



Vision Pro™: Reporting Overview

Reference Guide

POWERFLEET®
People Powered IoT

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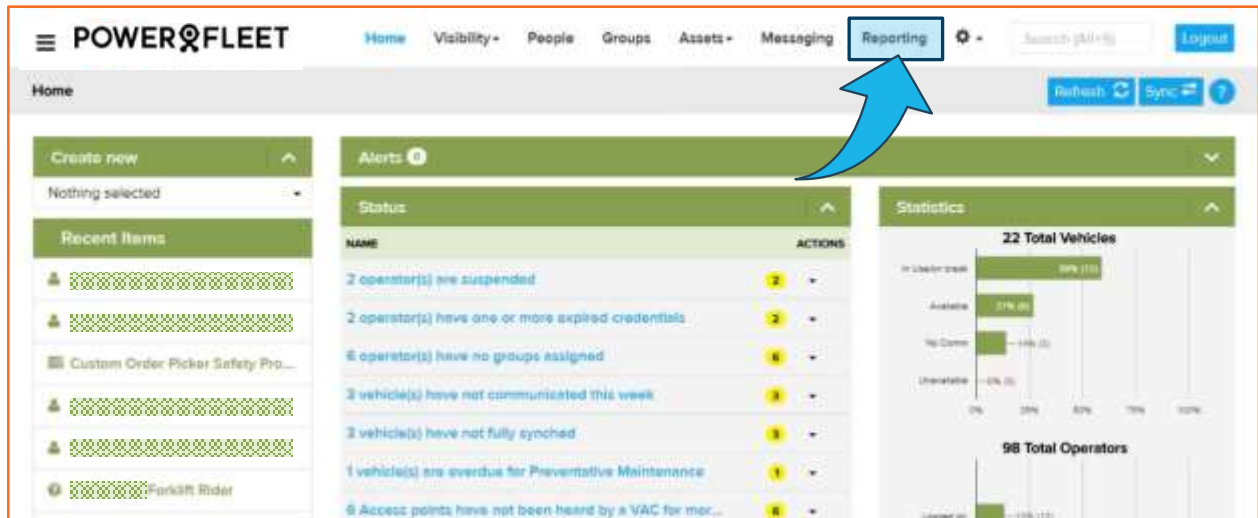
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NAVIGATING REPORTS

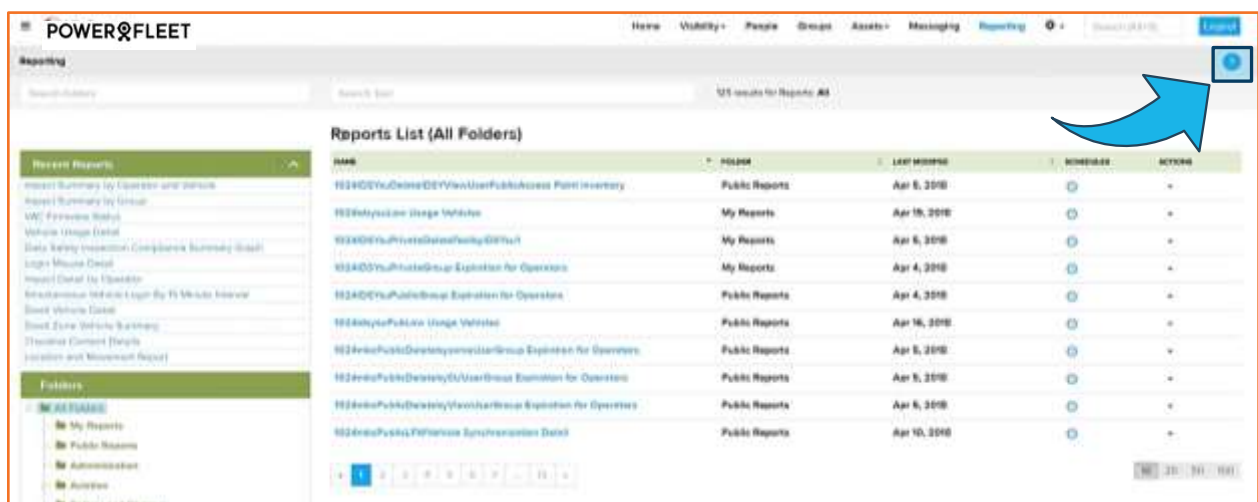
Accessing the Reporting Main Page

To access reports from the Home page, select Reporting from the global navigation bar at the top of the page.



Vision Pro Online Help

For detailed information about the Reporting main page, click the question mark icon to access the [Vision Pro Online Help Knowledge Base](#).



Reporting Main Page | Reports List

On the Reporting main page, the **Reports List** displays a list of all available reports.

| NAME | FOLDER | LAST MODIFIED | SCHEDULE | ACTIONS |
|--|----------------|---------------|----------|---------|
| H124GDSysOnlineGDSViewUserPublicAccess Point Inventory | Public Reports | Apr 5, 2018 | 🕒 | ✖ |
| H124GDSysOnlineGDSViewUserPublicAccess Point Inventory | My Reports | Apr 18, 2018 | 🕒 | ✖ |
| H124GDSysOnlineGDSViewUserPublicAccess Point Inventory | My Reports | Apr 5, 2018 | 🕒 | ✖ |
| H124GDSysOnlineGDSViewUserPublicAccess Point Inventory | My Reports | Apr 4, 2018 | 🕒 | ✖ |
| H124GDSysOnlineGDSViewUserPublicAccess Point Inventory | Public Reports | Apr 4, 2018 | 🕒 | ✖ |
| H124GDSysOnlineGDSViewUserPublicAccess Point Inventory | Public Reports | Apr 16, 2018 | 🕒 | ✖ |
| H124GDSysOnlineGDSViewUserPublicAccess Point Inventory | Public Reports | Apr 5, 2018 | 🕒 | ✖ |
| H124GDSysOnlineGDSViewUserPublicAccess Point Inventory | Public Reports | Apr 5, 2018 | 🕒 | ✖ |
| H124GDSysOnlineGDSViewUserPublicAccess Point Inventory | Public Reports | Apr 10, 2018 | 🕒 | ✖ |

Report names appear as hyperlinks. Clicking on the report name will run the report in its **As Saved** configuration. This means the report data will run in its native form, reflecting the timeframe when the report was last saved, and including any filters applied to the report at that time.

As you navigate, search, and filter through your reports and reports folders, the **Reports List** will update to display those results.

Reports List (All Folders)

NAME

- [Checklist Completed Detail by Group](#)
- [Lockout Trend](#)
- [Checklist Critical Warning Response](#)
- [Checklist Issue Trend](#)
- [Checklist Non-Compliance Event Details](#)
- [Checklist Profiles](#)
- [Checklist Warning Critical Response](#)
- [Compliance Shift Configuration](#)
- [Current Location & Status Snapshot](#)
- [Current Location and Status Snapshot](#)

Reporting Main Page | Recent Reports

| Recent Reports |
|---|
| VAC Firmware Status Scott |
| Vehicle Health Verification |
| Impact Detail by Operator |
| System Change Audits |
| Usage Group Summary |
| Usage Period Assigned Vehicle Summary Top 10 Graph |
| Impact Daily Summary Graph by ext id with severity filter |
| Fault Code Details |
| Group Expiration for Operators |
| Lockouts and Releases Detail |

The **Recent Reports** section displays a list of the most recently generated reports. Having quick access to these reports is helpful if your role requires you to run the same report(s) on a regular basis, or you need to quickly re-run a report. Just locate the report, click on the hyperlink, and it will pull the data and run the report again.

Reporting Main Page | Folders

The **Folders** section contains a collection of default report folders built and maintained by PowerFleet that cannot be changed by local users.

However, the **Public Reports** and **My Reports** folders can be used as locations to save any report, including reports you edit and customize.

| Folders |
|--|
| <ul style="list-style-type: none"> All Folders My Reports Administration Aviation Battery and Charger Impact Maintenance Planning Messaging Operator Analysis Safety Compliance System Settings and Diagnostics Vehicle Analysis |

Reports saved in the Public Reports folder can be accessed by anyone who has access to your Vision Pro software site. Alternately, you can create, edit or customize reports and save them to the My Reports folder, a private location that cannot be accessed by other users.

Selecting a folder will result in the main Reports List displaying all reports found within that folder.

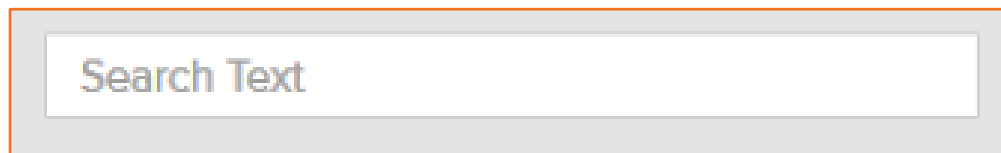
Reporting Main Page | Search Folders

The **Search Folders** filter allows you to search for specific report folders. Begin entering the name of a folder and results will automatically be displayed as you type.

A rectangular input field with a light gray border and a white background. The text "Search folders" is displayed in a light gray font, serving as a placeholder.

The Search Folders filter also finds reports based on the search term you enter. For example, if you enter the term "checklist," then all reports with the word "checklist" in the name and any reports in folders with the word "checklist" will be displayed.

