Reports

Contents

1 Reports

This page allows several reports to be run and for the results to be downloaded in Excel or XML formats.
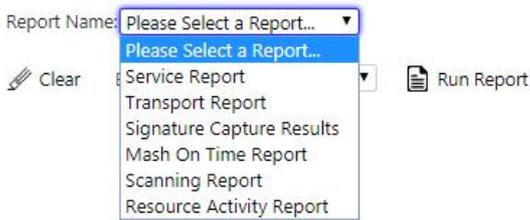
The currently available reports (dependent upon system type) in the system are:

- *Service Report* - a report of all items serviced in the period.
- *Transport Report* - general-purpose transport report, including weighbridge information.
- *Signature Capture Results* - signatures captured by week number per site.
- *TomTom Planned vs Actual Report* - 💡 **Note:** Requires full planning details from external system.
- *Mash On Time Report* - a report detailing jobs which were completed on-time or late.
- *Scanning Report* - a report detailing how many items were scanned versus manually confirmed on the mobile devices.
- *Resource Activity Report* - a report counting users and vehicles used per site, per sit and date, and in detail.
- *Collection Performance Report* a bespoke multi-page collection KPI report.
- *Product Scanning Report* - a report detailing how many products were scanned versus manually confirmed on the mobile devices.
- *Asset Count Report* - a count of assets at customer locations, with detail.

These may be selected from a drop-down list of reports. This list of reports will be extended. Note also that extracts exists within several main screens to filter and extract to a spreadsheet file.

Depending on the report, you will be prompted to enter criteria to filter the report:

- *Date Range* - Date From/To - calendar views are offered,
- *Job Group* - selected from a drop-down list.
- *Customer Code* - a drop-down list of all customers.
- *Job Type* - "All", "Collect Only" or "Delivery Only", through a drop-down list.
- *Job Status* - A drop-down list.
- *Year* - a drop-down list of years in which the system has data.
- *Driver* - a drop-down list of all drivers for the site.
- *Vehicle* - a drop-down list of all vehicles for the site.
- *Route Code* - a drop-down list of all route codes for the date range.
- *Load* - a drop-down list of all Loads for the date range (and Route Code selected, if enabled).

To reset the criteria for that report, you can press the **Clear** button.

You can extract the reports as an Excel spreadsheet (the default) or as XML - you can choose which from the *Export To* drop-down list provided.

When you click clicking **Run Report**, the application will create and then open up the report. Depending on your browser settings, this could be through the browser, through download or directly in Microsoft Excel (if locally installed).

1.1 Service Report

When you select this report, the screen requests the following parameters:

- *A date range* - the report will only show service jobs within this date range.
- *Job Group* - a drop-down list of job groups, one of which must be chosen. The report will only show jobs for that job group.

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Report Name: Service Report ▼

Date From: 10/03/2019　To Date: 03/04/2019　Job Group: OTHER ▼

✎ Clear　Export To: Excel Spreadsheet ▼　▤ Run Report

The report consists of 1 worksheet showing the following columns matching the parameters:

