




Quick Reference Card

Working with Report Schedules

OVERVIEW

In the *Reporting* module, Report Schedules allow you to schedule reports and automatically email them to the appropriate recipient(s) at set frequencies

ACCESS REPORT SCHEDULES

1. Log in to Fleet Complete
2. From the *Tracking* screen, click the **Menu Bar** icon on the top left-hand corner to access the Navigation Panel 
3. Click the **Reporting** menu item
4. Click the **Report Schedules** submenu item

REPORT SCHEDULE LAYOUT

In the *Report Schedule* Screen, all existing **Report Schedules** are listed and organized into the following sections:

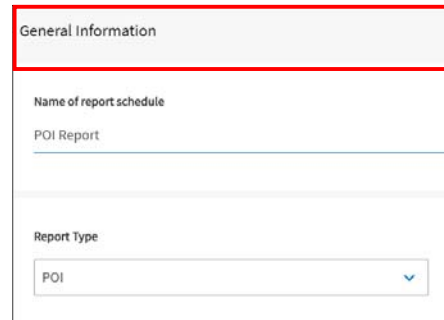
- Report Schedule Name
- Report Type
- Frequency and Run Time
- Report Period and
- Status of Last Run

| Report Schedule | Report Type | Frequency and Run Time | Report Period | Status of Last Run |
|--------------------|-----------------|------------------------|---------------|--------------------|
| CURRENT DAY - Alex | Activity custom | Every Day 5:30 pm | Current Day | Succeeded |
| Current Month | Activity custom | Every Thursday 3:30 pm | Current Month | Succeeded |
| Current Week | Activity custom | Every Day 3:30 pm | Current Week | Succeeded |

ADD A REPORT SCHEDULE

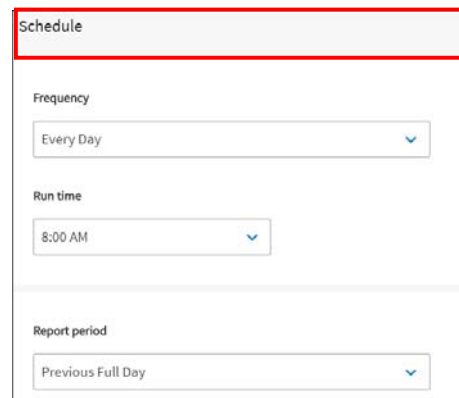
1. Complete steps 1-4 from **Access Report Schedules**
2. On the *Report Schedules* Screen, click the **Add New Report Schedule** button on the top right-hand corner

3. In the *Report Schedule* screen, on the **General Information** section, type the name of the report schedule as it will appear in the subject line of the email
4. Click the **Report Type** drop-down menu and select the Type of Report that you would like to schedule



5. In the **Schedule** section, click the **Frequency** drop-down menu and from the available options select how often you want the report to be emailed
6. Click the **Run Time** drop-down menu and select a preferred time when you want the report to be emailed
7. Click the **Report Period** dropdown menu and select the period you want to include in the Report

Note: The Frequency and the Report Period of a report schedule should be logical. For example: if you want a report to be sent to you every **First Day of the Month**, then the **Report period** will need to be the Previous Full Month.

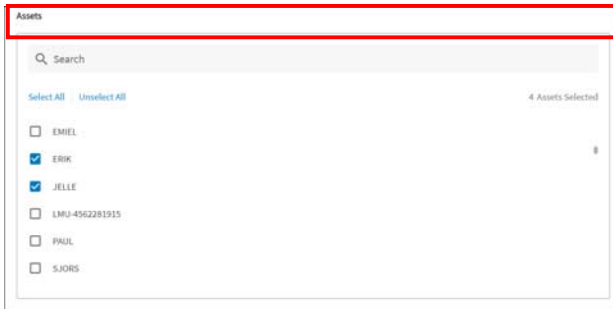


8. In the **Assets** section, click the **Asset Types** drop-down menu and select the checkboxes next to the Asset type(s) you wish to include in the report
9. Alternatively, click the checkboxes next to the **Asset description(s)** that you want to include in the report, or



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10. Click the **Select All** button to assign all your assets to the schedule
11. Click the **Unselect All** button to unselect the Assets, if necessary

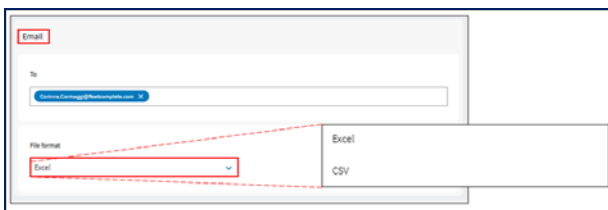


Note: Depending on the type of report you are scheduling, you will need to define the corresponding parameters/restrictions. For Example, for a POI Report, you can define Work Hours, POI Category and Minimum duration.

12. In the the **Email** section, type one or more email addresses in the **To** field that you want to send the scheduled reports to

Note: To add more than one email address, type a Semi-Colon to separate one email from another.

13. Click the **File Format** drop-down menu and select between **Excel** or **CSV** to email the Report in the preferred format



14. Click the **Save** button on the top right-hand corner of the *Report Schedule* screen to save the New Report Schedule



TO LEARN MORE ABOUT REPORT SCHEDULES

To learn more about Report Schedules, click the **Help** button located in the top right-hand corner of the application and perform a keyword search.