



Your Telematics Platform Getting Started



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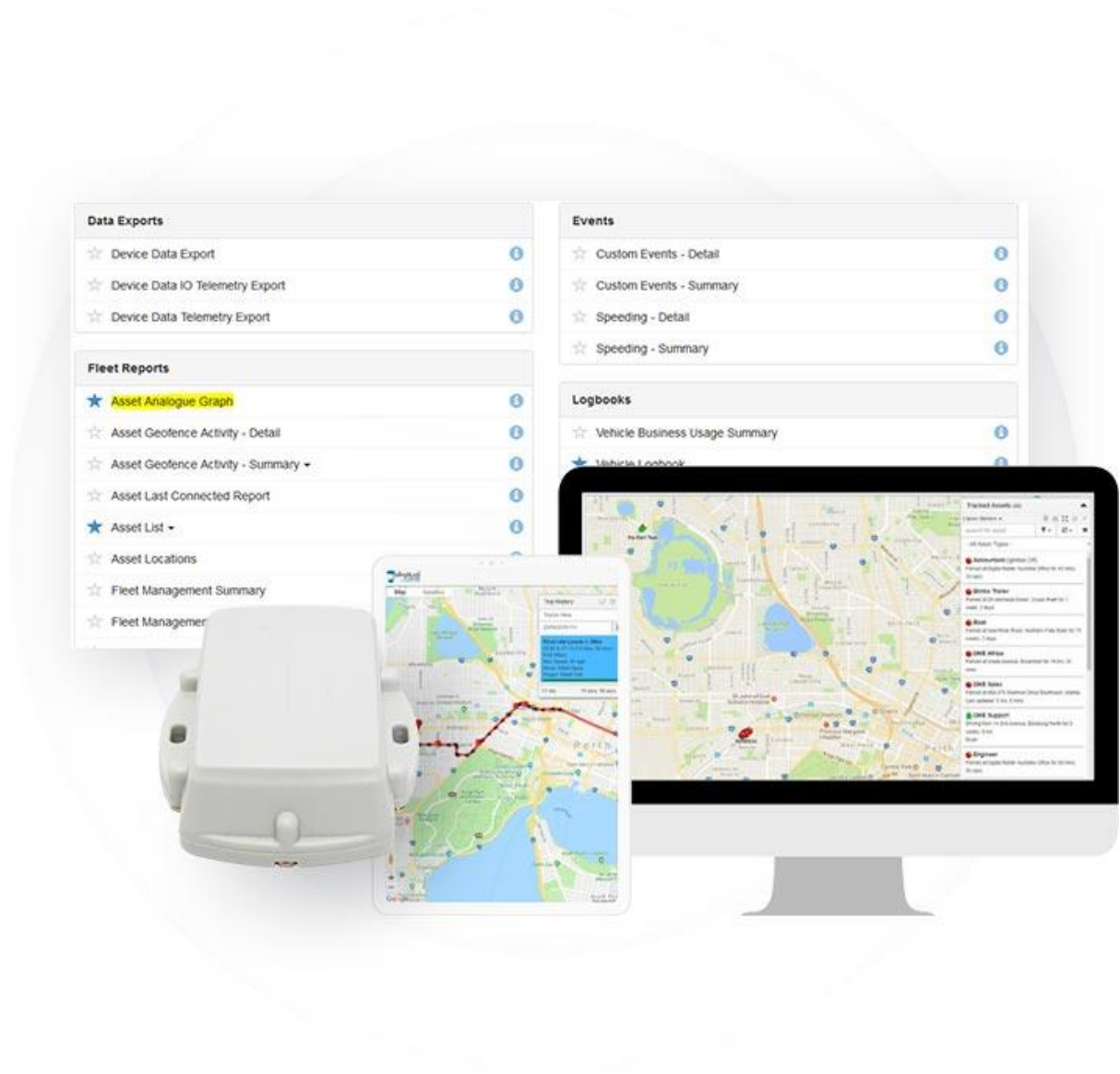
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Welcome to your Telematics Platform.

In this guide we will cover how to set up an asset in the Telematics platform and how to configure different functions to get the most out of your device data.

Track and manage the assets that power your business with the Telematics platform, our GPS Tracking Platform featuring Google Maps, powerful customizable reporting and alerts, remote device health monitoring, and more.



