

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 <i>only</i> 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:**

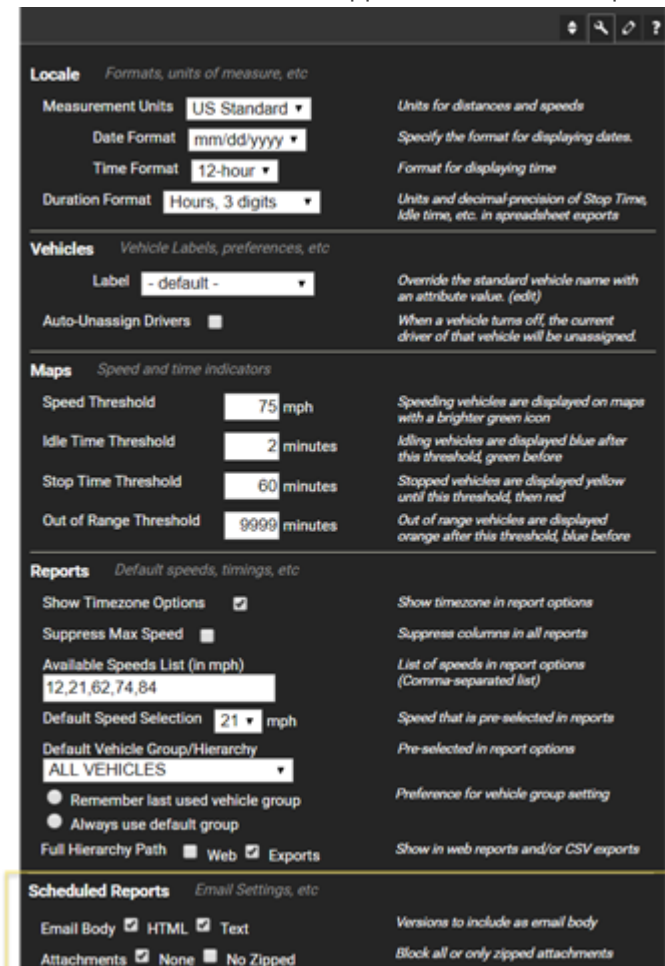
Scheduling a Report

Link: <https://help.wextelematics.com/docs/about-reports/scheduling-a-report-pro/> Last Updated: February 25th, 2019

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

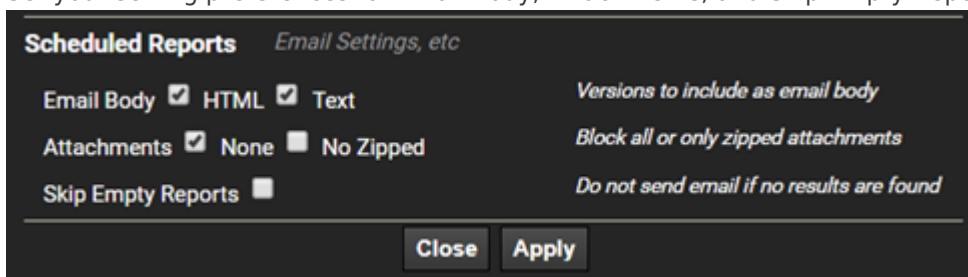


The User Preferences menu appears. Scheduled Report settings are displayed at the bottom of the menu.

A dark-themed user preferences menu with a title bar containing icons for expand, search, refresh, and help. The menu is divided into sections: 'Locale' (Measurement Units, Date Format, Time Format, Duration Format), 'Vehicles' (Label, Auto-Unassign Drivers), 'Maps' (Speed Threshold, Idle Time Threshold, Stop Time Threshold, Out of Range Threshold), 'Reports' (Show Timezone Options, Suppress Max Speed, Available Speeds List, Default Speed Selection, Default Vehicle Group/Hierarchy, Remember last used vehicle group, Always use default group, Full Hierarchy Path), and 'Scheduled Reports' (Email Body, Attachments, Skip Empty Reports). The 'Scheduled Reports' section is highlighted with a yellow border.

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.

A dark-themed 'Scheduled Reports' settings panel with a title bar. It contains three rows of settings: 'Email Body' with checkboxes for HTML and Text; 'Attachments' with checkboxes for None and No Zipped; and 'Skip Empty Reports' with a checkbox. Below the settings are 'Close' and 'Apply' buttons.

3. Click **Apply**.

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

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.

EXAMPLE

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.



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**.

Setup Scheduled Report ✕

Drive Time Summary Report

A Summary of fleet driving statistics.

