Oracle Field Service Cloud

Configuring and Using Reports

19C
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Preface

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

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1 Overview of Dashboards and Reports

The Dashboard

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

You can access the Dashboard by selecting Dashboards from the navigation menu. The Dashboard displays the dashboard reports available for the login user.

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

To add a dashboard report, click Configure Dashboard and then drag and drop reports from the configuration menu to the Dashboard.

Grant Permissions to View the Dashboard

You can access the Dashboard functionality using the User Types screen. This screen allows you to set the required permissions.

To grant permissions to view the Dashboard:
1. Click Configuration.
2. In the Configuration page, click User Types.
   The User Types screen appears.
3. Select a user type and then select Screen Configuration tab.
   This figure shows the Screen Configuration tab options in the User Types screen. Selecting a screen displays the list of available permissions for that screen.
4. **Click Dashboard** to open the Dashboard Permissions screen.

5. To select the dashboard reports with default permissions, click the **Click to Add** button.

6. In the **Add Action** dialog, click the check boxes next to the dashboard reports and click OK.

7. Click the profile under the **Actions** column to add each profile.

   This figure shows the Dashboard report permissions screen with the access modes available for use.

8. Select a profile and click the **Modify** link. Select the access mode you want to use for the profile selected and click **Save**.
Note: If the Modify dialog displays Read-only access, you cannot specify any conditions to validate access to the report.

9. Click Close.

View Dashboard Details

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

If you are accessing for the first time, your dashboard screen is empty, displaying the ‘Use drag and drop to create reports’ message with the Configuration menu in the bottom.

The configuration menu is a horizontal bar with icons representing the available reports. Each icon consists of a graphical image of the chart corresponding to the report and the report name. A hint appears when you hover on the icon to display the type of data presented in the report.

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

Click any slice in a pie chart or bar in a bar graph to view the details in the dashboard as follows:

This figure shows the Resources by statuses dashboard window with details about a slice representing Active Route selected in the pie chart.

To close the dashboard window, click the “X” in the top right-hand corner.

Add Dashboard Charts

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

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 charts that interest you most.

To add Dashboard charts:

1. Click Dashboard to open the Dashboard.
2. Click Configure Dashboard.

   The Dashboard configuration menu displays a selection of reports at the bottom of the work area.
This figure shows the configuration menu as a horizontal bar with icons representing dashboard charts.

Each icon consists of the graphical image of the chart corresponding to the report and the report name.

3. Hover your mouse over any icon.
   A hint appears describing briefly the type of data presented in the report.

4. Select the item from the Resource Tree whose report you want to view.

5. Drag the appropriate report icon to your work area.
   A chart is automatically created based on the Resource or Bucket selected in the resource tree.

6. Repeat the above steps to add more reports to the Dashboard screen.
   If the user quits the Dashboard after creating the charts, the layout of the charts is saved and displayed the next time the user accesses the Dashboard.

7. Click Configure Dashboard button to hide the Dashboard configuration menu.

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

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

## Navigate the Dashboard

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

To navigate the Dashboard:

1. Hover your cursor over the title of any dashboard and a set of icons will display in the upper right corner of your screen.
2. Click the Options icon to display the options for the Dashboard.

   The Options icon allows you to set options for this Dashboard so that when you open it, the Dashboard displays refreshed statistics for the resource, organization, or bucket on which it is currently based.

   This figure shows the Dashboard Options panel with Always show report for resource check box, Date drop-down list.
3. Optionally, set values for the following fields.
   a. Click Always show report for check box to ensure that the most current chart data displays whenever you open the Dashboard.
   b. Select a date from the drop-down list.
      By default, the chart displays statistics for the current day.
   c. Click Save.
      This chart will always display in your Dashboard for this resource or bucket or organization, regardless of the entity you selected in the resource tree.
4. Click the Minimize icon to hide the chart from view.
   See Modify Dashboard Reports for details about minimizing charts.
5. Click the Close icon to close the Dashboard.

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

Minimize Dashboard Charts
To minimize Dashboard charts or reports:

1. Click the minimize icon.
   The chart setting window collapses into a single title bar with two icons – maximize and 'remove.
2. Click the Minimize icon to hide the chart from view.
   A minimized Dashboard floats to the top of the Dashboard page, where it appears with other minimized dashboards.
   This figure shows how minimized dashboards appear in the Dashboard page.
3. Click the **maximize** icon to restore the chart to its original size.
4. Click the **Close** icon on the title bar to remove the chart from the Dashboard.

### Maximize Dashboard Charts

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

To maximize a chart on the Dashboard page:

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

### Animated Highlighting in Charts

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

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

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

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

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

### Chart Hints

A set of hints displayed to assist the user working on charts. All charts (except Gauge) have hints containing the details of the data used in the chart. The hints appear when the mouse is hovered over the chart sections. Depending on the type of the chart and the type of the report, the hint content may vary.
This figure shows the dashboard window for Resource by statuses report. The dashboard window displays a pie chart with chart hints for a selected slice.

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

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

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

Dashboard Calendar

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

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

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

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

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

Date Filters

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

To set a date filter

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

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

Resource Filters

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

My Dashboard

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

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

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

Reports

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

You must have a user name and password to log in to Oracle Field Service Cloud Core Manage Service. If you do not know your user name or password, contact your system administrator.

You can view the following categories of standard reports:

- Routes and activities reports
- Oracle Field Service Cloud communication and post activity survey reports
- Statistical and administrative reports
Grant Permissions to View Reports

You can access the Reports functionality using the User Types screen. This screen allows you to set the required permissions.

