

Quick Reference Card

Working with Reports

RUNNING A REPORT

1. From the main toolbar, select Reports.



Tracking Reports - Operations

System

3. From the list, select the report that you want to generate.

Report / Fleet.

2. In the ribbon toolbar select

- 4. In the *Report Parameters* panel, select the criteria you want including: the assets, the date range, the Work Hours, and any other parameters specific to the report.
- 5. Click Get Data.

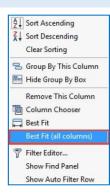
Report Parame	eters	.0
Assets		~
Branch		
CI Courier Services		-
Include shared	items from above	
Include items in	sub branches	
adys asset		
Andres		
CHEVY CIPODevice		
Jet's Mobile		
Starlane Brampton		
Starlane Mississaug	ja	
Starlane Toronto Starlane Vaughan		
Stephen's Asset		
TRUCK 3		
Van 1		
Date From	Date To	
15/02/2015	Date To 15/02/2015	
15/02/2015 Work Hours		v
		~

ADJUSTING THE REPORT LAYOUT

The first time you generate the report, the columns displayed may not be optimized to meet your needs. However, the look and feel of the report's columns are customizable.

TO VIEW THE COLUMN HEADER LABELS

- Right-click on any column header.
- From the menu, select Best Fit (all columns).

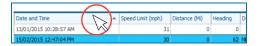


MOVING A COLUMN HEADER

- **1.** Select the column name.
- **2.** Drag it to its new location within the other columns.

REMOVING A COLUMN FROM THE REPORT

- 1. Select and hold the column name, and then drag it down from the header bar.
- 2. Once you see a black X, release the mouse.



ADDING A COLUMN THAT WAS REMOVED FROM VIEW

- Right-click on any column name.
- 2. From the menu select Column Chooser.
- From the Customization menu, select the column name that you want and then drag it back into place in the report.

Customization	×
Asset Status	^
Asset Type	
City	
Date and Time	
Direction	
Distance (Km)	
Heading	
Latitude	
Max. Speed (km/h)	
Max. Speed (mph)	
Phone No	
Speed Limit (km/h)	~

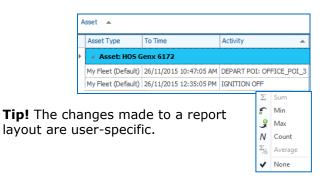
SORTING THE REPORT BASED ON A PARTICULAR COLUMN

 Select the column name and then drag it to the white space above the report header and then release the mouse.

Tip! You	A	sset 🔺 🔨				
can sort by		Duration	Start Date & Time	End Date & Time	POI	LSD
,	Þ	🔺 Asset: TRU				
more than		5 min	05/02/2015 12:27:03 PM	05/02/2015 12:32:04 PM		
one column		1 h 3 min	05/02/2015 1:26:16 PM	05/02/2015 2:29:04 PM		
name.		10 min	05/02/2015 3:46:33 PM	05/02/2015 3:56:52 PM		
namei		4 min	10/02/2015 8:38:13 AM	10/02/2015 8:42:15 AM		
		1 d 1 h 57 min	06/02/2015 2:46:40 PM	07/02/2015 4:43:16 PM		
		477	0.5 /0.0 /0.0 / 5 / 0.0 / 50 / 54	05/00/0045 6:07:44 044		

VIEWING THE REPORT DETAILS & ADDING COLUMN FUNCTIONS

- Click the right arrow () corresponding to the header name.
- **2.** To add a function under each column that you want, right-click the white bar.
- **3.** From the menu select the function you want.





EMAILING A REPORT THROUGH OPERATIONS

When running a report you also have the option to send that report by email to anyone you choose.

- 1. Referring to the *Running a Report* process steps on page 1, complete steps 1-4.
- Located in the lower portion of the *Report* Parameters panel, select the **Do not show the** report. Email report to a list of users or email addresses checkbox.

Do not show report. Email report to a list of	
users or email addressses.	

- 3. Click Get Data.
- **4.** In the pop-up window, select the checkboxes beside the user names of whom will receive a copy of the report.
- 5. In the *Email Recipients* field, type the email address (es) of whom will receive a copy of the report.
- **6.** From the *Export Format* dropdown list, select the format of the report.



Tip! You can type multiple addresses by separating them with a semi-colon.

Note: There will be no visual representation of the report on the screen. It will run in the background and when done, it will be sent to the selected email addresses.

SETTING UP A REPORT SCHEDULE

This feature allows you to automatically generate reports and email them to the appropriate recipient(s) at set frequencies.

1. From the main toolbar, select **Reports** / **Report** Schedules.



- 2. In the ribbon toolbar select Add / Fleet and then choose the report you want to schedule.
- **3.** In the *Parameters* section to the left, complete the fields as necessary.
- **4.** In the *Schedule* section, complete the scheduling and exporting parameters as necessary.
- 5. Click Save & Close.

Description					Frequency	
Idle Report					Every Day	~
Recipient E-mails					Export Format	
					PDF	~
Report Period		Run Time 🔹 R		Run Time Zon	ne Zone	
Previous Full Day	~	3:00:00 AM	\$	(UTC-05:00) 8	Eastern Time (US & Canada)	~
Language						
English (Canada)	~	Editable by	creator	only		

Note: to edit the reports layout, highlight the scheduled report and either double-click or click the Edit button. For more information, refer to the *Adjusting the Report Layout* section on page 1.

VEIWING ONLINE HELP FOR REPORTS

There are many reports available to help you analyze and manage your fleet's performance. To learn more about each report in Fleet Complete,

click the Help 🕐 button from the Quick Access toolbar and review the *About Operations Reports* help topic.