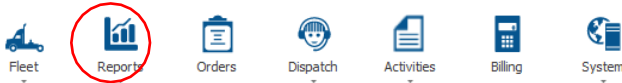# Working with Reports

RUNNING A REPORT
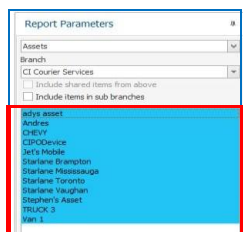
1. From the main toolbar, select **Reports**.

Fleet | Reports | Orders | Dispatch | Activities | Billing | System

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

Tracking | Reports - Operations
Report | Show on Map
Report Parameters
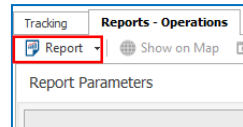
3. From the list, select the report that you want to generate.

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.
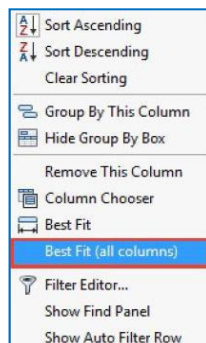
Report Parameters
Assets
Branch
CI Courier Services
Include shared items from above
Include items in sub branches
Adys asset
Andres
CHEVY
CIPODevice
Jet's Mobile
Starlane Brampton
Starlane Mississauga
Starlane Toronto
Starlane Vaughan
Stephen's Asset
TRUCK 3
Van 1

Date From | Date To
15/02/2015 | 15/02/2015
Work Hours
Any Time
Minimum Idle Time (minutes)
Get Data
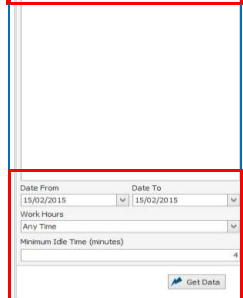
5. Click **Get Data**.

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)**.

Sort Ascending
Sort Descending
Clear Sorting
Group By This Column
Hide Group By Box
Remove This Column
Column Chooser
Best Fit
Best Fit (all columns)
Filter Editor...
Show Find Panel
Show Auto Filter Row

MOVING A COLUMN HEADER

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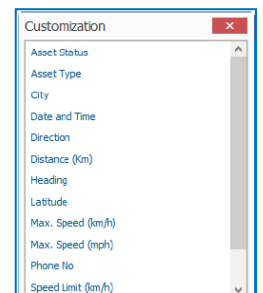2. Drag it to its new location within the other columns.

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.

Date and Time	Speed Limit (mph)	Distance (Mi)	Heading	D
13/01/2015 10:28:57 AM	31	0	0	
15/02/2015 12:47:04 PM	30	0	62	N

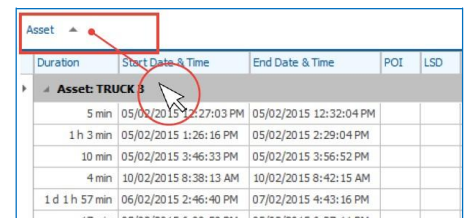### ADDING A COLUMN THAT WAS REMOVED FROM VIEW

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.

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)

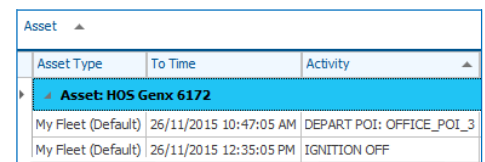### SORTING THE REPORT BASED ON A PARTICULAR COLUMN

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.

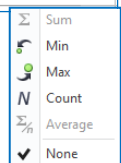| Asset				
Duration	Start Date & Time	End Date & Time	POI	LSD
◢ Asset: TRUCK 3				
5 min	05/02/2015 12:27:03 PM	05/02/2015 12:32:04 PM		
1 h 3 min	05/02/2015 1:26:16 PM	05/02/2015 2:29:04 PM		
10 min	05/02/2015 3:46:33 PM	05/02/2015 3:56:52 PM		
4 min	10/02/2015 8:38:13 AM	10/02/2015 8:42:15 AM		
1 d 1 h 57 min	06/02/2015 2:46:40 PM	07/02/2015 4:43:16 PM		

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.

Asset		
Asset Type	To Time	Activity
◢ Asset: HOS Genx 6172		
My Fleet (Default)	26/11/2015 10:47:05 AM	DEPART POI: OFFICE_POI_3
My Fleet (Default)	26/11/2015 12:35:05 PM	IGNITION OFF

Σ Sum
Min
Max
N Count
Σ/n Average
✔ None

**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.
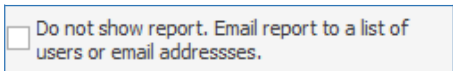
3. Click **Get Data.**

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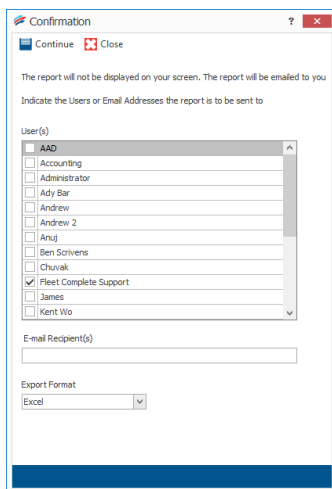
Tip! You can type multiple addresses by separating them with a semi-colon.

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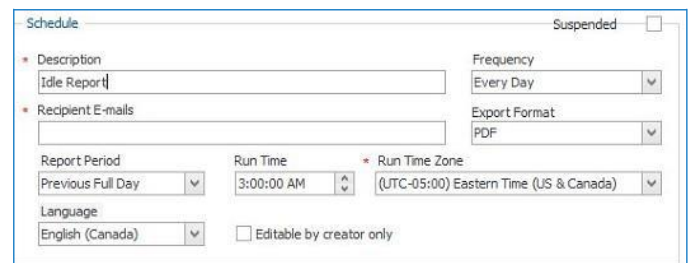
Note: to edit the reports layout, highlight the scheduled report and either double-click or click the Edit button. For more information, refer to the *Adjusting the Report Layout* section on page 1.

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.