Scheduling a Report

The following properties are available for all scheduled reports. Depending on the scheduled report type you create, additional properties vary.

Option	Description
Vehicle	The vehicles that apply to the report. Available choices include: All Vehicles, individual vehicles, vehicle groups, and/or vehicle hierarchies. The vehicle name and/or vehicle group (if applicable) will be visible in the report.
Schedule	The frequency of the scheduled report. Available choices include system and custom schedules. (See below.)
Email Subject	The subject as it will appear in the email message. The subject line is always followed by the vehicle name, group, or hierarchy and the date in parentheses.
Addresses*	The email address(es) where the report will be sent. Separate values by commas. If you select a hierarchy node in the Vehicle option, the Addresses defaults to use an address attribute hierarchy (if available). You can override the hierarchy list from the drop-down.
Custom Parameters	Scheduled report types vary. Refer to the report description for details.
Email Body	Choose which format(s) you want to allow. Choosing both options allows the recipient's mail client to decide how to display the message. (Plain text does not use colors, graphics, or hyperlink display names.)
Attachments	Two copies of the report (HTML and CSV formats) are sent with the email body.
Delivery	Select the **Don't send empty reports** check box if you want to receive reports *only* when there is data in them. On the other hand, some people like to see positive confirmation that no one was speeding, idling, etc. during a day, in which case they prefer a blank report.
Active	Temporarily turn on/off the scheduled report. To specify a date range for activation, modify the report's schedule.

> **Note.** *Contact Support if you need to configure delivery of scheduled reports to your FTP server. Include the portal usernames of the users whose reports should be sent to the server, the FTP server name, the FTP username, and the FTP password. When set up is confirmed, enter "ftp" as a recipient in the Addresses field of any scheduled report.

Set Scheduled Report Settings

Prior to scheduling a report, set your Scheduled Report settings from the Portal home page. These settings apply to all scheduled reports regardless of selected report type.

To set Scheduled Report settings:

Scheduling a Report

1. From the Portal home page, click on the **change user preferences** button.
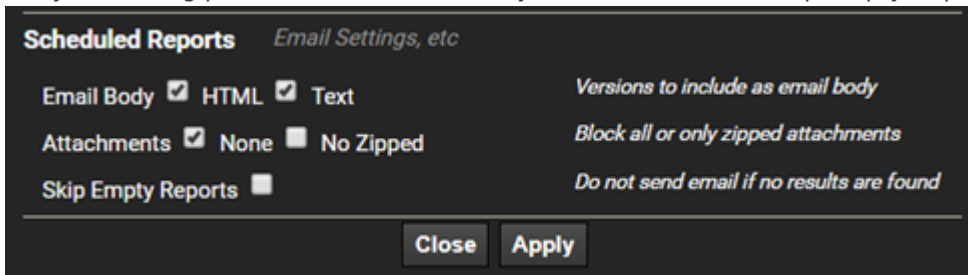

The User Preferences menu appears. Scheduled Report settings are displayed at the bottom of the menu.

> **Note.** You may need to scroll down to see the Scheduled Report settings section.

2. Set your setting preferences for Email Body, Attachments, and Skip Empty Reports.

3. Click **Apply**.

   Your settings are saved and the User Preferences menu automatically closes.

Scheduling a Report

Schedule a Report

You can create an unlimited number of scheduled report configurations for each report type, and you can customize the schedule (frequency) for each one.

> **Note.** In order to manage scheduled reports, you must have the Manage Reports menu item enabled in the Menu Access List. Some reports (like Metrics) are also schedulable from the related administrative page.

> **E X A M P L E**
> Company XYZ's owner wants each fleet manager to receive daily drive time summary reports for their fleets (one for Delivery vehicles and one for Service vehicles).

To create a new Drive Time Summary scheduled report

1. From the portal, hover over the **Account** menu, click **Manage Scheduled Reports**, and click **Open**.

   The Scheduled Reports page opens in a new browser tab.

