



Vision Pro™: Reporting Overview  
Reference Guide

**POWERFLEET®**

People Powered IoT

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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.

The screenshot shows the PowerFleet Reporting Main Page. The top navigation bar includes 'Home', 'Visibility', 'People', 'Groups', 'Assets', 'Messaging', 'Reporting' (which is highlighted with a blue box and has a blue arrow pointing to it), and 'Logout'. Below the navigation bar, there are sections for 'Create new' (Nothing selected), 'Recent Items' (a list of recent reports), 'Alerts' (a list of operator status issues), and 'Statistics' (a chart showing vehicle status: In Use (80%), Available (15%), No Comm (3%), and Unknown (2%)).

## 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](#).

The screenshot shows the PowerFleet Reporting page with the 'Reports List (All Folders)' table. The table has columns for 'NAME', 'HOSTED', 'LAST MODIFIED', 'OWNER/CREATOR', and 'NOTES'. The table lists various reports such as 'Report Summary by Operator and Vehicle', 'Report Summary by Vehicle', 'EV Fleet Status', 'Vehicle Usage Detail', 'Data Mining Inspection/Compliance Summary (last 12 hours)', 'Long Distance Detail', 'Report Detail by Operator', 'Report Summary by Operator (by 15-Minute Interval)', 'Recent Vehicle Details', 'Report Zone Vehicle Summary', 'Threshold Context Details', and 'Violation and Movement Report'. The 'OWNER/CREATOR' column shows 'Public Reports' for most entries. The 'LAST MODIFIED' column shows dates from April 4, 2018, to April 10, 2018. The 'NOTES' column contains a mix of 'a', 'v', and 'n' symbols. A blue arrow points to the question mark icon in the top right corner of the page.

## Reporting Main Page | Reports List

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

The screenshot shows the POWERFLEET Reporting Main Page. The top navigation bar includes Home, Visibility, People, Groups, Assets, Messaging, Reporting, and Logout. A search bar is present. The main content area is titled "Reports List (All Folders)". It displays a table with columns: FOLDER, LAST MODIFIED, NUMBER OF, and ACTION. The table lists various reports and folders, such as "Public Reports" and "My Reports". A sidebar on the left shows "Recent Reports" and "Folders" (My Reports, Public Reports, Administration, Assets, Reports and Forms).

FOLDER	LAST MODIFIED	NUMBER OF	ACTION
Public Reports	Apr 6, 2018	1	+
My Reports	Apr 16, 2018	1	+
My Reports	Apr 6, 2018	1	+
My Reports	Apr 4, 2018	1	+
Public Reports	Apr 4, 2018	1	+
Public Reports	Apr 16, 2018	1	+
Public Reports	Apr 6, 2018	1	+
Public Reports	Apr 6, 2018	1	+
Public Reports	Apr 6, 2018	1	+
Public Reports	Apr 10, 2018	1	+

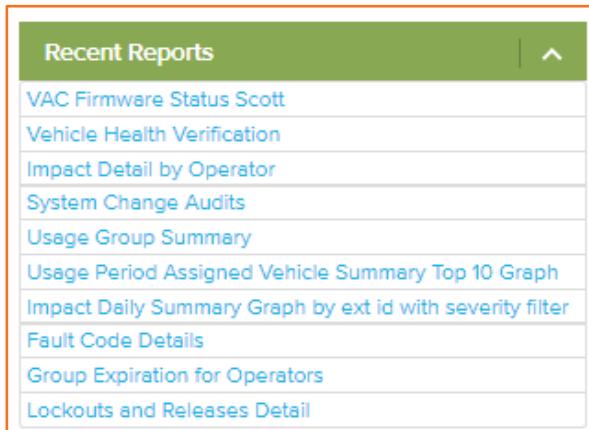
Report names appear as hyperlinks. Clicking on the report name will run the report in its **As Saved** configuration. This means the report data will run in its native form, reflecting the timeframe when the report was last saved, and including any filters applied to the report at that time.

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



The screenshot shows a list of recent reports with hyperlinks:

- 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.



The screenshot shows a tree view of report categories:

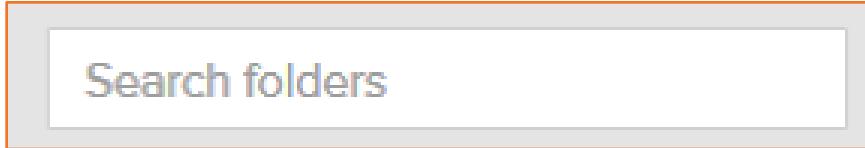
- All Folders
  - My Reports
  - Administration
  - Aviation
  - Battery and Charger
  - Impact
  - Maintenance Planning
  - Messaging
  - Operator Analysis
  - Safety Compliance
  - System Settings and Diagnostics
  - Vehicle Analysis

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

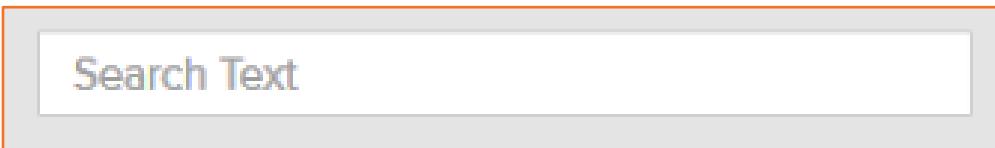
The **Search Folders** filter allows you to search for specific report folders. Begin entering the name of a folder and results will automatically be displayed as you type.



Search folders

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

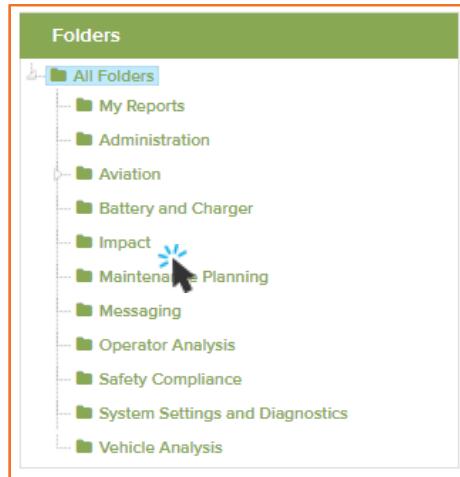


Search Text

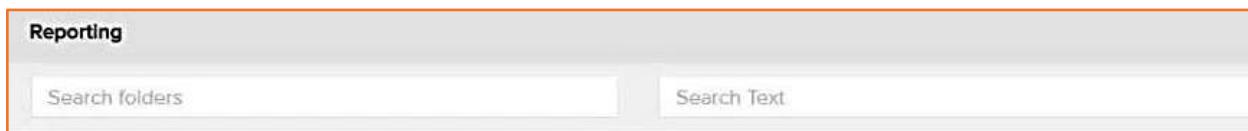
The **Search Text** filter allows you to search for specific reports. Begin entering the name of a report or folder and results will automatically be displayed as you type.