- *Client Name* - Job Group.
- *Site Name* - Site ID.
- *Store Number* - Service ID.
- *Order Number* - Job Code.
- *Job Ref* - Job ID
- *Product* - Service Group.
- *System type* - System Type.
- *Other* - blank.
- *Priority Code* - blank.
- *Date Logged* - Order Date
- *Time Logged* - Order Time.
- *Date Required* - Expiry Date.
- *Time Required* - Expiry Time.
- *Date Attended* - Arrival Date.
- *Time On Site* - Arrival Time.
- *Time Off Site* - Actual End Time.
- *Eng* - User Name.
- *Status* - Job Status, one of C - Complete, X - Cancelled, P - Pending or I - In Progress.
- *Status 2* - a status selected by the engineer when completing a job.
- *Rectification Required* - blank.
- *Additional Text* - engineer notes.
- *Materials Used* - Product Code.
- *Qty* - Product Quantity.
- *Customer Name* - signatory.
- *Job Text* - Job Instructions.
- *Completion Text* - diagnosis.
- *Date Complete* - actual end date.
- *Job Start Mileage* - blank.
- *Job Comp Mileage* - blank.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Client Name	Site Name	Store Number	Order Number	Job Ref	Product	System type	Other	Priority Code	Date Logged	Time Logged	Date Required	Time Required	Date Attended	Time On Site	Time Off Site	Eng	Status
2	OTHER	MAN_TRSPT	SID-L13504011-1	GENL11501	12345678DU	AWNING	Display			21/12/2018	09:05	22/12/2018	09:00	23/12/2016	14:41	10:24	John Doe	C
3	OTHER	MAN_TRSPT	SID-L13504011-2	GENL11501	12345678DU	UMBRELLA	Display			21/12/2018	09:05	22/12/2018	09:00	23/12/2016	14:41	10:24	John Doe	C
4	OTHER	MAN_TRSPT	SID-L13504011-3	GENL11501	12345678DU	UMBRELLA	Display			21/12/2018	09:05	22/12/2018	09:00	23/12/2016	14:41	10:24	John Doe	C
5	OTHER	MAN_TRSPT	BX65EUV	GENL09-501	GENL09011	LAC10742	BOILER1			22/03/2018	13:44	29/03/2016	15:30	29/03/2016	15:06	17:10	John Doe	C
6	OTHER	MAN_TRSPT	BX65EUV	GENL09-501	GENL09011	LAC10742	BOILER2			22/03/2018	13:44	29/03/2016	15:30	29/03/2016	15:06	17:10	John Doe	C
7	OTHER	MAN_TRSPT	CK155BX	GENL09-501	GENL09011	LAC10742	BOILER3			22/03/2018	13:44	29/03/2016	15:30	29/03/2016	15:06	17:10	John Doe	C
8	OTHER	MAN_TRSPT	WCS51935976	GENL09-501	GENL09011	LAC10742	BOILER4			22/03/2018	13:44	29/03/2016	15:30	29/03/2016	15:06	17:10	John Doe	C
9	OTHER	MAN_TRSPT	WCS51935981	GENL09-501	GENL09011	HM76	BOILER5			22/03/2018	13:44	29/03/2016	15:30	29/03/2016	15:06	17:10	John Doe	C
10	OTHER	MAN_TRSPT	WV63XPY	GENL09-501	GENL09011	HM76	BOILER6			22/03/2018	13:44	29/03/2016	15:30	29/03/2016	15:06	17:10	John Doe	C

💡 **Note:**

- This report includes blank fields, intended for users to fill in after the report is produced.

1.2 Transport Report

When you select this report, the screen requests the following parameters:

- *A date range* - the report will only show jobs collected or delivered within this date range.
- *Customer Code* - a drop-down list of customers. If you select a customer, the report will only show jobs for that customer.
- *Collect or Delivery* - a drop-down list. This determines how the report selects jobs. If you select "Collect", the parameters entered here apply to collection jobs, if you select "Delivery", the parameters apply to delivery jobs.
- *Job Status* - a drop-down list, determining what status of jobs are selected, from "Pending", "In Progress", "Complete" and "Cancelled".

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Report Name: Transport Report ▼

Date From: 03/03/2019   Date To: 03/04/2019
Customer Code: All Customers ▼   Collect or Delivery: Collect ▼
Job Status: Complete ▼

✏ Clear   Export To: Excel Spreadsheet ▼   📄 Run Report

The report consists of 1 worksheet showing the parameters for the report and the following columns matching the parameters:

- *Vehicle Id* - the collection vehicle ID.
- *Vehicle Reg* - the collection vehicle registration.
- *Trailer Id* - the collection trailer ID.
- *Collection Id* - the collection job ID.
- *Collection Job Group.*
- *Collection Customer Code.*
- *Collection Customer Name.*
- *Collection Address1* - the collection job address (if exists) or the collection customer address.
- *Collection Address2.*
- *Collection Address3.*
- *Collection Address4.*
- *Collection Postcode.*
- *Collection Arrival Date.*
- *Collection Arrival Time.*
- *Collection End Date* - the collection job's actual end date
- *Collection End Time* - the collection job's actual end time
- *Collection Weighbridge* - the weighbridge number captured at collection.
- *Collection Weight* - the product quantity entered at collection.
- *Product Collected* - the collected product description.
- *Job Code* - the job code linking the collection and delivery job.
- *Order No* - the customer reference.
- *Reference* - the SO reference.
- *Delivery Id* - the delivery job ID.
- *Delivery Job Group.*
- *Delivery Customer Code.*
- *Delivery Customer Name.*
- *Delivery Address1* - the delivery job address (if exists) or the delivery customer address.
- *Delivery Address2.*
- *Delivery Address3.*
- *Delivery Address4.*
- *Delivery Postcode.*
- *Delivery End Date* - the delivery job's actual end date.
- *Delivery End Time* - the delivery job's actual end time.
- *Delivery Weighbridge* - the weighbridge number captured at delivery.
- *Delivered Weight* - the product quantity entered at delivery.
- *Product Delivered* - the delivered product description.