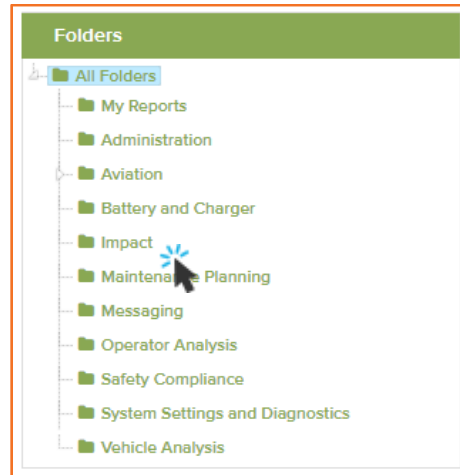
Reporting Main Page | Search Text

A rectangular input field with a light gray border and a white background. The text "Search Text" is displayed in a light gray font, serving as a placeholder.

The **Search Text** filter allows you to search for specific reports. Begin entering the name of a report or folder and results will automatically be displayed as you type.

Reporting Main Page | Filters | Combination Search

To perform a **Combination Search** of your reports, select a specific Report Folder...



...and enter keywords to filter by search terms found in the reports within that folder.

Reporting


Reporting Main Page | Reports List | Column Headers

The columns in the Reports List display the report:

- **Name**
- **Folder** where the report is located
- **Last Modified Date**
- **Schedules** icon
- **Actions** carat to access a drop-down menu

| NAME | FOLDER | LAST MODIFIED | SCHEDULES | ACTIONS |
|---|----------------|---------------|-----------|---------|
| 1024IDSYuDeleteIDSYViewUserPublicAccess Point Inventory | Public Reports | Apr 5, 2018 | 🕒 | - |
| 1024idsysuLow Usage Vehicles | My Reports | Apr 19, 2018 | 🕒 | - |
| 1024IDSYuPrivateDeleteTestbyIDSYu1 | My Reports | Apr 5, 2018 | 🕒 | - |
| 1024IDSYuPrivateGroup Expiration for Operators | My Reports | Apr 4, 2018 | 🕒 | - |
| 1024IDSYuPublicGroup Expiration for Operators | Public Reports | Apr 4, 2018 | 🕒 | - |

Reporting Main Page | Sorting the Reports List

You can sort the Reports List by clicking on the sort icons  in the **Name**, **Folder**, or **Last Modified** headers.



| NAME | FOLDER | LAST MODIFIED | SCHEDULES | ACTIONS |
|---|----------------|---------------|---|---------|
| 1024IDSysuDeleteIDSViewUserPublicAccess Point Inventory | Public Reports | Apr 5, 2018 |  | ✖ |
| 1024idsysuLow Usage Vehicles | My Reports | Apr 19, 2018 |  | ✖ |
| 1024IDSysuPrivateDeleteTestbyIDSysu1 | My Reports | Apr 5, 2018 |  | ✖ |
| 1024IDSysuPrivateGroup Expiration for Operators | My Reports | Apr 4, 2018 |  | ✖ |
| 1024IDSysuPublicGroup Expiration for Operators | Public Reports | Apr 4, 2018 |  | ✖ |

Reporting Main Page | Reports List | Schedules

Clicking on a **Schedules** icon opens a window that displays the corresponding report's assigned schedules.

| NAME | FOLDER | LAST MODIFIED | SCHEDULES |
|---|----------------|---------------|---|
| 1024IDSysuDeleteIDSViewUserPublicAccess Point Inventory | Public Reports | Apr 5, 2018 |  |
| 1024idsysuLow Usage Vehicles | My Reports | Apr 19, 2018 |  |
| 1024IDSysuPrivateDeleteTestbyIDSysu1 | My Reports | Apr 5, 2018 |  |
| 1024IDSysuPrivateGroup Expiration for Operators | My Reports | Apr 4, 2018 |  |
| 1024IDSysuPublicGroup Expiration for Operators | Public Reports | Apr 4, 2018 |  |

Here you can view existing schedules that have been created for the report. This window also allows you to quickly create a schedule for the report by clicking on the **+ Create schedule** button.

| Job Name | Owner | State | Last Run | Next Run | Enabled | |
|----------|-------|--------|------------------------|------------------------|---------|---|
| training | | NORMAL | 01-01-0001 12:00:00 AM | 05-08-2018 11:44:00 AM | Yes |   |

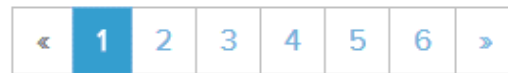
Reporting Main Page | Reports List | Actions

Select the carat icon in the **Actions** column to **Delete**, **Subscribe** to, or **Edit** the corresponding report.

| NAME | FOLDER | LAST MODIFIED | SCHEDULES | ACTIONS |
|---|----------------|---------------|-----------|---------|
| 1024IDSYuDeleteIDSYViewUserPublicAccess Point Inventory | Public Reports | Apr 5, 2018 | ⌚ | ⌵ |
| 1024IDSYuLow Usage Vehicles | My Reports | Apr 19, 2018 | ⌚ | ⌵ |
| 1024IDSYuPrivateDeleteTestbyIDSYu1 | My Reports | Apr 5, 2018 | ⌚ | ⌵ |
| 1024IDSYuPrivateGroup Expiration for Operators | My Reports | Apr 4, 2018 | ⌚ | ⌵ |
| 1024IDSYuPublicGroup Expiration for Operators | Public Reports | Apr 4, 2018 | ⌚ | ⌵ |

Reporting Main Page | Navigating the Reports List

The **page numbers** located in the lower left of the screen allow you to jump to a specific page. Use the << and >> arrows to advance to the beginning or end of the Reports List.

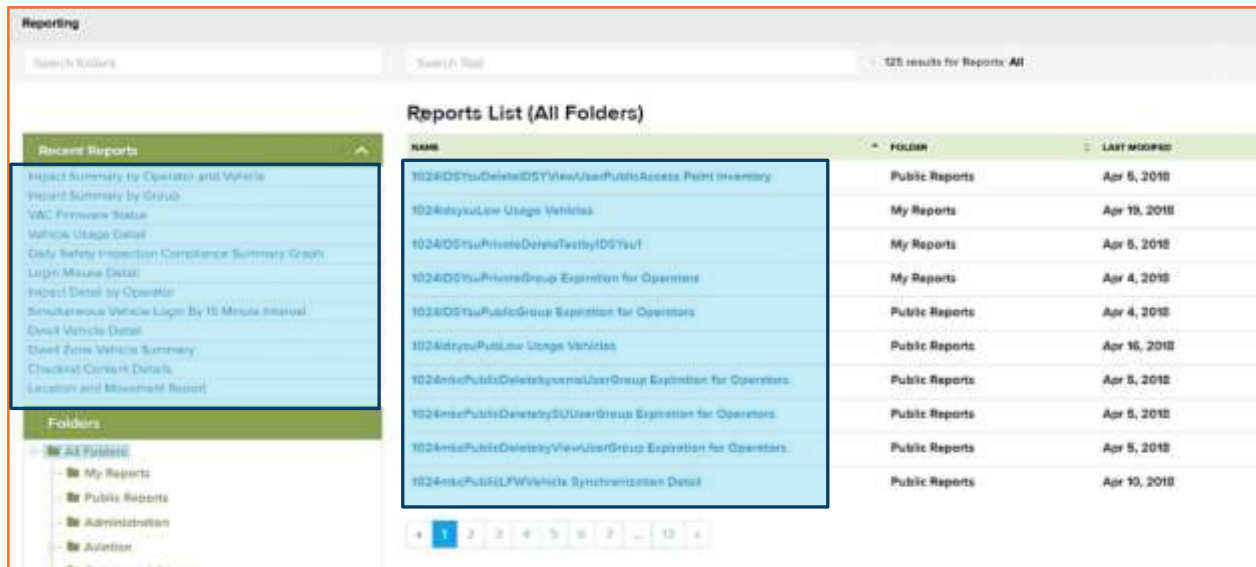


In the bottom right of the screen, you can select a **pagination button** to view 10, 25, 50 or 100 reports at a time.

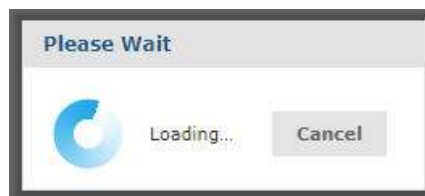
Running Reports | Reporting Main Screen

On the Reporting main screen, report names appear in the Recent Reports section and the Reports List as **hyperlinks**.

Click on the report name to run the report in its **As Saved** configuration.



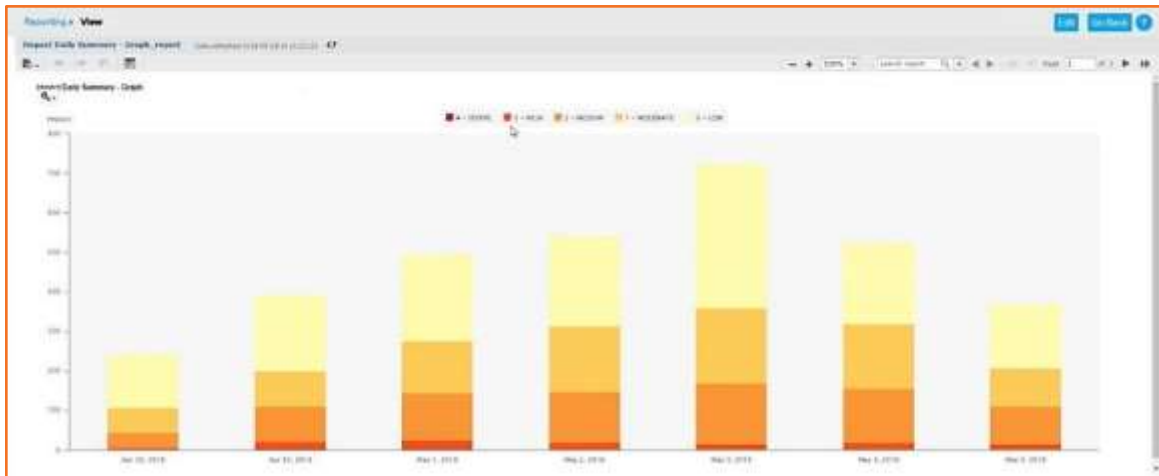
A load window will appear while the system collects information to display the requested report.