To grant permissions to view a report:
1. Click Configuration.
2. In the Configuration page, click User Types.
   The User Types screen appears.
3. Select a user type and then select Screen Configuration tab.
4. Click Main Menu Items to open the Permissions screen for commands displayed on the main menu.
5. To select the reports with default permissions, click the Click to Add button.
6. In the Add Action dialog, click the check boxes next to each report to add it and click OK.
7. Click the profile under the Actions column to add each profile.
8. Select a profile and click the Modify link. Select the access mode you want to use for the profile selected and click Save.
   - **Note:** If the Modify dialog displays Read-only access, you cannot specify any conditions to validate access to the report.
9. Click Close.

Associate a Report With a Resource

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

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

To add a dashboard chart to the dashboard:
1. Click Dispatch.
2. Select Dashboard from the drop-down menu to open your Dashboard.
   The Dashboard screen appears with a resource tree.
   - **Note:** The resource tree shows the hierarchical structure of all resources in the company with the root resource on the top.
3. Select a resource from the resource tree.
4. Drag a report icon from the configuration menu and drop it in the Dashboard screen.
   The corresponding chart appears in the Dashboard screen.
5. To display the chart, click the Show icon.
This figure shows the Show icon used to display a chart.

6. To hide the chart, click the Hide icon.
   This figure shows the Hide icon used to hide a chart.

   Note: The charts are saved automatically when you quit the dashboard and displays on the screen when you access the dashboard again.

7. Click Configure dashboard.
   The Dashboard configuration menu is closed.

   Note: You cannot hide the configuration menu if the Dashboard is empty without any charts.

The chart configured for the selected resource in the resource tree is displayed on the dashboard screen. If you select another resource, the charts are updated with the resource’s data.

Refresh a Report

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

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

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

Manual Refreshing

A report is refreshed when:

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

Only those reports that have new data are refreshed after one of these actions.
To refresh the tables manually:

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

**Export 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. When you print or export a report, it is printed or exported in the language set in the **Company language** section of the **Display** screen.

The **Export** option is available for all reports in the work area. You can save your report as a **.csv** file that you can open in Excel or other application.

To export a report:

1. From any open report window, click **Export**.
   The Open Report dialog for the selected report appears.
2. Select **Open with** and then choose any application from the list to view the report.
3. Optionally, select **Save File** to save the report to the default application, Excel.
   The filename of the saved file is displayed in the language set in the operating system.
4. Optionally, click the **Do this automatically for files like this from now on** check box to save the export settings as default.
5. Click OK to export the report.
   The file is saved in **.csv** format.
2 Dashboard Reports

Completion Progress By Volume Report

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

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

- buckets/organizations
- individual resources

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

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

<table>
<thead>
<tr>
<th>Completion progress by volume (11/01/17, Planning)</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image_url" alt="Graph" /></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>Displays the report name and date in the header.</td>
</tr>
</tbody>
</table>
| Columns | There can be up to three columns per hour representing the following data:  
- the volume of activities completed by a resource in an hour on the selected date.  
- the average number of activities completed by the same resource at the same time in the previous week.  
- the average number of activities completed by the same resource at the same time in the previous month.  
  **Note:** If the previous week/month statistics is not available, the corresponding column is not shown. |
| Legend  | Type of data represented by the chart:  
- Completed (date), Units of measurement  
- Average completed (week), Units of measurement  
- Average completed (month), Units of measurement |
| Axes    | horizontal: Hour  
vertical: Volume |
| Hint    | Each activity displays a hint pop-up with Hour, data corresponding to the selected column, column representing the volume of activities and the units of measurement. |

### View the Completion Progress Report

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

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

- buckets/organizations  
- individual resources

To view the Completion Progress report:

1. Click **Dashboard** to open the Dashboard.
2. Select the **Completion progress by volume** chart.  
The title bar of the chart displays a set of icons.
3. Click the **Options** icon to display the options for the chart.  
See **Navigate the Dashboard** for more details.
4. Select the following **Date** options from the drop-down list:
View the Capacity By Category Report

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

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

This figure shows the Capacity by category report that appears as a gauge.
The gauge shows in minutes the anticipated total activity duration (based on work orders) and the amount of quota assigned for each specific time slot and work type:

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

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

Consider an example where the gauge shows the following information:

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

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

Average Productivity By Activity Report

The Average Productivity by Activity report displays the average number of activities by each activity type per day for selected resource(s) and month. The report does not consider teamwork and pre-work.
If there are no activity types in the system, the report will show the whole number of activities. The report is calculated by grouping the number of activities of each type and dividing the resulting sums by the number of working resources. This is done for each day of a month. For example, if 20 upgrades were performed, and 4 resources worked, the average will be 5 upgrades per resource. The 'Average productivity by activity type' Dashboard report can be displayed for:

- buckets/organizations
- individual resources

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

The Average Productivity by Activity report is represented with a column chart. This figure shows the Average Productivity by Activity column chart with average activities and date.

![Average Productivity by Activity chart](image)

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

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>Displays the report name and the reported period in parentheses</td>
</tr>
<tr>
<td>Columns</td>
<td>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.</td>
</tr>
</tbody>
</table>
### View the Average Productivity By Work Type Report

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

This report has the following characteristics:

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

To view the Average Productivity By Work Type report:

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

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

This figure shows the Average productivity by work type report displaying the average productivity for each day.
View the Resources By Statuses Report

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

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

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

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>Displays the report name and date.</td>
</tr>
<tr>
<td>Columns</td>
<td>The chart displays all the resources in the selected bucket or organization for the specified date. Each slice represents the percentage of the route status in the whole number.</td>
</tr>
<tr>
<td>Legend</td>
<td>The following statuses are available:</td>
</tr>
<tr>
<td></td>
<td>• Non Working Day</td>
</tr>
<tr>
<td></td>
<td>• Non Activated Route</td>
</tr>
<tr>
<td></td>
<td>• Non Activated in Time</td>
</tr>
<tr>
<td></td>
<td>• Activate Route</td>
</tr>
<tr>
<td></td>
<td>• Deactivated Route</td>
</tr>
<tr>
<td></td>
<td>If resources of the selected bucket or organization have routes of only some of the statuses, the slices and the legend will contain only such statuses.</td>
</tr>
</tbody>
</table>
Element | Description
--- | ---
Hint | Each activity displays a hint with route status, number of resource routes of such status in the bucket or organization and their percentage share in the whole number of resources.