	A	B	C	D	E	F	G	H
1	Date From:	01/01/2019						
2	Date To:	06/03/2019						
3	Customer:	All Customers						
4	Col/Del:	Collect						
5	Job Status:	Complete						
6								
7	Vehicle Id	Vehicle Reg	Trailer Id	Collection Id	Collection Job Group	Collection Customer Code	Collection Customer Name	Collection Address1
8	TW15 ANW		TR132456	0000000045	MAN_TRSPT	7644 /001	Blue Anchor (Aintree)	32 School Lane
9	TW15 ANW		TR132456	0000000041	ADHOCCOL	CUST002	Customer Name for Customer 002	Delivery Addr 002 Line 1
10	MF61 OGG	MF61 OGG	TR998789	12345678CR	MAN_TRSPT	_MAN_TRSPT_GATE_	Gateshead	Gateshead
11	TW15ANW	TW15 ANW	TR212315	12345678DR	MAN_TRSPT	7644 /001	Blue Anchor (Aintree)	32 School Lane
12	TW15ANW	TW15 ANW	TR212315	12345678DT	MAN_TRSPT	MAN_TRSPT	Admin House	Liverpool Road South

💡 **Note:**

- In order to see weighbridge numbers in this report, collection or delivery jobs must be configured for Job Details UDF with a field "WB_NUMBER".

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- If multiple products are included on the collection or delivery, the job will appear multiple times, once for each product collected or delivered.
- If collection or delivery information is not present (i.e. this is not a linked job), the respective columns will be blank. The Job Type selection will determine whether the job is selected for the report.

1.3 Signature Capture Results

When you select this report, the screen requests a year from a drop-down list.

Report Name: Signature Capture Results ▼

Year 2017 ▼

✐ Clear   Export To: Excel Spreadsheet ▼   📄 Run Report

The report consists of 1 worksheet, showing the following columns matching the parameters:

- *Partner*.
- *Week Number* - showing the total captured signatures in that week.

	A	B	C	D	E	F
1	Partnerlink Signature by Week No					
2	Week Number	11	19	22	32	33
3	A Site	0	0	1	0	0
4	Hathaway	0	0	0	0	1
5	Knights Kettering	1	1	0	1	0

💡 **Note:**

- **This is a bespoke report.**
- The year selected is shown in the report name and worksheet title.

1.4 Mash On-Time Report

When you select this report, the screen requests the following parameters:

- *A date range* - the report will only show jobs completed within this date range. This defaults to yesterday's date to today's date.
- *Customer Code* - a drop-down list of customers, defaulting to "All Customers". If you select a customer, the report will show only jobs for that customer.
- *Route Code* - a drop-down list defaulting to "All Routes for Date Range". The list will show all unique Route Codes entered against loads.
- *Load* - a drop-down list defaulting to "All Loads for Date Range/Route". The list will show all load IDs in the system. If you have selected a route, the list will only show loads for that route.
- *Job Type* - a drop-down list. This determines how the report selects jobs. If you select "All", the report will show all jobs. If you select "Collection Only", the parameters you entered here apply to collection jobs, if you select "Delivery Only", the parameters apply to delivery jobs.

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Report Name: Mash On Time Report ▼

Date Type: Planned ▼
Date From: 03/04/2019   Date To: 04/04/2019
Customer Code: All Customers ▼
Route Code: All Routes For Date Range ▼
Load: All Loads For date Range/Route ▼
Job Type: All ▼

✎ Clear   Export To: Excel Spreadsheet ▼   📄 Run Report

The report consists of 1 worksheet showing the report title and the following columns matching the parameters:

- *Customer Code.*
- *Customer Name.*
- *Load ID.*
- *Job Code.*
- *Status* - one of "C" - Complete of "X" - Cancelled.
- *Reason* - the reason code if the job is cancelled.
- *Sequence* - the sequence of the job on the load.
- *Service* - service level.
- *Planned Date* - planned start date.
- *Planned Time* - planned start time.
- *Arrival Date*.
- *Arrival Time*.
- *On Time* - calculated.

