

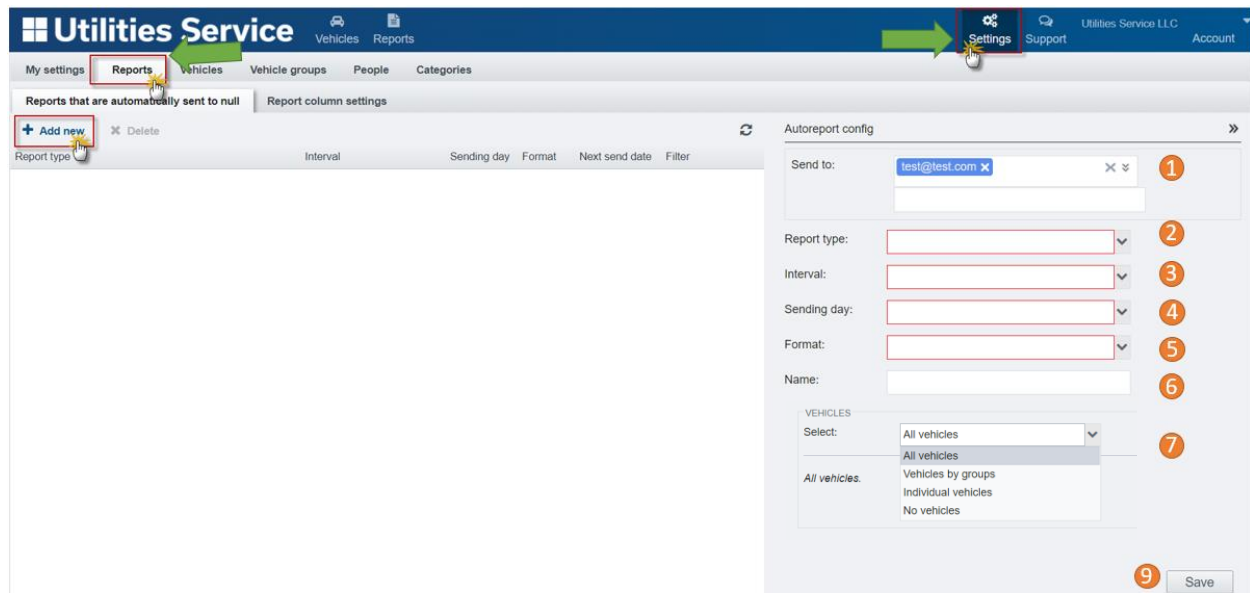


ADMIN USERS - AUTO- CONFIGURATION REPORTS

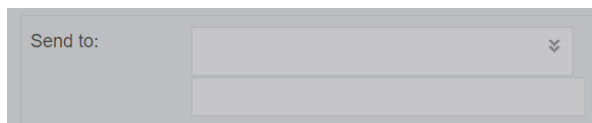
NOVEMBER 2020

Settings Module > Reports tab

Limited Admin users have access to the **Reports** tab in **Settings** module. Reports can be configured to be automatically sent to users. Follow the steps below to create an automatically sent email with a report attached, at a specified interval and day of the week.



1. **Send to:** Use the drop-down arrow to select recipients. By default the report will be sent to you, include one or many recipients.



2. Report type:

Use the drop-down arrow to select a report from the list.

For steps to create the Utilserv co-location report skip to step 6 and include step 7.

All of the Reports in the drop-down list follow steps 3 to 6, skip step 7 and finish with step 8.

- Journal report
- Events list
- Events report
- Jobs in areas
- Jobs in areas simple
- User login report
- Speed limit violations
- Default
- Vehicle list
- Utilserv co-location report
- Utilserv fuel mismatch report
- Utilserv miles per state
- Utilserv vehicle history report
- Installed - Not Reporting
- Utilserv hierarchy

Report Type definitions:

Driving behavior test: List of vehicles, driving distance and the associated safety driving KPIs by day.

Safety miles: Individual miles driven by vehicle by day.

Utilserv miles per state: Summary of miles driven by vehicle for given date or range provided.

Utilserv period report*: Report listing the vehicle and KPIs for a given time period.

Utilserv vehicle history report: Listing of vehicles and the associated events triggered for the given time period.

Utilserv co-location report: Listing of the GF visits with crews or show-up locations, calculating the visit time and comparison against goal.

Jobs in Areas: can be utilized to investigate the occurrences of a vehicle passing through or stopping within an Area (Marker) address. The report can be broken down by Area (address), Area Group (category) and/or individual vehicle. The report contains the enter and exit times of the Area, distance within the Area, time within the Area, as well as ignition status/time.

3. Interval: Select the appropriate historical interval from the drop-down list.

- daily for previous day
- daily for current week
- weekly for previous week
- monthly for previous month

- Every day
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

- 1
- 2
- 3
- 4
- 5
- 6

4. Sending day: Which day of the week to begin the reporting.



5. **Format:** Select the format of the report to attach to the email. Co-location report is only available in Excel. All others send as PDF if available.

A dropdown menu for selecting the report format. The options are PDF, HTML, Excel, and CSV. The 'Excel' option is highlighted with a red box.

6. **Name:** Important to add a unique name to the report . For example, type GF XXXX, Utilserv colocation report weekly into the text box. This will be the name that will show up in the subject line each time the report is sent via email and the name of the report attachment.

7. **Vehicles:** Select which vehicles to report on by using the drop-down arrow to then use the list to choose all vehicles, vehicles by groups or individually. For example, choose vehicles by group and then select a GF folder to report on.

A form titled 'VEHICLES' with a 'Select:' dropdown menu. The dropdown menu is open, showing options: All vehicles, Vehicles by groups (highlighted with a red box), Individual vehicles, and No vehicles. There is a 'Save' button at the bottom right.