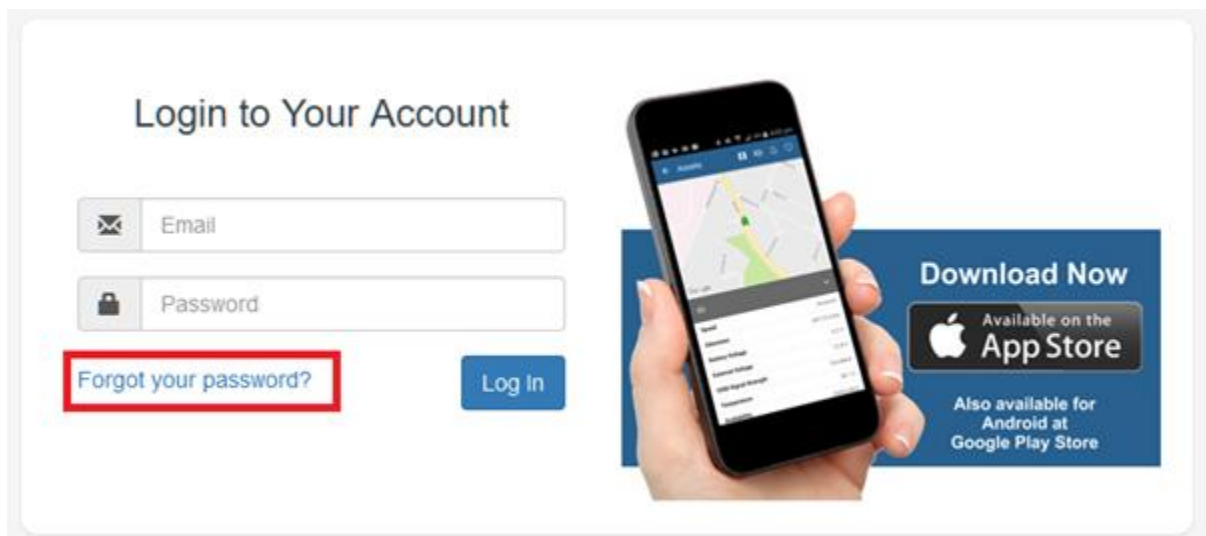
Logging into your new platform

By now, you should have received an email invitation to log into your new telematics platform and start getting set up.

Your personalised URL is <https://homeofiot.telematics.guru>

Forgotten Password?

If you have forgotten or misplaced your password, simply go to your company URL and follow the prompts to reset your access using the email address for your account.



Managing Assets

Creating an Asset

To create an asset, navigate to Assets >> Manage Assets and click 'Create New Asset'.

To get going, all we need to do is input a device name, and serial. The system will automatically select the correct device type for that serial, and we are set to go!

The screenshot shows a 'Create Asset' form with the following fields and options:

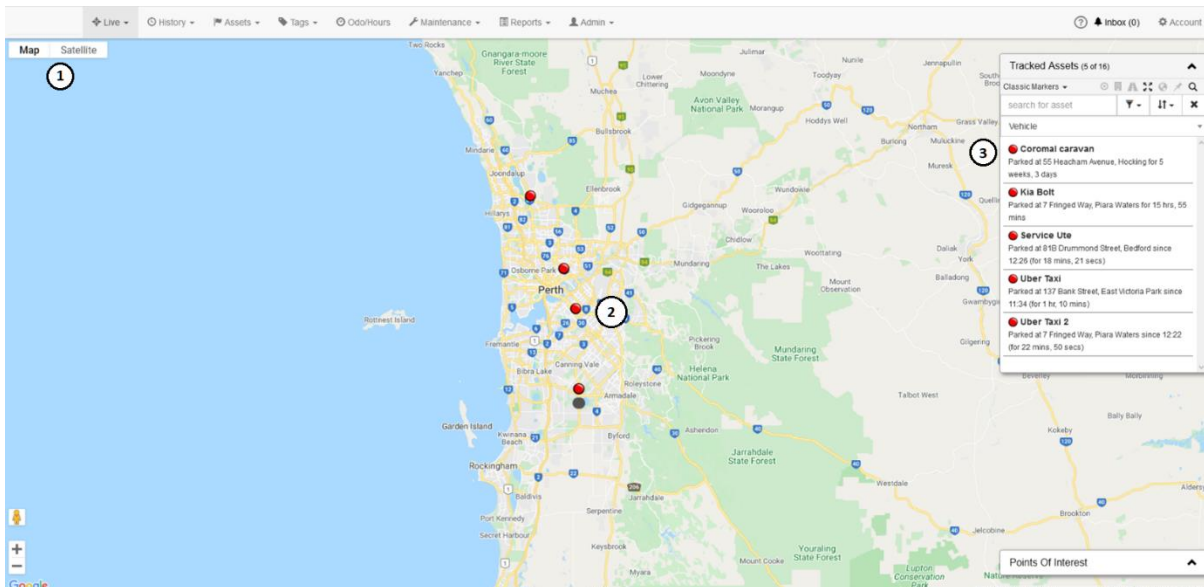
- Name:** Text input field containing 'asset name'.
- Description (optional):** Text input field containing 'asset description'.
- Asset Type:** Dropdown menu with 'Bag' selected and a 'New' button.
- Department:** Dropdown menu with 'None' selected and a 'New' button.
- Project:** Dropdown menu with 'None' selected and a 'New' button.
- Device Serial:** Text input field containing 'device serial'.
- Device Type:** Dropdown menu with 'G60' selected.
- Asset Code (optional):** Text input field containing 'asset code'.

