Visualization:**

<p>Column Chart</p>	<table border="1"> <caption>Approximate data from the chart</caption> <thead> <tr> <th>Resource</th> <th>Percent of activities</th> </tr> </thead> <tbody> <tr><td>AMBRIZ...</td><td>100</td></tr> <tr><td>BLOOM...</td><td>100</td></tr> <tr><td>CLEM, ...</td><td>90</td></tr> <tr><td>DIAL, ...</td><td>85</td></tr> <tr><td>DIAL, K...</td><td>85</td></tr> <tr><td>HOLBR...</td><td>100</td></tr> <tr><td>HOLBR...</td><td>80</td></tr> <tr><td>KEENE...</td><td>85</td></tr> <tr><td>KEENE...</td><td>100</td></tr> <tr><td>KEENE...</td><td>85</td></tr> <tr><td>LUND, ...</td><td>100</td></tr> <tr><td>LUND, ...</td><td>100</td></tr> <tr><td>LUND, ...</td><td>100</td></tr> <tr><td>LUND, ...</td><td>100</td></tr> <tr><td>NURSE,...</td><td>85</td></tr> <tr><td>PASTO...</td><td>100</td></tr> <tr><td>PASTO...</td><td>100</td></tr> <tr><td>PASTO...</td><td>100</td></tr> <tr><td>PASTO...</td><td>100</td></tr> <tr><td>PASTO...</td><td>100</td></tr> <tr><td>RAYNE...</td><td>100</td></tr> <tr><td>REAVIS...</td><td>100</td></tr> <tr><td>REAVIS...</td><td>100</td></tr> <tr><td>SUITER...</td><td>80</td></tr> <tr><td>SUITER...</td><td>100</td></tr> <tr><td>VO, Mar...</td><td>100</td></tr> <tr><td>VO, Mar...</td><td>85</td></tr> <tr><td>VO, Mar...</td><td>100</td></tr> </tbody> </table>	Resource	Percent of activities	AMBRIZ...	100	BLOOM...	100	CLEM, ...	90	DIAL, ...	85	DIAL, K...	85	HOLBR...	100	HOLBR...	80	KEENE...	85	KEENE...	100	KEENE...	85	LUND, ...	100	NURSE,...	85	PASTO...	100	RAYNE...	100	REAVIS...	100	REAVIS...	100	SUITER...	80	SUITER...	100	VO, Mar...	100	VO, Mar...	85	VO, Mar...	100														
Resource	Percent of activities																																																										
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KEENE...	85																																																										
LUND, ...	100																																																										
LUND, ...	100																																																										
LUND, ...	100																																																										
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VO, Mar...	100																																																										
<p>Header</p>	<p>Report name, the reported period and the number of resources whose data is displayed on the chart</p>																																																										
<p>Columns</p>	<p>Percentage share of activities started by each resource before the service window end</p>																																																										
<p>Legend</p>	<p>The chart uses only one color to display data, therefore, the chart has no legend</p>																																																										
<p>Axes</p>	<p>horizontal: Resources vertical: Percent of activities</p>																																																										

Hint



Resource name and their percent of activities met

• Chart Options

The 'Percent of activities met' report shows data for one month. When any date is selected in the Calendar, the chart will display data for the period from the 1st of the month till the last date of the same month. The chart options allow choosing the selected month or the month before it and the chart will display the data for the corresponding period. 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 or group. The third option allows defining the number of resources whose number of activities is to be shown on the chart. The user can select 20, 40, 50 or all resources to be displayed.

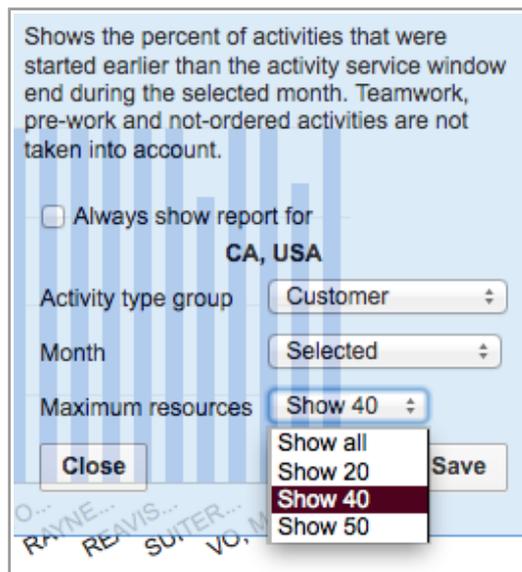


Figure 35: Options of 'Percent of activities met' report

4.14 Percent of Customer Expectations Met

- Data Shown on Report:**

The number of activities which were started earlier/inside/after the delivery window that was messaged to customer for all direct children of the chosen bucket/group. Only completed and not-done activities are taken into account. If an activity has no specified 'service window start' and/or 'service window end' fields, it is not included in the report.