## 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 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

Reports List (All Folders)					
NAME	FOLDER	LAST MODIFIED	SCHEDULES	ACTIONS	
1024IDSYouDeleteIDSViewUserPublicAccess Point Inventory	Public Reports	Apr 5, 2018	⊕	⊖	
1024idsysuLow Usage Vehicles	My Reports	Apr 19, 2018	⊕	⊖	
1024IDSYouPrivateDeleteTestbyIDSyou1	My Reports	Apr 5, 2018	⊕	⊖	
1024IDSYouPrivateGroup Expiration for Operators	My Reports	Apr 4, 2018	⊕	⊖	
1024IDSYouPublicGroup 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.

Reports List (All Folders)					
NAME	FOLDER	LAST MODIFIED	SCHEDULES	ACTIONS	
102410DSYsuDelete10DSYViewUserPublicAccess Point Inventory	Public Reports	Apr 8, 2018			
102410DSYsuLow Usage Vehicles	My Reports	Apr 19, 2018			
102410DSYsuPrivateDeleteTestby10DSYsu1	My Reports	Apr 8, 2018			
102410DSYsuPrivateGroup Expiration for Operators	My Reports	Apr 4, 2018			
102410DSYsuPublicGroup 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.

Reports List (All Folders)					
NAME	FOLDER	LAST MODIFIED	SCHEDULES		
102410DSYsuDelete10DSYViewUserPublicAccess Point Inventory	Public Reports	Apr 5, 2018			
102410DSYsuLow Usage Vehicles	My Reports	Apr 19, 2018			
102410DSYsuPrivateDeleteTestby10DSYsu1	My Reports	Apr 5, 2018			
102410DSYsuPrivateGroup Expiration for Operators	My Reports	Apr 4, 2018			
102410DSYsuPublicGroup 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.

Subscriptions (Vehicle Usage Detail)					
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	

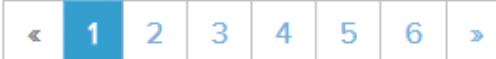
## Reporting Main Page | Reports List | Actions

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

Reports List (All Folders)				
NAME	FOLDER	LAST MODIFIED	SCHEDULES	ACTIONS
1024IDSYouDeleteIDSViewUserPublicAccess Point Inventory	Public Reports	Apr 6, 2018	0	+
1034IDSyouUsage Vehicles	My Reports	Apr 19, 2018	0	+
1024IDSYouPrivateDeleteTestbyIDSyou1	My Reports	Apr 5, 2018	0	+
1024IDSYouPrivateGroup Expiration for Operators	My Reports	Apr 6, 2018	0	+
1034IDSyouPublicGroup Expiration for Operators	Public Reports	Apr 4, 2018	0	+

## 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.



10    25    50    100

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

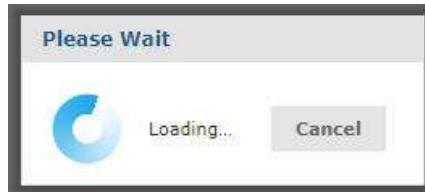
## Running Reports | Reporting Main Screen

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.

NAME	FOLDER	LAST MODIFIED
10244D59suDeleteDSYView/UserPublicAccess Point Inventory	Public Reports	Apr 6, 2018
10244D59suDeleteDSYView/UserPublicAccess Point Inventory	My Reports	Apr 19, 2018
10244D59suDeleteDSYView/UserPublicAccess Point Inventory	My Reports	Apr 6, 2018
10244D59suDeleteDSYView/UserPublicAccess Point Inventory	My Reports	Apr 4, 2018
10244D59suDeleteDSYView/UserPublicAccess Point Inventory	Public Reports	Apr 4, 2018
10244D59suDeleteDSYView/UserPublicAccess Point Inventory	Public Reports	Apr 16, 2018
10244D59suDeleteDSYView/UserPublicAccess Point Inventory	Public Reports	Apr 6, 2018
10244D59suDeleteDSYView/UserPublicAccess Point Inventory	Public Reports	Apr 6, 2018
10244D59suDeleteDSYView/UserPublicAccess Point Inventory	Public Reports	Apr 5, 2018
10244D59suDeleteDSYView/UserPublicAccess Point Inventory	Public Reports	Apr 19, 2018

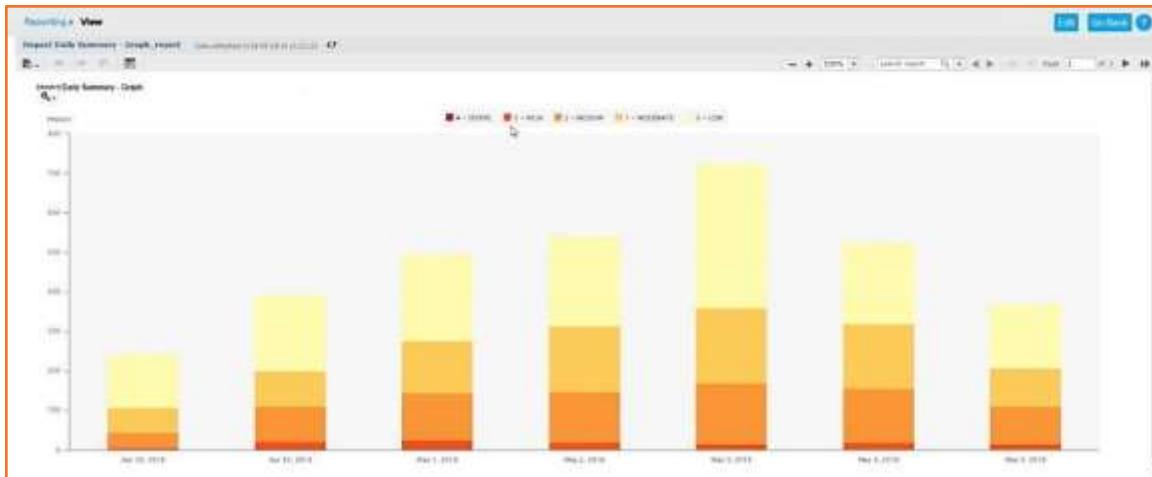
A load window will appear while the system collects information to display the requested report.



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.