Depending on the report timeframe and the amount of data being pulled for the report, a report load times may vary but should not be excessively long.

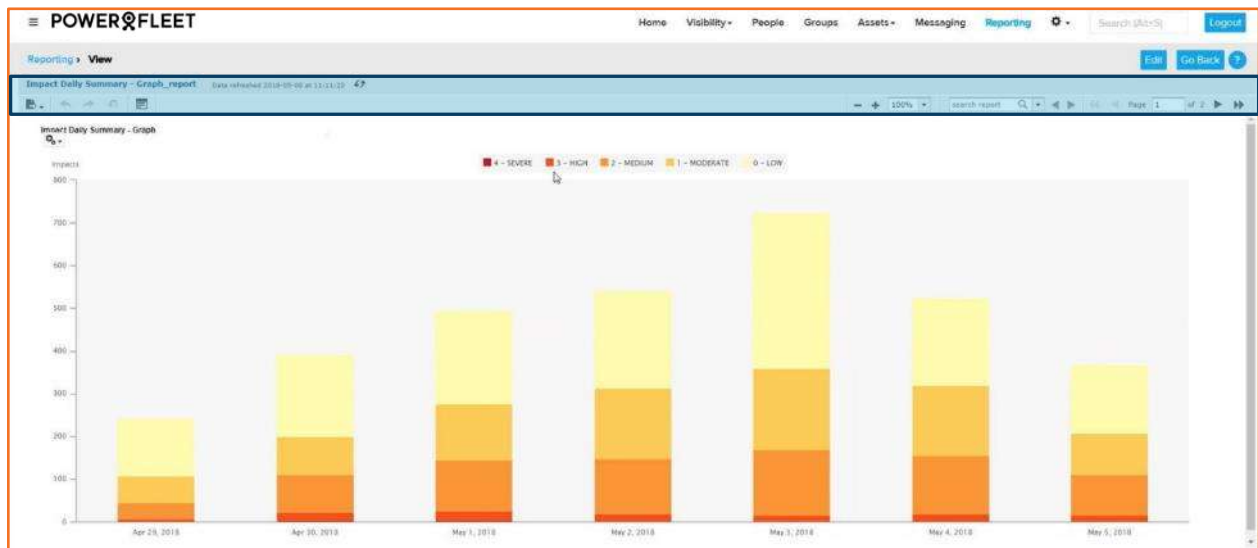
Running Reports | Report View

Running a report displays the most recently generated report data in the **Report View** screen. The Report View is designed to display report data in a presentable format that makes it easier for you to review and modify the report.



Running Reports | Report View Controls

A set of menu items and navigation controls sits above the report table.



The upper-left corner of the **Report View** displays the toolbar below:

Impact Summary by Day - Graph_report

Data refreshed 2021-11-03 at 11:39:24



The report type & the name of the report

Impact Summary by Day - Graph_report

Date and time when the report data was last refreshed

Data refreshed 2021-11-03 at 11:39:24



A button to refresh the report data



The upper-right corner of the **Report View** displays the toolbar below:



Zoom controls



Tools to navigate and search the report



The report's page count



Running Reports | Export Report

In the upper-left corner below the Report Name, the Report View displays the **Export Report** icon.



Click on the icon to access the Export Report tool and select the file format for your report.



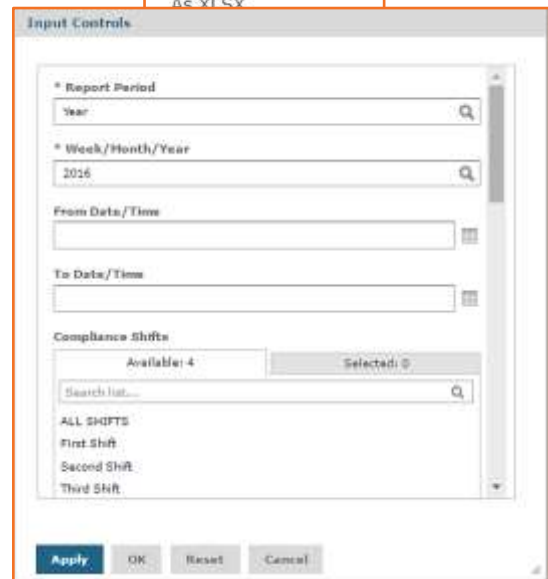
Running Reports | Input Controls

In the upper-left corner, below the Report Name, the Report View displays the **Input Controls** icon.



Click on this icon to access the Input Controls.

The **Input Controls** define the basic parameters of your report. This is where you can review settings for the reporting period timeframe, as well as the groups, shifts and default filters applied to the report. It's also where you can access advanced options for modifying your report.

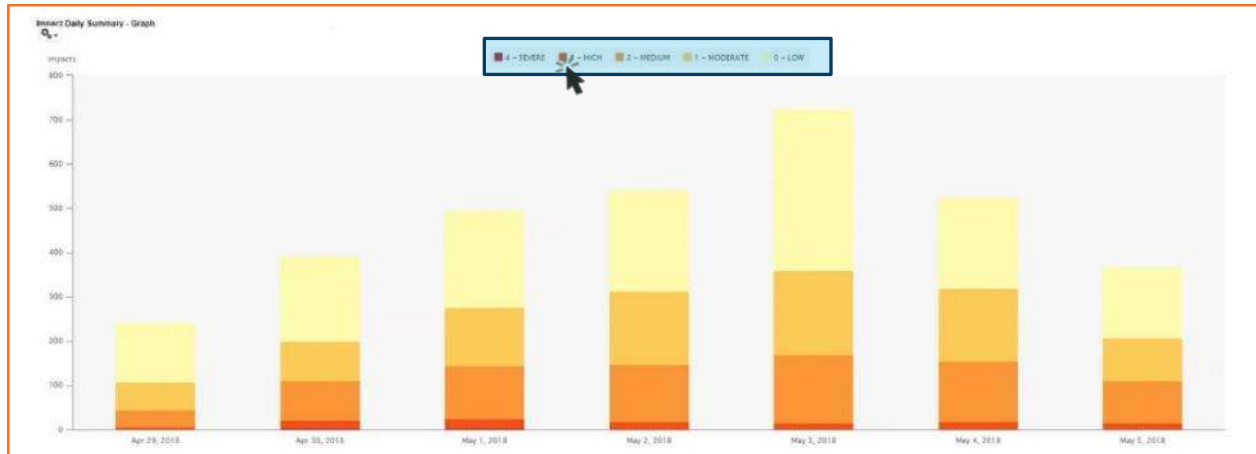


From the Input Controls window, you can customize a report by modifying its Report Period and default filters, as well as adding other filters such as **Vehicle Name** or **Operator Name**.

For instruction on using the **Input Controls** to edit and modify a report's parameters, see **Customizing Reports**.

Running Reports | Chart Report Values

Chart Reports with values displayed in the header can be dynamically updated by clicking on the sets you want to include or exclude from view.



Running Reports | Tabular Reports

In addition to the same tools and features available when you run a Chart Report, **Tabular Reports** give you access to a subset of additional editing and search capabilities, such as:

- conditional formulas
- column and table layout
- redisplaying the report as you make changes