The 'Percent of customer expectations met' DashBoard report can be displayed for:

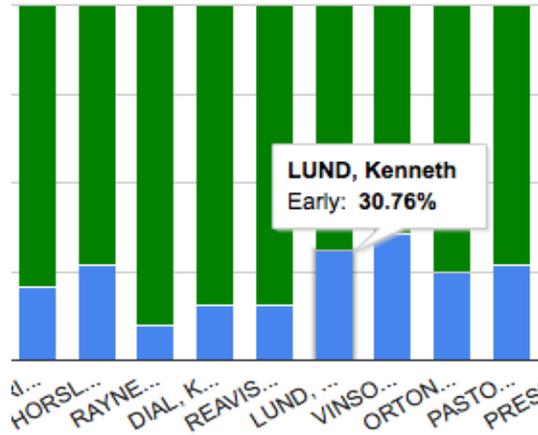
- buckets/groups

If an individual resource is selected in the Resource Tree, the report will be configured for its parent bucket or group.

- Visualization:**

<p>Column Chart</p>	<p>Percent of customer expectations met (April 2014, 16 resources)</p>
<p>Header</p>	<p>Report name, the reported period and the number of resources whose data is displayed on the chart</p>
<p>Columns</p>	<p>Each column represents 100% of the resource's not-done and completed activities.</p> <p>Each column may consist of the maximum of three parts marked by different colors representing the percentage share of activities started before the delivery window, in time and after the delivery window.</p>
<p>Legend</p>	<p>Late In time Early</p>
<p>Axes</p>	<p>horizontal: Resources vertical: Percent of activities</p>

Hint



Resource name and the percent of activities started early, in time or late.

• Chart Options

The 'Percent of customer expectations met' report shows data for one month. When any date is selected in the Calendar, the chart will display data for the period from the 1st of the month till the last date of the same month. The chart options allow choosing the selected month or the month before it and the chart will display the data for the corresponding period. 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 or group.

It is also possible to set the 'Allowable lateness' value, which means the acceptable delay with which the activity is considered to be started on time. Changes to this parameter result in the chart data recalculation and may change the chart appearance.

The fourth option allows defining the number of resources whose number of activities is to be shown on the chart. The user can select 20, 40, 50 or all resources to be displayed.



Figure 36: Options of 'Percent of customer expectations met' report

4.15 Resources by Statuses

- Data Shown on Report:**

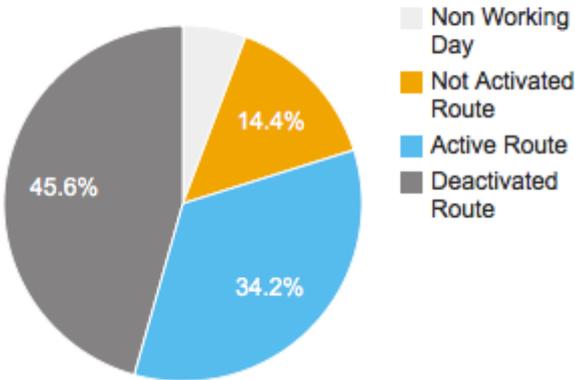
The number of resources by statuses for the selected date.

The 'Resources by statuses' DashBoard report can be displayed for:

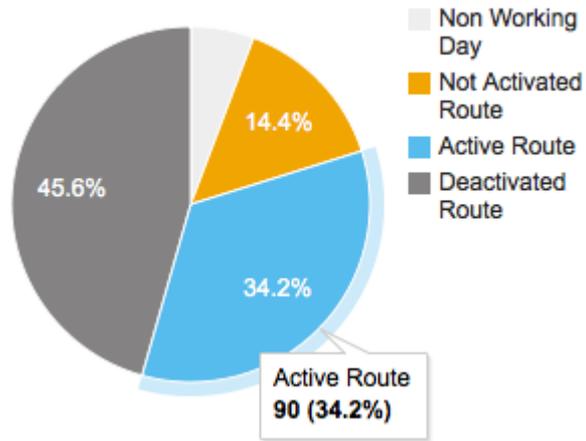
- buckets/groups

If an individual resource is selected in the Resource Tree, the report will be configured for its parent bucket or group.