At the bottom right, there are three buttons: 'Save', 'Save and New', and 'Cancel'.

The other tabs can be used to record additional details against the asset like the installer, VIN, vehicle make and model, a photo. They also allow configuration of more advanced features.

The Live Map

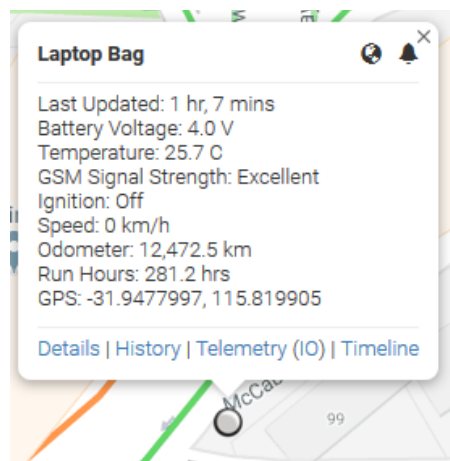
Live View in Telematics can be useful to see an instant representation of where your assets are and in what state they are currently in. Below is a capture of some example assets in Perth, WA.



1. Here you can choose whether to display a road map view or satellite view.
2. This is what Assets can look like on the live view.
3. The 'Map Menu' holds several search and grouping tools including groupings by Asset colour, project, Asset type and Department. You can quickly and easily search for a specific asset.

Selecting an Asset

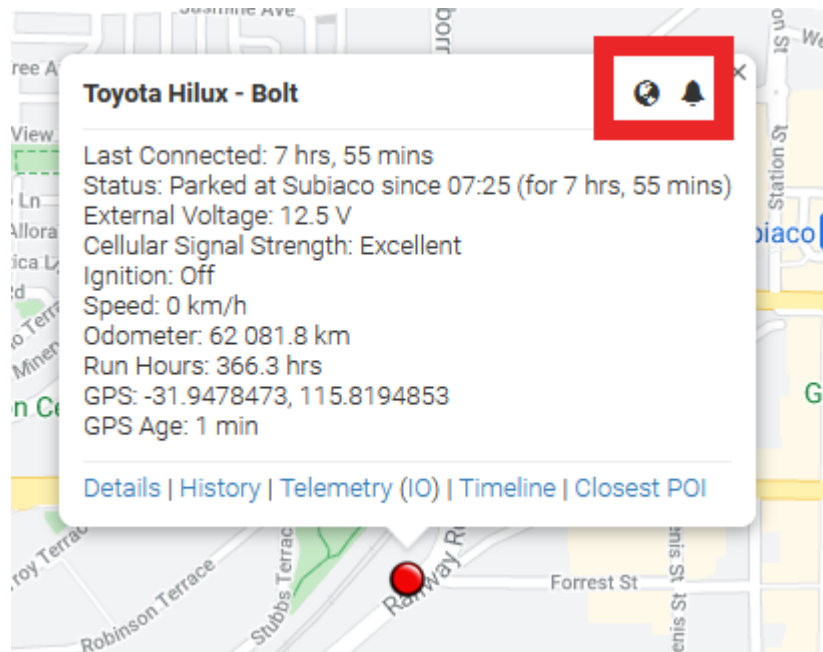
When you select an asset, your map will zoom to its location and show the information card. The information card displays some key asset data.



Asset Location Sharing

You can click on the world icon to share the location to anyone via a link.

The bell icon is to Activate a Movement Alert. The next time the asset starts a trip, you will receive an alert.



