



SmartReporting User Guide

Part Number E62348-01

Contents

Chapter 1: Accessing ETAdirect Web Interface.....	5
Chapter 2: Dashboard.....	7
Adding Dashboard Charts.....	8
Viewing the Details.....	9
Navigating the Dashboard/Using Dashboard Controls.....	9
Refreshing the tables.....	11
Dashboard Reports.....	11
Completion Progress.....	11
Capacity by Category.....	12
Viewing Amount of Work By Work Type.....	13
Average Productivity by Work Type.....	14
Viewing Providers By Statuses.....	15
Comparing Resources by Number of Appointments.....	16
Comparing Providers Productivity.....	16
Viewing Routing Errors Reasons.....	17
Viewing Percentage of Appointments Met.....	18
Percentage of Customer Expectations Met.....	18
PAS Responses per Provider.....	19
Viewing Average Travel Time per Provider.....	19
Mean Time to Deliver.....	20
Chapter 3: Routes/Activities Reports.....	23
Notification Summary Report.....	24
Route Statistics Report.....	24
Last Message Window Size.....	25
Routing Report.....	26
In Time/Late/Early Appointment Report.....	27
Route Totals.....	28
Appointment by Statuses Report.....	29
Activities by Statuses Chart.....	30
Schedule Report.....	31
Print Route.....	32
Chapter 4: SmartCommunication/PAS Reports.....	35
Average Number of Calls Per Customer.....	36
Percent of Contacted Customers.....	36
Percent of Last Accurate Message.....	37
Last Message Window Size.....	37
Transferred Calls.....	37
Post Appointment Survey (PAS) Reports.....	37
Chapter 5: Statistical/Administrative Reports.....	39
Inactive Users Report.....	40
Number of Active Users.....	40

SOAP Report..... 41
Average Travel Time Report.....42
Work Statistics.....42
Work Statistics.....45
Travel Statistics.....47
Exporting a Report..... 48

Chapter 1

Accessing ETAdirect Web Interface

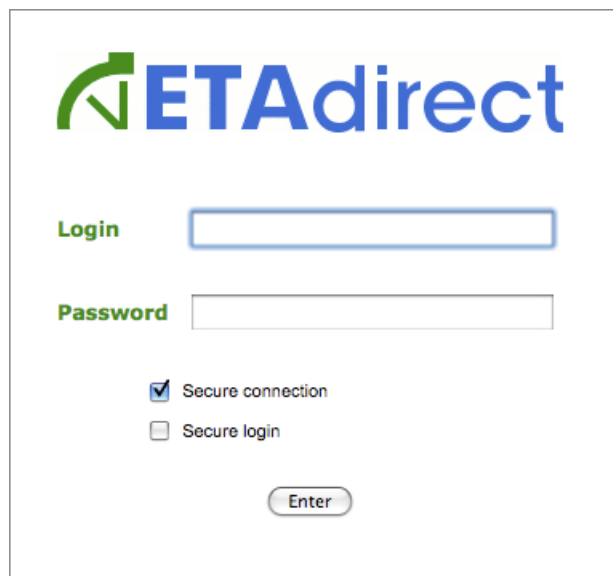
Follow these steps to access ETAdirect from a computer, it is necessary to have an Internet connection and Web Browser.

Follow these steps to access your ETA direct website:

1. In the address bar of your web browser, type the ETAdirect URL (example: sunrise.etadirect.com).
2. Click **Enter**. The ETAdirect login window appears. Logging in requires a login name and password. Your system administrator assigns login names and passwords. If you do not know or forgot your login or password, contact your system administrator. Your user login may be blocked automatically after entering the wrong password several consecutive times.

Follow these steps to login to ETAdirect:

1. Launch the ETAdirect website. Enter your **Username** in the Login textbox. All users have unique usernames.
2. Enter your **Password** in Password textbox.



The screenshot shows the ETAdirect login page. At the top is the ETAdirect logo, consisting of a green stylized 'E' and 'A' followed by the text 'ETAdirect' in blue. Below the logo are two input fields: one labeled 'Login' and one labeled 'Password'. Underneath the input fields are two checkboxes: 'Secure connection' which is checked, and 'Secure login' which is unchecked. At the bottom of the form is a button labeled 'Enter'.

- Optionally use the Secure Connection option to activate secure data transfer protocol for connection.
- Optionally use the Secure Login options to replace login by asterisks and hide password length.

3. Click **Enter** to access to the system. ETAdirect opens and you have access to the features and functionalities of the system according to your user profile.

Chapter 2

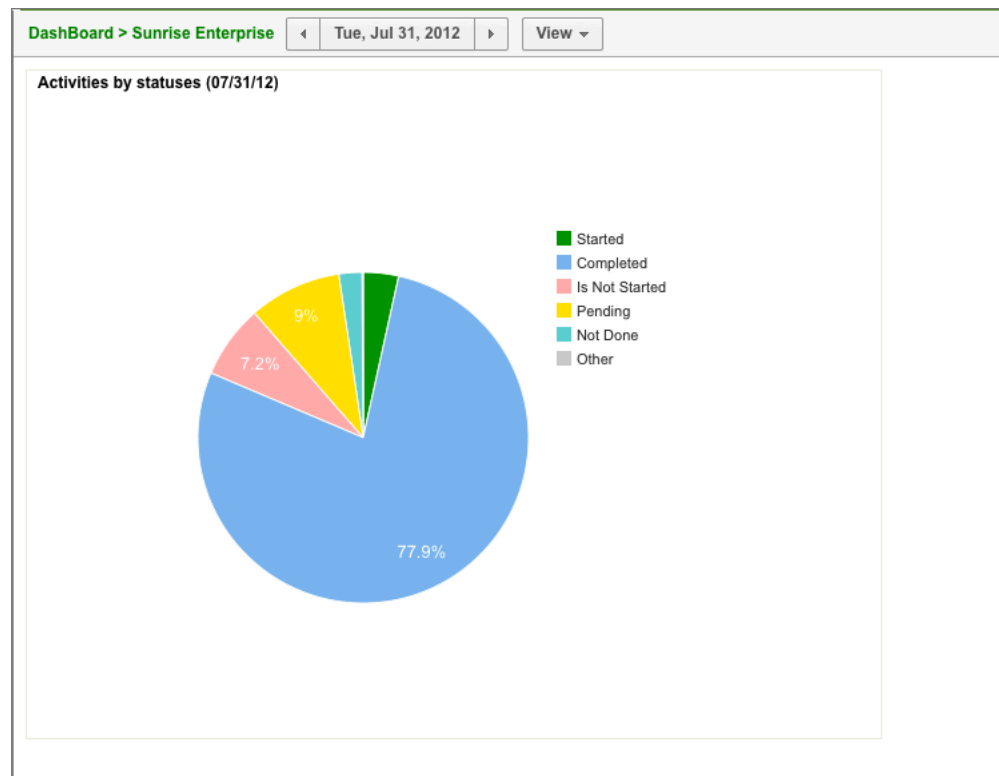
Dashboard

Topics:


- [Adding Dashboard Charts](#)
- [Viewing the Details](#)
- [Navigating the Dashboard/ Using Dashboard Controls](#)
- [Refreshing the tables](#)
- [Dashboard Reports](#)
- [Completion Progress](#)
- [Capacity by Category](#)
- [Viewing Amount of Work By Work Type](#)
- [Average Productivity by Work Type](#)
- [Viewing Providers By Statuses](#)
- [Comparing Resources by Number of Appointments](#)
- [Comparing Providers Productivity](#)
- [Viewing Routing Errors Reasons](#)
- [Viewing Percentage of Appointments Met](#)
- [Percentage of Customer Expectations Met](#)
- [PAS Responses per Provider](#)
- [Viewing Average Travel Time per Provider](#)
- [Mean Time to Deliver](#)

The **Dashboard** provides a quick and convenient snapshot of the issues and information that are important to you. The Dashboard you see is determined by your role assignment and by the configuration of optional components.

The **Dashboard** analyzes information on selected Resources or Buckets/ Groups in an easy to read graphic format.



The **Dashboard** reflects information about the Resource, Bucket or Group selected in the Resource Tree. The name of the entity whose information you are viewing (e.g., Sunrise Enterprise) is shown at the top of the page.

 **Note:** Dashboard reports vary by configuration. You may not see all the reports discussed in this Guide.

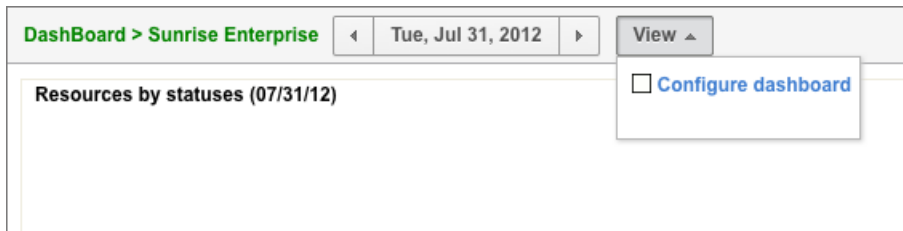
Adding Dashboard Charts

When you open the Dashboard, the configuration menu appears at the bottom of the screen. Adding a chart to your personal Dashboard is quick and easy.

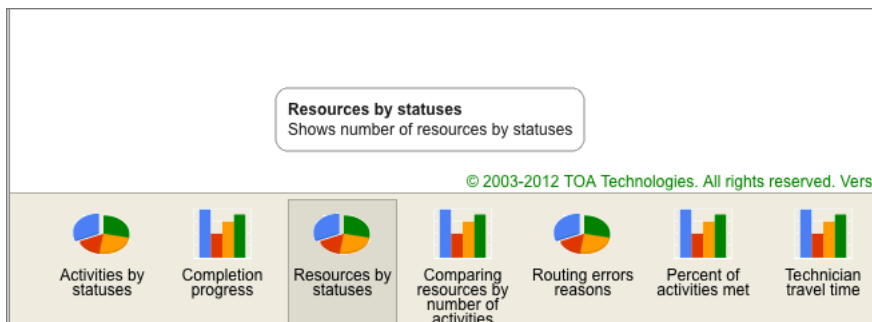
The configuration menu is a horizontal bar with icons that represent the reports that are available to you. You can configure your Dashboard to view the the charts that interest you most. Just select an item from the Resource Tree, then pull an icon up into your work area and the data will display in the proper format without any further input.

Follow these steps to add a new chart to your **Dashboard**:

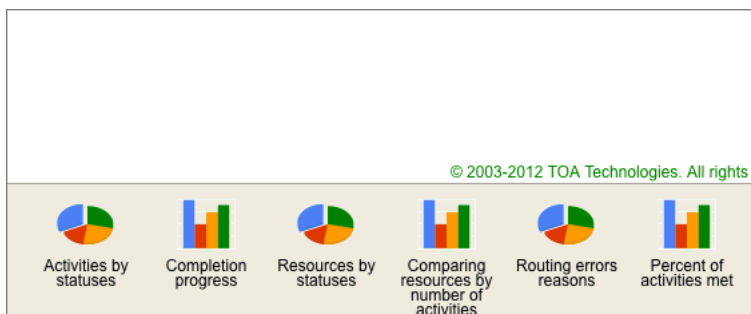
1. Click the **View** button.
2. Check **Configure Dashboard** to view a selection of reports at the bottom of your work area.
- 3.



Hover over an icon to view a pop-up description of the report.