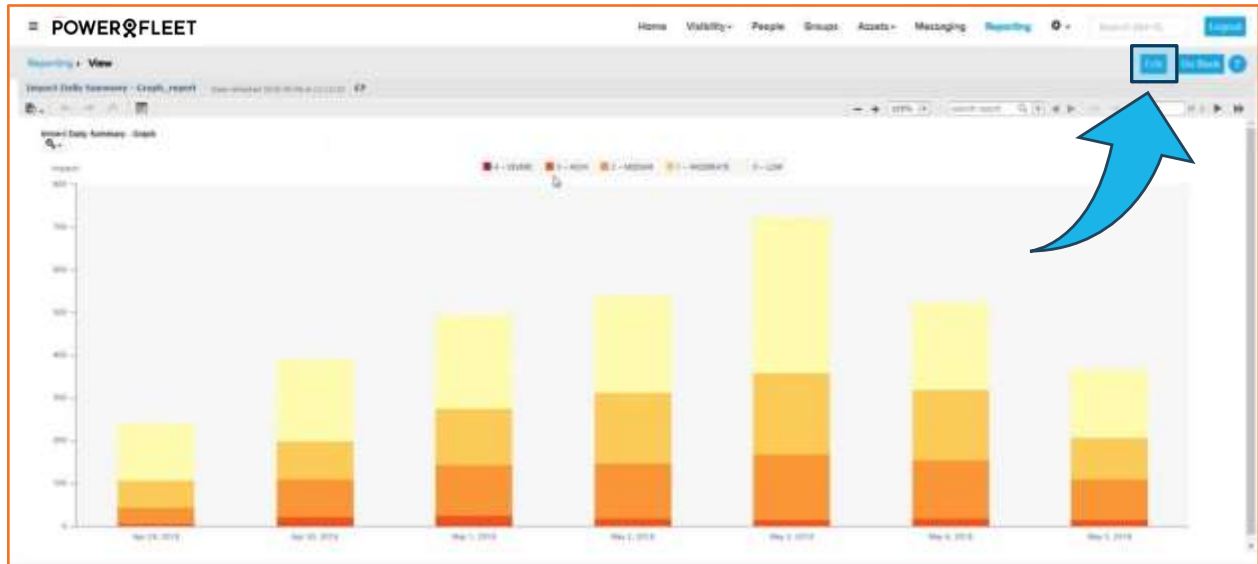
| Vehicle | Impact Date Time | Severity | Status Pre-Impact | Status At Impact | Status Post-Impact | Impact Location |
|----------|-------------------------|--------------|-------------------|------------------|--------------------|--|
| RT 05207 | May 7, 2018 9:16:14 AM | 1 - MODERATE | Motion | Motion | Motion | Near WAP: SC FC: 66: 8A 9F D_([Unknown]) |
| PR 33169 | May 7, 2018 9:13:42 AM | 2 - MEDIUM | Unknown | Motion | Lift | Near WAP: SC FC: 66: 8A 9F D_([Unknown]) |
| RT 05207 | May 7, 2018 8:04:10 AM | 1 - MODERATE | Motion | Motion | Motion | Near WAP: SC FC: 66: 8A 9F D_([Unknown]) |
| PR 33170 | May 7, 2018 2:20:32 PM | 2 - MEDIUM | Motion | Motion | Motion | Near WAP: SC FC: 66: 8A 9F D_([Unknown]) |
| PR 33170 | May 7, 2018 2:10:45 PM | 0 - LOW | Motion | Motion | Motion with Lift | Near WAP: SC FC: 66: 8A 9F D_([Unknown]) |
| PR 33170 | May 7, 2018 12:42:42 PM | 0 - LOW | Motion | Motion | Motion with Lift | Near WAP: SC FC: 66: 8A 9F D_([Unknown]) |
| PR 33170 | May 7, 2018 12:28:18 PM | 0 - LOW | Motion | Motion | Motion with Lift | Near WAP: SC FC: 66: 8A 9F D_([Unknown]) |
| PR 33170 | May 7, 2018 11:15:38 AM | 2 - MEDIUM | Motion | Motion | Motion | Near WAP: SC FC: 66: 8A 9F D_([Unknown]) |

For instruction on creating and applying conditional formulas, navigating, and modifying column and table layout, and additional editing features of Tabular Reports, see [Customizing Reports](#).

CUSTOMIZING REPORTS

Customizing Reports | Edit Mode

To begin customizing a report, run the report and then click the **Edit** button located in the upper-right corner above the report tool bar.



Or select **Edit** from the Action column in the Reports List.

| | | | | |
|--|----------------------|--------------|--|--|
| Checklist Critical Warning Response | OSHA Checklist | Mar 9, 2016 | | |
| Checklist Issue Trend | Maintenance Planning | Mar 29, 2016 | | |
| Checklist Non-Compliance Event Details | Safety Compliance | Mar 9, 2016 | | |
| Checklist Profiles | Safety Compliance | Mar 9, 2016 | | |
| Checklist Warning Critical Response | Maintenance Planning | Feb 29, 2016 | | |

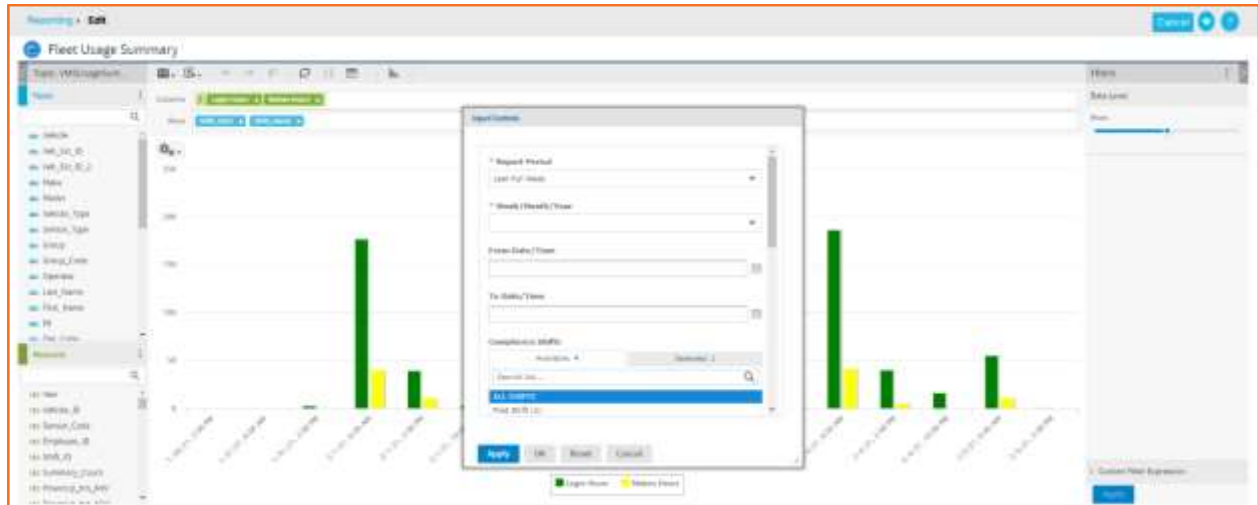
Delete

Subscribe

Edit

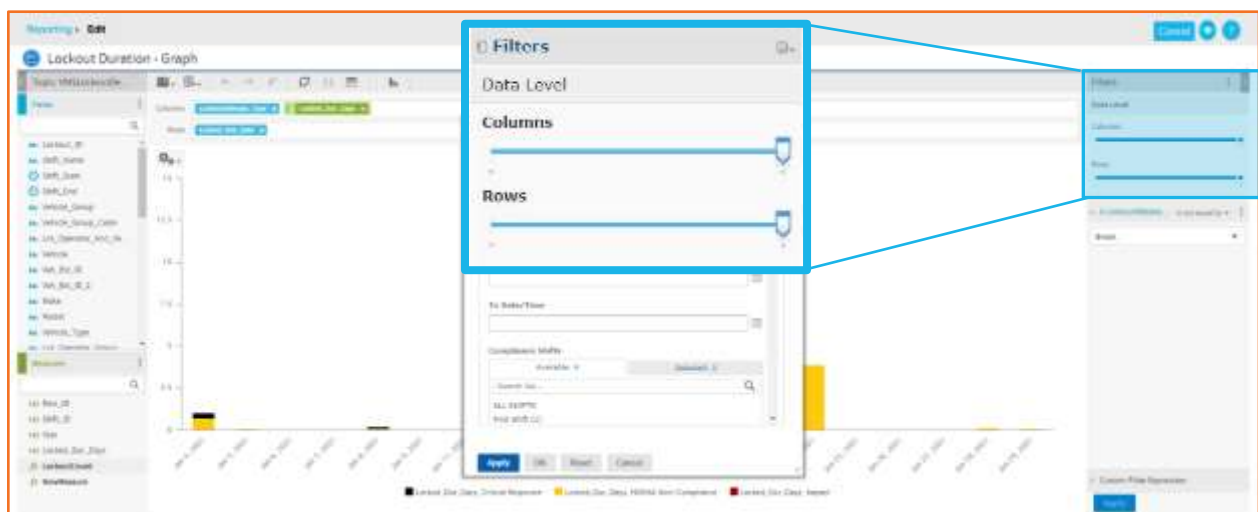
Edit Mode | Input Controls

When you open a report in Edit Mode, the **Input Controls** automatically appear in the center of the screen.



Edit Mode | Filters

The upper-right corner of the Edit Mode screen displays filters for the report's columns and rows. Use the **Columns** and **Rows** sliders to adjust how column and row data is filtered in the report. As you adjust the sliders, you will see the data levels adjust accordingly.



Edit Mode | Menu Options | Saving, Exporting & Editing

The menu bar above the report display contains the following option for saving, exporting, and editing your report:



Save | To save a default report that you've modified, select **Save As**, rename the report, and choose the **Public Reports** or **My Reports** folder as the save destination.



Export | Access the list of available file formats to export your report.



Undo | Undo the last change you made to the report.



Redo | Redo the last change you made to the report after selecting the Undo option.




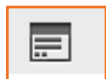
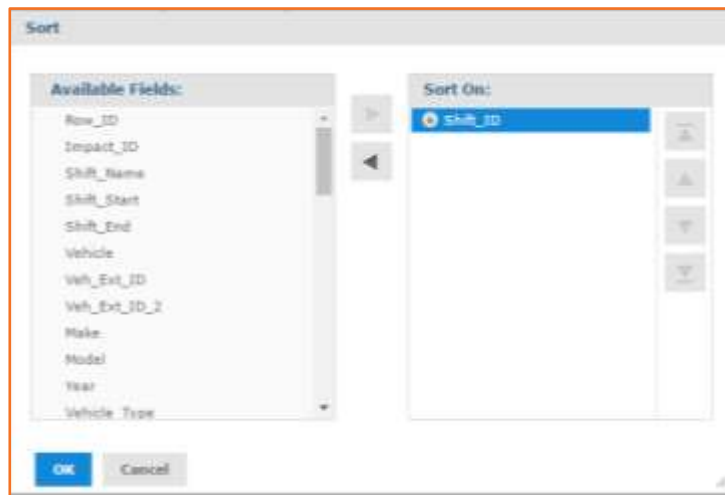
Undo All | Reset the report to the its last saved configuration.