1. From the Report List grid, click **New Scheduled Report** (green plus sign) next to the report you want to create. In the Company XYZ example, we choose the "Drive Time Summary" report.

> **Note.** You can also invoke a new scheduled report from within an existing report window ("Schedule This" button).

1. In the Setup Scheduled Report window, choose the vehicle, group, or hierarchy you want to include in the report. In the Company XYZ example, we chose the "Service" group.
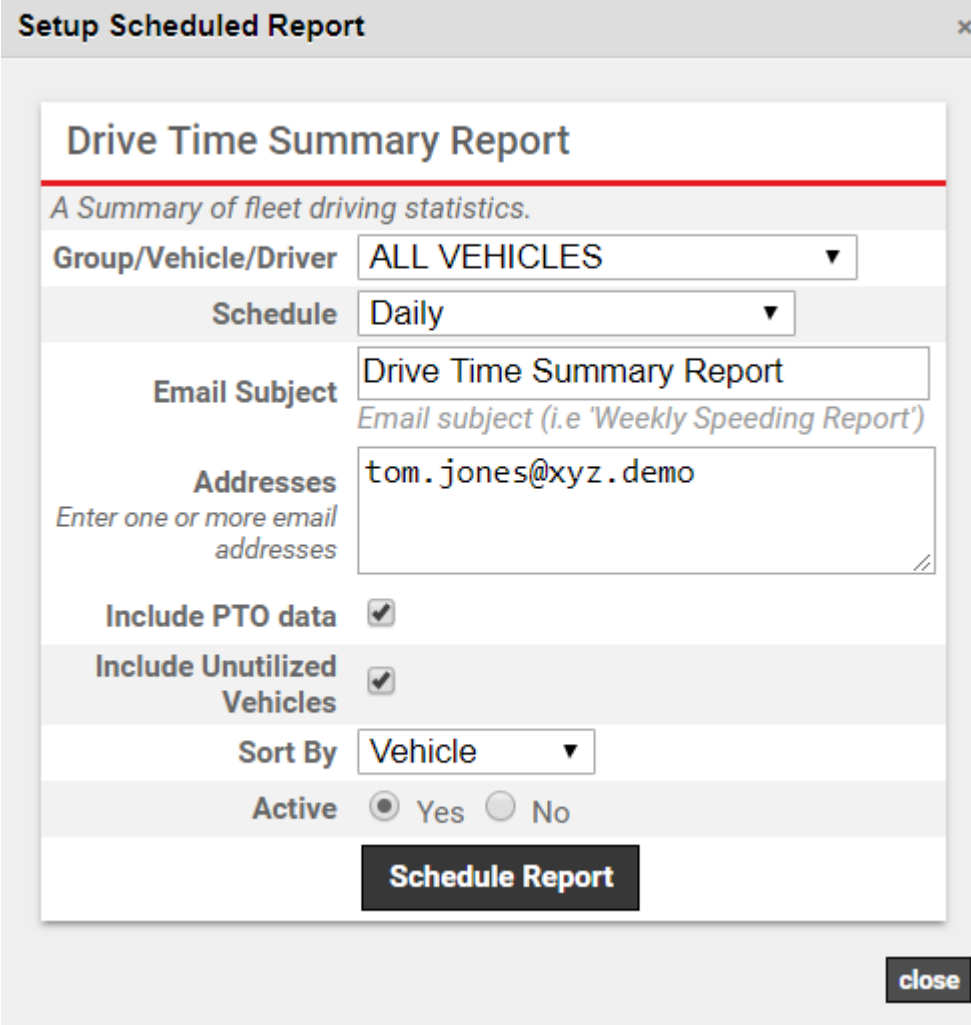
   > **Note.** You may be able to select Driver, depending on the report type selected.