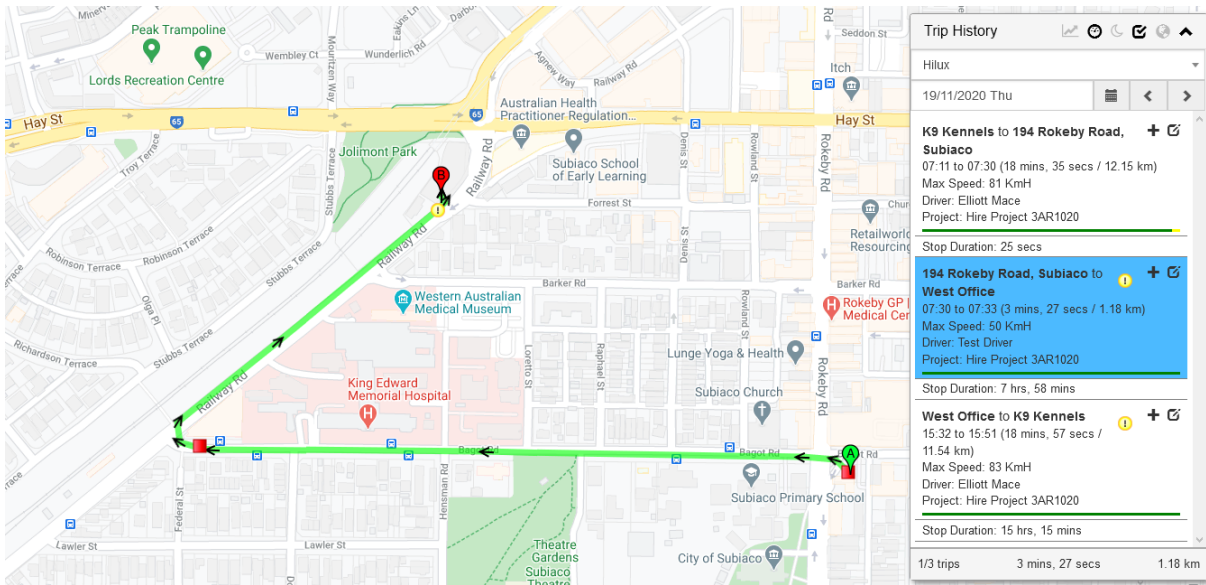
Trip History Views

The history of an asset can be represented in a few ways.

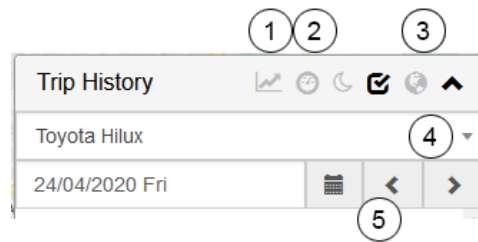
- **Trip History Map View:** Trips for an asset displayed on the map.
- **Point History Map View:** Locations of non-trip-based assets on the map.
- **Manage Trips:** See the trips of an asset in table form. In this view you can add comments and change trip properties.
- **Asset Timeline:** See the asset events in a list. E.g., Trip start/stop, duress, hard driving (if enabled).
- **Asset Daily Coverage Map:** Show all the trips that selected assets did on a specific date.
- **Destination History Map:** Start and end of trip locations are displayed as a heat map for a specific date range.

Trip History Map View

This view displays the selected day's trips chronologically, displaying information on start and end location, times, distance, max speed, and driver details (if configured).



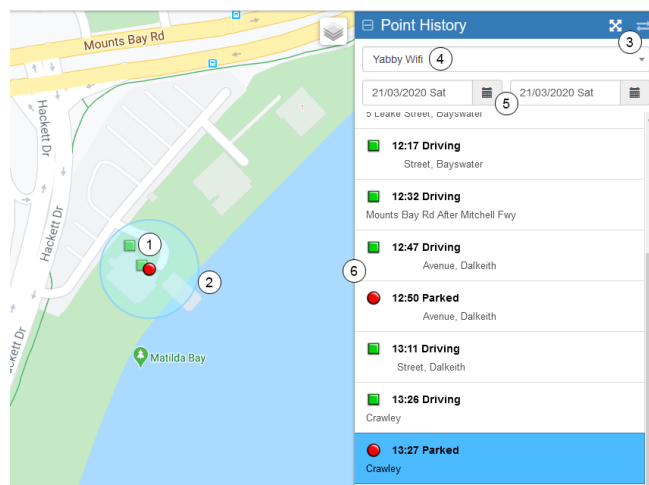
1. Speed Graph – This generates an interactive graph of Speed vs Time.
2. Speed View – Highlights areas where asset speed has exceeded local speed (requires TG-PRO).
3. Enable Geofences – Shows geofences with labels on Map.
4. Asset Selection field.
5. Date selection controls - either pick a date from a month or browse day by day.



Point based View

This view displays pins for each point-based asset, Red for a still asset, and green for an asset that is moving.

1. The Asset Pins.
2. The ring is an aspect of the Yabby Wi-Fi – signifying the Wi-Fi lookup position accuracy.
3. Turn off/on the lines connecting pins (pictured off).
4. Select Asset from list of Point based assets.
5. Date range selection.
6. List of logged Points.



Manage Trips

Manage Trips view is a bit more interactive, with functions that let you Create Geofences, set a Trip Type, Project, mark the trip Business or Private, write a trip comment, assign drivers and export data.