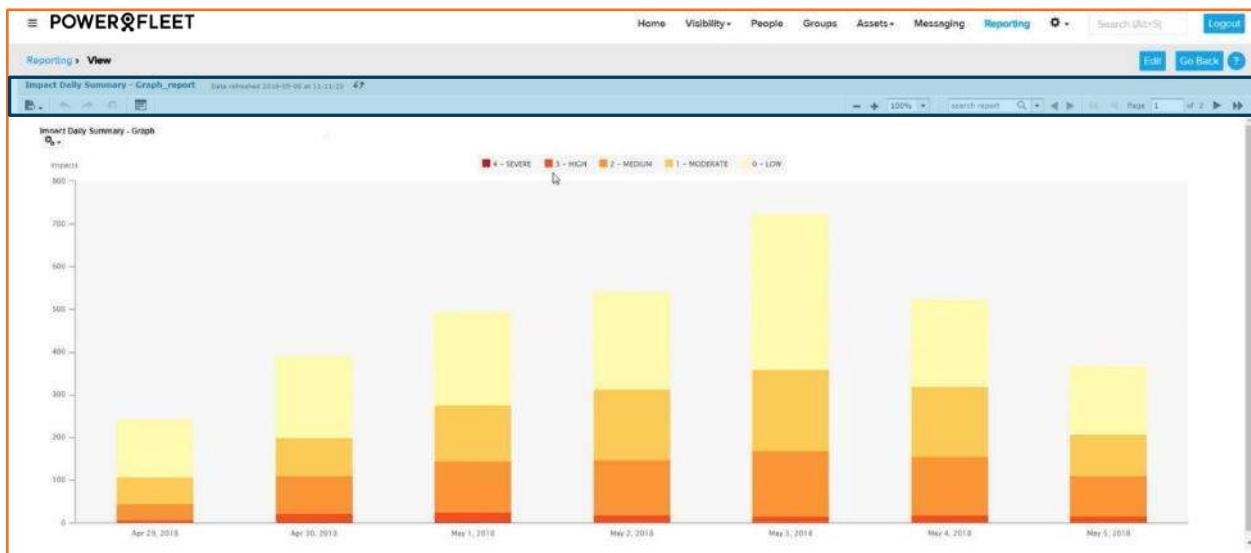
## Running Reports | Report View

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



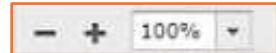
A button to refresh the report data



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**.

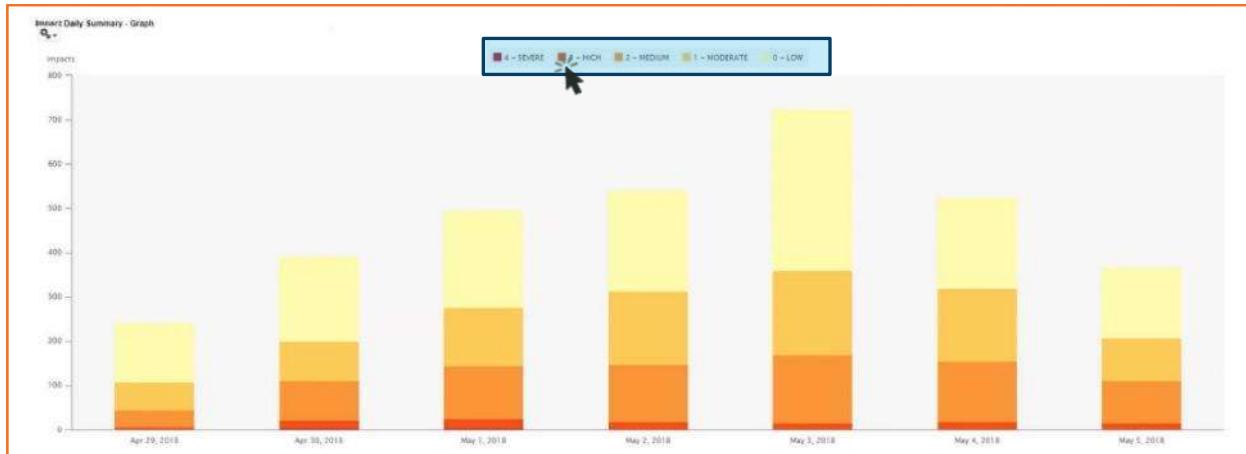
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For instruction on using the **Input Controls** to edit and modify a report's parameters, see [Customizing Reports](#).

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## 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

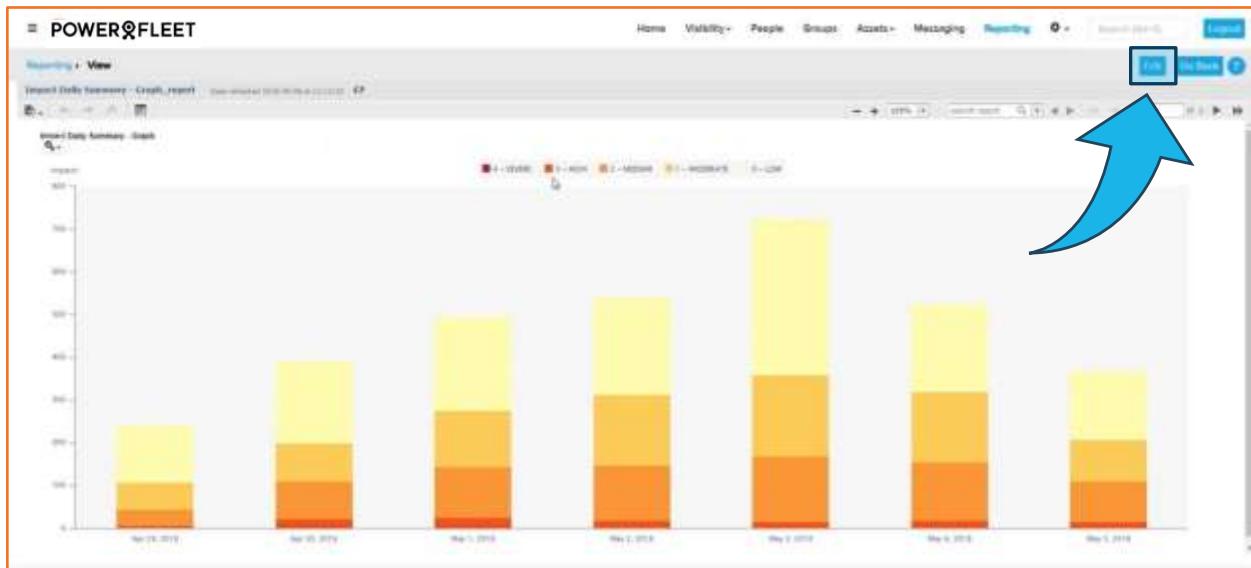
Impact Detail							
Vehicle	Impact Date Time	Severity	Status Pre-Impact	Status At Impact	Status Post-Impact	Impact Location	
RT 00207	May 7, 2018 9:16:14 AM	1 - MODERATE	Motion	Motion	Motion	Near WAP_5C_FC_66 8A_9F_D_{[Unknown]}	
PR 33169	May 7, 2018 9:13:42 AM	2 - MEDIUM	Unknown	Motion	Lift	Near WAP_5C_FC_66 8A_9F_D_{[Unknown]}	
RT 00207	May 7, 2018 10:04:10 AM	1 - MODERATE	Motion	Motion	Motion	Near WAP_5C_FC_66 8A_9F_D_{[Unknown]}	
PR 33170	May 7, 2018 2:20:32 PM	2 - MEDIUM	Motion	Motion	Motion	Near WAP_5C_FC_66 92_33_3_{[Unknown]}	
PR 33170	May 7, 2018 2:10:46 PM	0 - LOW	Motion	Motion	Motion with Lift	Near WAP_5C_FC_66 8A_9D_E_{[Unknown]}	
PR 33170	May 7, 2018 12:42:42 PM	0 - LOW	Motion	Motion	Motion with Lift	Near WAP_5C_FC_66 92_33_3_{[Unknown]}	
PR 33170	May 7, 2018 12:29:16 PM	0 - LOW	Motion	Motion	Motion with Lift	Near WAP_5C_FC_66 92_33_3_{[Unknown]}	
PR 33170	May 7, 2018 11:15:38 AM	2 - MEDIUM	Motion	Motion	Motion	Near WAP_5C_FC_66 92_33_E_{[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.