	Customer Code	Customer Name	Load ID	Job Code	Status	Reason	Sequence	Service	Planned Date	Planned Time	Arrival Date	Arrival Time	On Time
1	Mash On Time Report												
3	BRAI0001	MRS A BRAID	JBGL01	ofl-3178023	X	REF	2	1000-1200	03/07/2017	10:00	03/07/2017	14:24	N
4	M1	Manchester Blood Centre		NHS0003-1	C		1	0900-1700	23/10/2014	14:44			N
5	TOOL-LIV	TOOLSTATION LIVERPOOL	DEM-00001012	3398	C		1	0600-1200	16/02/2019	07:43	05/02/2019	07:15	Y
6	TOOL-LIV	TOOLSTATION LIVERPOOL	DEM-00001012	3397	C		1	0600-1200	16/02/2019	07:43	05/02/2019	07:15	Y
7	TOOL-LIV	TOOLSTATION LIVERPOOL	DEM-00001012	3396	C		1	0600-1200	16/02/2019	07:43	05/02/2019	07:15	Y
8	TOOL-LIV	TOOLSTATION LIVERPOOL	DEM-00001012	3399	C		1	0600-1200	16/02/2019	07:43	05/02/2019	07:15	Y
9	TOOL-LIV	TOOLSTATION LIVERPOOL	DEM-00001012	3395	C		1	0600-1200	16/02/2019	07:43	05/02/2019	07:15	Y
10	BRI-BUILDERS	BRITTANIA BUILDER COMPANY	DEM-00001012	3398	C		2	0800-1700	16/02/2019	08:00	05/02/2019	08:32	Y
11	BARRAT-ROBY	BARRATTS ROBY	DEM-00001012	3397	C		3	0900-1700	16/02/2019	08:51	05/02/2019	09:39	Y
12	BAR-WINNINGT	BARRATTS HOMES - WINNINGTON	DEM-00001012	3396	C		4	0900-1700	16/02/2019	10:14	05/02/2019	11:39	Y

💡 **Note:**

- **This is a bespoke report.**
- On Time is calculated as follows:
    - ♦ If no planned start date - "Y"
    - ♦ If no arrival date - "N"
    - ♦ If arrival before or at planned time - "Y"
    - ♦ If arrival after planned time - "N"
- The data is ordered by Actual End date.

1.5 Scanning Report

When you select this report, the screen requests the following parameters:

- *A date range* - the report will only show jobs completed within this date range. This defaults to yesterday's date to today's date.
- *Job Type* - a drop-down list. This determines how the report selects jobs. If "All" is selected, the report will show all jobs. If "Collection Only" is selected, the parameters entered here apply to collection jobs, if "Delivery Only" is selected, the parameters apply to delivery jobs.
- *Job Status* - a drop-down list, determining what status of jobs are selected, from "All", "Completed Only" and "Cancelled Only".

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Report Name: Scanning Report ▼

Date From: 03/04/2019   Date To: 04/04/2019
Job Type: All ▼   Job Status: All ▼

🖉 Clear   Export To: Excel Spreadsheet ▼   📄 Run Report

The report consists of 1 worksheet showing the following columns matching the parameters:

- *Owner* - owner name.
- *User Id*.
- *End Date* - actual end date.
- *End Time* - actual end time.
- *Job Code*.
- *Customer Code*.
- *Container Id* - item collected or delivered.
- *Status* - "Pending", "In Progress", "Complete" or "Cancelled".
- *Reason Code* - if cancelled.
- *Scanning Method* - blank (automatically confirmed or cancelled), "SCAN", "KEY" or "ACCEPT" (accepted through clicking on the screen).
- *Package Code*
- *Package Desc*
- *Code 1*