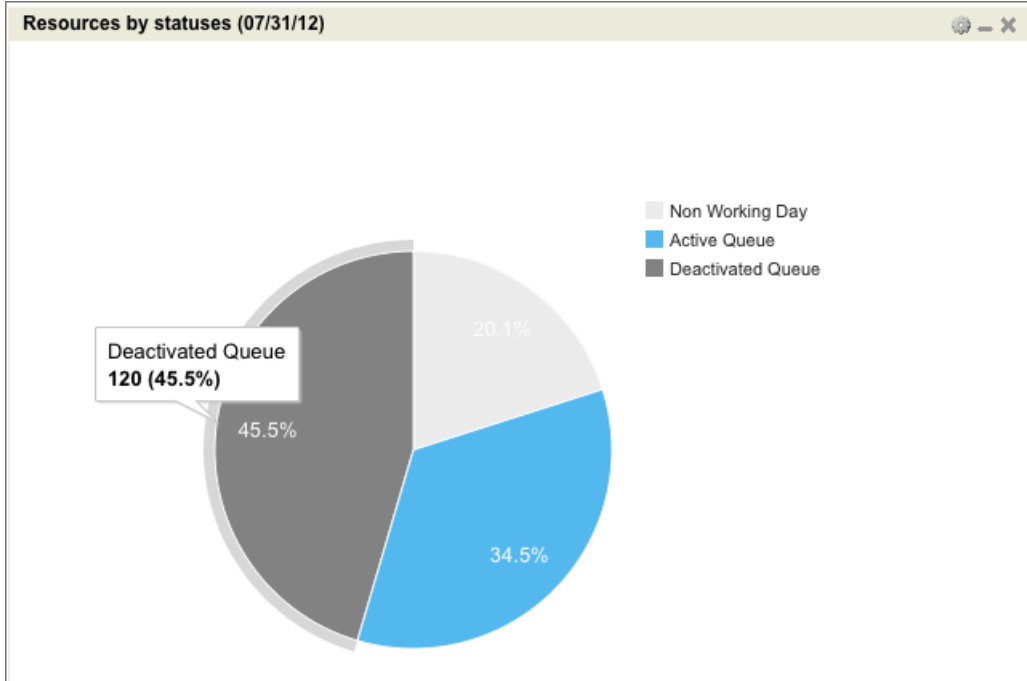
4. Make sure you have selected an item from the Resource Tree that will serve as the subject of your report.
5. Click one of the icons and drag it into your Work Area. That's all that it takes! A new chart will be created automatically based on the Resource or Bucket/Group you have selected.



Viewing the Details

You can view details about the data in a dashboard by clicking a "slice" of a pie chart or a bar in a bar graph.

A pop-up displays with details about the information that you are viewing. To close the pop-up, click the X in the upper right hand corner.



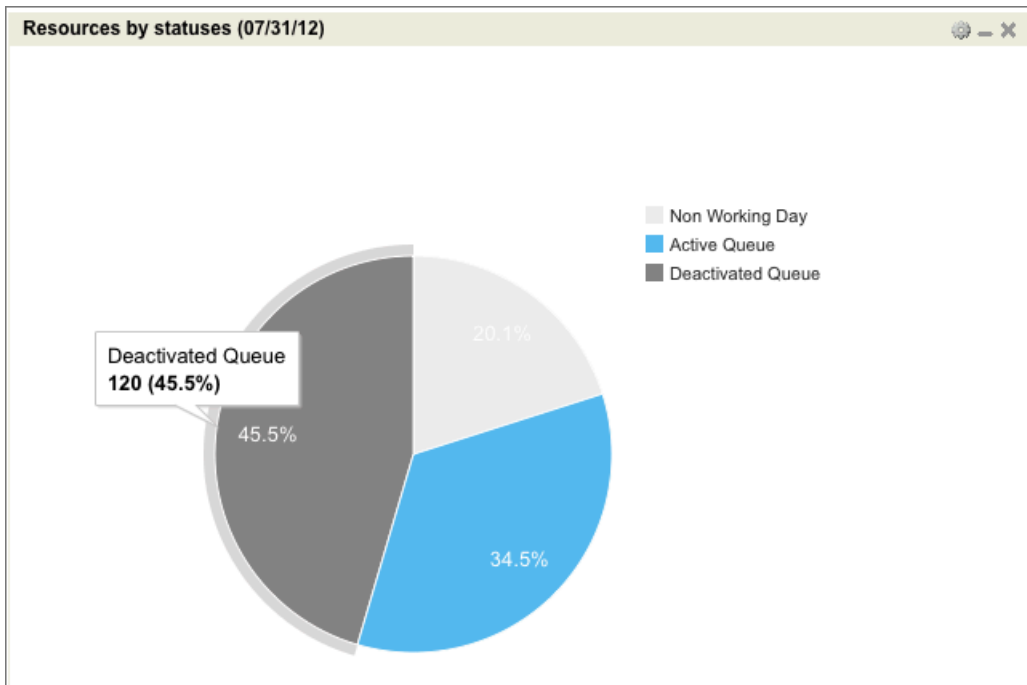
Navigating the Dashboard/Using Dashboard Controls


Hover your cursor over the title of any dashboard and a set of icons will display in the upper right corner of your screen.

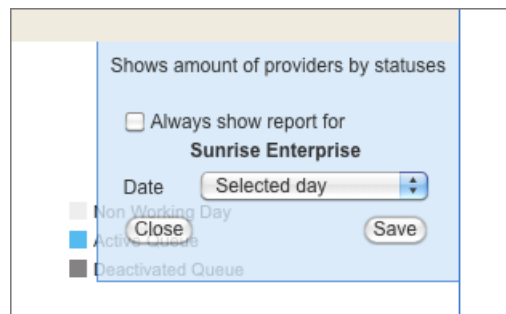



	Closes the dashboard
	Minimizes the dashboard by moving it to the top (rather than the bottom) of your screen.
	Standardizes this dashboard so that it displays with refreshed statistics for the resource, group or bucket on which it is currently based whenever you open the dashboard.

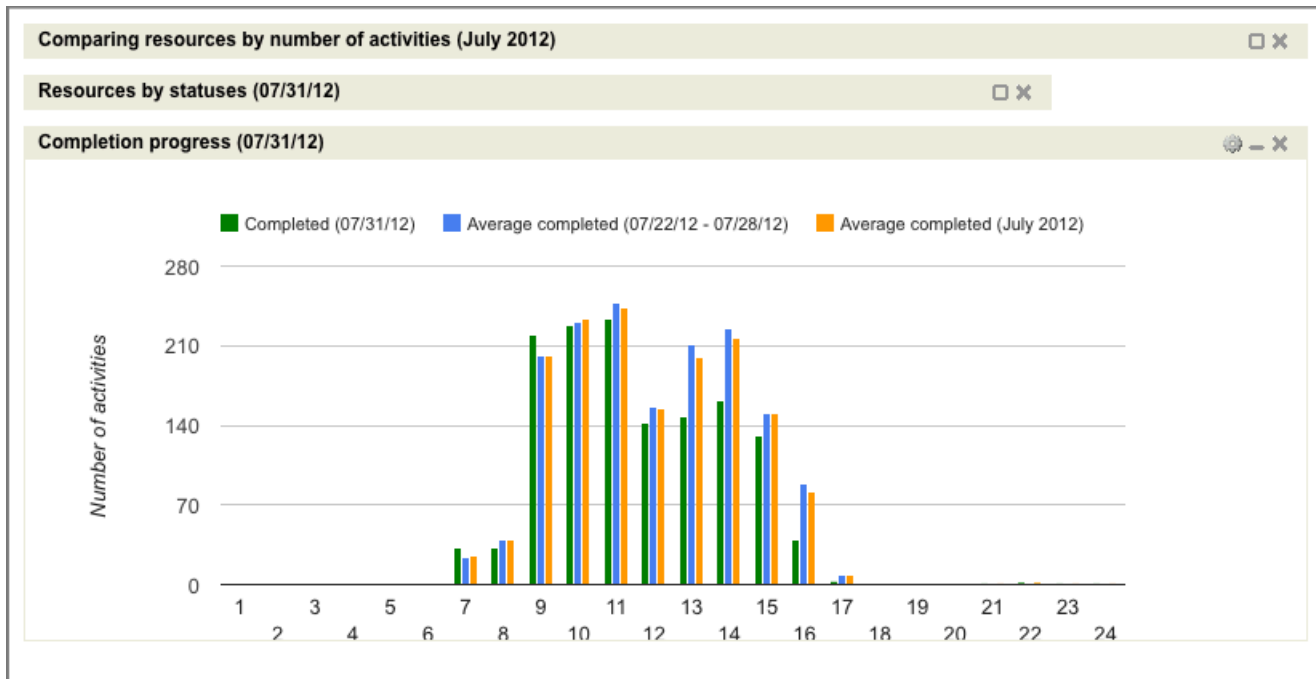
Follow the steps below to standardize the current dashboard:




1. Click the icon  to standardize this dashboard. A pop-up box will display.
2. Check the box to *Always show report for Sunrise Enterprise* (your company) to display a refreshed version of this chart whenever you open the dashboard.



3. Indicate the *Selected day*. Otherwise, the dashboard will default to statistics for today's date.
4. Click **Save**. This chart will always display in your **Dashboard** for this Resource/Bucket/Group regardless of the entity you have selected in the Resource Tree.
5. Click this icon  to minimize the dashboard so that it remains open but in the background. Note that a minimized dashboard rises to the top rather than the bottom of your screen where it stacks up in order with other minimized dashboards.



6. Use this icon  to close the dashboard so that it no longer displays on your screen.

Refreshing the tables

There are two ways refresh a table:

Automatic: 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 1 hour.

At the same time the general reloading timer that affects all ETAdirect windows affects the Dashboard page. This setting is found in the **My Display** settings.

Manual: Follow these steps to refresh the tables manually, click on **Refresh** button in the top right corner of the Main Screen. tables automatically refresh when you perform the following actions:

1. Choose another bucket/resource in the Resource Tree (if report is not fixed for a certain resource/bucket)
2. Change the fixed resource (if the resource was fixed)
3. Change report settings
4. Change the report date
5. Open another tab of ETAdirect, and come back to the Dashboard.

Dashboard Reports

This section provides detailed descriptions for all the charts currently available in the Dashboard. Your user profile and your configuration determine whether all these reports are available to you.

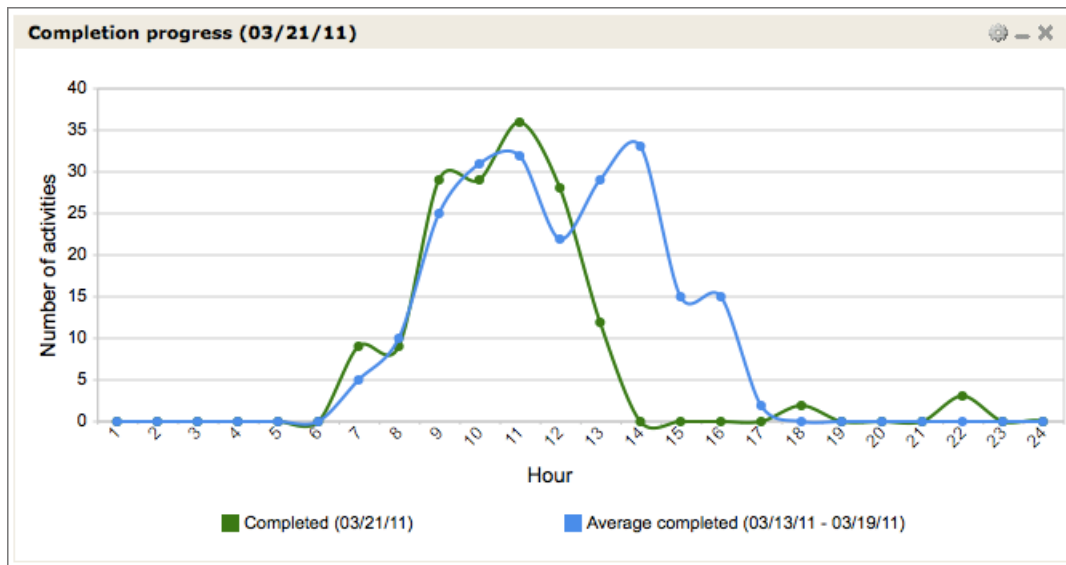
Completion Progress

Completion Progress shows the number of completed activities per hour compared to the average number of completed activities.