This report has the following characteristics:

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

To view the Resources By Statuses report:

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

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

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

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

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

This report has the following characteristics:

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

To view the Comparing Resources By Number of Activities report:

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

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

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

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

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

---

Oracle Field Service Cloud
Configuring and Using Reports

Chapter 2
Dashboard Reports

22
### View the Comparing Resources Productivity Report

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

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

This report has the following characteristics:

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

To view the Comparing Resources Productivity report:

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

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

This figure shows the dashboard window for Comparing Resources by Productivity column chart displaying average activities for each resource.
The horizontal axis lists individual resources by name; the vertical axis represents the number of work orders. Each column represents the number of work orders completed by one resource during the month. The colors correspond to the work types defined in the legend. Apart from differentiating the work types in colors, you can also view them as text in the chart hints.

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

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>Displays the report name, the reported period and the number of resources in the header.</td>
</tr>
<tr>
<td>Columns</td>
<td>Each column represents the average number of activities for each activity type completed by a resource during the specified month. The chart columns contains several sections marked with different colors representing various types of activities.</td>
</tr>
<tr>
<td>Legend</td>
<td>Denotes the type of activities performed by the resources in the selected bucket/organization. If the resources in the selected bucket/organization perform only some of the activity types existing in the system, the columns and the legend displays only the activities performed.</td>
</tr>
</tbody>
</table>
| Axes      | • horizontal: Resources  
            • vertical: Average activities |
| Hint      | Each activity displays a hint pop-up with Resource name, activity type and the number of activities for each activity type. |

View the Auto-Routing Results Dashboard Chart

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

- You can run this report for buckets or organizations. If you select an individual resource or organization in the Resource Tree, the report will be configured for the parent bucket.
- It displays the share or auto-routed, manually routed or not-routed activities as a percentage of the whole number of activities in the selected bucket, which is assumed to be 100%. Breaks are not included.
- If you have not run Routing, the report shows the message, 'No Data'.
- The report calculates data for all child resources of the selected bucket (not only direct child resources but also their child resources, and so on).

The Auto-Routing Results report is represented with a pie chart. This figure shows the Auto-routing results dashboard report that calculates data for all child resources of a selected bucket.

To view the Auto-Routing Results Dashboard chart:

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

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

This report has the following characteristics:

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

To view the Routing Errors Reasons report:

1. Click **Dashboard** to open the Dashboard.
2. Select the **Routing errors reasons** report.
3. Click the **Options** icon to display the options for the chart.
   
   See *Navigate the Dashboard* for more details.

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

5. Optionally, filter the chart by selecting a work-type option from the drop-down list.

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

This figure shows the Routing errors reasons report displaying the number of work orders that were not analyzed or processed.
The chart options allow you to select a date from the calendar. You can also filter the display data by the activity type group for a selected bucket. The Routing errors reasons report is represented with a pie chart.

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

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>Displays the report name and date.</td>
</tr>
<tr>
<td>Columns</td>
<td>The chart represents all the not-routed activities in the selected bucket on a specified day and is assumed to be 100%. Each slice represents the percentage share of the activities not-routed for a specific routing error reason. The chart may contain as many slices as there are routing error reasons.</td>
</tr>
<tr>
<td>Legend</td>
<td>Type of data represented by the chart:</td>
</tr>
<tr>
<td></td>
<td>• Routing error reasons.</td>
</tr>
<tr>
<td></td>
<td>• The slices and the legend contain only the routing error reasons used in the selected bucket routing results.</td>
</tr>
<tr>
<td>Hint</td>
<td>Each activity displays a hint pop-up with Routing error reason, number of activities not routed for that reason and percentage share.</td>
</tr>
</tbody>
</table>
View the Mean Time to Deliver Report

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

This report has the following characteristics:

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

To view the Mean Time to Deliver report:

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

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

This figure displays the Mean Time to deliver report that calculates data for all direct children of a selected bucket.
The horizontal axis lists resources by name; the vertical axis shows the time in days. Each column of the chart shows the time that passed from the creation of a work order until it is assigned (blue) and from assignment until it is started (red). Apart from differentiating the assignment status of work orders in colors, you can also view the status as text in the chart hints.

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

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

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

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

This report has the following characteristics:

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

To view the Percentage of Activities Met report:

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

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

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

This figure shows the Percentage of activities met chart displaying the percent of completed work orders by a resource.
View the Percentage of Customer Expectations Met Report

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

This report has the following characteristics:

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

To view the Percentage of Customer Expectations Met report:

1. Navigate the Dashboard.
2. Select the Percentage of customer expectations met chart
   The title bar of the chart displays a set of icons.
3. Click the Options icon to display the options for the chart.
   See Navigate the Dashboard for more details.
4. Select an activity type group from the drop-down list.
5. Select the following Month options from the drop-down list:
   - Selected–Reports for the month selected in the calendar
   - Before selected–Reports for the month before the one selected in the calendar
6. Provide a value to specify Allowable lateness limit.
7. Select an option from the Number of resources to show drop-down list to specify the number of rows to be displayed in the work area.