	Owner	User Id	End Date	End Time	Job Code	Customer Code	Container Id	Status	Reason Code	Scanning Method	Package Code	Package Desc	Code 1
2	04 FARNBOR	TETSUO	17/12/2018	09:02	NH50003-1	M1	50552324AAA00029	Complete	AdminCancel		CMED_UBP150	Clinimed UBP150	
3	04 FARNBOR	TETSUO	17/12/2018	09:02	NH50003-1	M1	50552324AAA00030	Complete	AdminCancel		CMED_UBP150	Clinimed UBP150	
4	04 FARNBOR	KANEDA	11/03/2015	15:32	NH51432-1	M1	150552324000541821	Complete		SCAN	Envelope	Post Envelope	
5	04 FARNBOR	KANEDA	11/03/2015	15:32	NH51432-1	M1	50552324AAA00029	Complete		SCAN	CMED_UBP150	Clinimed UBP150	
6	04 FARNBOR	KANEDA	11/03/2015	15:32	NH51432-1	M1	50552324AAA00030	Complete		SCAN	CMED_UBP150	Clinimed UBP150	
7	04 FARNBOR	KANEDA	11/03/2015	15:32	NH51432-2	M1	50552324AAA00031	Complete		SCAN	CMED_UBP150	Clinimed UBP150	
8	04 FARNBOR	KANEDA	11/03/2015	15:32	NH51432-2	M1	50552324AAA00032	Complete		SCAN	CMED_UBP150	Clinimed UBP150	
9	04 FARNBOR	KANEDA	11/03/2015	15:35	NH51432-2	M103	50552324AAA00031	Complete		SCAN	CMED_UBP150	Clinimed UBP150	
10	04 FARNBOR	KANEDA	11/03/2015	15:35	NH51432-2	M103	50552324AAA00032	Complete		SCAN	CMED_UBP150	Clinimed UBP150	
11	04 FARNBOR	KANEDA	11/03/2015	15:37	NH51432-3	M103	150552324000541838	Complete		SCAN	SMPBX_BLACK	Sample box black	
12	04 FARNBOR	KANEDA	11/03/2015	15:37	NH51432-3	M103	50552324AAA00031	Complete		ACCEPT			
13	04 FARNBOR	KANEDA	11/03/2015	15:37	NH51432-3	M103	50552324AAA00032	Complete		ACCEPT			
14	04 FARNBOR	KANEDA	11/03/2015	15:39	NH51432-1	M040	150552324000541821	Complete		KEY	Envelope	Post Envelope	
15	04 FARNBOR	KANEDA	11/03/2015	15:39	NH51432-1	M040	50552324AAA00029	Complete		KEY	CMED_UBP150	Clinimed UBP150	
16	04 FARNBOR	KANEDA	11/03/2015	15:39	NH51432-1	M040	50552324AAA00030	Complete		KEY	CMED_UBP150	Clinimed UBP150	
17	04 FARNBOR	KANEDA	11/03/2015	15:41	AHC01_TRN-00001432	M040	150552324000541814	Complete		KEY	SMPBX_BLACK	Sample box black	

1.6 Resource Activity Report

When you selects this report, the screen requests a date range, defaulting to the last 7 days. The report will only show activity from mobile device users in this date range.

Report Name: Resource Activity Report ▼

Date From: 27/03/2019   Date To: 03/04/2019

🖉 Clear   Export To: Excel Spreadsheet ▼   📄 Run Report

The report consists of 4 worksheets:

- *Parameters* - a title page, showing the parameters entered.
- *Site Summary* - a count of all users and vehicles in use, per site.
- *Day Summary* - a count of all users and vehicles in use, per site per day.
- *Details* - a detailed view of the site, user, vehicle, day, time start and end and EPOD application version number.

	A	B	C	D	E	F	G	H	I	J	K
1			**Resource Activity Report**								
2											
3											
4	**Parameters**										
5		**Date From:**	24/02/2019								
6		**Date To:**	06/03/2019								
7											

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»»»»»

	A	B	C	D
1	Site	User Count	Vehicle Count	
2	SITE1	1	1	
3	SITE1	2	2	
4				

	A	B	C	D	E
1	Site	Date	User Count	Vehicle Count	
2	SITE1	26/02/2019	1	1	
3	SITE2	25/02/2019	2	2	
4	SITE2	26/02/2019	1	1	
5	SITE2	27/02/2019	1	1	
6					