This chart can be run for the current day or the previous day.

- It can be run for buckets/aggregators and regular resources.
- It is updated automatically every minute.
- The following **Date** options can be selected from the drop-down:
 - 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 horizontal axis in the chart below shows hours and the vertical axis shows the number of work orders. The green diagram indicates the number of completed work orders as of 3/21/2011. The blue indicates the average for the period 3/13-19-2011.



Capacity by Category

Capacity by Category shows the expected duration in minutes as well as the quota (amount of work performed) for a specific work type and time slot.

- It can be run for buckets/aggregators and individual resources.
- It is updated automatically every 5 minutes.

The following **Date** options can be selected from the drop-down:

- Selected day – Reports for the day selected in the calendar
- Day before selected - Reports for the day before the day selected in the calendar

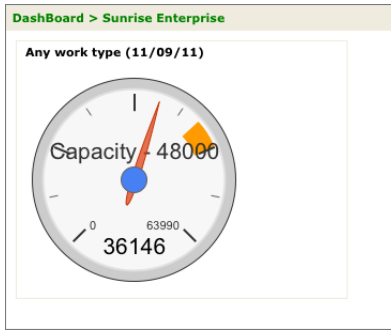
The following **Work Type** options can be selected from the drop-down:

- Any work type – Average values for all work types will be calculated.
- Specific work type -- Values for any specific work type that applies to this Resource will be calculated.

The following **Time Slot** options can be selected from the drop-down:

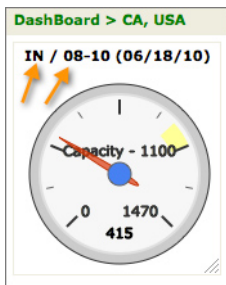
- All: Average values for all time slots will be calculated.
- Specific time slot: Values for any specific time slot can be calculated.

Warning Percent: Input box with possible values from 0 to 80; the percent specified is the percent of Capacity Quota Value to be included in the yellow area.



This report is a gauge that shows in minutes the anticipated total appointment duration (based on work orders) and the amount of quota assigned for each specific time slot and work type.

- The gauge is set up with 0 in the lower left quadrant. Multiplying capacity by 1.3 creates the higher value in the lower right quadrant.
- Actual capacity is represented by the yellow highlight on the gauge.
- 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.
- The higher value is determined automatically by multiplying Capacity x 1.3.
- 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.



This gauge shows the following information:

- Work Type is *Installs*.
- Time Slot is 8-10.
- Date is 06/18/09.
- Capacity (based on available resources and their calendars) is 1100 minutes shown both as a value in the center of the gauge and as a tic mark highlighted in yellow at the outer edge.
- The hand points to the current capacity that has been consumed (415 minutes). That number is also shown at the bottom of the gauge.

Viewing Amount of Work By Work Type

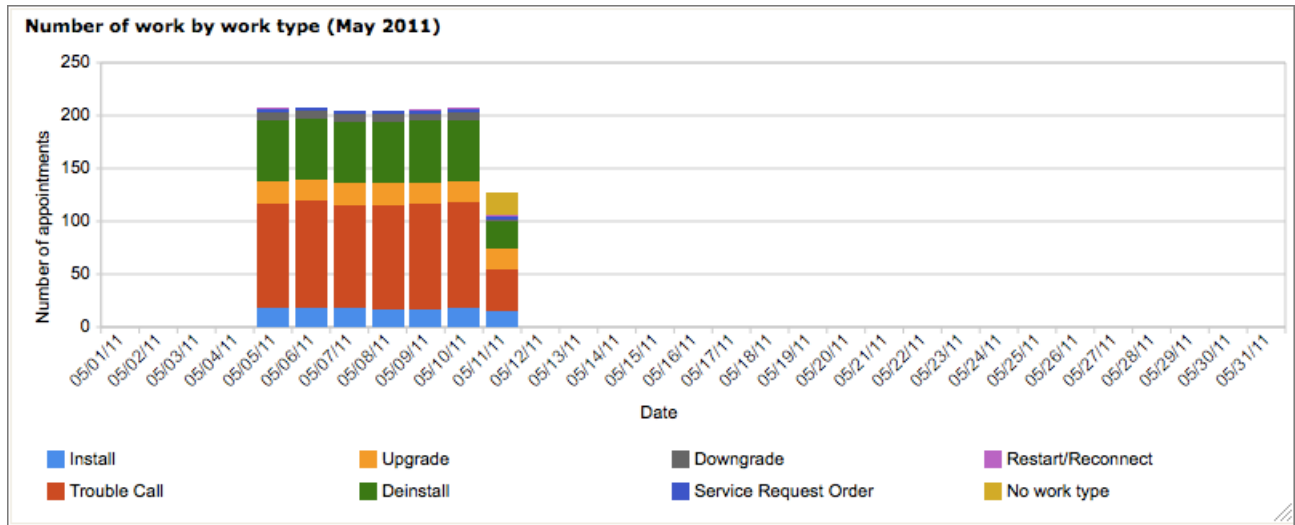
Amount of Work By Work Type shows the total number of activities by work type for resources for the month by day.

This enables you to quickly see the most active job types for the month. This report can be run for the current month or the previous month.

- The chart can be run for buckets/aggregators as well as individual resources.
- It is updated automatically every minute.

- The following **Date** options can be selected from the drop-down:
 - 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 horizontal axis (x) shows the days of the month while the vertical axis (y) shows the number of activities. Each column represents completed work orders per day; each color in a column matches a particular activity as described in the legend.



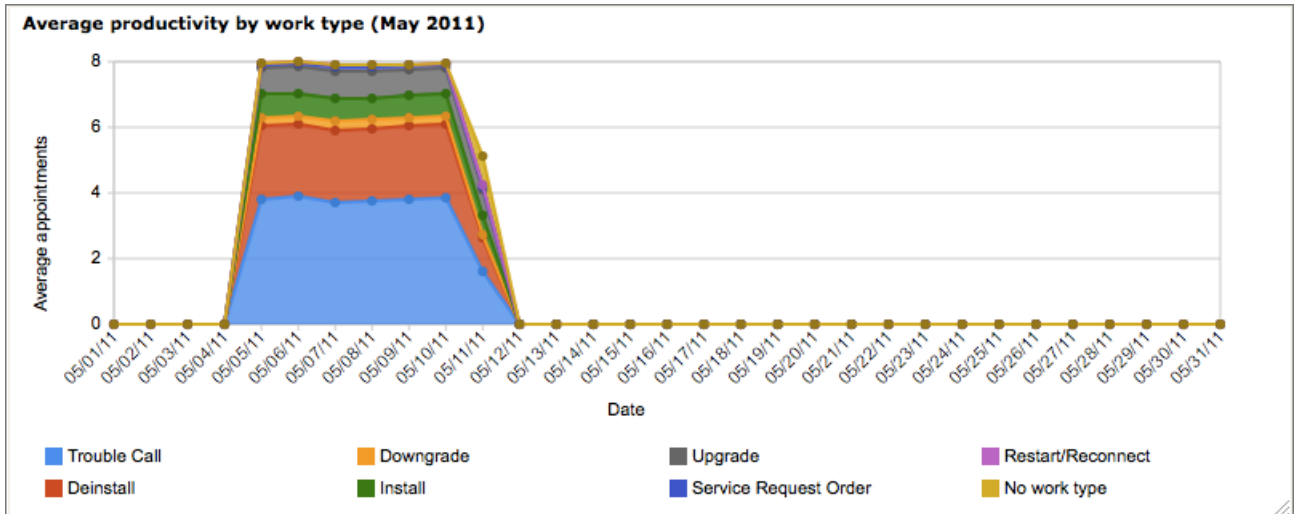
Average Productivity by Work Type

Average Productivity by Work Type displays the average number of activities per day for the month by work type.

If you select a group of resources, you view the group. If you select an individual resource you 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. Teamwork, non-customer activities and pre-work are not included.

- The report is reloaded automatically every hour.
- The following **Month** options can be chosen from the drop-down:
 - Selected – Reports for the month selected in the calendar
 - Before selected - reports for the month before the one selected in the calendar

The horizontal axis shows the days of the month; the vertical shows the average number of appointments. The ranges represent the average number of completed appointments of each type on that day. The colors in a range match the work types described in the chart.



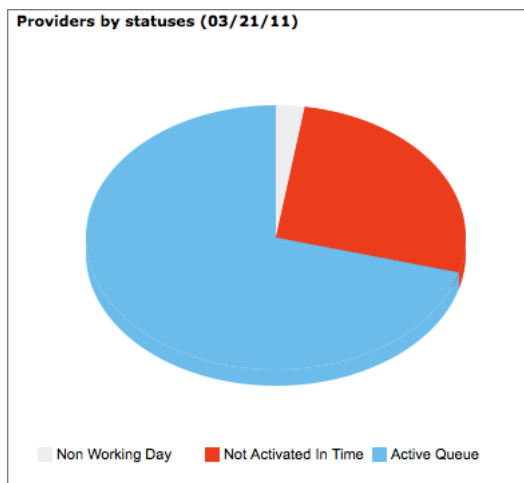
Viewing Providers By Statuses

Providers by Statuses 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 chart depicts the number of resources for each status (*Non Working Day*, *Not Activated Queue*, *Not Activated In Time*, *Active Queue*, *Deactivated Queue*) for the date that you select. It can be run for any group or bucket.

- This chart is run for buckets/aggregators; if you select an individual resource in the Resource Tree, the chart will be configured for the parent bucket/aggregator.
- It is reloaded automatically every 10 minutes.
- The following **Month** options can be selected from the drop-down:
 - Selected – Reports for the month selected in the calendar
 - Before selected - Reports for the month before the one selected in the calendar

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



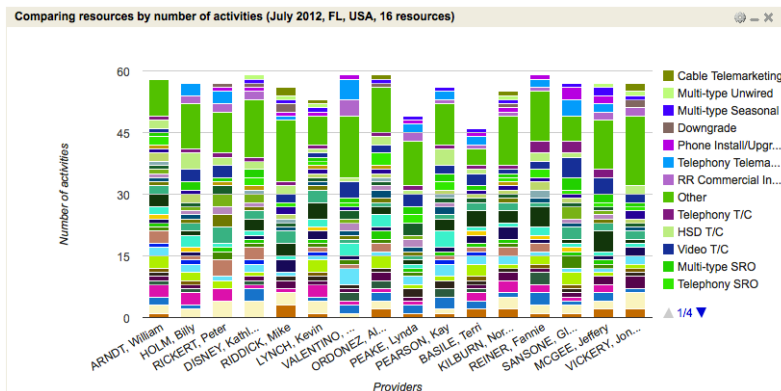
- **Non Working Day:** The resource is not scheduled to work on this day.
- **Not Activated Queue:** The resource has not activated his/her queue (route) for the day.