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

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

This figure shows the Percent of Customer Expectations Met column chart displaying percentage of activities assigned to resources. Late, In time and Early activities are denoted in the chart.
This table displays the elements in the Percent of Customer Expectations report and their description:

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>Displays the report name, the reported period and the number of resources whose data is displayed on the chart.</td>
</tr>
<tr>
<td>Columns</td>
<td>Each column represents 100% of the resource's not-done and completed activities. Each column may consist of the maximum of three parts marked in different colors representing the percentage share of activities started before the delivery window, in time and after the delivery window. Apart from differentiating the percentage share of activities in colors, you can also view them as text in the chart hints.</td>
</tr>
<tr>
<td>Legend</td>
<td>Type of data represented by the chart:</td>
</tr>
<tr>
<td></td>
<td>• Late</td>
</tr>
<tr>
<td></td>
<td>• In time</td>
</tr>
<tr>
<td></td>
<td>• Early</td>
</tr>
</tbody>
</table>
| Axes       | horizontal: Resources  
vertical: Percent of activities                                                                                                                |
| Hint       | Each activity displays a hint pop-up with resource name and their percent of activities met.                                                 |
View the Post Activity Survey Responses Per Resource Report

The Post Activity Survey (PAS) responses per resource report shows the responses to Post Activity Surveys for an individual resource.

The chart can be configured to show data for all direct children of the buckets/organizations that you select. If an individual resource is selected, the chart will be configured for its parent bucket/organization. The system uses the data warehouse to calculate the report. You must update the report manually.

To view the Post Activity Survey Responses Per Resource report:

1. Open the Post Activity Survey (PAS) responses per resource report.
   The report shows the responses to Post Activity Surveys for the selected resource.

2. Select the following date options from the drop-down list:
   - Selected day – Reports for the day selected in the calendar
   - Day before selected – Reports for the day before the day selected

3. Select a question from the PAS question drop-down list:

4. Select the options from the Maximum resources drop-down list options to indicate the number of resources to be included in the report and click Apply:
   - Show all
   - Show 20
   - Show 40
   - Show 50

The chart options allows you to choose the selected date from the calendar. For the chart to display the required data, PAS needs to be selected in the corresponding field. Additionally, the chart options lets you to define the number of resources whose data needs to be shown in the chart. You can select from 20, 40, 50, or all resources to be displayed.

This figure shows the PAS Response per Resource column chart showing number of answers for each technician.
This table displays the elements in the PAS Response per Resource report and their description:

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>Report name, date, resource name, number of resources.</td>
</tr>
<tr>
<td>Columns</td>
<td>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. Apart from differentiating the answers received in colors, you can also view them as text in the chart hints.</td>
</tr>
<tr>
<td>Legend</td>
<td>Answers as they are defined in the voice script:</td>
</tr>
<tr>
<td></td>
<td>• no</td>
</tr>
<tr>
<td></td>
<td>• yes</td>
</tr>
<tr>
<td></td>
<td>• - (no answer)</td>
</tr>
<tr>
<td>Axes</td>
<td>• horizontal: Resources</td>
</tr>
<tr>
<td></td>
<td>• Vertical: Number of answers</td>
</tr>
<tr>
<td>Hint</td>
<td>Resource name, PAS answer and number of such answers.</td>
</tr>
</tbody>
</table>
View the Average Travel Time Per Resource Report

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

The ‘Average travel time per resource’ Dashboard report can be displayed for buckets or organizations. If an individual resource is selected in the Resource Tree, the report will be configured for its parent bucket or organization.

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 organization or for any activity types represented in the list of activities in the selected bucket. The third option allows defining the number of resources whose travel time is to be shown on the chart. The user can select 20, 40, 50 or all resources to be displayed.

The Average Travel Time Per Resource report is represented with a column chart.

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

This report has the following characteristics:

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

To view the Average travel time per resource report:

1. Click Dashboard to open the Dashboard.
2. Select the Average travel time per resource report.
   - The Average travel time per resource report shows data for the day selected in the calendar. The chart options allow choosing the selected date or the date before it. Additionally, the chart can be filtered to display data for a particular activity type group or for any activity types represented in the list of activities in the selected bucket. The third option allows defining the number of resources whose travel time is to be shown on the chart. The user can select 20, 40, 50 or all resources to be displayed. The Average Travel Time Per Resource report is represented with a column chart.
3. Click the Options icon to display the options for the chart.
   - See Navigate the Dashboard for more details.
4. Select the following date options from the drop-down list:
   - **Selected** – Reports for the day selected in the calendar
   - **Before selected** – Reports for the day before the one selected in the calendar

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

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

This figure shows the Average Travel Time Per Resource report:

<table>
<thead>
<tr>
<th>Resource name</th>
<th>Average Travel Time, minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benally, Terry</td>
<td>20.1</td>
</tr>
<tr>
<td>Black, Todd</td>
<td>19.7</td>
</tr>
<tr>
<td>Braun, Johnny</td>
<td>22.7</td>
</tr>
<tr>
<td>Browder, Benjamin</td>
<td>19.3</td>
</tr>
<tr>
<td>Casias, Iris</td>
<td>21.5</td>
</tr>
<tr>
<td>Casteel, Jose</td>
<td>22.8</td>
</tr>
<tr>
<td>Child, Loretta</td>
<td>19.3</td>
</tr>
<tr>
<td>Coulson, Latoya</td>
<td>20.2</td>
</tr>
<tr>
<td>Dietrich, Jack</td>
<td>21.2</td>
</tr>
<tr>
<td>Gallas, Carl</td>
<td>21.3</td>
</tr>
<tr>
<td>Hollingshead, Dale</td>
<td>20.1</td>
</tr>
<tr>
<td>Hollins, Charles</td>
<td>19.3</td>
</tr>
<tr>
<td>Horsley, Krista</td>
<td>19.9</td>
</tr>
<tr>
<td>Hubbell, Sarah</td>
<td>21.5</td>
</tr>
<tr>
<td>Hughes, Gladys</td>
<td>19.3</td>
</tr>
<tr>
<td>Hutt, Peter</td>
<td>21.9</td>
</tr>
<tr>
<td>Kiely, James</td>
<td>21.3</td>
</tr>
<tr>
<td>Laboy, Emily</td>
<td>20.6</td>
</tr>
<tr>
<td>Lanning, Louis</td>
<td>22.3</td>
</tr>
<tr>
<td>Larson, Harry</td>
<td>21.5</td>
</tr>
</tbody>
</table>

This table displays the elements in the Average Travel Time Per Resource report and their description:
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Element</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>Header</td>
<td>Displays the Report name, the reported period and the number of resources whose data is displayed on the chart.</td>
</tr>
<tr>
<td>Columns</td>
<td>Average travel time of each resource is shown as a column</td>
</tr>
<tr>
<td>Legend</td>
<td>The chart uses only one color to display data, therefore, the chart has no legend</td>
</tr>
</tbody>
</table>
| Axes | horizontal: Resource  
vertical: Minutes of traveling |
| Hint | Resource name and their average travel time in minutes |

**View the Activities By Status Report**

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

The Activities by Statuses Dashboard report is displayed for:

- buckets/organizations  
- individual resources

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

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

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

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

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

This figure shows the Activities by Status report showing the activity group, final status and the total count of prework, regular, and reopened activities.
This table displays the Activities by statuses elements and their description.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>Displays the report name and date in parentheses.</td>
</tr>
<tr>
<td>Slices</td>
<td>The entire diagram represents all activities assigned to the selected resource on the specified day and is assumed to be 100%. Each colored slice represents the activities of a certain status showing the percentage share of such activities in the whole number. Apart from differentiating the activity statuses in colors, you can also view them as text in the chart hints.</td>
</tr>
</tbody>
</table>
| Legend  | Statuses of the activities assigned to:  
  - the selected individual resource (if an individual resource is selected in the Resource Tree), or  
  - all resources in the selected bucket/group (if a bucket or group is selected) If activities assigned to the selected resource belong only to some of the statuses existing in the system, the slices and the legend will contain only the statuses of the activities assigned to the resource. |
| Hint    | Activity status, the number of such activities assigned to the resource and their percentage share in the whole number of activities. |
3 Routes and Activities Reports

About Routes and Activities Reports

These reports provide the information necessary to manage routing, schedule activities and respond to customer demand.

You can directly access the following reports from the Reports menu.

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

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

The other reports cannot be accessed directly.

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

View the In Time/Late/Early Activity Report

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

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

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

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

% of Started Early—The percent of regular activities that were started early. This includes activities with a not null service window and an actual start time that occurs earlier than the start time of the service window. The search option for this field was set to 100% in order to return all start time statistics.

% of Not Started—The percent of regular activities that were not started, indicated by a final status of Pending. The search option for this field was set to 100% in order to return statistics for all activities that were not started.

% Canceled—The percent of regular activities that were canceled without having been started. The search option for this field was set to 100% in order to return statistics for all canceled activities.

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

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

View the Notification Summary Report

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

To view the Notification Summary report:

1. Select the Navigation button.
2. Select Notification Summary from the navigation pane.

The Notification Summary reports include all messages of any status excluding new and sending that were sent by any method available (voice, e-mail, external system, manual, etc.).
This figure shows the Notification Summary report displaying the summary of message statuses sent to customers.

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

Print the Route of a Single Resource

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

To print the route of a single resource:

1. Select the resource in the resource tree whose route you would like to print.
2. Select the Navigation button.
3. Select Print Route from the navigation pane.

The Print Route report is displayed.

The route report displays in the Work area.

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

4. Review the following information in the report:
   - **Start** – Indicates the estimated time of arrival for the pending work order or the time that the job is scheduled to begin
   - **Activity Type** – Displays the type of job or work to be performed, such as install, trouble call, and so on, as well as any non-customer facing activities, such as warehouse, break, and so on.
Service Window – Specifies the time boundaries for this work order, as scheduled by the company and expected by the customer.

Account Number – Displays the primary identifier for ownership of an account.

Name – Displays the name of the customer receiving the service.

Address – Displays the customer’s service location.

Zip – Displays the postal code of the service location.

Phone – Displays the telephone number of the customer receiving the service.

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

View the Route Statistics Report

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

To view the Route Statistics report:

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

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

View the Route Time Parameters Report

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

To view the Route Time Parameters report:

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

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

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

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

### View the Routing Report

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

To view the Routing report:

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

4. Select a resource bucket or organization in the Resource Tree to run the routing report.

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

5. Review the following information in the report:
   - **Aggregator**—Either a bucket or an organization
   - **Technician**—Name of the selected resource
   - **Date**—The date of Route in day/month/year format
   - **Jobs**—The number of jobs on route for that day, filtered by status and work type conditions. Status can be any of the following:
     - Pending
     - Started
     - Complete
     - Suspended
   The total number of jobs includes jobs that meet the status and work type conditions above, including jobs that were on the resource’s route within the specified day and jobs with no service window (all day jobs).
   - **Travel, minutes**—The number of minutes used for travel. If the route has not yet been completed, this will show the estimated travel time.
     - **Note:** Travel time represents total travel time from and to known locations. If an activity (such as lunch) is not a known location, Oracle Field Service Cloud will not represent that time in travel time. Similarly, time spent on activities (meetings or lunch) is not represented in the routing report.
   - **Work, minutes**—The total minutes of work-duration time in a technician’s route for a specified day in the defined date range. If the route has not been started or completed yet, this will show the estimated work time.
   - **Job Fit %**—The average skill level for jobs on a route. This metric is based on the Oracle Field Service Cloud work skill %. If a technician does not have a corresponding work skill for an activity (or doesn't have any work skills), then the work skill for the activity is considered to be 0.
   - **Overtime, minutes**—The number of overtime minutes for the day. Overtime is calculated as [End of the last job performed] - [Schedule shift end time]. If a resource has no overtime, the report will display a “0” value.
     - **Note:** Oracle Field Service Cloud considers overtime to be any time outside the resource’s shift for that day. This does not influence the Oracle Field Service Cloud overtime calculation. if the technician has a 10 hour day scheduled or has worked 35 hours earlier in the week, Oracle Field Service Cloud just looks at time within or outside the shift represented in that day’s working calendar.
   - **Idle Time, minutes**—The time within a route when a technician is waiting to begin traveling to the customer’s location in order not to arrive before the service window starts. In other words, it is the time that is not filled with travel time, work time, or an activity.
View Scheduled Reports

The Schedule Report option enables you to view a list of reports that have been set up to run on a specified schedule. Initial report scheduling is handled by your system administrator.

To view scheduled reports:

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

A list of the reports that have been scheduled to run on a recurring basis by the system administrator appears.

This figure displays the Schedule Reports page showing the list of all scheduled reports.

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

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

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

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

To view the Configuration History report:

1. Select the Navigation button.
2. Select 'Configuration History' from the navigation pane.
   The Configuration History report is displayed.

3. Review the following information in the report:
   a. **Action Time**—Specifies the date and time in the time zone and desired format of the user viewing the page when the change in Configuration was made.
   b. **Action**—Specifies either an Insert, Update or a Delete based on the operation carried out by the user.
   c. **Old value**—Displays the previous value of the fields related to the element in case of a Delete or an Update operation.
   d. **New value**—Displays one of the following:
      - In case of an Update operation, this column displays the modified value of fields related to the element.
      - In case of an Insert operation, this column displays the set value of the fields.
   e. **Element**—Displays the element or object that has been added, deleted or modified.
   f. **User**—Displays the user name of the user who made the modification. On mouse hover, the user name and the user ID will be displayed.

4. To filter the report, click **View**.
   a. **Start Date** and **End Date**—Select the date range to filter the data.
   b. **Find**—Enter a string to search within the Old value and New value columns in the report.
   c. **Search Category**—Select an action to filter the report based on a category for example message type.
   d. **Rows**—Specify the number of rows to be displayed on each page of the report.
Changes made to the following screens in the application are included in the Configuration History report:

- Business Rules
- Link Templates
- Work Schedules
- Work Zones
- Work Skills
- Properties
- Capacity Categories
- Time Slots
- Resource Types
- Activity Types
- Inventory Types
- Glossary
- Action Management
- Display
- Filters
- Organizations
- Login Policies
- User Types
- Oracle Knowledge
- Statistics
- Outbound Integration
- Message Scenarios
- Holidays
- Resource Info
- Resource Calendars
- Locations
- Resource Work Zones
- Users (Except for Collaboration and Helpdesk groups)
- Daily
- Routing
- My Display
- Themes (only when default Theme is changed)
- Applications (limited to changes in the context of APIs)

Known Behaviors:

- The 'Find' option within 'View' is applicable only for the Old value and New value columns, it is not available for the Identifier column.
• You can search only Old value and New value columns using the value of the field and not the field name. For example: for the entry 'Activity Type: Install', you can search the word 'Install', but not on 'Activity Type'. You can search Users using the User ID; you cannot search using the User Name.

• Some fields may display the IDs of the values, instead of the actual values. For example: Design Theme: 2 or Time Slots can have values like 2, 3.

• The Identifier column, in some cases may display IDs instead of or in addition to values. For example: ‘Display Profile: UT16_DISPLAYPROFILE/26’ instead of ‘Display Profile: UT16_DISPLAYPROFILE’ ID: 15497

• The Identifier may display just the Company name when the Business Rules screen is modified.

• In entries related to the Statistics page, the value of the Type displays the label instead of the text. For example: 'Type: appt_duration' instead of 'Type: Activity duration stats fields'

• The Context Layout displayed within the Identifier column shows the label instead of the text. For example: 'Display Context Layout: web_menu manage/540'

• In some cases, the number of rows displayed on the screen may be less than the configured number of rows. For example: The page may display only 18 rows on the screen though the user has set 20 as the number of rows.

• Sorting is only available using the Action Time and Operation columns.

• Values of sensitive information like passwords, client secrets, and certificates are masked using * characters.

• Collaboration and Helpdesk groups are not shown in the Configuration History.

• Changes done to the SAML login policy using "Upload Metadata XML" are not logged.

Note: Configuration History Log information will be available for the past 90 days; information beyond 90 days is automatically removed.
4 Communication and Post Activity Survey Reports

About Oracle Field Service Cloud Communication and Post Activity Survey Reports

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

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

View the Average Number of Calls Per Customer Report

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

To view the Average Number of Calls Per Customer report:

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

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

2. Use the **Print** or **Export** links to print the report or to export it in **.csv** format.
View the Percent of Accurate Last Messages Report

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

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

To view the Percent of Accurate Last Messages report:

1. Select the **Percent of accurate last messages** report from the navigation pane.
2. Click **View**
   
   The **Percent of accurate last messages** report is displayed:
   
   This image shows the Percent of accurate last messages report that displays the percent of last notification calls.