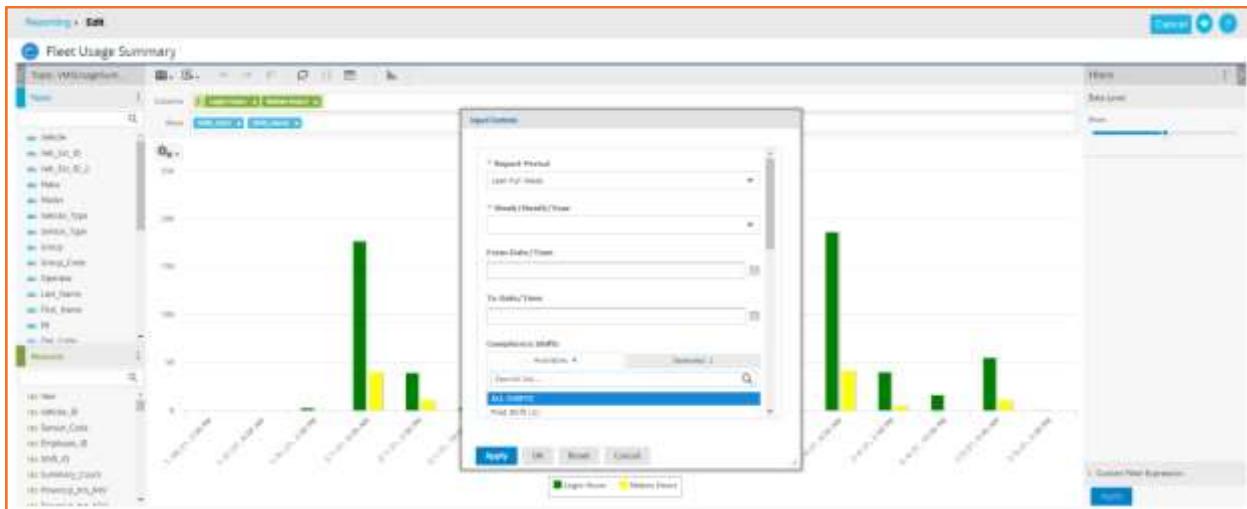
Or select **Edit** from the Action column in the Reports List.



Checklist Critical Warning Response	OSHA Checklist	Mar 9, 2016	<span>🕒</span>	<span>▼</span>
Checklist Issue Trend	Maintenance Planning	Mar 29, 2016	<span>🕒</span>	<span>▼</span>
Checklist Non-Compliance Event Details	Safety Compliance	Mar 9, 2016	<span>🕒</span>	<span>▼</span>
Checklist Profiles	Safety Compliance	Mar 9, 2016	<span>🕒</span>	<span>▼</span>
Checklist Warning Critical Response	Maintenance Planning	Feb 29, 2016	<span>🕒</span>	<span>▼</span>

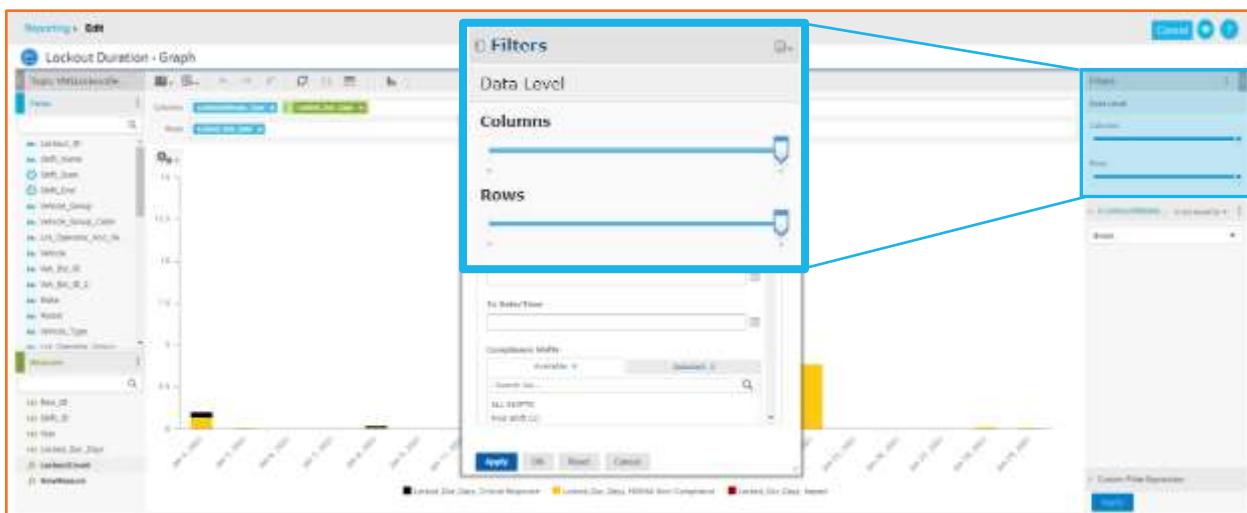
## Edit Mode | Input Controls

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.



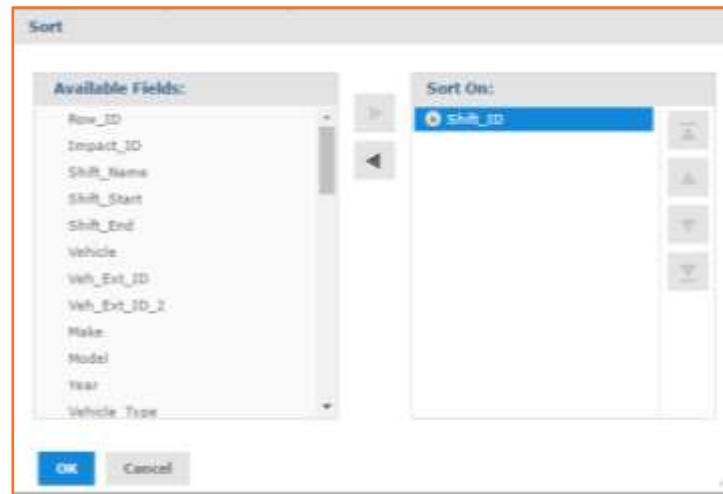
**Undo All** | Reset the report to its last saved configuration.