Switch the Groups | Selecting this icon will switch rows and columns. In other words, rows become columns and columns become rows.



Set the Sort Order | Access options for sorting data. A window will open with a list of available fields on the left. Use the right arrow ► to add and the left arrow ◀ to remove available fields to and from the **Sort On:** list. Use the up and down arrows to the right of the Sort On: list to adjust the order and use the  icon in front of each field name to define whether the field should display data in ascending or descending order.



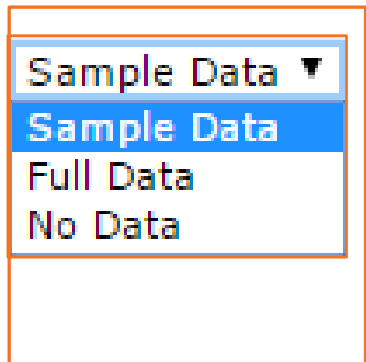
Change the Input Values | Selecting this icon will allow you to adjust the report parameters. The **Input Controls** window will open with options for adjusting the data displayed in the report (for example, the report period, shifts included, groups included, etc.). After making changes, click on the **Apply** button.

Edit Mode Menu Options | Display Formats & Display Data

The menu bar above the report also contains an icon and drop-down menus that allow you to select how your report and its data appear on the screen while in Edit Mode.



Select Visualization Type | The pop-up menu lets you select how the report data will be displayed.



Display Data | The Display Data drop-down menu lets you select how much data will be displayed on screen. Select **Sample Data**, **Full Data**, or **None**.

If you're making several changes and want to see how they impact the report as you modify it, the Sample Data setting lets you quickly view changes as you edit the report.

Display Format | Table

When editing a report displayed as a Table, click on the **Gear Icon**  to select whether you want your report's **Detailed Data**, **Totals Data** or both the **Detailed and Totals** displayed on screen. You also have the option to **Hide** or **Show Duplicate Rows** as applicable.

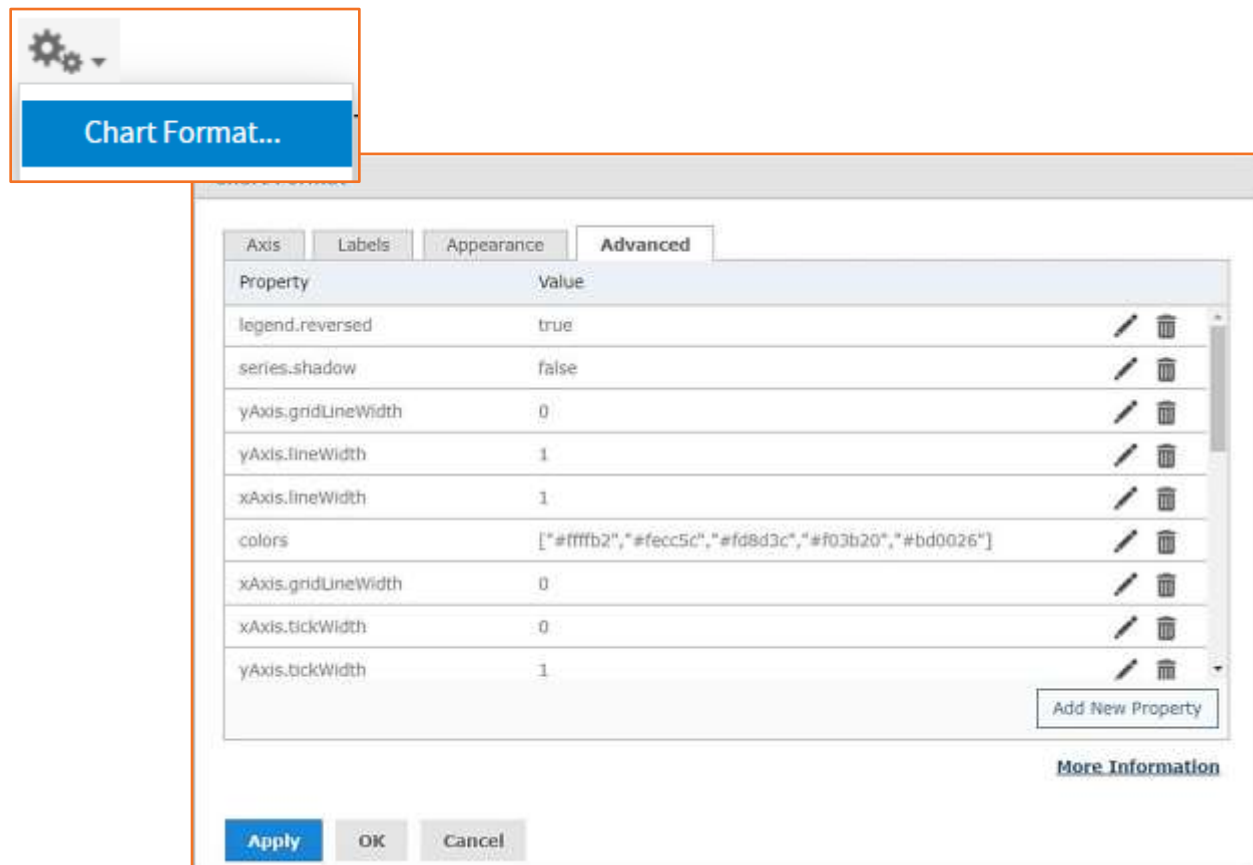
| • Detailed Data | • Detailed Data |
|---------------------|---------------------|
| Totals Data | Totals Data |
| Details and Totals | Details and Totals |
| Hide Duplicate Rows | Show Duplicate Rows |

Display Format | Chart

When editing a report displayed as a Chart, click on the **Gear Icon**  to adjust the report's Chart Format.

Chart Report | Chart Format

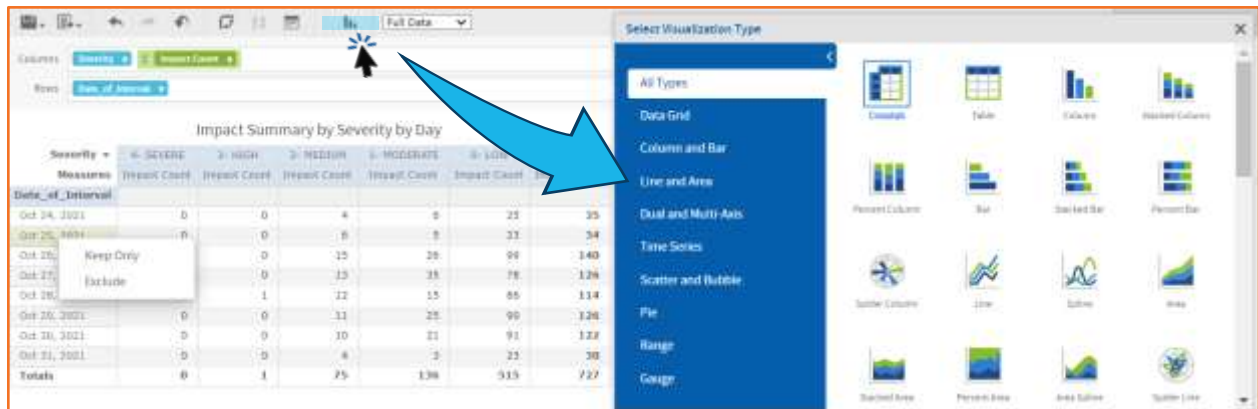
The **Chart Format** controls allow you to customize properties of the selected chart type, such as **Axis**, **Labels** and **Appearance**. You can also access **Advanced** customization options to modify nearly every aspect of the chart report.



From the **Advanced** tab, click on **More Information** to access a full list of Advanced Chart Formatting commands with definitions and descriptions for every command's Property and Value.

Display Format | Crosstab

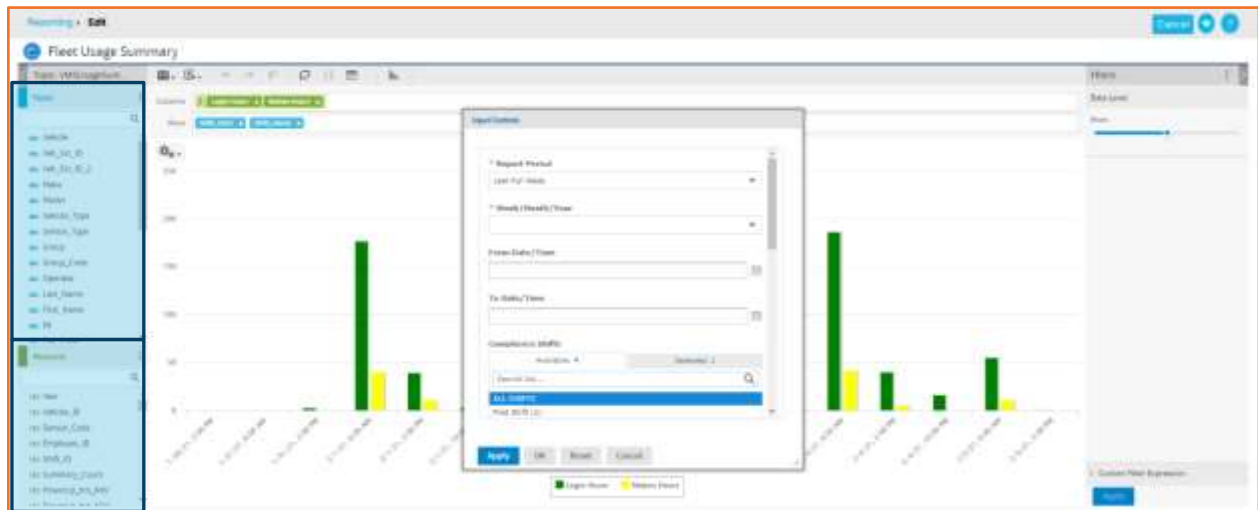
Editing a report displayed in a Crosstab view provides a tabular summary of your report and allows you to edit its values within a table format.