2. Modify the **Schedule** (frequency) as needed. In the Company XYZ example, we chose "Daily."

3. Modify the **Email Subject** as needed.

4. Enter the email address(es) of the person(s) who should receive the report.

Scheduling a Report

> **Note.** If your account includes hierarchy, you can create and assign email hierarchy attributes.

1. Choose your preference for including PTO (Power Take-Off) data in the report.

2. Choose your preference for including Unutilized Vehicles data in the report.

3. Choose your sort preference for how you want data to be grouped in the report. We chose "Vehicle."

4. Leave the defaults selected for the Active setting.

1. Click **Schedule Report**.

The report appears in the Scheduled Reports grid. The status is temporarily set to pending. (The next scheduled date populates when you refresh the screen.)

In the Company XYZ example, the owner should repeat the steps to create a second Drive Time Summary scheduled report, this time choosing the "Delivery" group and specifying the Delivery Manager's email address.

> **Tip!** If you have advanced reporting distribution needs and don't want to manage multiple scheduled reports per group, consider using hierarchies (if available to your account).

When the report is delivered, the data appears within the email body. Attachments are available in HTML and CSV formats. (Some reports also include a KML file for plotting points in Google Earth.) Most reports also have the option to re-run the report, which runs it live within the system in case you want to interact with the report data (e.g., create a landmark or re-sort).

Fleet Drive Time Summary Overview »

Total Distance	2,835.4 mi. (18.3 mi. avg)	Max Speed	92 mph (33 mph avg)
Total Engine Hours	166.71 hrs (1.08 hrs avg)	Sorted By	Vehicle
Total Idle Time	67.53 hrs (26 min avg)	Vehicle Group	ALL VEHICLES (155 vehicles)
Total Stops	428 stops (3 stops avg)	Vehicles Shown	155 of 155 (100%)
Earliest Start Time		Report Time Period	Nov 6 12:00 AM to 11:59 PM
Latest Stop Time	Nov 7, 2018 5:32:00 AM	Report Created	November 7, 2018 8:26:21 AM

* Driven is the number of distinct days on which the vehicle operated. (not restricted by odd-hours)

* Total Idle Time is based on a 5 minute minimum threshold.

- Re-run Report

Fleet Drive Time Summary Report »
Vehicle Group: ALL VEHICLES

Vehicle	Driver	Driven	Stops	Distance	Idle Time	Travel Time	First Start Time	Last Stop Time	Max Speed	Avg Speed	Last Update
2323		0 days	0	0.0 mi.	0 min	0 min			0 mph	0 mph	Aug 22 12:01 PM
8000		1 day	2	36.5 mi.	0 min	55 min	Nov 6 7:33 AM	Nov 6 4:52 PM	80 mph	40 mph	Nov 7 8:05 AM
8000-SAMs		0 days		0.0 mi.					0 mph	0 mph	Nov 7 8:26 AM
8002-01		0 days	0	0.0 mi.	0 min	0 min			0 mph	0 mph	Jun 26 4:27 PM
8002-02		0 days	0	0.0 mi.	0 min	0 min			0 mph	0 mph	Jun 25 2:16 AM
8002-03		1 day	6	78.4 mi.	23 min	2 hrs, 23 min	Nov 6 7:14 AM	Nov 6 10:23 PM	91 mph	39 mph	Nov 7 7:14 AM
8002-04		1 day	6	5.9 mi.	49 min	1 hour, 17 min	Nov 6 8:49 AM	Nov 6 5:33 PM	42 mph	15 mph	Nov 7 3:03 AM
8003		1 day	5	32.5 mi.	4 min	1 hour, 14 min	Nov 6 8:20 AM	Nov 6 7:07 PM	63 mph	27 mph	Nov 7 8:24 AM
8004-01		1 day	17	107.1 mi.	16 min	3 hrs, 56 min	Nov 6 5:40 AM	Nov 6 6:25 PM	78 mph	28 mph	Nov 7 8:22 AM
8004-03		1 day	7	142.7 mi.	6 min	2 hrs, 54 min	Nov 6 6:21 AM	Nov 6 10:02 PM	88 mph	47 mph	Nov 7 8:25 AM
8004-04		1 day	5	118.5 mi.	54 min	4 hrs, 13 min	Nov 6 7:30 AM	Nov 6 11:50 PM	85 mph	36 mph	Nov 7 8:05 AM

> **Note.** Scheduled reports come from the address report@[provider].com. Ensure messages sent from this address are not caught in your email filter.