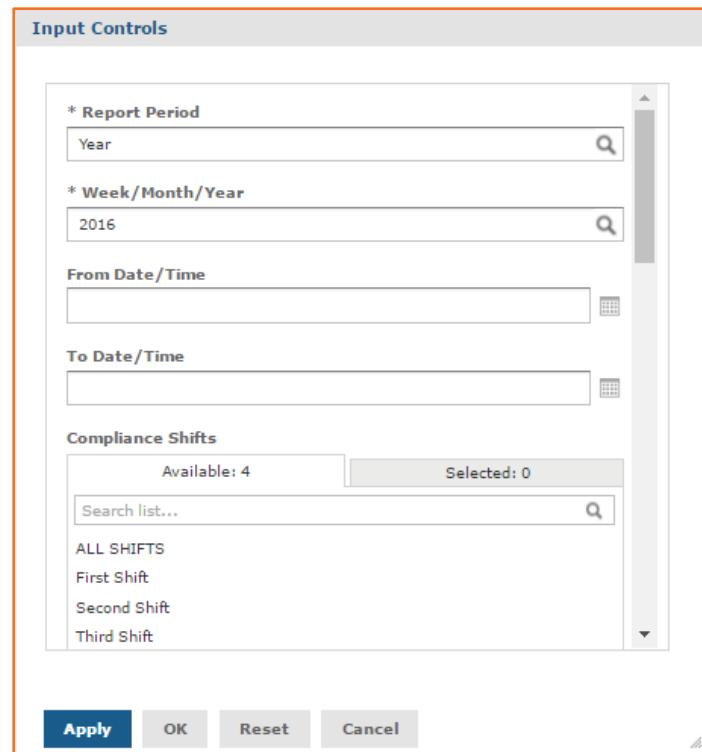
**Switch the Groups** | Selecting this icon will switch rows and columns. In other words, rows become columns and columns become rows.



**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.

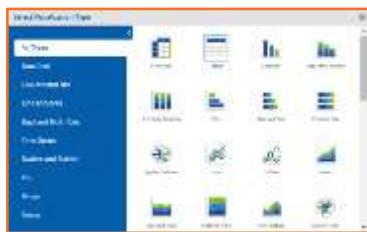


**Change the Input Values** | Selecting this icon will allow you to adjust the report parameters. The **Input Controls** window will open with options for adjusting the data displayed in the report (for example, the report period, shifts included, groups included, etc.). After making changes, click on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

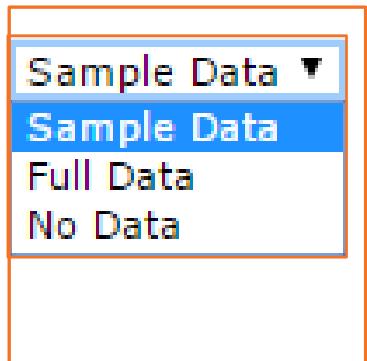


## Edit Mode Menu Options | Display Formats & Display Data

The menu bar above the report also contains and 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.

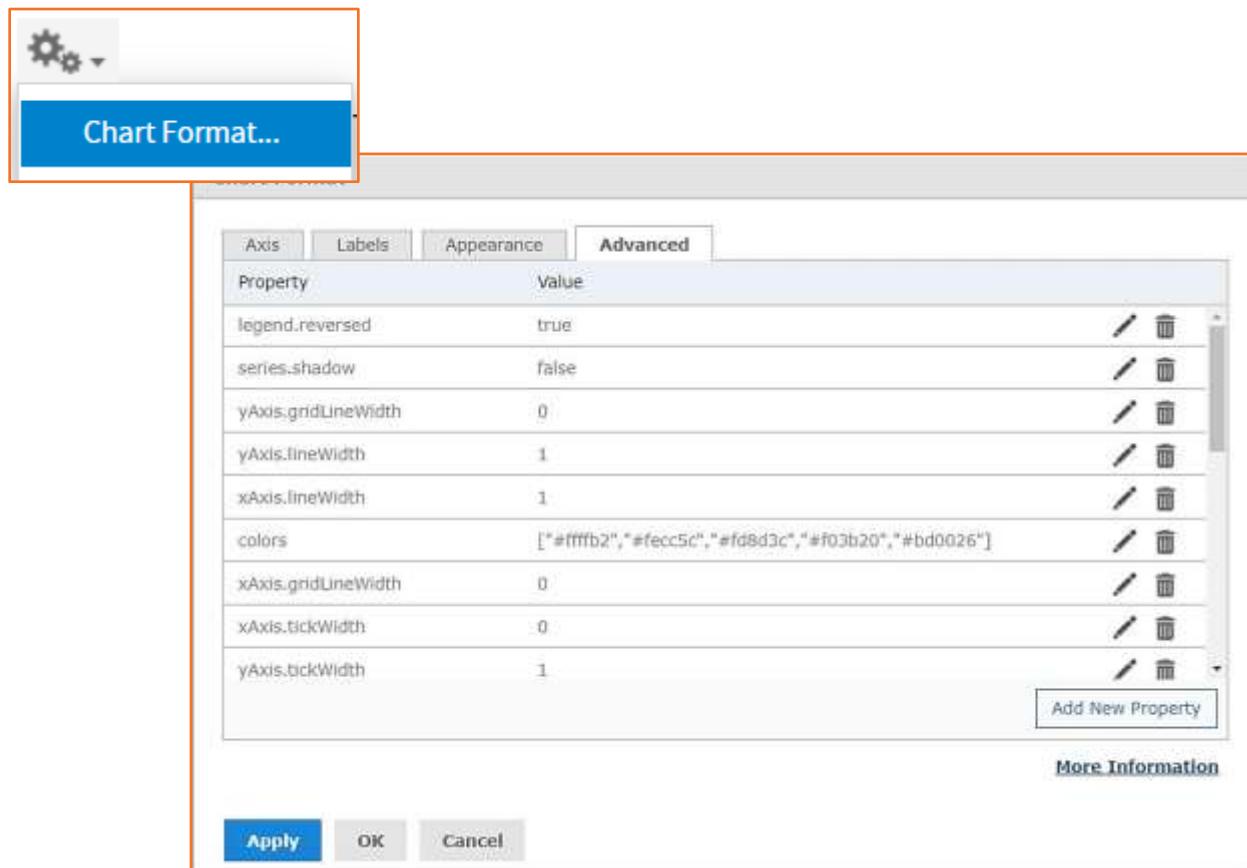
• Detailed Data	• Detailed Data
Totals Data	Totals Data
Details and Totals	Details and Totals
Hide Duplicate Rows	Show Duplicate Rows