You can right-click on a row or column to access a list of editing options specific to that section, such as, excluding or only keeping certain sections.

Edit Mode | Fields & Measures

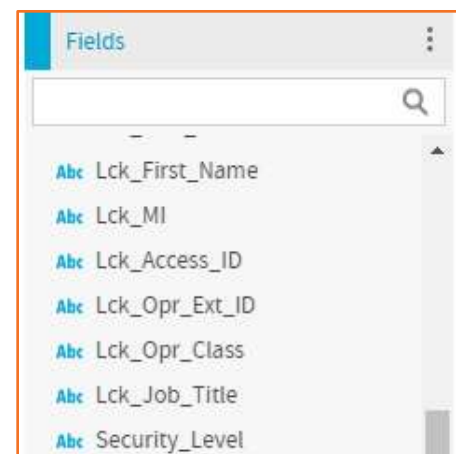
The left side of the Edit Mode screen lists **Fields** and **Measures**. These are the building blocks of your reports. When you think about modifying or customizing a report, think about it terms of modifying or customizing the displayable fields and calculable measures that make up the report.



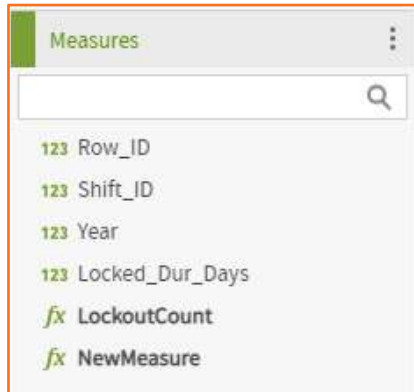
Fields & Measures | Fields

Fields are content-based data elements that can be displayed on a report. The items in the Fields list represent all the available data content that can be displayed on the current report.

To find a specific field, scroll through the list or enter keywords into the search box.



Fields & Measures | Measures



Measures are formula-based items that can calculate data and display the calculated results on the report. The items in the Measures list represent all the available calculable data elements that can be displayed on the current report.

To find a specific measure, scroll through the list or enter keywords into the search box.

Adding Fields & Measures to a Report

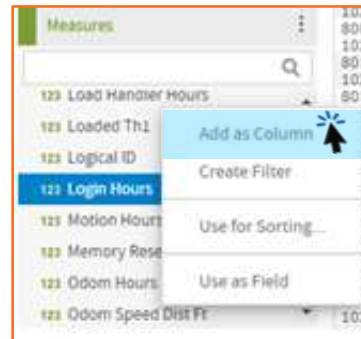
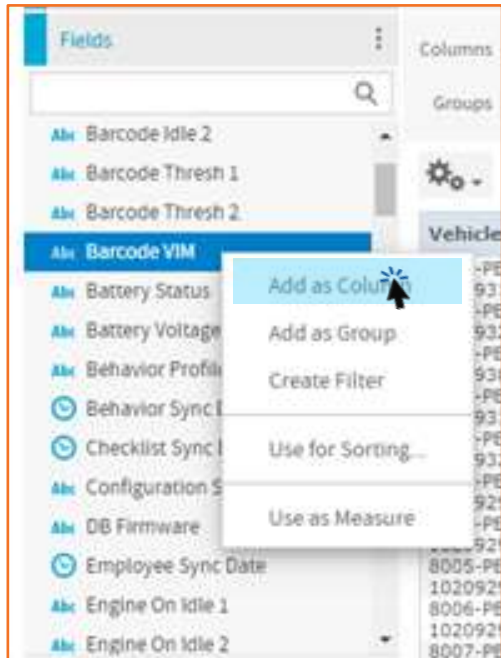
To add a field or measure to a report, click and hold on the desired element and then **drag and drop** it into the Columns, Rows or Groups area.

The screenshot shows the 'Vehicle Health Report' interface. On the left, there's a 'Fields' list with various items like 'Access Mode', 'Activity Assignment', 'Authorization Sync Date', etc. A blue arrow points from 'Battery Status' in the Fields list to the 'Days Since Last Detect' column in the report. The report table has columns: Vehicle, Vehicle Type, Days Since Last Detect, and In Service. The data rows show various vehicle IDs and their status.

| Vehicle | Vehicle Type | Days Since Last Detect | In Service |
|----------------------|--------------------|------------------------|------------|
| 8024-PE4500-10209317 | Pallet Jack Rider | 13 | Yes |
| 8033-PE4500-10209326 | Pallet Jack Rider | 13 | Yes |
| 8013-PE4500-10209306 | Pallet Jack Rider | 9 | Yes |
| 8021-PE4500-10209314 | Pallet Jack Rider | 9 | Yes |
| 8027-PE4500-10209320 | Pallet Jack Walkie | 8 | Yes |
| 8002-PE4500-10209295 | Pallet Jack Rider | 7 | Yes |
| 8003-PE4500-10209296 | Pallet Jack Rider | 7 | Yes |
| 8005-PE4500-10209298 | Pallet Jack Rider | 7 | Yes |
| 8006-PE4500-10209298 | Pallet Jack Rider | 7 | Yes |

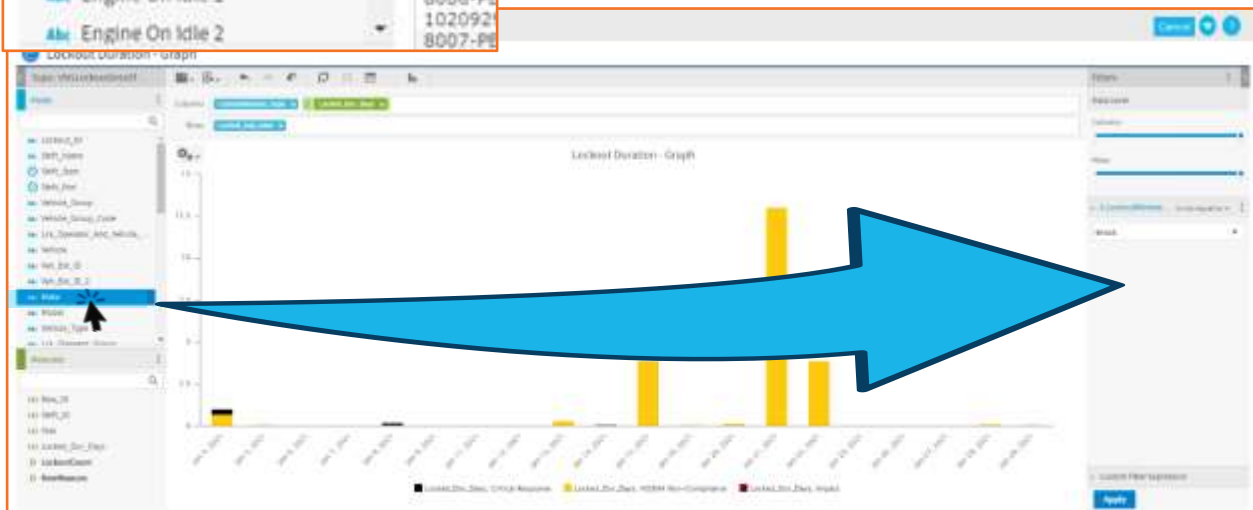
Alternately, you can right-click on the field and select **Add to Columns**, **Add to Rows** or **Add to Groups**.

The report editor is designed with built-in logic to prevent it from presenting your with **Add to...** options that can't be supported based on the report type or its parameters.

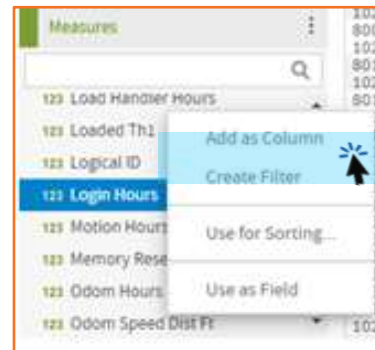
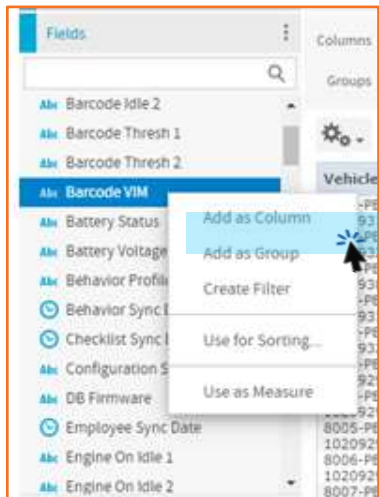


Adding Fields & Measures as Report Filters

To add a Field or Measure as a report filter, click and hold on the desired element and then **drag and drop** it into the Filters section.