3. To select the time duration, select the calendar icons in the **Start Date** and **End Date** fields and click **Apply**.

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

   - **Date**—Indicates the notification date.
   - **Percentage of Accurate Last Calls** —Shows the ratio between the number of accurate last customer notification calls and the total number of work orders that have at least one customer notification call with the Sent or Delivered result.

   The following activities are taken into account:

   - Activities that have been started
   - Notification calls containing the estimated service or delivery window
View the Percent of Contacted Customers Report

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

To view the Percent of Contacted Customers report:
1. Click Dashboard to open the Dashboard.
2. Select the Percent of Contacted Customers report.

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>The notification date</td>
</tr>
<tr>
<td>Number of Contacted Customers</td>
<td>The total number of customers contacted during a given date.</td>
</tr>
<tr>
<td>Percent of Contacted Customers</td>
<td>The percent of contacted customers.</td>
</tr>
</tbody>
</table>

The following equation is used to determine this percentage:

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

View the Last Message Window Size Report

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

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

View the Transferred Calls Report

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

To view the Transferred Calls reports:
1. Select the Navigation button.
2. Navigate to the **Transferred Calls** report from the navigation pane. The **Transferred Calls Report** contains the following information:
   - **Date:** Notification Date.
   - **Before Route Start**—The number of voice calls transferred to the Call Center before the route was activated.
   - **After Route Start**—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**—Total number of voice calls transferred to the Call Center.

### View the Post Activity Survey (PAS) Reports

**PAS Reports** summarize the results of Post Activity Surveys.

You must be using the Oracle Field Service Cloud Communication module in order to generate this report.

To view PAS reports:
1. Click **Dashboard** to open the Dashboard.
2. Select **PAS Report**.

The **PAS Report** displays the results of Post Activity Surveys.

This figure shows the PAS Report displaying the results of Post Activity Surveys.

<table>
<thead>
<tr>
<th>Question</th>
<th>Total number of answered</th>
<th>Number of answered [Yes]</th>
<th>% of answered [Yes]</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAS 1: Are all of your service centers working properly? (YES)</td>
<td>6,516</td>
<td>574</td>
<td>8.41%</td>
</tr>
<tr>
<td>PAS 2: Did the Technician arrive on time as scheduled? (YES)</td>
<td>5,711</td>
<td>5841</td>
<td>57.34%</td>
</tr>
<tr>
<td>PAS 3.1: Did the Technician show you how to use the equipment? (YES)</td>
<td>2,694</td>
<td>2378</td>
<td>88.27%</td>
</tr>
<tr>
<td>PAS 3.2: Did the Technician show you how to use the equipment? (YES)</td>
<td>1,918</td>
<td>1724</td>
<td>90.64%</td>
</tr>
</tbody>
</table>

This table provides the elements in the PAS report and their description:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>The total number of respondents.</td>
</tr>
<tr>
<td>(Yes)</td>
<td>The number of respondents who answered &quot;Yes.&quot;</td>
</tr>
<tr>
<td>(No)</td>
<td>The number of respondents who answered &quot;No.&quot;</td>
</tr>
<tr>
<td>1 to 5</td>
<td>The level of satisfaction based on the question posed to the customer.</td>
</tr>
</tbody>
</table>
PAS Reports can vary significantly based on the questions in the post-activity surveys. The percent given for each question row should total 100% across all columns.

View the Messages Report

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

To view the Messages report:

1. Select the subject of your report from the resource tree. This could be a bucket or organization, such as XYZ contractors, or one or more resources.
2. Click the Navigation button.
4. Click View to display the filtering options for this report.
5. Select your options.
   a. From/To Date: Use the calendar icons to select the desired dates.
   b. Trigger: Select a trigger from the drop-down menu. The trigger is the action taken within Oracle Field Service Cloud that triggers the message. For example, if you would like to run a report showing all messages triggered when an order is canceled, select Cancel.
   c. Find: Use this field to search for a certain term, word, or character (such as the name of a resource) within the results.
   d. Rows: Enter the number of rows you want to see at one time. The default value is 20.

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

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

About Statistical and Administrative Reports

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

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

Time Calculations

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

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

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

View the Average Travel Time Report

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

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

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

To view the Average Travel Time report:

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

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

```
Average travel time > Sunrise Enterprise
```

```
<table>
<thead>
<tr>
<th>Resource name</th>
<th>Average Travel Time, minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA, USA</td>
<td>12.8</td>
</tr>
<tr>
<td>FL, USA</td>
<td>12.3</td>
</tr>
<tr>
<td>Newfoundland</td>
<td>12.7</td>
</tr>
<tr>
<td>Planning</td>
<td>19.7</td>
</tr>
<tr>
<td>São José dos Campos</td>
<td>18.4</td>
</tr>
</tbody>
</table>
```

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

**View the File Storage Usage Report**

The File Storage usage report provides you with information about the file storage usage, namely: a number of requests and transferred bytes which are grouped by day, file storage type, backend and bucket.

To view the File Storage Usage report:

1. Select the **Navigation** button.
2. Select **File Storage usage** from the navigation pane.
   - The File Storage usage screen is displayed.
3. Click **View** to display the drop-down menu, specify the following values and then click **Apply**.
   a. Enter the the **From date** and **To date**: to specify the reporting period.
   b. Select the **Status** to display the report only for a specific status (failed, success).
   c. Enter the **Operation** to display the report only for a specific operation.
      - del—delete file
      - get—get file contents
      - put—put file contents
      - list—get stored files listing
   d. **Find...in**: Enter values to search for results for a particular location based on a **To/From Activity Key** or portion of a key that you enter here.
   e. **Rows**: Enter the number of rows you want to see at one time.
4. Click **Print** to print the report or **Export** to export the report as a .csv file.