## 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.



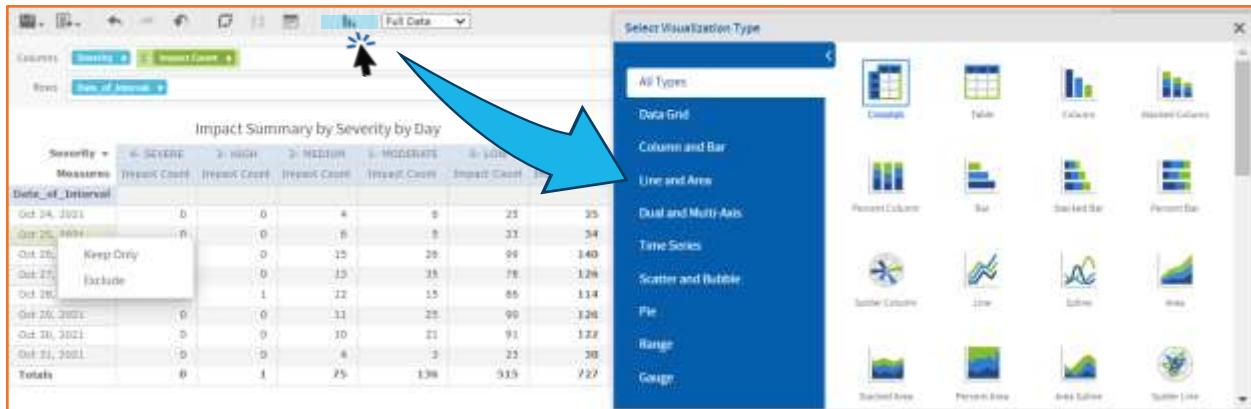
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From the **Advanced** tab, click on **More Information** to access a full list of Advanced Chart Formatting commands with definitions and descriptions for every command's Property and Value.

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## 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.



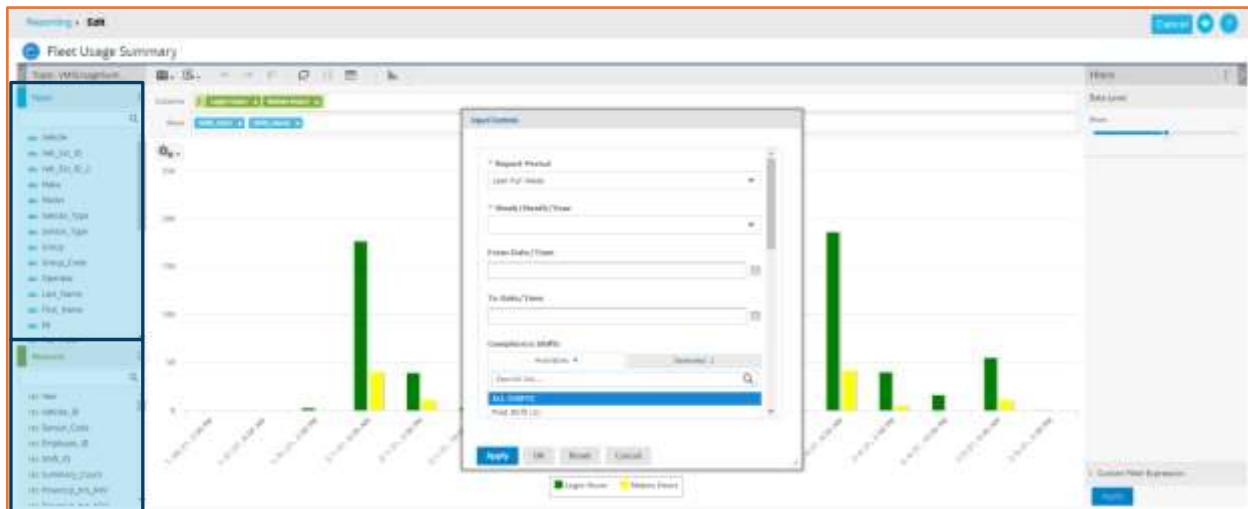
The screenshot shows the PowerFleet software interface. On the left, a Crosstab view titled 'Impact Summary by Severity by Day' is displayed. The columns represent severity levels: SEVERE, HIGH, MEDIUM, MODERATE, and LOW. The rows represent dates from Oct 14, 2021, to Oct 31, 2021, and a 'Totals' row. A blue arrow points from the text below to the 'Select Visualization Type' dialog box on the right. This dialog box is titled 'Select Visualization Type' and shows a grid of icons representing various visualization types: Data Grid, Column and Bar, Line and Area, Dual and Multi-Axis, Time Series, Scatter and Bubble, Pie, Range, Gauge, Crosstab, Table, Calendar, Stacked Bar, Percent Bar, Scatter Column, Line, Scatter, Map, Stacked Area, Percent Area, Area Stacked, and Scatter Line.

Date_of_Interval	1- SEVERE	2- HIGH	3- MEDIUM	4- MODERATE	5- LOW	Total
Oct 14, 2021	0	0	4	0	25	35
Oct 15, 2021	0	0	8	5	33	54
Oct 16, 2021	0	0	12	29	99	140
Oct 17, 2021	0	0	13	35	78	126
Oct 18, 2021	1	0	12	15	85	114
Oct 19, 2021	0	0	11	26	99	136
Oct 20, 2021	0	0	10	21	91	122
Oct 21, 2021	0	0	6	3	25	38
Oct 22, 2021	0	0	1	25	136	151
<b>Totals</b>	<b>0</b>	<b>0</b>	<b>25</b>	<b>136</b>	<b>515</b>	<b>727</b>

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

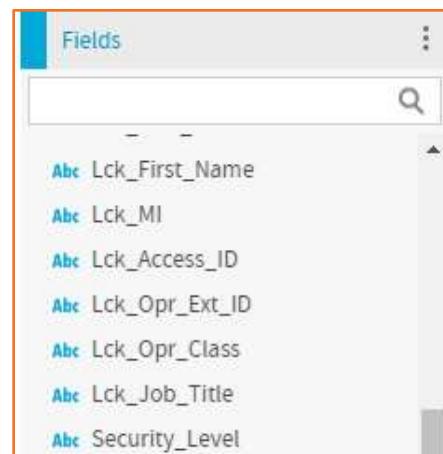
The left side of the Edit Mode screen lists **Fields** and **Measures**. These are the building blocks of your reports. When you think about modifying or customizing a report, think about it terms of modifying or customizing the displayable fields and calculable measures that make up the report.



## 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 &amp; 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.

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-PE4500-10209299	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**.