	A	B	C	D	E	F	G	H	I
1	Site	User ID	User Name	Vehicle ID	Vehicle Reg	Date	Time From	Time To	Device Version
2	SITE1	pda	User 1	AB12XYZ	AB12 XYZ	26/02/2019	12:43	13:26	4.00.01.35
3	SITE2	rmpda	Robert McGuinness	OU74TME	OU74 TME	25/02/2019	09:59	13:54	
4	SITE2	rmpda	Robert McGuinness	TI43LRD	TI43 LRD	25/02/2019	15:48	15:48	
5	SITE2	rmpda2	Rojer Mackintosh	OU74TME	OU74 TME	25/02/2019	09:57	09:59	
6	SITE2	rmpda	Robert McGuinness	OU74TME	OU74 TME	26/02/2019	12:04	12:24	
7	SITE2	rmpda	Robert McGuinness	OU74TME	OU74 TME	27/02/2019	10:40	16:36	
8									

💡 **Note:**

- The version number will only show on a day if the user has performed a login request on that day. If users are not logging out or exiting the app overnight, this will be blank. Example: line 3 onward.
- When the driver changes vehicle, the version number is not shown again.
- If the driver uses two vehicles in a day, that user will be shown twice on the *Details* sheet for that day. Example: Line 3 and 4.
- The times show the earliest and latest times on that date that that vehicle was used. If the user uses vehicle A, then vehicle B, then vehicle A again, there will only be two lines on the report. The times for vehicle A will show the full day, whereas the times for vehicle B will be contained within vehicle A's time range.

You can use this report to determine:

- The number of vehicles and users used in the sites, either over the period or per day or per user/vehicle combination.
- The mobile device application version of the users.

1.7 Collection Performance Report

A bespoke multi-page collection KPI report.

When selected, the report will prompt for the parameters:

- Date range, cannot be more than a month. A date lookup is provided.
- Depot - from drop-down list, defaulting to current depot, selecting only non-warehouse depots for the list, including a first row option of "All Depots".

When you click **Run Report**, the application will create and then open up the report. Depending on the browser settings, this could be through the browser, through download or directly in Microsoft Excel (if locally installed).

The report generated will produce several tabs:

- A Parameters sheet, showing the entered parameters and the report title.
- A Reports sheet, identical in structure and operation to the existing report.
- A Report Data sheet, identical in structure and operation to the existing report.
- An Arrivals Before Collection Time sheet, identical in structure and operation to the existing report.
- A Calculation sheet, combining the data currently reported in the existing Calculation Sheet and Data Extract OTIF sheets.

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1.8 Product Scanning Report

A report detailing how many products were scanned versus manually confirmed on the mobile devices.

When selected, the report will prompt for the parameters:

- Date From/To - a date range for the report
- Job Type - a drop-down list of the job types to be selected, defaulting to All.
- Job Status - a drop-down list of the job statuses to be selected, defaulting to All.

When you click **Run Report**, the application will create and then open up the report. Depending on the browser settings, this could be through the browser, through download or directly in Microsoft Excel (if locally installed).

The following data is reported:

- Site
- Owner
- User Id
- End Date
- End Time
- Load
- Job ID
- Job Code
- Customer Code
- Container Id
- Product Code
- Sequence
- Description
- Ordered
- Planned
- Actual
- Qty Per Case
- Unit Type
- Status
- Reason Code
- Scanning Method
- Item Type
- Long Description
- Amended
- Position
- Activity

1.9 Asset Count Report

A count of assets at customer locations, with detail.

When selected, the report will prompt for the parameters:

- Date range, cannot be more than a month. A date lookup is provided.
- Customer - from drop-down list, defaulting to all customers.

When you click **Run Report**, the application will create and then open up the report. Depending on the browser settings, this could be through the browser, through download or directly in Microsoft Excel (if locally installed).

The report generated will produce several tabs:

- Parameters - the parameters for the report.
- Asset Counts - the basic asset counts for each customer.
- Asset History - the detail of each transaction for the asset and customer.

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The Asset Counts tab shows the following data:

- Site
- Customer
- Name
- DU Type
- Description
- Count

The Asset History tab shows the following data:

- Site
- Customer
- Name
- Job Code
- Cust Ref
- Date
- Time
- DU Type
- Description
- Count
- Activity

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