- **Not Activated on 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:** Resource has activated his or her route for the day.
- **Deactivated Queue:** Resource has deactivated his or her route for the day.

Comparing Resources by Number of Appointments

Comparing Resources by Number of Appointments 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. Teamwork, non-customer facing activities, and pre-work are not included.

- The report is run for buckets/aggregators; if you select an individual resource in the Resource Tree, the report will be configured for the parent bucket/aggregator.
- The report is reloaded automatically every hour.
- The following Month options can be selected from the drop-down:
 - Selected – Reports for the month selected in the calendar
 - Before selected - Reports for the month before the one selected in the calendar



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.

Comparing Providers Productivity

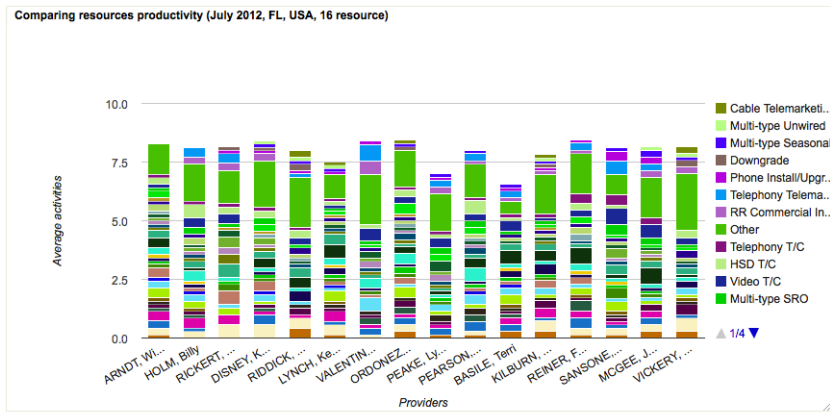
Comparing Providers Productivity displays the average number of completed work orders by work skill per resource/day. The report calculates data for all direct children of a chosen bucket/aggregator. Activities, teamwork, and pre-work are not included.

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 Providers by Number of Appointments* report.

- The chart can be run for buckets/aggregators; if you select an individual resource in the resource tree, the report will be configured for its parent bucket/aggregator.
- Teamwork, activities and pre-work are not taken into account.
- This chart is reloaded automatically every hour.
- The following **Month** options can be selected from the drop-down:
 - Selected – Reports for the month selected in the calendar

- Before selected - Reports for the month before the one selected in the calendar

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.

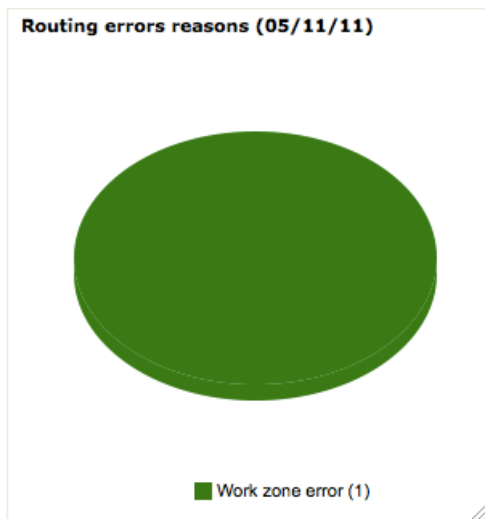


Viewing Routing Errors Reasons

Routing Error Reasons shows the number of work orders that were not analyzed/processed by ETAdirect Routing and the reasons they could not be routed.

- This chart is run for buckets/aggregators; if you select an individual resource in the Resource Tree, the report will be configured for its parent bucket/aggregator.
- The chart is reloaded automatically every hour.
- The following **Date** options can be selected from the drop-down:
 - Selected – Reports for the day selected in the calendar
 - Before selected - Reports for the day before the one selected in the calendar

The pie chart represents the total number of work orders to be routed; the colors 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.

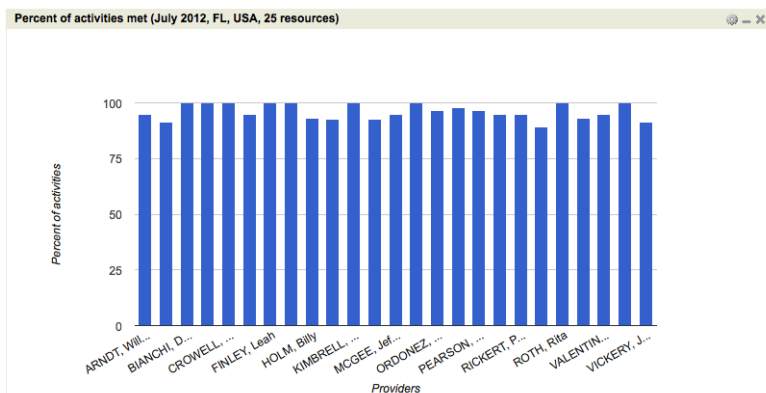


Viewing Percentage of Appointments Met

Percentage of Appointments Met displays the percent of completed work orders by resource that were started within the service window during a selected month. Teamwork, activities, pre-work and Not-ordered activities are not included.

- This chart is run for buckets/aggregators. If an individual resource is selected from the Resource Tree, it will be configured for the parent bucket/aggregator.
- Activities, teamwork and pre-work are not included. Not-ordered activities are also not included.
- This chart is reloaded automatically every hour.
- The following **Month** options can be selected from the drop-down:
 - Selected – Reports for the month selected in the calendar
 - Before selected - Reports for the month before the one selected in the calendar

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.

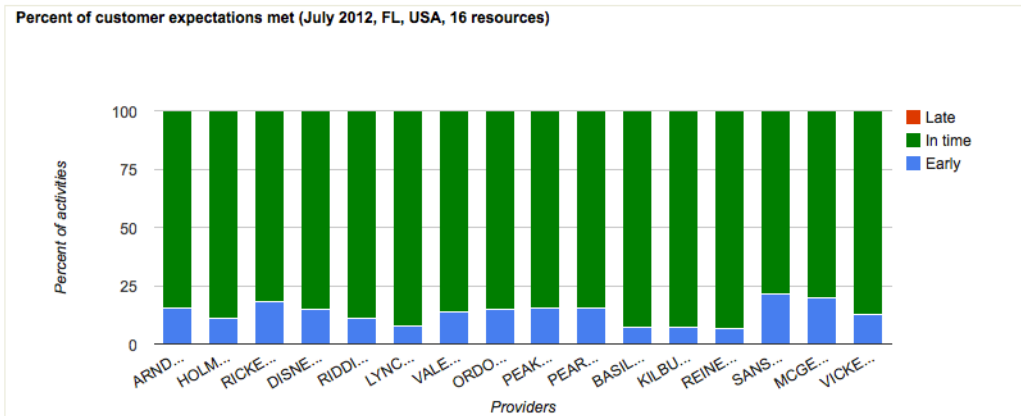


Percentage of Customer Expectations Met

Percentage of Customer Expectations Met 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%.

- The chart can be run for buckets/groups; if you select an individual resource in the Resource Tree, it will be configured for the parent bucket/group of that resource.
- Activities, teamwork and pre-work are not taken included. Not-ordered activities are also not included.
- The chart is reloaded automatically every hour.
- Allowable lateness: A value from '0' to '80' can be entered to define the interval during which any work orders started are considered 'started on time.'
- The following **Month** options can be selected from the drop-down:
 - Selected – Reports for the month selected in the calendar
 - Before selected - Reports for the month before the one selected in the calendar

Each column represents 100% of the work orders that were either completed or not-done by the resource. The colors stand for the start time: started earlier (blue), started on time (green) and delayed (red).



PAS Responses per Provider

PAS Responses per Provider shows the responses to Post Appointment Surveys for an individual resource. The system uses the Data Warehouse to calculate this report.

The chart can be configured to show data for all direct children of the buckets/groups that you select. If an individual resource is selected, the chart will be configured for its parent bucket/group. Note that the report must be updated manually.

The following settings can be adjusted:

- The following **Date** options can be selected from the drop-down:
 - Selected day – Reports for the day selected in the calendar
 - Day before selected - Reports for the day before the day selected
- **PAS question:** Select a question from the drop-down.
- **Maximum providers:** Select the number of resources to be included in the report from the drop-down:
 - Show all (Not recommended for groups of more than 50)
 - Show 20
 - Show 40
 - Show 50

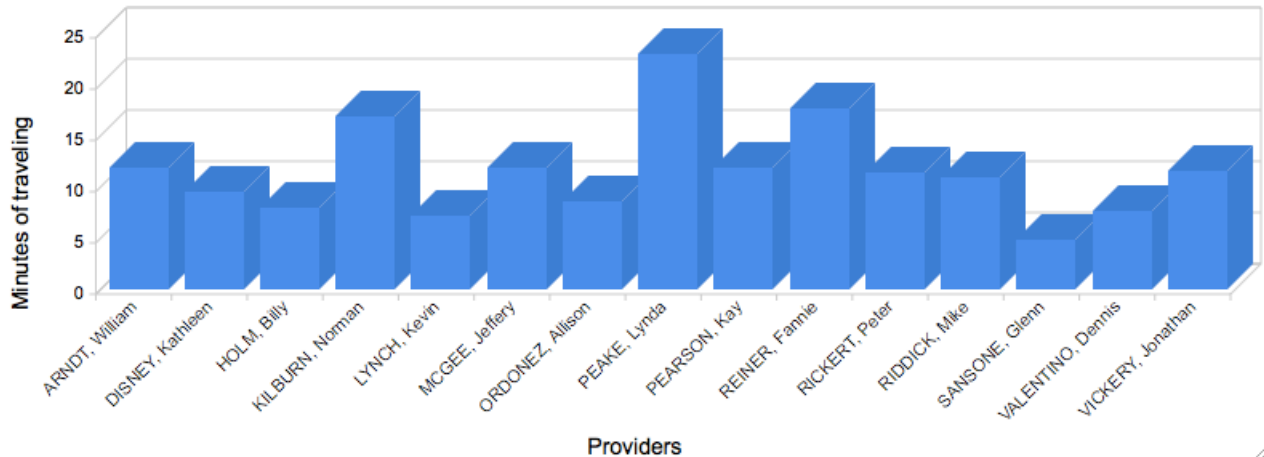
Viewing Average Travel Time per Provider

Average Travel Time per Provider displays the average time spent by resources traveling to customers on any day that you select.

- The report can be run for buckets/aggregators; if you select an individual resource in the Resource Tree, the report will be configured for the parent bucket/aggregator.
- The chart is reloaded automatically every hour.
- The following **Date** options can be selected from the drop-down:
 - Selected – Reports for the day selected in the calendar
 - Before selected - Reports for the day before the one selected in the calendar

The horizontal axis shows individual resources by name; the vertical axis measures travel time in minutes.

Average travel time per provider (05/11/11, 15 providers)



Mean Time to Deliver

Mean Time to Deliver displays the average time from the moment a work order is created until it is assigned to a resource (or reassigned to another resource) and from the moment it is assigned until it is started by the resource. Teamwork, activities, and pre-work are not included.

- 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.
- Teamwork, activities, and pre-work are not included.
- The report reloads automatically every hour.