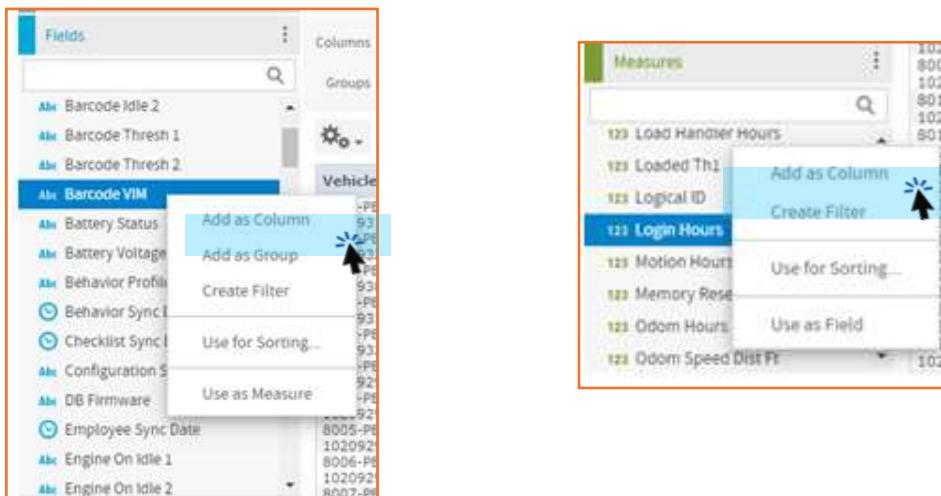
The report editor is designed with built-in logic to prevent it from presenting your with **Add to...** options that can't be supported based on the report type or its parameters.

The screenshot illustrates the report editor's context menu system. On the left, the 'Fields' section shows a list of vehicle-related data items. A context menu is open over the item 'abc: Barcode VIM', with the 'Add as Column' option highlighted and a blue cursor icon. On the right, the 'Measures' section shows a list of vehicle metrics. A context menu is open over the item '123: Login Hours', with the 'Add as Column' option highlighted and a blue cursor icon. A large blue arrow points from the 'Fields' section towards a 'Locked Duration - Graph' visualization below, indicating the flow from selected fields to the resulting report output.

### 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.

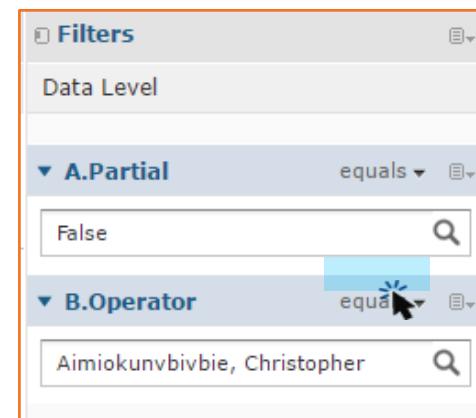
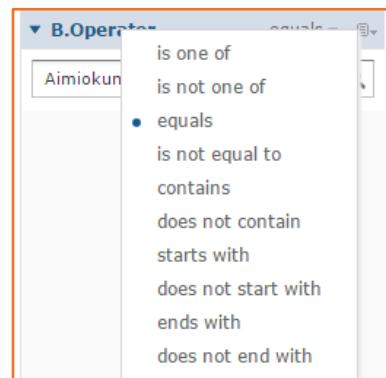
Alternately, you can right-click on the field and select **Create Filter**.



### 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.

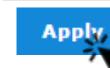


These filter values are similar to logical or comparison operators you might use to create formulas in Excel or other spreadsheet programs.

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.

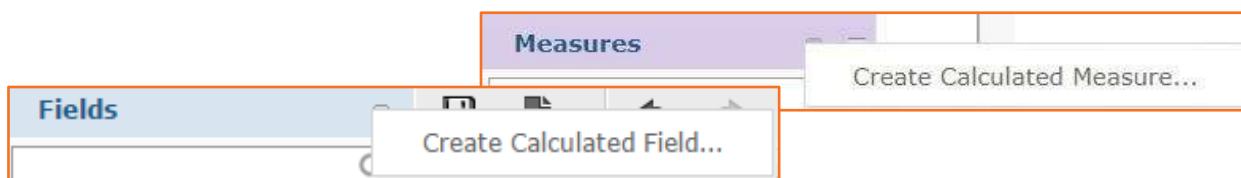
▼ Custom Filter Expression

Example: A or (B and C)

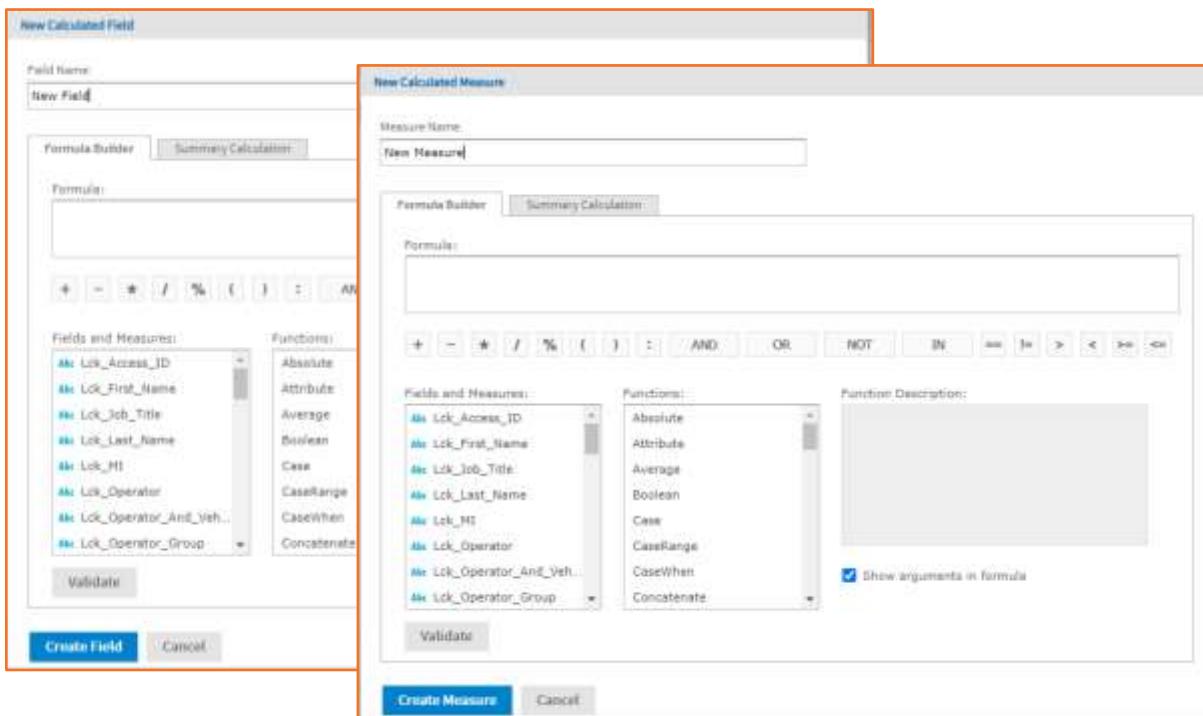


## Creating a Calculated Field

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.

