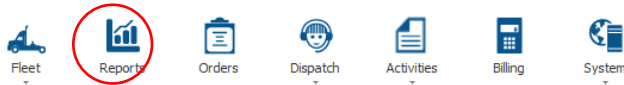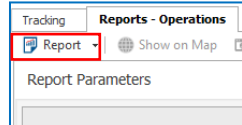# Working with Reports

RUNNING A REPORT

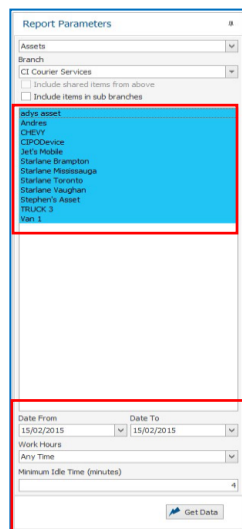1. From the main toolbar, select **Reports**.

2. In the ribbon toolbar select **Report / Fleet**.

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

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.
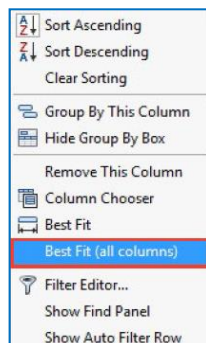

5. Click **Get Data**.

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

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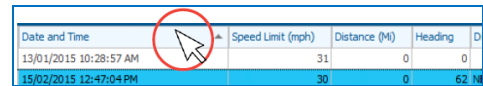
2. From the menu, select **Best Fit (all columns)**.

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

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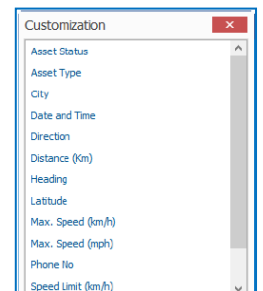


SORTING THE REPORT BASED ON A PARTICULAR COLUMN

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

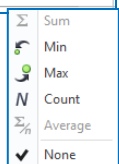   **Tip!** You can sort by more than one column name.
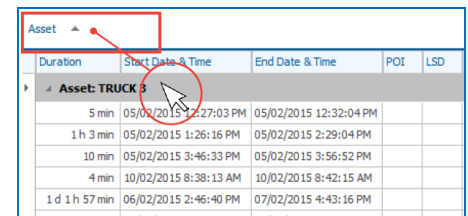
VIEWING THE REPORT DETAILS & ADDING COLUMN FUNCTIONS

1. 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.
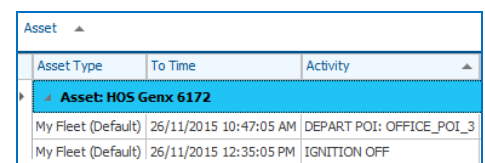
   **Tip!** The changes made to a report layout are user-specific.

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.

2. 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.
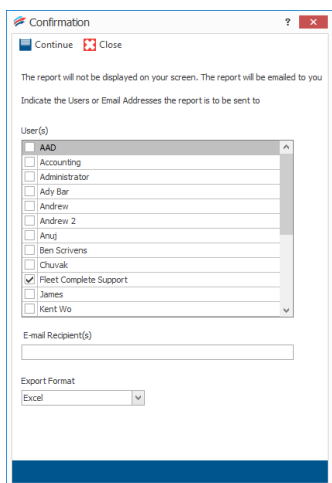
Tip! You can type multiple addresses by separating them with a semi-colon.

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**.
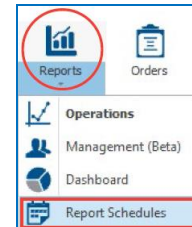
2. In the ribbon toolbar select **Add / Fleet** and then choose the report you want to schedule.

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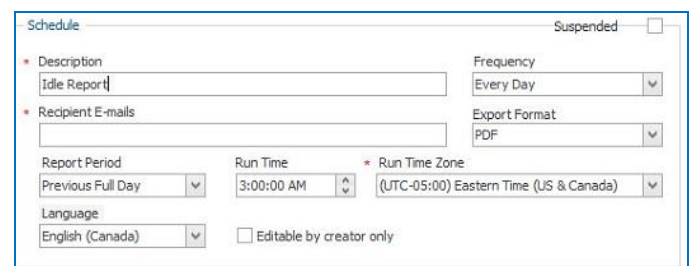
Note: to edit the reports layout, highlight the scheduled report and either double-click or click the Edit button. For more information, refer to the *Adjusting the Report Layout* section on page 1.

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 ⑦ button from the Quick Access toolbar and review the *About Operations Reports* help topic.