Date	Duration	Distance	Start Location	End Location	Project	B/P	Comment	Trip Type	Driver	Stop Time	Idle Time	Hourly Rate	Distance Rate	Billable Rate
Tuesday 24 Nov 2020														
06:54 - 06:55	31 secs	17 m	K9 Kennets	K9 Kennets	Hire Project 3...	<input type="checkbox"/>		-	-	3 mins, 52 secs	14 secs	0.00	0.00	0.00
06:58 - 07:18	19 mins, 32 secs	13.35 km	K9 Kennets	West Office	Hire Project 3...	<input type="checkbox"/>		-	-	2 mins, 3 secs		0.00	0.00	0.00
Monday 23 Nov 2020														
06:56 - 06:59	3 mins, 14 secs	998 m	K9 Kennets	K9 Kennets	Hire Project 3...	<input type="checkbox"/>		-	-	24 secs	1 min, 19 secs	0.00	0.00	0.00
06:59 - 07:02	3 mins, 3 secs	1.09 km	K9 Kennets	Eastern Operation Area	Hire Project 3...	<input type="checkbox"/>		-	-	2 mins, 57 secs	2 mins, 35 secs	0.00	0.00	0.00
07:05 - 07:25	19 mins, 19 secs	11.67 km	Eastern Operation Area	West Office	Hire Project 3...	<input type="checkbox"/>		-	-	8 hrs, 22 mins	4 mins, 47 secs	0.00	0.00	0.00
15:47 - 16:04	17 mins, 28 secs	11.85 km	West Office	K9 Kennets	Hire Project 3...	<input type="checkbox"/>		-	-	3 hrs, 30 mins	3 mins, 32 secs	0.00	0.00	0.00
19:35 - 19:37	2 mins, 41 secs	1.43 km	K9 Kennets	Eastern Operation Area	Hire Project 3...	<input type="checkbox"/>		-	-	3 mins, 49 secs	28 secs	0.00	0.00	0.00
19:41 - 19:45	4 mins, 7 secs	1.47 km	Eastern Operation Area	K9 Kennets	Hire Project 3...	<input type="checkbox"/>		-	-	11 hrs, 8 mins	1 min, 36 secs	0.00	0.00	0.00

1. Select Asset.
2. Select Date, Jump to Today or Most recent logs.
3. Set Range of trips shown, Day, Week or Month.
4. Trip Filter (See more below).
5. Export selected trips as a CSV (this runs the Trip List Report with any applied filters).
6. Assign Trip Operations.
7. Select individual or multiple trips.
8. View Trip in Trip History View.
9. End Location (Geofence name will show if the trip ends in a geofence).
10. Business or Private trip toggle button.
11. Driver.
12. Globe icon - Create Geofence at this location.

Trip List Filter

Trip list filter has many options to view trips based on criteria. Some uses for this could be:

1. Viewing out of work hour trips.
2. Viewing All Business type trips.
3. Viewing All Business trips without a comment.
4. All Weekend only trips.
5. All trips by a certain Driver.
6. Any trips over 50 kms.
7. Any Trips belonging to a project.

Select Asset: Toyota Hilux | Date: April 2020 | Today | Most Recent | Range: 1 Month | Hide Trip Filter | Operations: Export All | Trip Operations

From Time: 08:00 | To Time: 17:00 | Days of the Week: M T W T F S S | Weekdays | Weekends | All | None | Business trips without comment

Trip Type: Any | Project: Any | Driver: Elliott Mace | Trip Duration (minutes): Any | Trip Distance (km): Any

Apply

Asset Timeline

The Asset Timeline view is useful to see the events of an asset for a date range.

Event types can include:

- Trip Start/Stop.
- Duress.
- Harsh Acceleration/Braking.
- Accidents.
- Speeding events.
- Any Custom event you have defined.
- Any change in Asset State.