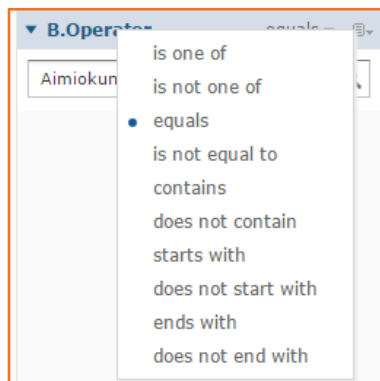
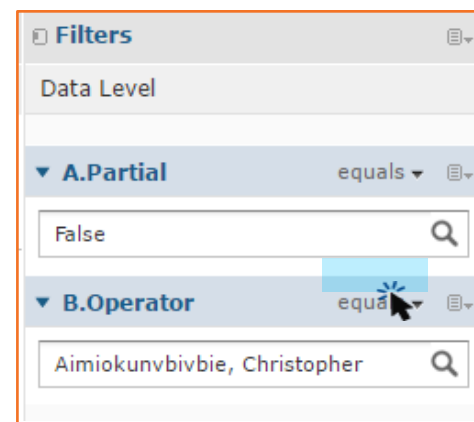
Alternately, you can right-click on the field and select **Create Filter**.



Defining Filter Values for Fields & Measures

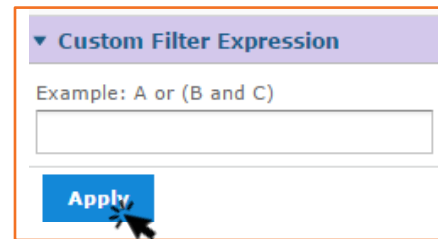
On the right side of the screen, under the **Filters** heading, you'll see a new filter for the field or measure you added.

Click on **equals ▼** to access the drop-down menu of available filter values. Select the values that will define how your field or measure will be filtered in the report.



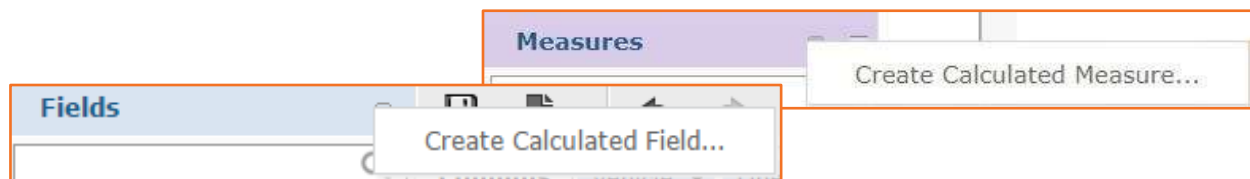
These filter values are similar to logical or comparison operators you might use to create formulas in Excel or other spreadsheet programs.

After you've set up your filters, click on the **Apply** button and the report will redraw itself using the field and/or measure filters as you defined them.

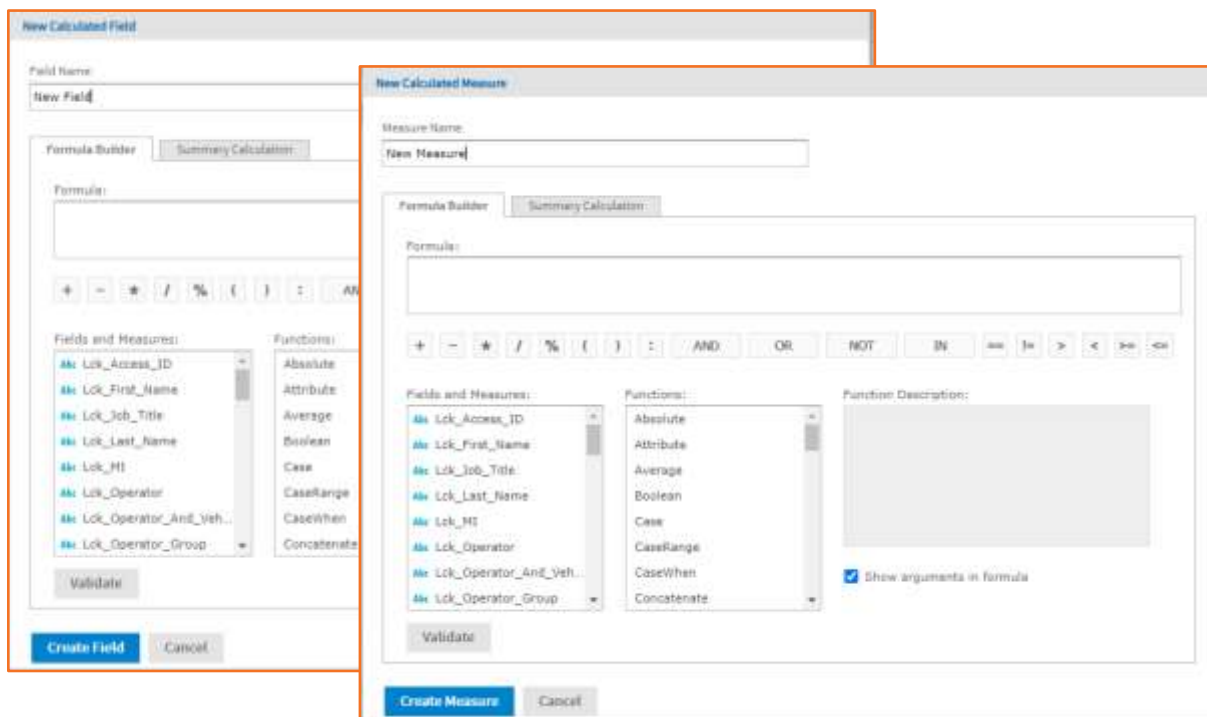


Creating a Calculated Field

To create a new calculated field or measure, click on the icon to the right of the Fields or Measures section header, and select **Create Calculated Field** or **Create Calculated Measure**.



The **New Calculated Field** or **Calculated Measure** window will appear.



Enter a name for your new field or measure in the **Field Name / Measure Name** box.

New Calculated Field

Field Name:

New Calculated Measure

Measure Name:

Double-click on an element in the **Fields and Measures** list to add it to your new formula.

Fields and Measures:

Abc

Lck_Access_ID

Abc

Lck_First_Name

Abc

Lck_Job_Title

Abc

Lck_Last_Name

Abc

Lck_MI

Abc

Lck_Operator

Abc

Lck_Operator_And_Veh...

Abc

Lck_Operator_Group

Similarly, double-click on a formula function in the **Functions** list to add it to the formula.

Functions:

Absolute

Attribute

Average

Boolean

Case

CaseRange

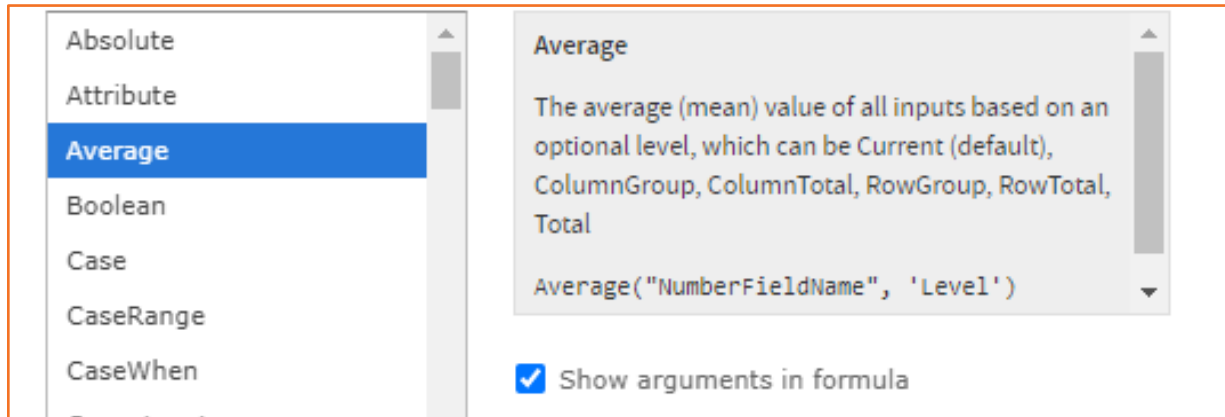
CaseWhen

Concatenate

Function Description:

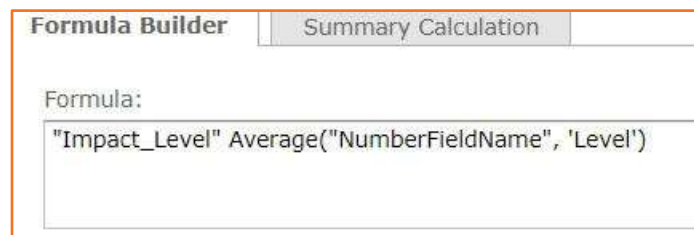
☒ Show arguments in formula

Click on a Function to see its definition in the **Function Description** box.



Formatted information that you're required to provide for a function is called an **argument**. For example, the **Average** function (shown above) requires that you enter arguments for "NumberFieldName" and "Level."