<b>New Calculated Field</b> Field Name: <input type="text" value="New Field"/>	<b>New Calculated Measure</b> Measure Name: <input type="text" value="New Measure"/>
--	--

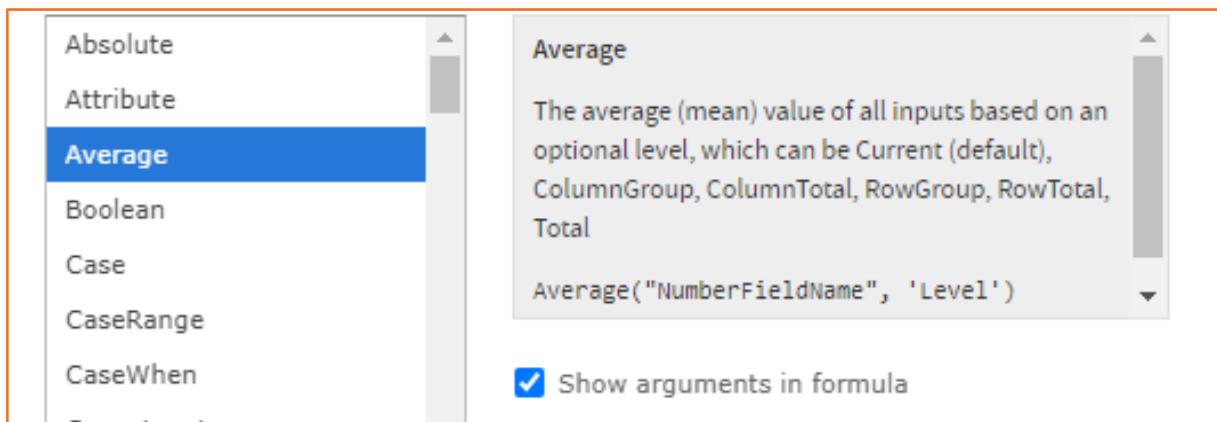
Double-click on an element in the **Fields and Measures** list to add it to your new formula.

<b>Fields and Measures:</b> <input type="checkbox"/> Lck_Access_ID <input type="checkbox"/> Lck_First_Name <input type="checkbox"/> Lck_Job_Title <input type="checkbox"/> Lck_Last_Name <input type="checkbox"/> Lck_MI <input type="checkbox"/> Lck_Operator <input type="checkbox"/> Lck_Operator_And_Veh... <input type="checkbox"/> Lck_Operator_Group
---

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

<b>Functions:</b> <input type="checkbox"/> Absolute <input type="checkbox"/> Attribute <input type="checkbox"/> Average <input type="checkbox"/> Boolean <input type="checkbox"/> Case <input type="checkbox"/> CaseRange <input type="checkbox"/> CaseWhen <input type="checkbox"/> Concatenate	<b>Function Description:</b> <div style="border: 1px solid #ccc; height: 150px; width: 100%;"></div>
<input checked="" type="checkbox"/> Show arguments in formula	

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

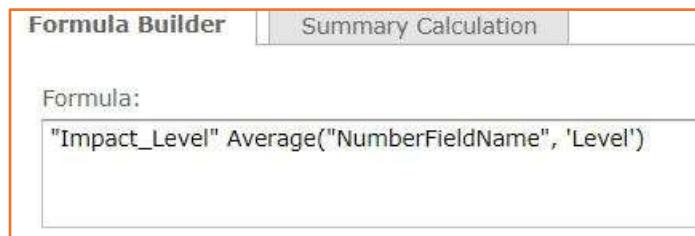


The screenshot shows a list of functions on the left and a detailed description on the right. The 'Average' function is selected, highlighted with a blue background. The description text is: 'The average (mean) value of all inputs based on an optional level, which can be Current (default), ColumnGroup, ColumnTotal, RowGroup, RowTotal, Total'. Below the description is the formula: 'Average("NumberFieldName", 'Level')'. At the bottom of the description box is a checked checkbox labeled 'Show arguments in formula'.

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."

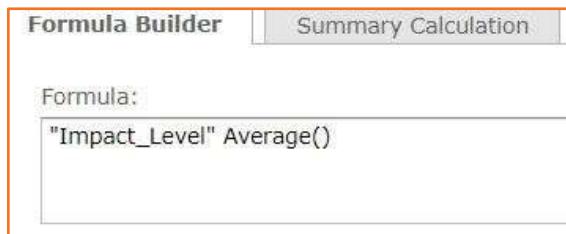
To have the Function arguments visible in the Formula, check the **Show arguments in formula** box, and the arguments will display as shown below.

Show arguments in formula



The screenshot shows the 'Formula Builder' interface. The 'Summary Calculation' tab is selected. In the 'Formula' field, the text is: '"Impact\_Level" Average("NumberFieldName", 'Level')'

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.

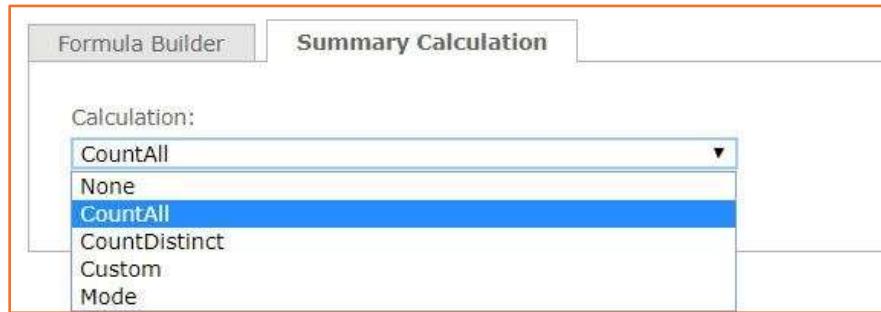


The screenshot shows the 'Formula Builder' interface. The 'Summary Calculation' tab is selected. In the 'Formula' field, the text is: '"Impact\_Level" Average()'

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.



**Create Field**



**Create 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.

Reports List (All Folders)					
NAME	FOLDER	LAST MODIFIED	SCHEDULES		
10241DSYsuDeleteDSYViewUserPublicAccess Point Inventory	Public Reports	Apr 5, 2018			
10241dsysuLow Usage Vehicles	My Reports	Apr 19, 2018			
10241DSYsuPrivateDeleteTestbyDSYsu1	My Reports	Apr 5, 2018			
10241DSYsuPrivateGroup Expiration for Operators	My Reports	Apr 4, 2018			
10241DSYsuPublicGroup 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.

Subscriptions (Vehicle Usage Detail)					
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:

Start Date:

### 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**

## 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**

<b>File Name:</b>	Access_Control_Bypass__ID_Optional_Mode__History			
<b>Formats:</b>	<input type="checkbox"/> PDF	<input type="checkbox"/> CSV	<input type="checkbox"/> XLS	<input type="checkbox"/> XLSX
	<input type="checkbox"/> RTF	<input type="checkbox"/> HTML	<input type="checkbox"/> PPTX	<input type="checkbox"/> DOCX
	<input type="checkbox"/> ODT	<input type="checkbox"/> 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:**  

**Password:**  

**File Handling:**

**Overwrite Files**  
 **Sequential File Names by Timestamp**

**Timestamp Pattern:**  yyyyMMddHHmm

**Test Connection**

**Enable FTPS**

**Port:**  21

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.

**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**