Select Asset 1 Select Event Type 2 From Date 3 To Date Use Most Recent

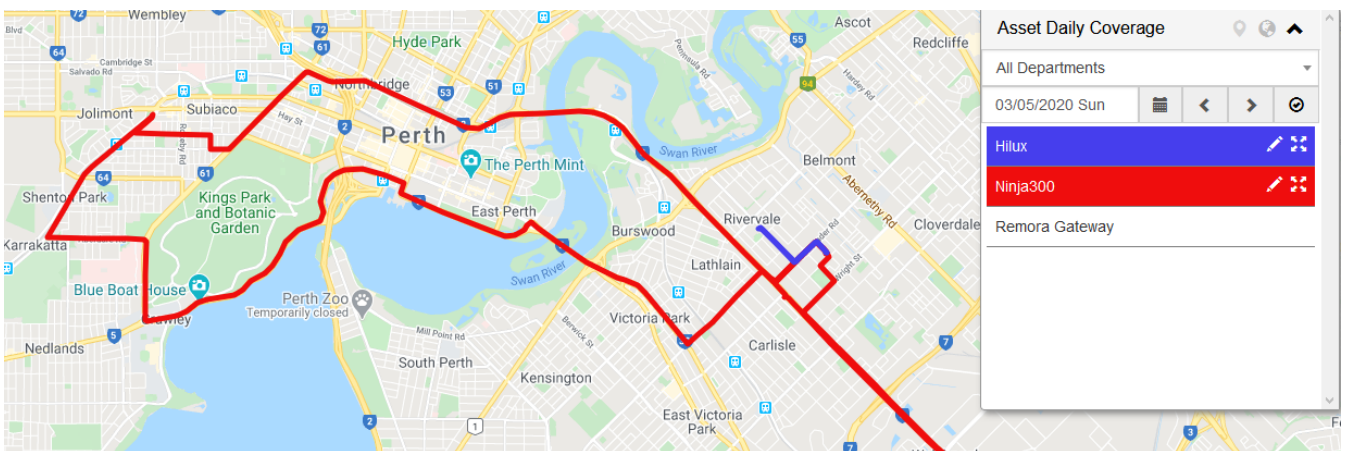
Key: ■ Start of Event ■ End of Event ■ Instantaneous Event Click on an event to highlight the corresponding start or end event.

View Trip	Event Date	Event Time	Detail
<input type="button" value="Q"/> 4	27/04/2020 Mon	15:07	Trip Start at Home
<input type="button" value="Q"/>	27/04/2020 Mon	15:10	Trip End at Kooyong Road, Rivervale for 1.43 km / 3 mins, 11 secs. Max Speed: 51 km/h
<input type="button" value="Q"/>	27/04/2020 Mon	15:14	Trip Start at Kooyong Road, Rivervale
<input type="button" value="Q"/>	27/04/2020 Mon	15:18	Trip End at Home for 1.46 km / 3 mins, 15 secs. Max Speed: 55 km/h
<input type="button" value="Q"/>	29/04/2020 Wed	07:13	Trip Start at Home
<input type="button" value="Q"/>	29/04/2020 Wed	07:19	Trip End at Great Eastern Highway, Burswood for 3.20 km / 5 mins, 55 secs. Max Speed: 57 km/h

1. Select your Asset.
2. Select your event type or leave as All.
3. Select your Range or use most recent logs.
4. View trip on the map.
5. If you click on the start or end of a trip, the start will show in green and the end highlighted in red.

Asset Daily Coverage Map

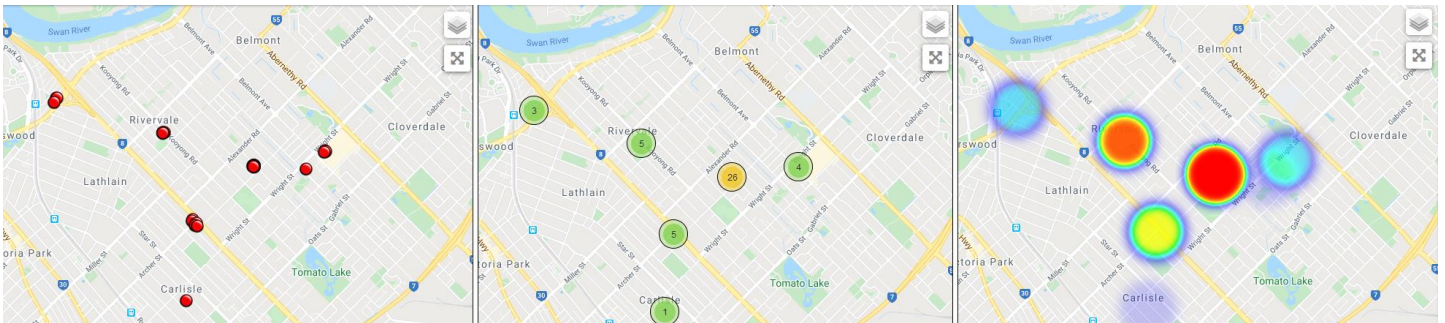
The Asset Daily coverage map shows the trip paths of all Assets for the specified date.



Destination Map

The destination history view provides several ways of visualizing tracking data by displaying the trip end locations. You can access the Destination History Map under History-> Destination History Map. If this is not an option, contact Home of IoT to enable the function on your organisation.

1. See on the map where the asset has ended its trips, and the stop time at each location. (left)
2. Cluster the trip ends to show the most visited destinations. (middle)
3. Show the destinations as a heat-map, representing the most visited destinations. (right)



The screenshot shows the 'Destination History' interface. On the left is a map with a heat map overlay. On the right is a filter panel with the following elements:

- Asset** (1): A dropdown menu showing 'Toyota Hilux' (2).
- Date from** (3): A date picker set to '01/04/2020'.
- Date to**: A date picker set to '01/05/2020'.
- Exclude Weekends** (4): A checkbox that is currently unchecked.
- Arrival Time Between**: A section with two time pickers:
 - Start** (5): A time picker set to '00:00'.
 - End**: A time picker set to '23:59'.
- 46 trips found**: A summary of the filtered results.