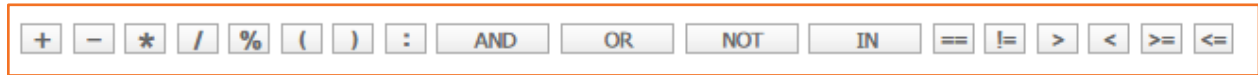
To have the Function arguments visible in the Formula, check the **Show arguments in formula** box, and the arguments will display as shown below.



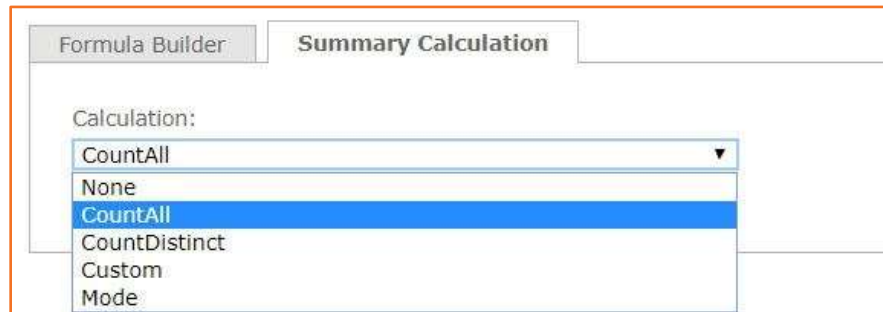
Uncheck the **Show arguments in formula** box if you prefer the Function to appear in the Formula without any definition of argument, as shown below.



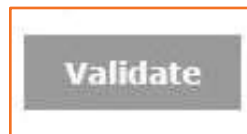
Select the **Operators** your formula requires from the row beneath the formula box.



To choose a calculation type, click on the **Summary Calculation** tab and select one of the options from the Calculation drop-down list.



Once you've finished building your formula, click on the **Validate** button to make sure it will work.



An **invalid formula** will return a message like the one below and provide an explanation of why the formula failed validation.



A **valid formula** will return the following message:



When you are finished, click on the **Create Field** / **Create Measure** button to save your new calculated measure.





A banner will appear at the top of the screen to confirm that a new field/measure has been added, and your new calculated field/measure will appear in bold in the Fields or Measures list.

Creating a Schedule

To view or create scheduled reports and set up subscribers to receive the reports as scheduled, click on the **Schedules** icon on the right side of a report row.

| NAME | FOLDER | LAST MODIFIED | SCHEDULES |
|---|----------------|---------------|---|
| 1024IDSYuDeleteIDSYViewUserPublicAccess Point Inventory | Public Reports | Apr 5, 2018 |  |
| 1024idsysuLow Usage Vehicles | My Reports | Apr 19, 2018 |  |
| 1024IDSYuPrivateDeleteTestbyIDSYu1 | My Reports | Apr 5, 2018 |  |
| 1024IDSYuPrivateGroup Expiration for Operators | My Reports | Apr 4, 2018 |  |
| 1024IDSYuPublicGroup Expiration for Operators | Public Reports | Apr 4, 2018 |  |

A pop-up window will open displaying any existing schedules. To set up a new schedule, click on the **+ Create Schedule** button in the upper-right corner.

| Job Name | Owner | State | Last Run | Next Run | Enabled | |
|----------|-------|--------|------------------------|------------------------|---------|---|
| training | | NORMAL | 01-01-0001 12:00:00 AM | 05-08-2018 11:44:00 AM | Yes |   |

The **Add new schedule** window will appear.

Add Report Schedule (Vehicle Usage Detail)

Job Name:

Field is required.

Description:

Recurrence:

Recurrence Type:

None

Start Date:

Cancel Add

Job Name

Enter a name to briefly define the purpose of the schedule.

Job Name:

Field is required.

Description

If needed, enter a more detailed description of the schedule.

Description:

Recurrence

For the **Recurrence Type**, use the drop-down menu to select how often and when the selected report should be scheduled. Recurrence options are:

- **None** – no recurrence
- **Simple** – defined by timeframe values
- **Calendar** – defined by calendar date(s)

Recurrence:
Recurrence Type

None ▼

None

Simple

Calendar


Start Date

Define the Report Schedule's **Start Date**.

Start Date:

☒ Immediately

☐ On specific date:



If the schedule is recurring, define the **End Date**.

Output Options

Confirm or modify the scheduled report's **File Name** and select the file **Format**.

Output options

File Name:

Formats:

☐ PDF
 ☐ CSV
 ☐ XLS
 ☐ XLSX
 ☐ RTF
 ☐ HTML
 ☐ PPTX
 ☐ DOCX
 ☐ ODT
 ☐ ODS

Output To:

Select how you want the scheduled report to go out, either via email or FTP.

Output To:

Email

Email

FTP

Output to Email

Complete the fields need to enter the email addresses for your scheduled report recipients, as well as a subject line, and a message to be included in the body of the email.

Select whether the scheduled report(s) should be included with the email as an attachment in the previously defined file type or as a Zipped attachment of those files.

- ☒ Include report files as attachments
- ☐ Include report files as ZIP attachment

You can also select to choose to opt out of sending emails for empty reports.

- ☐ Do not send emails for empty reports

Output to FTP

To schedule your report to output via FTP, complete the fields to provide the Server Address, Directory name, User Name, Password, and Port. Select whether to enable FTPS. After entering the information, you can make sure the FTP connection works by clicking [Test Connection](#).

Output To:

FTP

Server Address:

Directory:

Field is required.

User Name:

Field is required.

Password:

Field is required.

Test Connection

☒ Enable FTPS

Port:

21

File Handling:

☐ Overwrite Files

☐ Sequential File Names by Timestamp

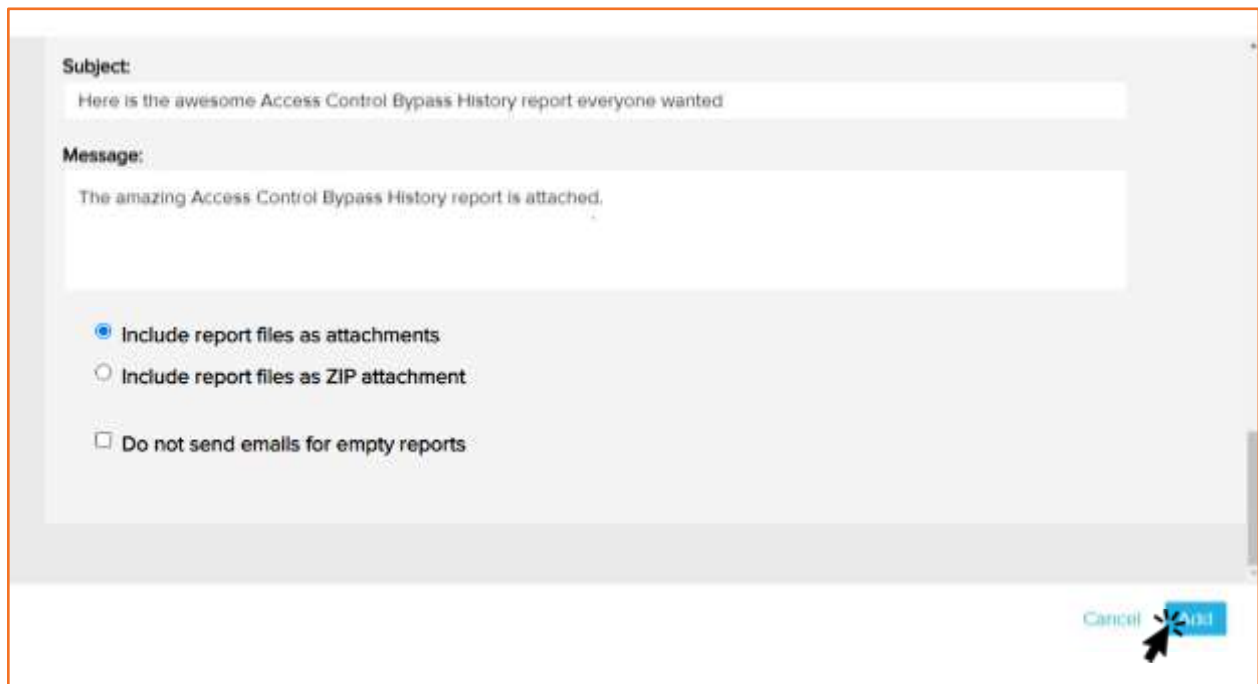
Timestamp Pattern:

yyyyMMddHHmm

For outputting to a network folder, you will need to specify the name of the folder. Choose whether you want new reports in this schedule to overwrite previous reports, if you want the report files to be sequenced by timestamp and, if so, configure the timestamp pattern.

Add the New Scheduled Report

Click **Add** to create your new scheduled report.



The screenshot shows a web form for adding a new scheduled report. It has a light gray background with white input fields. The form is titled "Subject:" and "Message:". The "Subject:" field contains the text "Here is the awesome Access Control Bypass History report everyone wanted". The "Message:" field contains the text "The amazing Access Control Bypass History report is attached,". Below the message field, there are three radio button options: "Include report files as attachments" (selected), "Include report files as ZIP attachment", and "Do not send emails for empty reports" (unchecked). At the bottom right of the form, there are two buttons: "Cancel" and "Add". A mouse cursor is pointing at the "Add" button.

Subject:

Here is the awesome Access Control Bypass History report everyone wanted

Message:

The amazing Access Control Bypass History report is attached,

☒ Include report files as attachments

☐ Include report files as ZIP attachment

☐ Do not send emails for empty reports

Cancel Add