The following **Month** options can be selected from the drop-down:

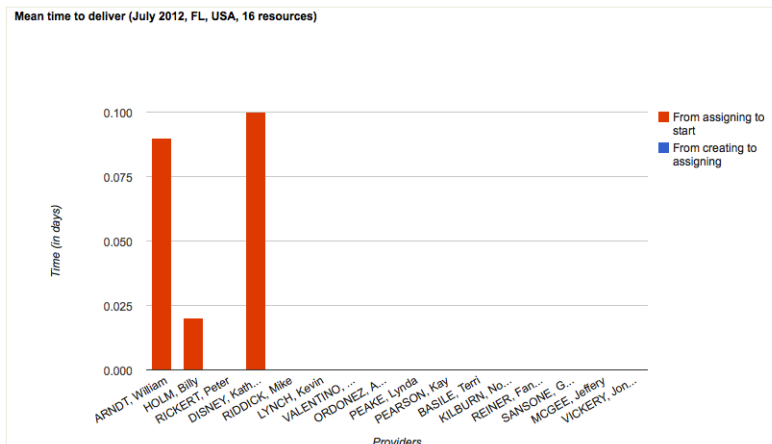
- Selected – Reports for the month selected in the calendar
- Before selected - Reports for the month before the one selected in the calendar

The following **Work type** options can be chosen from the drop-down list-box:

- Any work type – Average values for all work types will be calculated
- Specific work type – Any work type applicable to the resource can be calculated

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).

Mean time to deliver (July 2012, FL, USA, 16 resources)



Chapter

3

Routes/Activities Reports

Topics:

- [Notification Summary Report](#)
- [Route Statistics Report](#)
- [Last Message Window Size](#)
- [Routing Report](#)
- [In Time/Late/Early Appointment Report](#)
- [Route Totals](#)
- [Appointment by Statuses Report](#)
- [Activities by Statuses Chart](#)
- [Schedule Report](#)
- [Print Route](#)

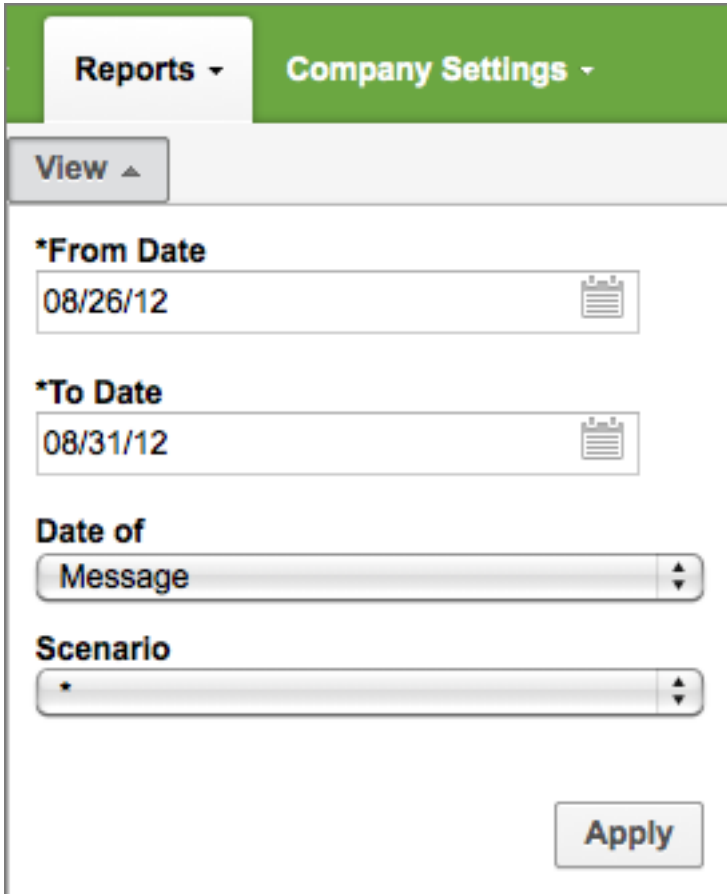
These reports provide the information necessary to manage routing, schedule appointments and respond to customer demand. The **Messages Report**, **Notification Summary** and **Print Route** options can be accessed directly from the Reports menu. The other reports are run from the **All Reports** option.



Note: The reports listed under the Reports tab in your configuration may vary from the ones discussed here.

Notification Summary Report

The **Notification Summary** Report summarizes the status of the messages sent to customers during the reporting period. This includes all messages of any status except “new” and “sending” that were sent by any method available (voice, e-mail, external system, manual, etc.). Filters enable you to view messages sent on a certain day and/or under a particular scenario.



The screenshot shows a web interface for filtering reports. At the top, there are two tabs: "Reports" and "Company Settings". Below the tabs is a "View" button. The main area contains four filter fields: "*From Date" with the value "08/26/12", "*To Date" with the value "08/31/12", "Date of" with a dropdown menu set to "Message", and "Scenario" with a dropdown menu set to "*". An "Apply" button is located at the bottom right of the filter area.

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. This information can be broken down by Resource or by Bucket depending on the selection you make in the Resource Tree. Select the **All Reports** option to run this report.

Route Statistics

Provider name	Total Routes	% Activated	% Completed	Average number appts per route
CA, USA	26	61.50	61.54	6.6
Europe	26	61.50	61.54	6.6
FL, USA	26	61.50	61.54	6.6
	Total: 78			

The Route Statistics Report includes the following:

- **Provider Name:** The report shows only those resources, groups or buckets that had at least one route assigned during the reporting period.
- **Total Routes:** 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.
- **% Activated:** Percent of routes that were activated during the reporting period. Routes with activities and/or deleted activities only are not taken into account.
- **% Complete:** Percent of routes that were completed (activated routes that include activities with a status of *Completed* and/or *Canceled* only) during the reporting period. Routes with activities and/or deleted activities only are not taken into account.
- **Average Number of Appts per Route:** Average number of regular appointments (activities) per route. Reopened activities and pre-work are not taken into account.
- **Summary Time Spent on Appts (hrs):** 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.

Select the **Print/Export** options to print or export the report in .csv format.

Last Message Window Size

The Route Time Parameters Report calculates the average statistics for one route. Time parameters are given in hours. Select the All Reports option to run this report.

Route Time Parameters includes the following:

- **Provider:** 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 (e.g., 08:40 will be displayed as 8.66) of route activation for the resource or bucket per day over the reporting period.
- **Length of day:** 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 Appointments:** The average number of hours spent on activities over 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 over the reporting period.
- **Number of Completed Appointments:** The average number of completed activities for the selected technician or Bucket per day over the reporting period.

Routing Report

The **Routing Report** provides route statistics, such as travel time, work time and number of completed jobs. It can be used to measure both productivity and drive time. Select the **All Reports** option to run the Routing Report.

The Routing Report helps to:



- Analyze the quality of routes.
- Measure the performance of the routing group over time.

The Routing report 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, so if run before the start of the day, it represents the planned route; if run after the end of the day (or days later) it represents what actually happened; if run mid-day the report will be part actual and part planned.

The Routing Report can be run for an individual resource, bucket or group in the Resource Tree. A single total line is provided for all the resources included in the report. Some buckets contain resources while others govern a hierarchy of groups or buckets. The report will be broken down either by individual resource or by bucket or group, depending on the hierarchy.

<< Previous 1 2 3 4 5 6 7 8 9 Next >>					
Aggregator	Technician	Date	Jobs	Travel (mins)	Work (mins)
Europe	MOSES, Joseph	03/21/11	11	143	342
Europe	OUELLETTE, Andrew	03/21/11	11	85	355
Europe	PLUMB, Luis	03/21/11	9	119	334
Europe	POLANCO, Kevin	03/21/11	10	128	360
Europe	RAGER, Frank	03/21/11	11	148	346
Europe	REMBERT, Matthew	03/21/11	12	125	345
Europe	RICHEY, Priscilla	03/21/11	11	127	344
Europe	SAMSON, Gary	03/21/11	10	122	336
Europe	VARGO, Dennis	03/21/11	11	85	387
Europe	VILLAREAL, Jacqueline	03/21/11	12	128	387
FLA, USA	ARNDT, William	03/21/11	11	135	571
FLA, USA	BASILE, Terri	03/21/11	5	119	246
FLA, USA	DISNEY, Kathleen	03/21/11	12	136	498
FLA, USA	HOLM, Billy	03/21/11	11	120	443

- Aggregator: Can be either a Group or a Bucket.
- Resource: Name
- Date: Date of Route in Day/Month/Year format.

- **Jobs:** Number of jobs on route for that day filtered by status and work type conditions. Status can be: • 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 (mins):** Number of minutes used for travel. Note: if the route has not been completed yet, this will show the estimated travel time.
 - **Work (mins):** Total minutes of work duration time in a technician's route for a specified day in the defined date range. Note: if the route has not been started or completed yet, this will show the estimated work time.
 - **Job Fit %:** This is the average skill level for jobs on a route. This metric is based on the ETAdirect 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:** 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.
 - **Idle Time:** 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, 'Idle time' is the time that is not filled with travel time, work time, or an activity
-  **Note: Overtime:** ETAdirect considers overtime to be any time outside the resources's shift for that day. This does not influence the ETAdirect overtime calculation. if the technician has a 10 hour day scheduled or has worked 35 hours earlier in the week, ETAdirect just looks at time within or outside the shift represented in that day's working calendar.
-  **Note: Travel time:** Travel time represents total travel time from and to known locations. If an activity (such as lunch) is not a known location, ETAdirect will not represent that time in travel time. Similarly, time spent on activities (meetings or lunch) is not represented in the Routing report.

In Time/Late/Early Appointment Report

The **In Time/Late/Early Appointment Report** shows you the percentage of activities that were started on time as well as 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. Select the **All Reports** option to run the **In Time/Late/Early Appointment Report**.

Provider	Total number of appts	Started In Time %	Started Late %	Started Early %	Not started %	% Cancelled
Eric Niemeyer	59	84.75	3.39	1.69	0.00	10.17
Michael Frey	56	78.57	3.57	12.50	0.00	5.36
Mark Coombs	53	81.13	5.66	7.55	0.00	5.66
Michael Ostroski	66	78.79	1.52	6.06	0.00	13.64
Scott Norris	56	80.36	14.29	3.57	0.00	1.79
Bryson Degrote	40	92.50	0.00	2.50	0.00	5.00
Total: 330						

The **In Time/ Late/ Early Appoinment Report** contains the following information:

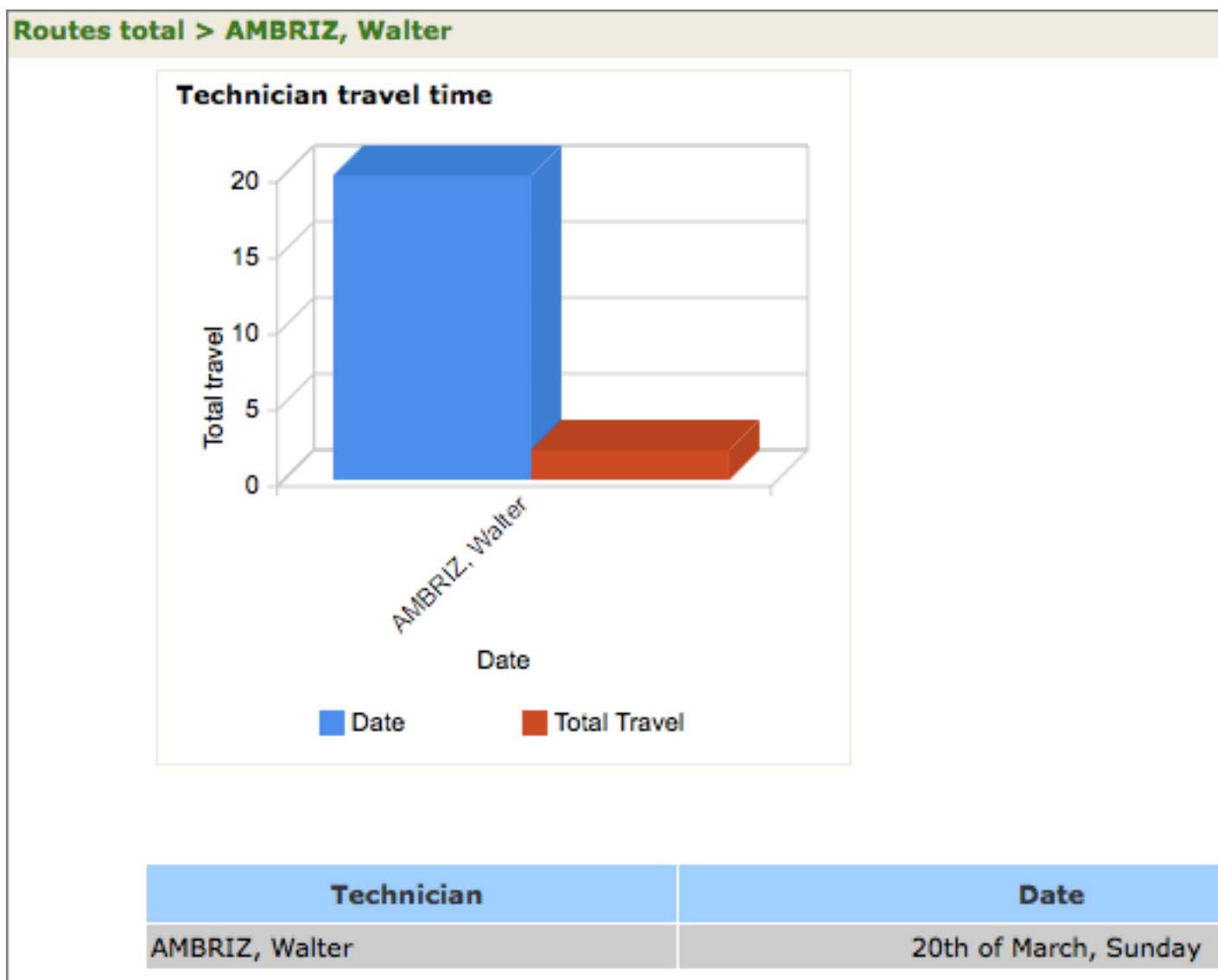
- **Provider Name:** The name of each individual resource. The report shows only those resources that were assigned at least one route assigned within the reporting period.
- **Total Number of Appts:** Total number of regular activities assigned to resources within the reporting period.
- **Started in Time %:** Indicates the perent of regular activities that were started within the service window as well as the activities that have an indefinite service window (i.e., service window start/end IS NULL). The search option for this field was set to 100% in order to return all start time statistics.

- **Started Late %:** 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.
- **Started Early %:** 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.
- **Not Started %:** Percent of regular activities that were not started. (Activities with 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:** 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.

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

Route Totals

The **Route Totals** Report displays both the total travel time and the total work duration for the the entity that you select from the Resource Tree. Select the **All Reports** option to print this report.



If you have selected a group or bucket, your report is likely to resemble the one below with each row representing an individual resource within that group or bucket.

Technician	Date
JEMISON, Jerry	20th of March, Sunday
KEENER, Rosa	20th of March, Sunday
KEENEY, Rosie	20th of March, Sunday
KELSEY, Nicholas	20th of March, Sunday
KESTER, Nathan	20th of March, Sunday
KIELY, James	20th of March, Sunday
KILBURN, Norman	20th of March, Sunday
KIMBRELL, Russell	20th of March, Sunday
KINGERY, April	20th of March, Sunday
KNISLEY, Lawrence	20th of March, Sunday
LABOY, Emily	20th of March, Sunday
LANNING, Louis	20th of March, Sunday
LARSON, Harry	20th of March, Sunday
LEFTWICH, David	20th of March, Sunday
LINDSTROM, Keith	20th of March, Sunday
LINK, Keith	20th of March, Sunday
LINVILLE, Carl	20th of March, Sunday
LUND, Kenneth	20th of March, Sunday
LYNCH, Kevin	20th of March, Sunday
MARIN, Jill	20th of March, Sunday

Appointment by Statuses Report

The **Appointment by Status** Report shows you the status of each activity within the reporting period. Select the **All Reports** option to run this report.

Appointment type	Appointment final status	count
break	cancelled	7
break	complete	147
break	started	1
regular	cancelled	93
regular	complete	361
regular	pending	18
regular	started	1
regular	suspended	12
reopened	complete	1
		Total: 641

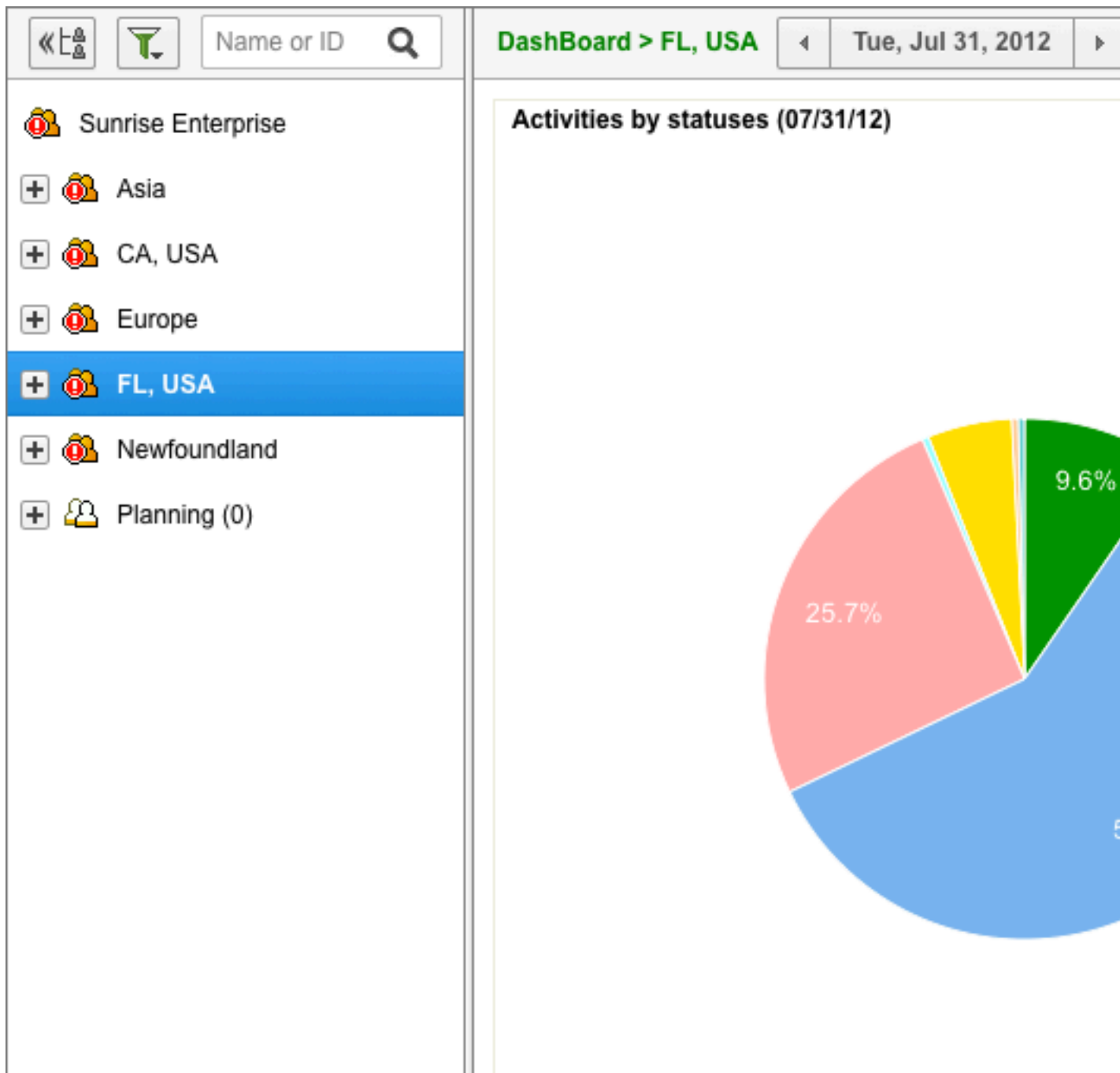
This report contains the following information:

- **Appointment Type:** Indicates the type of activity: regular, reopen, activities or pre-work.
- **Appointment Final Status:** The status of the job or activity at the time of this report.
- **Count:** Number of activities of each type and status.

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

Activities by Statuses Chart

The **Activities by Status** chart shows the distribution of activities for the entity that you select from the Resource Tree. Select the **All Reports** option to run this report.



- The report can be run for buckets/aggregators and individual resources.

- The report can be limited to a specific activity type or cover all activity types.
- The report is updated automatically every 10 minutes.
- The following Date options can be selected from the drop-down:
 - Selected day – Reports for the day selected in the calendar
 - Day before selected - Reports for the day before the day selected in the calendar

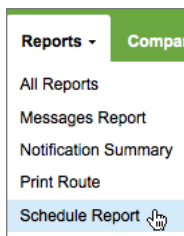
The pie chart represents the total number of work orders assigned to a resource (or to all resources in a bucket/aggregator) for a selected day. Each "slice" represents all the work orders of a particular status: started, suspended, canceled, completed, pending or not ordered.

Schedule Report

The **Scheduled Reports** option displays a list of recurring reports. These are reports that have been set up to run on a scheduled basis. The initial set-up to schedule a recurring report is handled by your system administrator.

Follow these steps to view the Scheduled Reports:

1. Click the **Reports** tab.
2. Select the **Schedule Report** menu item.



3. ETAdirect displays a list of the reports that have been pre-scheduled by the system administrator to run on a recurring basis.

Schedule report								1-2 of 2
<input type="checkbox"/>	ID ↑	Report name	Start Date	End Date	Report Type	Time	Recurrence	Action
<input type="checkbox"/>	1	Routing Report	03/31/10		csv	07:30 AM Eastern Time	everyday	View
<input type="checkbox"/>	2	Routing Report	04/01/10		csv	09:00 PM Eastern Time	everyday	View

The report contains the following information for each scheduled report:

- **ID:** The unique identifier for this report.
- **Report Name:** The name of the report.
- **Start Date:** The start date for the reporting period.

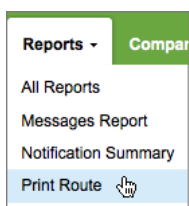
- **End Date:** The end date for the reporting period.
 - **Report Type:** The type of report to be sent/saved and the format: csv, html, xml, pdf.
 - **Time:** The time that the report was run.
 - **Recurrence:** How often the this report is run.
 - **Action:** The settings (View/Edit) available for this report.
4. View the details of the settings for an individual report by selecting **View** from the Actions Column. Note, however, you will not be able to run or modify any recurring reports.

Print Route

Use the **Print Route** option to print the route of a single Resource. The Route gives you a summary of the Resource's day.

Follow these steps to run the Print Route option:

1. Select the resource whose route you would like to print in the Resource Tree.
2. Open the **Reports** tab
3. Select **Print Route** from the **Reports** menu.