Create a Custom Schedule

For each report you want to schedule, you must specify the schedule (frequency). The portal provides the following system schedules:

- Daily

- Quarterly (January, April, July, October)

- Daily (weekdays)

- Daily (weekends)

- Monthly

- Weekly

- Weekly (weekdays)

- Weekly (weekends)

If one of the system schedules doesn't meet your needs, you can create a custom schedule.

> **E X A M P L E   S C E N A R I O**
> Company XYZ provides a monthly bonus to the driver with the lowest idle time. Rather than use the system monthly schedule, which reports on the 1st of each month, this report schedule must be generated by the 25th of each month in order to coincide with payroll's process for bonus payouts.

To create a custom schedule

1. From the portal, hover over the **Account** menu, click **Manage Reports**, and click **Open**.

   The Scheduled Reports page opens in a new browser tab.

1. At the bottom of the Schedule List grid, click **Schedule** next to Create New.
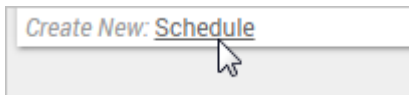
   The Define New Recurrence Pattern window appears.

1. Click the tab that best matches your recurrence pattern. In the Company XYZ example, we chose "Monthday."

2. In the **Day(s)** box, enter the day of the month to send the report, and tab out of the field. In the Company XYZ example, we chose "25."

   The calendar shows an updated preview of the new schedule. The reports will be run on dates shown in bold and delivered on dates highlighted in red. Notice in the following example, we are only reporting on one day (the 24th).

Scheduling a Report

1. Set the **Span** option to report on **month(s)** instead of day(s) so that the calendar shows all days.

1. Modify the report time as needed. The default is set to 3:00 AM.

2. Enter a name for the schedule (e.g., Monthly – bonus), and click **Save As**.

The new schedule appears in the Schedule List grid. You can now use it on a scheduled report.

Scheduling a Report

Delete or Inactivate a Scheduled Report

If a scheduled report is no longer needed, you can delete it or inactivate it. Deleting a scheduled report permanently removes the settings. Inactivating a scheduled report keeps the settings and prevents you from having to recreate them if you ever have the need for them again. You can manually inactivate a scheduled report, or you can tell the system to automatically inactivate a scheduled report after a specified date (defined by the associated schedule).

> E X A M P L E   S C E N A R I O
> Company XYZ is reorganizing its fleet. During the transition period, XYZ's owner wants to temporarily inactivate the daily drive time summary reports for their fleet managers.

To inactivate a scheduled report:

1. From the portal, hover over the **Account** menu, click **Manage Reports**, and click **Open**.

   The Scheduled Reports page opens in a new browser tab. The Scheduled Reports grid shows all the scheduled reports that you have created. By default, only active scheduled reports appear in the grid.
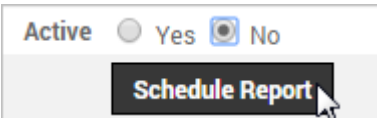
> **Note.** Portal administrators can see all scheduled reports by all account users.

1. From the Scheduled Report grid, locate the scheduled report you want to modify, and click **Edit** (pencil icon).

> **Tip!** Alternatively, you can click Delete, which also gives you the option for inactivating the scheduled report.

1. In the Setup Scheduled Report window, set the **Active** option to **No**.

> **Tip!** To specify a date range for automatic activation, modify the report's schedule.

More reference materials:

- Scheduled report not working? View Managing User Access.