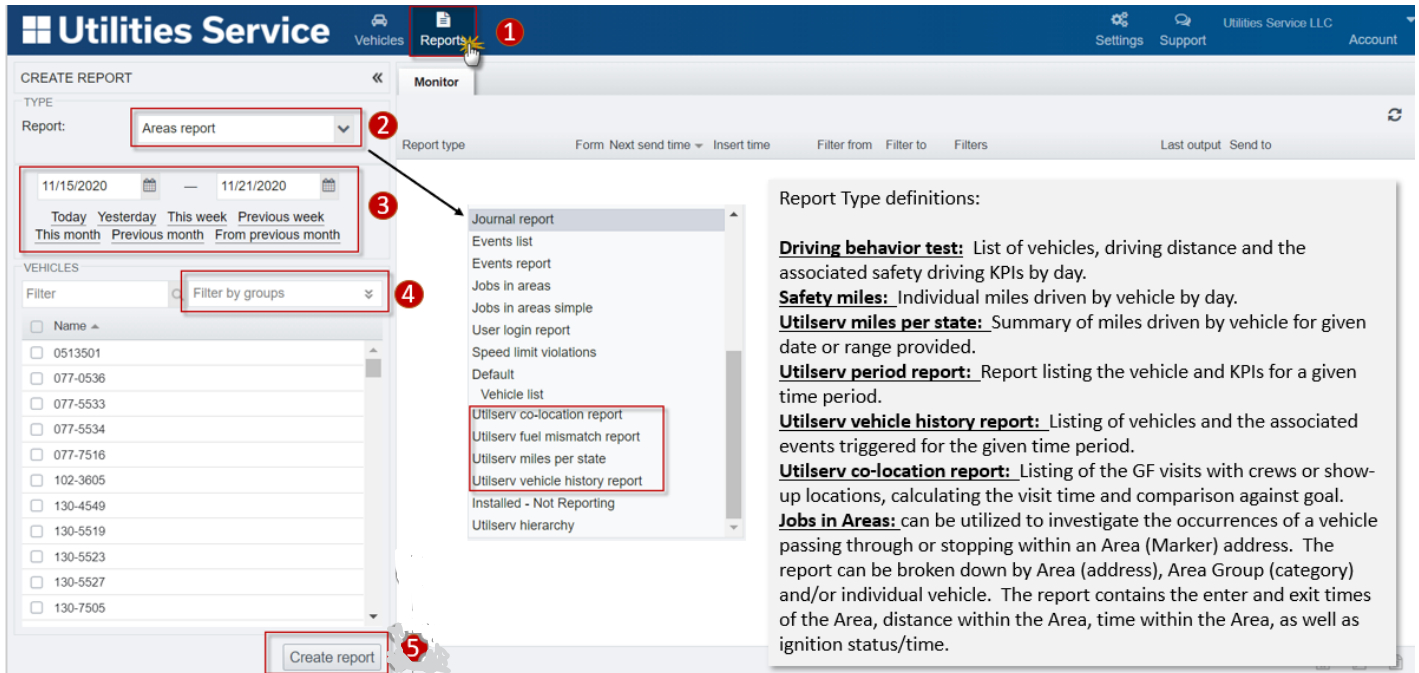
8. **Parameters for the Utilserv co-location report only:**

A form titled 'PARAMETERS' for configuring the Utilserv co-location report. It includes fields for: Hierarchy level (dropdown), Minimum co-location stop length (minutes) (5), Co-location radius (ft.) (500), Override dashboard (checkbox), Goal hours (3), Working hours (06:00 to 18:00), and Working days (checkboxes for Monday through Sunday, with Monday through Friday checked). There is a 'Save' button at the bottom right.

9. Save to complete the report auto-configuration.

Generate an ad-hoc report:

1. Click on Reports from the header menu
2. Choose a type of report from the drop-down list
3. Select the date range for the report or use one of the pre-det dates
4. Select a group to report on by using the drop-down arrow and selecting from the list
5. Click on create report



The screenshot shows the 'Utilities Service' interface. At the top, the 'Reports' menu is highlighted with a red box and a red circle with the number 1. Below the header, the 'CREATE REPORT' section is visible. The 'Report:' dropdown is set to 'Areas report' and is highlighted with a red box and a red circle with the number 2. To the right of the dropdown, the 'Report type' section is open, showing a list of report types. The 'Utiliserv vehicle history report' is highlighted with a red box and a red circle with the number 3. Below the report type list, the 'VEHICLES' section is visible. The 'Filter by groups' dropdown is highlighted with a red box and a red circle with the number 4. At the bottom of the 'CREATE REPORT' section, the 'Create report' button is highlighted with a red box and a red circle with the number 5.

Report Type definitions:

- Driving behavior test:** List of vehicles, driving distance and the associated safety driving KPIs by day.
- Safety miles:** Individual miles driven by vehicle by day.
- Utiliserv miles per state:** Summary of miles driven by vehicle for given date or range provided.
- Utiliserv period report:** Report listing the vehicle and KPIs for a given time period.
- Utiliserv vehicle history report:** Listing of vehicles and the associated events triggered for the given time period.
- Utiliserv co-location report:** Listing of the GF visits with crews or show-up locations, calculating the visit time and comparison against goal.
- Jobs in Areas:** can be utilized to investigate the occurrences of a vehicle passing through or stopping within an Area (Marker) address. The report can be broken down by Area (address), Area Group (category) and/or individual vehicle. The report contains the enter and exit times of the Area, distance within the Area, time within the Area, as well as ignition status/time.