4. The route report displays in the Work area.

Start	Activity Type	Work Order	Service Window	Account Number	Name	Address	ZIP	Phone
06:48	Warehouse Activity		-					
	Uncertain	028677292	08 - 10	019891654	Ofa Venegas	1003 GREEN BRANCH CT OVIEDO FL	327657098	5555001190
07:50	Properties: W/O Type: IN Inventory: SABDKNDVS; WR72151FB125003; 0007559212; SABKGCRDF							
	Uncertain	028600982	08 - 10	029865187	Zheng Kahmala	990 VICKI CT OVIEDO FL	327656915	5555001190
08:29	Properties: W/O Type: UP Inventory: 58ABME39T093226; PZAL04B88; 0006757102							
	Non-pay	028648529	08 - 10	019908273	Tandra Cowden	202 PINEFIELD DR SANFORD FL	327716819	5555001190
09:30	Properties: W/O Type: TC Inventory: SABBRVZQS; 0002506742; 408180308479							
	Telephony Unwired Installs	028620408	10 - 12	019922246	Burton Muto	200 W 16TH ST SANFORD FL	327713420	5555001190
10:12	Properties: W/O Type: TC Inventory: HRSC82171; SABJWJHDB							
	Maintenance	028621449	10 - 12	019921813	Geneva Pio	2618 MOHAWK AVE SANFORD FL	327735309	5555001190
10:59	Properties: W/O Type: TC Inventory: PMAI0867A; HRSC95188							
11:53	Lunch break	3956573	12:00 - 12:30					
	HD-DVR Upgrade	028621409	13 - 15	019921833	Gizella Quintero	213 COACHMAN CT SANFORD FL	327736037	5555001190
12:55	Properties: W/O Type: TC Inventory: PITL2C31C; HRC025128; SARCO4833; SABGVRWPX							

- **Start:** ETA (estimated time of arrival) for pending work order or the time that the job is scheduled to begin.
- **Activity Type:** Type of job or work to be performed, such as Install, Trouble Call, etc., as well as any non-customer facing activities, such as warehouse, break, etc.
- **Service Window:** Time boundaries for this work order as scheduled by the company and expected by the customer.
- **Account Number:** The primary identifier for ownership of an account.
- **Name:** The name of the customer receiving the service.
- **Address:** Service location for this customer.
- **Zip:** Postal code for the service location.
- **Phone:** The telephone number of the customer receiving service.

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

Chapter

4

SmartCommunication/PAS Reports

Topics:

- *Average Number of Calls Per Customer*
- *Percent of Contacted Customers*
- *Percent of Last Accurate Message*
- *Last Message Window Size*
- *Transferred Calls*
- *Post Appointment Survey (PAS) Reports*

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

Average Number of Calls Per Customer

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

- *Number of Sent Messages* shows the total number of voice messages (of all types) that were sent to customers within the reporting period.
- *Average Number of Calls per Customer* shows the average number of calls (of all types) that one customer received within the reporting period.

Select the **All Reports** option to run *Average Number of Calls per Customer*.

The **Average Number of Calls per Customer** contains the following information:

- **Message Type:** Types of messages based on message triggers:
 - day_before
 - reminder
 - today_%
 - call_ahead
 - complete
- **Number of sent messages:** Total number of successfully sent voice messages (i.e., messages with a final status of *Sent* or *Delivered*).
- **Average Number of Calls per Customer:** 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*.

Percent of Contacted Customers

Percent of Contacted Customers shows the total number and percent of customers who have received at least one message containing either a *service window* or a *delivery window*. Select the **All Reports** option to run the **Percent of Contacted Customers** Report.

The **Percent of Contacted Customers** includes the following information:

- **Date:** Notification date.
- **Number of Contacted Customers:** Total number of customers contacted during a given date.

“Contacted customers” are those customers who received at least one message with any delivery time window (either 'service window' or 'delivery window').
- **Percent of Contacted Customers:** Percent of contacted customers is calculated as:
 - The number of contacted customers
 - *Divided by:* The total number of customers that should have been contacted

Customers that should be notified are determined by the 'day_before_flag':

- If 'day_before_flag'=1, then the customer should be notified.

So, the percentage of contacted customers is the ratio of: The number of activities for which the value of both *time_delivered_start* and *time_delivered_end* is NOT NULL.

Percent of Last Accurate Message

Percent of Last Accurate Message shows the percentage of Last Notification calls in which the service window boundaries communicated to the customer were accurate.

- *Accurate call* means that the actual start time of the activity appears to be within the boundaries (with precision of plus-minus 10 minutes) of the time window specified by the call.
- *Last notification call* is the last voice message that the customer received before the activity was started.

The Percent of Last Accurate Message report contains the following information:

- **Date:** Notification date.
 - **Percent of Accurate Last Calls:** 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 *Delivered* or *Sent* result.
- Activities taken into account:**
- Activities that have been started.
 - Notification calls containing the estimated delivery time window (*service window* or *delivery window*).

Last Message Window Size

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

Last Message Window Size contains the following information:

- **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 Delivered)
- **Percent of Calls:** Percent of customers who were given an estimated window of time for delivery.

Transferred Calls

Transferred Calls shows the number of voice calls that were transferred to the Call Center (when a customer selected the corresponding automatic option). Select the All Reports option to run the **Transferred Calls** Report.

The **Transferred Calls Report** contains the following information:

- **Date:** Notification Date.
- **Before Start Route:** The number of voice calls transferred to the Call Center before the route was activated.
- **After Start Route:** The number of voice calls transferred to the Call Center after the route had been activated.
- **Inactive Route:** The number of voice calls transferred to the Call Center for routes that were not activated.
- **Total Count:** Total number of voice calls transferred to the Call Center

Post Appointment Survey (PAS) Reports

PAS Reports summarize the results of Post Appointment Surveys. **Note:** you must be using the ETAdirect SmartCommunication module in order to generate this report. Select the **All Reports** option from the **Reports** menu to run this report.

Question †	Total	1(Yes)	2(No)	3	4	5
PAS 1: Are all of your services currently working properly? (Y/N)	6,518	5784 (88.74%)	734 (11.26%)			
PAS 2: Did the Technician arrive on time as scheduled? (Y/N)	5,179	5041 (97.34%)	138 (2.66%)			
PAS 3.1: Did the Technician show you how to use the equipment and left a Welcome Kit? (Y/N)	2,694	2378 (88.27%)	316 (11.73%)			
PAS 3.2: Did the Technician show you how to use the equipment? (Y/N)	1,919	1724 (89.84%)	195 (10.16%)			
PAS 4: To what extent do you feel that the Technician genuinely cared about your satisfaction with us? (1 to 4)	4,227	140 (3.31%)	80 (1.89%)	511 (12.09%)	3496 (82.71%)	
PAS 5: Based on this visit, how satisfied are you with the outcome of this interaction with us? (1 to 5)	3,729	101 (2.71%)	92 (2.47%)	145 (3.89%)	416 (11.16%)	2975 (79.78%)
PAS 6: Based on this visit, how likely would you be to recommend our company to friends or family? (1 to 5)	3,413	43 (1.26%)	80 (2.34%)	136 (3.98%)	370 (10.84%)	2784 (81.57%)

PAS Reports can vary significantly based on the questions in the post-appointment surveys. The percent given for each question row should total 100% across all columns.

- **Total:** The total number of respondents.
- **(Yes):** The number of respondents who answered "Yes."
- **(No):** The number of respondents who answered "No."
- The level of satisfaction based on the question posed to the customer.

Chapter

5

Statistical/Administrative Reports

Topics:

- *Inactive Users Report*
- *Number of Active Users*
- *SOAP Report*
- *Average Travel Time Report*
- *Work Statistics*
- *Work Statistics*
- *Travel Statistics*
- *Exporting a Report*

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

Inactive Users Report

The **Inactive Users Report** lists the ETAdirect users that have been inactive for a designated period of time. Administrators can use this report to monitor system use. Select the **All Reports** option from the Reports menu to run the **Inactive Users Report**.

The View settings determine the period during which users were inactive. The report itself provides the user names as well as their profiles and the number of days since their last login.

Inactive users		
<< Previous 1 2 3 4 Next >>		
1-20 of 68		
User Name	Profile	Days since last login
WFM-Frank Dagliere	FS - Manager	220
3DG-Edward Gaffney	FS - Manager, FS - Supervisor, FS - Coordinator	41
MDI-Bryan Slade	OV4B Tech	182
SPL-Scott Plate	FS - Manager	364
MDI-Bernard Wheatley	OV4B Tech	101
MDI-John Summers	Technician	180
MDI-Bob Latella	Technician	182
MDI-Matt Legora	Technician	282
MDI-Chris Kurtz	OV4B Tech	59
Agust Eiriksson	CSR	590
Glen Nosti	CSR	470
Jonathan Plouff	CSR	469
Kevin Mcloughlin	CSR	403
MDI-RFM 550	Technician	422

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

Number of Active Users

The **Number of Active Users Report** enables you to view the number of Profiles in use on any day that you select. Keep in mind that in some cases one user can have more than one profile. Select the **All Reports** option from the Reports menu to run **Number of Active Users**.

Specify a date and the number of rows for your report.

The report shows you the number of individual users for each user profile.

Profile	Active
Technician	6

SOAP Report

The **SOAP report** logs the actions performed through the SOAP interface. Select the **All Reports** option from the Reports menu to print the SOAP Report.

- **From/To Date:** Use the calendar icons to define the reporting period.
- **Find . . . in:** Search for a particular term, word or character in the *Request*, *User*, and/or *Result* fields.
 - For example: If you want to view all errors, type *Error* in the Find field and select *Result* from the drop-down.

SOAP			
<< Previous 1 2 3 4 5 6 7 8 9 ... 72 Next >>			1-20 of 1433
User	Request	Result	Created
fileupload		Success	11/14/11 23:58
fileupload		Error (insert_support_request: The 'sr_pid' field cannot be empty.)	11/14/11 23:53
fileupload		Success	11/14/11 23:53
fileupload		Success	11/14/11 23:50
fileupload		Success	11/14/11 23:48
fileupload		Success	11/14/11 23:48
fileupload		Success	11/14/11 23:44
fileupload		Success	11/14/11 23:33
fileupload		Success	11/14/11 23:27
fileupload		Success	11/14/11 23:26
fileupload		Success	11/14/11 23:24
fileupload		Success	11/14/11 23:22

The SOAP Report includes the following information:

- **User:** Name of the user who performed an action through the SOAP interface.
- **Request:** Type of action performed.
- **Result:** Result of the action.
 - If an error occurred during execution of the action, the type of error displays.
 - If no error occurred, then *Success* displays.
- **Created:** The time that the action was executed.

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

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. Select the **All Reports** option from the Reports menu to print the **Average Travel Time Report**.

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 since they do not have a destination.

If resources do not create activities in ETAdirect for things like fuel stops, special parts runs or meetings, then travel time as represented in ETAdirect 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.

Follow these steps 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. Click **View** to display the settings for this report:
 - **From/To Date:** Use the calendar icons to define the reporting period.
 - **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:** Use this field together with in: *Provider Name*: Enter a name or portion of a name to search for results for a particular resource.

Provider name	Average Travel Time (min)
7700-Jose Mejia14	13.9
7701-Bobby Bryant14	13.2
7702-Mike Ciesla14	20.8
7704-Chris Carter14	13.1
Average: 15.3	

1-4 of 4

This report lists the average travel time for each individual resource or group of resources that you select as well as the average for this report.

Work Statistics

This report measures work performed against company standards defined for certain types of appointments under Company Settings. These standards are based on characteristics such as work order type, activity properties, zip code and other variables developed specifically for your configuration. Select the **All Reports** option from the Reports menu to run the **Work Statistics Report**.