Group/Vehicle/Driver ALL VEHICLES ▼

Schedule Daily ▼

Email Subject Drive Time Summary Report
Email subject (i.e 'Weekly Speeding Report')

Addresses tom.jones@xyz.demo
Enter one or more email addresses

Include PTO data ☒

Include Unutilized Vehicles ☒

Sort By Vehicle ▼

Active ☒ Yes ☐ No

Schedule Report

close

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.)

Scheduled Reports





Please allow 'alerts@' on your email filter to ensure you receive these reports.

filter


Report Type: - ALL TYPES - Active: ☒ All Users: ☐
Schedule: - ALL SCHEDULES - Subject: *for wildcard
Vehicle Group: - ALL GROUPS - Address: filter

Page: 1-25 / 26-43


Show All 43: ☐

Subject	Run	Last	Next	Active
Drive Time Summary Report ¹	2 times	11/5/2018	11/12/2018	yes  

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).

 **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.

EXAMPLE SCENARIO

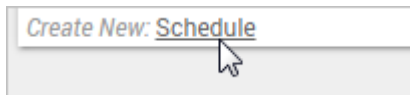
Company XYZ provides a monthly bonus to the driver with the lowest idle time. Rather than use the system monthly schedule, which reports on the 1st of each month, this report schedule must be generated by the 25th of each month in order to coincide with payroll's process for bonus payouts.

► 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).

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Define New Recurrence Pattern ×

daily

weekly

monthday

halfmonth

monthweek

Day(s) of every month(s)

Preview Schedule

Start and end ☒ never ☐ by

Span: ☒ day(s) ☐ month(s) Reports may span a number of days and will be run on the dates specified by the recurrence pattern above.

Generate report at: Daily reports generated before 12 PM (noon) will report on the previous day. After 12 PM (noon), reports will use the current day's data.

Skip days before sending:

Save As...

Assign a name to this recurrence pattern. Use general names like 'Every weekday' or 'Third Thursday'.

November 2018	December 2018	January 2019	February 2019	March 2019	April 2019
1 2 3		1	1 2 3 4 5	1 2	1 2 3 4 5 6
4 5 6 7 8 9 10	2 3 4 5 6 7 8	6 7 8 9 10 11 12	3 4 5 6 7 8 9	3 4 5 6 7 8 9	7 8 9 10 11 12 13
11 12 13 14 15 16 17	9 10 11 12 13 14 15	13 14 15 16 17 18 19	10 11 12 13 14 15 16	10 11 12 13 14 15 16	14 15 16 17 18 19 20
18 19 20 21 22 23 24	16 17 18 19 20 21 22	20 21 22 23 24 25 26	17 18 19 20 21 22 23	17 18 19 20 21 22 23	21 22 23 24 25 26 27
25 26 27 28 29 30	23 24 25 26 27 28 29	27 28 29 30 31	24 25 26 27 28	24 25 26 27 28 29 30	28 29 30
	30 31			31	
May 2019	June 2019	July 2019	August 2019	September 2019	October 2019
1 2 3 4		1 2 3 4 5 6	1 2 3	1 2 3 4 5 6 7	1 2 3 4 5
5 6 7 8 9 10 11	2 3 4 5 6 7 8	7 8 9 10 11 12 13	4 5 6 7 8 9 10	8 9 10 11 12 13 14	6 7 8 9 10 11 12
12 13 14 15 16 17 18	9 10 11 12 13 14 15	14 15 16 17 18 19 20	11 12 13 14 15 16 17	15 16 17 18 19 20 21	13 14 15 16 17 18 19
19 20 21 22 23 24 25	16 17 18 19 20 21 22	21 22 23 24 25 26 27	18 19 20 21 22 23 24	22 23 24 25 26 27 28	20 21 22 23 24 25 26
26 27 28 29 30 31	23 24 25 26 27 28 29	28 29 30 31	25 26 27 28 29 30 31	29 30	27 28 29 30 31
	30				

You will receive reports on days highlighted in red. Bold dates will be reported upon.

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

Span: ☐ day(s) ☒ month(s) Reports may span a number of days and will be run on the dates specified by the recurrence pattern above.

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.

Idle Time Report

Report on idle durations for your fleet.

Group/Vehicle/Driver

Schedule

Email Subject

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).

EXAMPLE SCENARIO

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).

Subject	Run	Last	Next	Active	
Drive Time Summary Report ⁺	0 times	N/A	pending	yes	
1 Scheduled Reports found.					



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**.

Active ☐ Yes ☒ No

Schedule Report



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](#).