- Visualization:**

<p>Pie Chart</p>	<p style="text-align: center;">Resources by statuses (04/25/14)</p>  <table border="1" style="display: none;"> <caption>Resources by Statuses Data</caption> <thead> <tr> <th>Status</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Non Working Day</td> <td>5.8%</td> </tr> <tr> <td>Not Activated Route</td> <td>14.4%</td> </tr> <tr> <td>Active Route</td> <td>34.2%</td> </tr> <tr> <td>Deactivated Route</td> <td>45.6%</td> </tr> </tbody> </table>	Status	Percentage	Non Working Day	5.8%	Not Activated Route	14.4%	Active Route	34.2%	Deactivated Route	45.6%
Status	Percentage										
Non Working Day	5.8%										
Not Activated Route	14.4%										
Active Route	34.2%										
Deactivated Route	45.6%										
<p>Header</p>	<p>Report name and date</p>										
<p>Slices</p>	<p>The entire diagram represents all resources in the selected bucket or group on the specified day and is assumed to be 100%. Each slice represents the percentage share of each route status in the whole number.</p>										
<p>Legend</p>	<p>Route statuses. The following statuses are available:</p> <ul style="list-style-type: none"> - Non Working Day - Not Activated Route - Not Activated in Time - Active Route - Deactivated Route <p>If resources of the selected bucket or group have routes of only some of the statuses, the slices and the legend will contain only such statuses.</p>										

Hint



Route status, the number of resource routes of such status in the bucket or group and their percentage share in the whole number of resources

• **Chart Options**

The 'Resources by statuses' report shows data for the day selected in the calendar. The chart options allow choosing the selected date or the date before it.



Figure 37: Options of 'Resources by statuses' report

4.16 Routing Errors Reasons

- Data Shown on Report:**

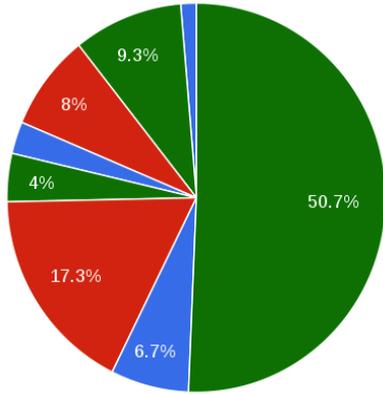
The reasons of NOT-routed activities by activity type groups for the selected date. Only planned activities are taken into consideration.

The 'Routing errors reasons' DashBoard report can be displayed for:

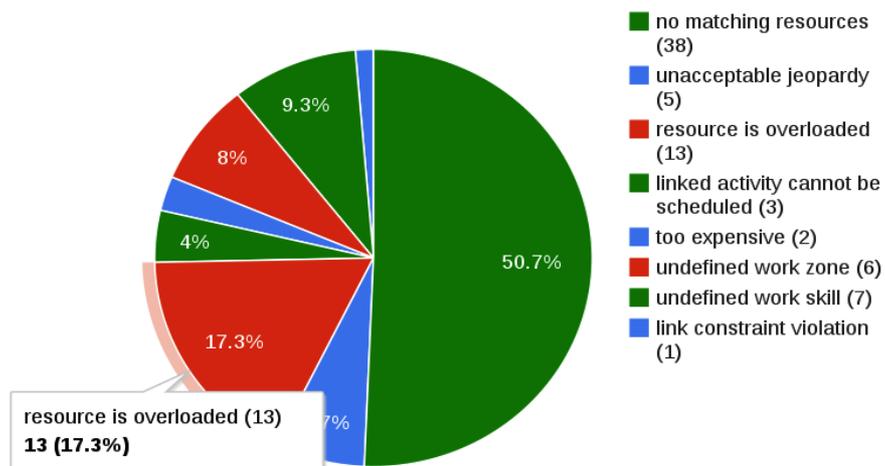
- buckets

If an individual resource or group is selected in the Resource Tree, the report will be configured for its parent bucket.

- Visualization:**

<p>Pie Chart</p>	<p style="text-align: center;">Routing errors reasons (04/23/14)</p>  <ul style="list-style-type: none"> ■ no matching resources (38) ■ unacceptable jeopardy (5) ■ resource is overloaded (13) ■ linked activity cannot be scheduled (3) ■ too expensive (2) ■ undefined work zone (6) ■ undefined work skill (7) ■ link constraint violation (1)
<p>Header</p>	<p>Report name and date</p>
<p>Slices</p>	<p>The entire diagram represents all not-routed activities in the selected bucket on the specified day and is assumed to be 100%.</p> <p>Each slice represents the percentage share of 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>
<p>Legend</p>	<p>Routing error reasons</p> <p>The slices and the legend contain only the routing error reasons used in the selected bucket routing results.</p>

Hint



Routing error reason, number of activities not outed for that reason and their percentage share

• **Chart Options**

The 'Routing errors reasons' 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.

Shows the reasons of NOT-routed activities by activity type groups for the selected date. Only planned activities are taken into consideration.

Always show report for **Planning**

Activity type group:

Date:

Figure 38: Options of 'Routing errors reasons' report