The screenshot shows a software interface with a green header bar containing three tabs: "Resource Settings", "Reports", and "Company". The "Reports" tab is active. Below the header is a row of buttons: "View", "Print", "Print All", and "Export". The "View" button has a small upward-pointing triangle. Below these buttons is a search section with the following elements:

- A label "Find" above a text input field.
- A label "in" above a dropdown menu.
- The dropdown menu is currently set to "Appointment Key".
- A label "*Rows" above a text input field.
- The text input field contains the number "20".
- An "Apply" button is located at the bottom right of the search section.

- Use the **Find . . . in: *Appointment Key*** field to search for particular 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 Appointment Keys.) Appointment keys are defined for your configuration under ***Company Settings/Statistics Parameters***.

Work Statistics can be based on work performed by a single resource, such as Johnny Alford below, or a group of resources selected from the Resource Tree. Selecting a subject from the Resource Tree is the first step in creating this

Work Statistics > ALFORD, Johnny		View ▾	Print	Print All	Export
<< Previous 1 2 3 Next >>					
Appointment Key	Avg				
10	40.00				
11	40.00				
12	40.20				
13	51.80				
14	34.70				
15	43.30				
16	23.20				
17	47.90				
18	50.50				
19	42.70				
20	35.90				
21	46.30				
22	48.90				
23	43.80				
24	45.40				
25	35.80				
26	36.70				
27	39.20				
28	45.00				
29	35.40				

report.

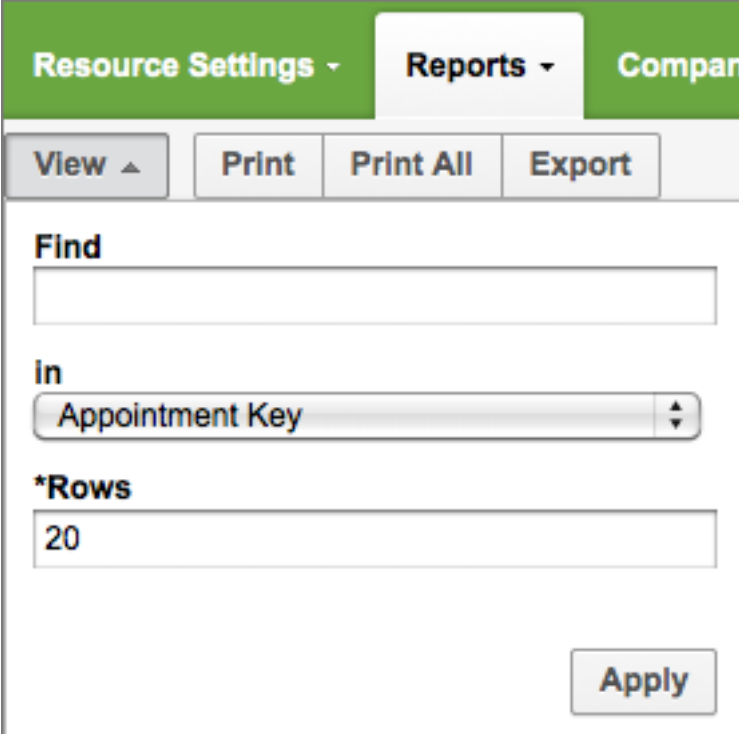
The Work Statistics Report includes:

- **Appointment Keys** or standards defined by your company for particular types of work and working conditions under *Company Settings/Statistics Parameters*.
- **Avg (min)**: The average number of minutes it has taken historically to complete this task.
- **Sigma2**: The standard deviation from the average number of minutes.
- **Count**: The number of completed activities on which these statistics are based.
- **Level Info**: Whether the statistics are at the company 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.

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

Work Statistics

This report measures work performed against company standards defined for certain types of appointments under Company Settings. These standards are based on characteristics such as work order type, activity properties, zip code and other variables developed specifically for your configuration. Select the **All Reports** option from the Reports menu to run the **Work Statistics Report**.



The screenshot shows a software interface for configuring a report. At the top, there are three tabs: "Resource Settings", "Reports", and "Company". The "Reports" tab is currently selected. Below the tabs, there are four buttons: "View", "Print", "Print All", and "Export". Underneath these buttons, there is a "Find" section with a text input field. Below the "Find" field is an "in" dropdown menu currently set to "Appointment Key". Below the dropdown is a "*Rows" section with a text input field containing the number "20". At the bottom right of the configuration area is an "Apply" button.

- Use the **Find . . . in:** *Appointment Key* field to search for particular 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 Appointment Keys.) Appointment keys are defined for your configuration under *Company Settings/Statistics Parameters*.

Work Statistics can be based on work performed by a single resource, such as Johnny Alford below, or a group of resources selected from the Resource Tree. Selecting a subject from the Resource Tree is the first step in creating this

Work Statistics > ALFORD, Johnny		View ▾	Print	Print All	Export
<< Previous 1 2 3 Next >>					
Appointment Key			Avg		
10					40.00
11					40.00
12					40.20
13					51.80
14					34.70
15					43.30
16					23.20
17					47.90
18					50.50
19					42.70
20					35.90
21					46.30
22					48.90
23					43.80
24					45.40
25					35.80
26					36.70
27					39.20
28					45.00
29					35.40

report.

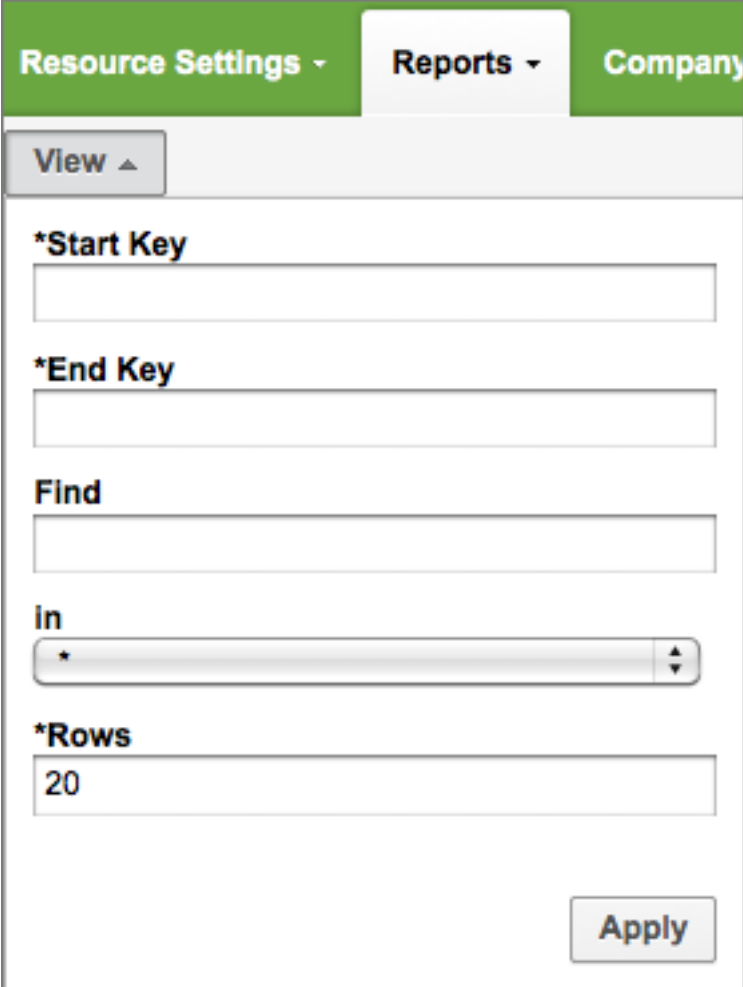
The Work Statistics Report includes:

- **Appointment Keys** or standards defined by your company for particular types of work and working conditions under *Company Settings/Statistics Parameters*.
- **Avg (min)**: The average number of minutes it has taken historically to complete this task.
- **Sigma2**: The standard deviation from the average number of minutes.
- **Count**: The number of completed activities on which these statistics are based.
- **Level Info**: Whether the statistics are at the company 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.

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

Travel Statistics

The **Travel Statistics** Report provides you with historical information about travel To/From various service locations based on the Appointment Keys set up for your configuration in Company Settings / Statistics Parameters. Select the **All Reports** option from the Reports menu to run the **Travel Statistics Report**.



The screenshot shows a web interface for configuring the Travel Statistics report. At the top, there are three tabs: "Resource Settings" (highlighted in green), "Reports" (highlighted in white), and "Company" (highlighted in green). Below the tabs is a "View" button with a downward arrow. The main configuration area contains several fields: a "*Start Key" text input, a "*End Key" text input, a "Find" text input, an "in" dropdown menu with a star icon and a downward arrow, and a "*Rows" text input containing the number "20". An "Apply" button is located at the bottom right of the configuration area.

Use the **Find . . . in:** fields to search for the results for a particular location based on a To/From Appointment Key or portion of a key that you enter here.

Travel Statistics					
<< Previous 1 2 3 4 5 6 7 8 9 ... 8253 Next >>					1-20 of 165058
Appointment Key From	Appointment Key To	Avg	Dev	Count	Level
		13.00	6.00	2,121	company
		59.10	17.60	24	company
07005	07005	7.60	2.70	1,200	company
07005	07054	12.80	2.50	468	company
07005	07834	15.00	3.50	339	company
07034	07034	4.30	0.50	388	company
07034	07054	11.50	3.20	750	company
07045	07005	10.10	3.00	521	company
07045	07045	8.20	2.50	944	company
07045	07054	14.10	3.10	491	company
07045	07082	7.60	2.10	395	company

Travel Statistics contains the following information:

- **Appointment Key From/To:** The **Start** and **Finish** indicators developed for your configuration under Company Settings/Statistical Parameters.
- **Avg (min):** Average travel time between "From" and "To" locations.
- **Dev (min):** Standard deviation from the travel time.
- **Count:** Quantity of averaged samples in the current category.
- **Level:** Indicates whether statistics were gathered at the company, group or individual resource level.

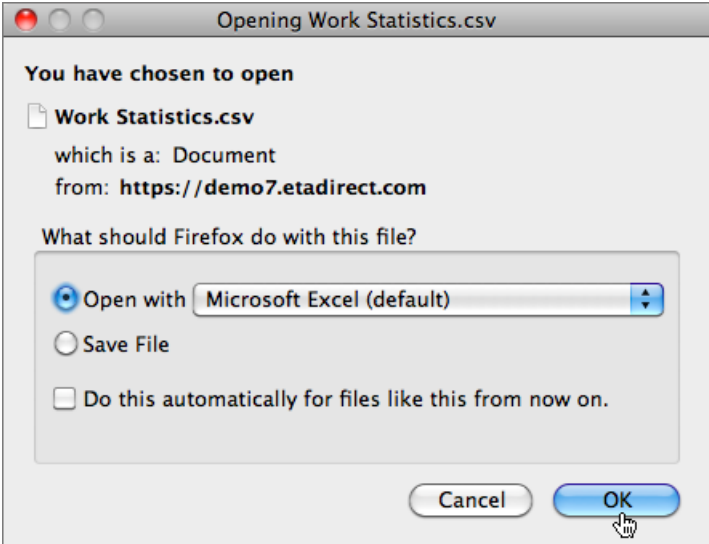
Use the **Print/Export** options to print or export this report in the .csv format.

Exporting a Report

Any report can be exported as a .csv file. Once it is downloaded, usually to Excel, you can use the data in any type of reporting tool.

Print and **Export** links display with all reports in the work area. You have the option of saving your report as a .csv file that can be opened in Excel or viewing and saving it in any of the applications listed.

1. Click **Export**. The Open CSV dialog window appears:



2. Select one of the following:

- Click **Open with**
 - Select an application from the list.
- Click **Save File**
 - Click **OK**. This saves the file in CSV format.
 - Double-click the saved file to open it in *Excel*.