1. Select which type of destination map you are after.
2. Select an Asset from the drop down.
3. Select the dates period you are interested in.
4. Exclude any stops on weekends by ticking "Exclude Weekends", OR
5. Only include stops within work hours by specifying Start and End times.

Note: This only works for "trip-based" assets. Point history devices will not appear in this view. An asset needs to end a trip (and send an "End of Trip" log the platform) to appear in this view.

Driver Trip History View (My Trips)

The Driver Trip History View (My Trips) allows a user's view of trips to be restricted to trips done by the user's driver. The main use case for this view is for a driver that needs to do log booking. When they log into the platform, they should only see trips linked to their driver. All other trips are hidden from them.

The Driver can also click on the Magnifying Glass Icon (1) to see the trip on the map and set the trip type (2)

Wednesday 29 Apr 2020							
<input type="checkbox"/>	07:13 - 07:19	5 mins, 55 secs	3.20 km		Home	Great Eastern Highway, Burswood	- -
<input type="checkbox"/>	07:20 - 07:26	5 mins, 44 secs	3.15 km		Great Eastern Highway, Burswood	Home	- -
<input type="checkbox"/>	12:04 - 12:08	3 mins, 46 secs	1.20 km		Home	Belmont Avenue, Cloverdale	- -
<input type="checkbox"/>	12:14 - 12:18	4 mins, 12 secs	1.16 km		Belmont Avenue, Cloverdale	Home	- -

from the My Trips view. To access this screen, go to History -> My Trips. If you cannot see this option, contact Home of IoT.

The Map view also allows:

- Drivers to login and only see their trips.
- Assign a Business/Private designation to the trip. Click the B/P Icons to change the designation.
- Add a Comment to the Trip. Enter the comment by clicking and typing in the Comment column.

Driver Trip History Map View

Close

Scheduled Maintenance, Odometer and Run Hours

Primary Odometers/Run Hours

The Telematics platform can keep track of run hours (engine hours) and odometer readings. To start you can start fresh with 0 kms and 0 hours or declare existing vehicle readings using the Odometer/Hours option in the top menu navigation bar. Click New Reading to enter the current figures. e.g., 54,000 kms or 15 hrs.

Based on this starting point, the platform will increment the odometer and run hours whenever the 'ignition'

(physical or virtual) is on.

Scheduling Maintenance

Scheduled Maintenance and reminders let you create jobs and maintenance schedules for your assets.

Some useful terms:

- Maintenance Schedule – this defines the schedule, the list of Assets and the various options relating to how they are to be scheduled.
- Job – a Job is created when an Asset becomes due for the work to be done as defined in the Maintenance Schedule.
- Reminder – this is created in the Job List as a Reminder ahead of the Job being created, so that you can get ready / book / plan for the upcoming Job.

Below we have an example of a Maintenance schedule with an Open job reminder on the right-hand side.

Asset	Scheduled Odometer	Current Odometer	Odometer To Go	Asset Instructions
Adam's Sting	1,500 km	1,319.4 km	180.6 km	View Open Job

To start creating a new schedule, click 'Create New Schedule' and fill out the name, instructions and set the time zone.

Once you hit next, the next two screens select the assets you are creating the schedule for, and the recipients of the email reminder then you can set the units for the schedule.

As you can see from the above image, there are two main ways to set up a maintenance schedule reminder; primary and secondary, there is also further sub-categories.

1. Primary
 - a. Odometer
 - b. Run Hours
 - c. Calendar

2. Secondary Unit Maintenance (activated by the check box)
 - a. Odometer
 - b. Run Hours

Each method has an absolute value (checked boxed) and a relative value (unchecked).

- **Absolute Value:** A point that is set at a certain interval, i.e., as shown in the image above; 15,000 kms. This means when the asset's odometer reaches 15,000 km, the next interval will be 30,000 kms.
- **Relative Value:** A Relative schedule will add the interval to the Asset's Odometer reading at the time that the maintenance is done. If the Asset has an Odometer reading of 55,000 km when the schedule is created, then the next Job will be scheduled for 70,000 km.

The Run hours schedule operates in the same manner as the Odometer but is instead based on hours of up time.

The Calendar schedule can be used for when the maintenance schedule is set to a particular date or ongoing time frame.