The File Storage usage report provides you with information about file storage usage.
This figure shows the File Storage usage report:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Displays the day for which the data are aggregated.</td>
</tr>
<tr>
<td>Type</td>
<td>Displays the type of the file storage as follows:</td>
</tr>
<tr>
<td></td>
<td>• exchange refers to daily extract</td>
</tr>
<tr>
<td></td>
<td>• property refers to file properties</td>
</tr>
<tr>
<td>Backend</td>
<td>Indicates the file storage type.</td>
</tr>
<tr>
<td></td>
<td>Note: This value is for reference only; it does not affect any functionality.</td>
</tr>
<tr>
<td>Bucket</td>
<td>Displays the File storage bucket (name of the backend specific container where the files are stored).</td>
</tr>
<tr>
<td>Requests</td>
<td>Displays the total number of requests performed.</td>
</tr>
<tr>
<td>Bytes</td>
<td>Displays the total number of bytes transferred.</td>
</tr>
</tbody>
</table>

### View the GPS Alerts Per Resource Report

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

To view the GPS Alerts Per Resource report:

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

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

3. Review the following fields:
   - **Resource**: Displays the name of the resource.
- **Total number of activities**: Displays the number of activities assigned to the resource (which have GPS tracks).
- **Activity started outside the location, %**: Displays the percentage of activities which were started outside the planned work location.
- **Activity completed outside the location, %**: Displays the percentage of activities which were completed outside the planned work location.
- **Resource left the activity location, %**: Displays the percentage of times when the resource left the work zone.
- **Idles, %**: Displays the percentage of idle statuses

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

**View the Inactive Users Report**

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

To view Inactive Users report:

1. Select **Inactive Users** from the navigation pane.
   
The View settings determine the period during which users were inactive. If you want to view the number of inactive users for a particular date, click **View** and then click the calendar icon below **Last login** to select a date, and then click **Apply**.
   
The **Inactive Users** report provides details about inactive users such as user names, status, user type, and the number of days since their last login.

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

This figure shows the Inactive users report.
2. Use the **Print** and **Export** options to print or export the report in the .csv format.

**View the Number of Active Users Report**

The **Number of Active Users** report enables you to view the number of users currently present in the system.

To view the number of active users:

1. Select the **Navigation** button.
2. Select **Number of Active Users** from the navigation pane.

   The Number of active users report is displayed.

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

**View the Inventories Report**

This report will display the inventory list and activity list for inventories. The user can configure and use custom inventory properties excluding file properties.

To view the Inventories report:

1. Select a resource from the resource tree.
2. Select the **Navigation** button.
3. Select **Inventories** from the navigation pane.
   - This figure shows the Inventories report.
4. Click Add New to add a new inventory or select the Modify link to edit an existing inventory. Complete the following fields as necessary:
   - **Serial Number**: Specifies the serial number of the inventory item.
   - **Inventory pool**: Displays the pool to which the inventory item belongs.
   - **Inventory Type**: Provides the type of the inventory item. Enter a value.
   - **Quantity**: Specifies the Quantity of non-serialized inventory. Enter a quantity.
   - **Model**: Displays the model number of the inventory item.

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

View the Travel Statistics Report

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

To view the Travel Statistics report:
1. Select the **Navigation** button.
2. Select **Travel Statistics** from the navigation pane.
   The Travel Statistics screen is displayed.
3. Click **View** to display the drop-down menu, specify the following values and then click **Apply**.
   a. **Start Key/End Key**: Optionally, enter a start and end key. These are based on the activity keys set up for your configuration in the **Statistics Parameters** screen.
      To open this screen, click **Configuration** and select Statistics Parameters in the Subsystems And Integrations section.
   b. **Find...in**: Enter values to search for results for a particular location based on a To/From Activity Key or portion of a key that you enter here.
   c. **Rows**: Enter the number of rows you want to see at one time.
4. The **Travel Statistics** report provides you with historical information about travel to and from service locations:
   a. **Activity Key From/Activity Key To**—Displays the Start and Finish indicators developed for your configuration under Statistics Parameters.
View the Work Order Statistics Report

This report displays the statistics for work orders.

To view the Work Order Statistics report:
1. Select a resource from the resource tree
2. Select the **Navigation** button.
3. Select **Work Order Statistics** from the navigation pane to display the report.

This figure shows the Work Order Statistics report.

4. Review the following information in the report:
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5. To filter the report, click View and enter one of the following values in the Work type filter field:
   - * (default value)—The report displays the data related to all activities of all work types within the selected date.
   - a label of a specific work type—The report displays the data related to activities of only that work type.

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

View the Work Statistics Report

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

To view the Work Statistics report:

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

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

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

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

Report Words and Header Translations

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

Time-Out Messages

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

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

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

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

<table>
<thead>
<tr>
<th>Date</th>
<th>What's Changed</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 2019</td>
<td>• Updated the Dashboard Reports section.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Minor changes for clarity and consistency</td>
<td></td>
</tr>
<tr>
<td>May 2019</td>
<td>• Updated the Dashboard Reports section.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Removed the Dashboard and Reports in Mobility section.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Minor changes for clarity and consistency</td>
<td></td>
</tr>
<tr>
<td>February 2019</td>
<td>• Updated the View the Number of Active Users section.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Minor changes for clarity and consistency</td>
<td></td>
</tr>
</tbody>
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