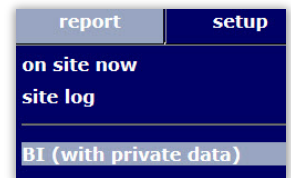




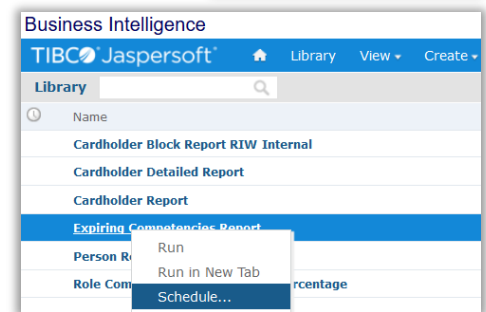
This Cheat Sheet Outlines the inputs and outputs of the most commonly used reports in Business Intelligence

## RUNNING BUSINESS INTELLIGENCE

**Business Intelligence Reports (BI)** are run from inside Onsite Track Easy. Access is usually turned on by default for all users that have a site/realm login account. **BI Reports** are accessed by the **REPORT > BI (with private data)** menu item.



Once opened, the list of available reports will vary from Client, but below are the standard reports that should be available to most. Any report in the list can be *Right Clicked* and the option to *Schedule* is available. Previously Scheduled reports have a Click icon next to the report. Right clicking and opening that schedule will show the list of report(s) that have been previously scheduled and users can modify those reports to add themselves to the email list if required.



User guides and more information on scheduling reports can be found here: <https://kb.pegasus.net.au/display/CA/Business+Intelligence+Reporting>

## COMMON BI REPORTS AND OUTCOMES

These are the most common BI Reports that sites run. Reports sometimes output extra information than expected, so by outlining the data the report will output, it can take the guesswork out of which report is right for your needs.

Some reports have a built in Summary Page that might display a pie chart, or bar graph. For those reports, the Summary page and its detail is also listed.

**Note:** On most Reports, unless you select a specific Company or Person to report on, it will default to selecting all Companies and Persons.

### Cardholder Competencies Report

**Components are:** Site, Competencies, Companies, Competency status

**Report Returns:** Last Name , First Name, OnsiteID, Company, Adder (Site or Realm Comp), Location (Site), Competency Name, Status (Colour coded as well) issue Date, expiry Date, appointment status, Verified Doc (Y/N), Review time, Reviewer

**Summary Page:** Pie Chart showing Status Breakdown

### Cardholder Competencies By Crew Report

**Components are:** Crew Name, Competencies, Companies (select Yancoal and Ashton coal for "employees" for example), "current only" is an optional tick box for competencies.

**Report Returns:** Name, OnsiteID, Person type (emp/con), Default Company, Crew Name, Competency, Current/non-current, Issue Date, Expiry Date, Appointed, Pending

## COMMON BI REPORTS AND OUTCOMES

### **Cardholder Without Competency**

**Components are:** Site, Choose one unassigned competency, Companies

**Report Returns:** - OnsiteID, Person Name, DOB, Company Name

### **Competency Status Matrix Report**

**Components are:** Crews, Competencies

**Report Returns:** Person ID, last Name, First Name, Company, Crew Name and then matrix against the Competency (current/expiring/pending)

### **Crew Attendance Report**

**Components are:** Select between Dates, Crew(s)

**Report Returns:** Person Name, ID, Logpoint In, Time In, Crew, Company

### **Expired Competencies Report**

**Components are:** Choose the competency

**Report Returns:** - Person Name, Company, Competency Name, Expiry Date

### **Expiring Competency Report**

**Components are:** Select Between Dates, Competencies

**Report Returns:** Person Name, Company, Competency Name - Expiry Date.

### **Onsite Hours Report**

**Components are:** Logpoint(s), Start and End Dates, Minutes range from and to, Person Types, Companies, Person

**Report Returns:** Company, Last Name, First Name, ID, Type, Location (logpoint) Vendor type, Gender, Activity, Forced, Date In, Logpoint In, Date Out, Logpoint Out, Hours, Legacy ID

**Summary Page:** Persons, Hours, Hours in Total by Person Type Bar Graph

### **Onsite Hours Summary Report**

**Components are:** Logpoints, Start and End Date, Minute Range, Person Types, Companies, Person

**Report Returns:** Company, Last Name, First Name, ID, Type, Gender, Total, Visits, Avg Shift.

**Summary Page:** Full total at bottom of last page.

### **Onsite Now Report**

**Components are:** Logpoint, Companies, Person Type, Activities, Crew, Option for "only overstayers"

**Report Returns:** - Time In, Site, Logpoint In, Hours, Last Move Time, Last Move Logpoint, Fatigue, Overstayer, Name, OnsiteID, Person Type, Phone, Company, Site Contact, Crew, Activity