Jobs and Reminders

The system continually analyses the data coming in for Assets and will automatically create Jobs and Reminders for the Assets when the schedule options have been met. When these are created in the system they are "Open" and imply that some action is required. You can go directly to the Jobs and Reminders list from the Maintenance Menu, or you can link to it from the "View Open Jobs" button on the Maintenance Schedules screen.

There are also reports available in the system and it is a good idea to schedule a report to email you a list of new Jobs and Reminders periodically, for example once a week.

When you click 'Complete Job' on a maintenance schedule you'll see the below screen which records the date, current odometer of the asset, run hours and an option of which schedule you'd like to action. There is also the space to enter in notes for the job.

Complete Job
×

ⓘ Closing this maintenance job means that the work was performed on the action date provided. The next scheduled date, run hour and odometer values will be calculated based on the appropriate schedule. Record any notes that are relevant to the work performed.

Action Date

Odometer At Action Date

Run Hours At Action Date

Skip ahead to schedule: 1,750 km?

Job Notes

*These will be appended to any existing notes

Maintenance & Schedule Reports

The following Reports are available for schedule reminders; they allow you to list the Jobs and Reminders based on report parameters. It is recommended that you schedule the "Open Maintenance Jobs and Reminders" report to be emailed to a suitable person or group within your Organisation so that they will be proactively notified of new Jobs and Reminders that have been created in the system.

Scheduled Maintenance

★ Maintenance History

A report listing all scheduled maintenance jobs and reminders in a date range.

★ Open Maintenance Jobs and Reminders

A report listing all new scheduled maintenance jobs and reminders for a variable number of past days.

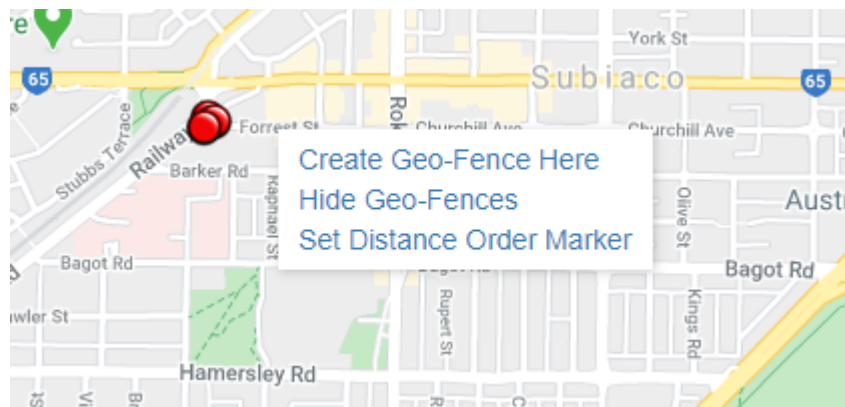
Geofences

Geofences are used to put virtual boundaries around a specific area. We can then set up alerts for entries/exits or track the activity of an asset inside this geofence.

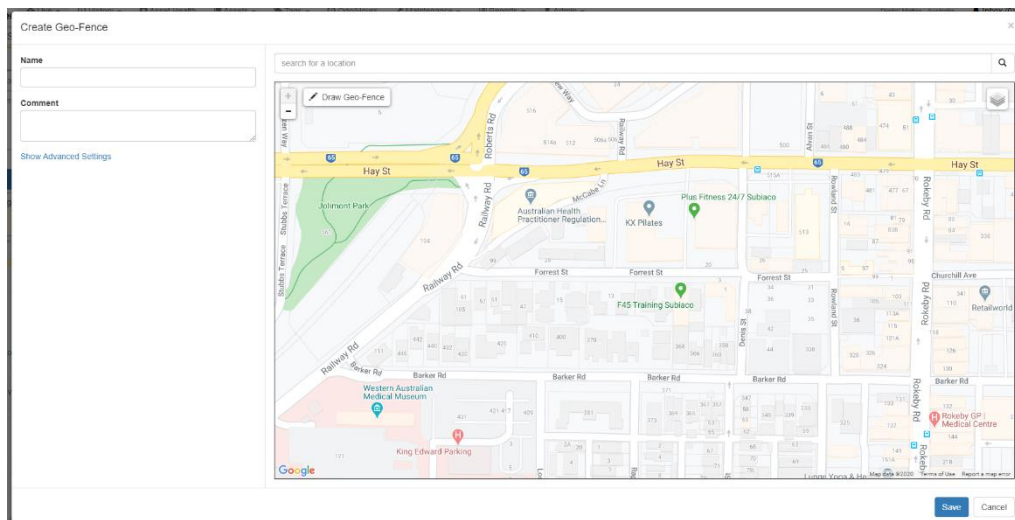
Setting up a Geofence

Creating a Geofence from the Live View or Trip History View

To set up a geofence from the Live View or Trip History View, right click to display the menu options of Create geofence Here or Hide geofences.



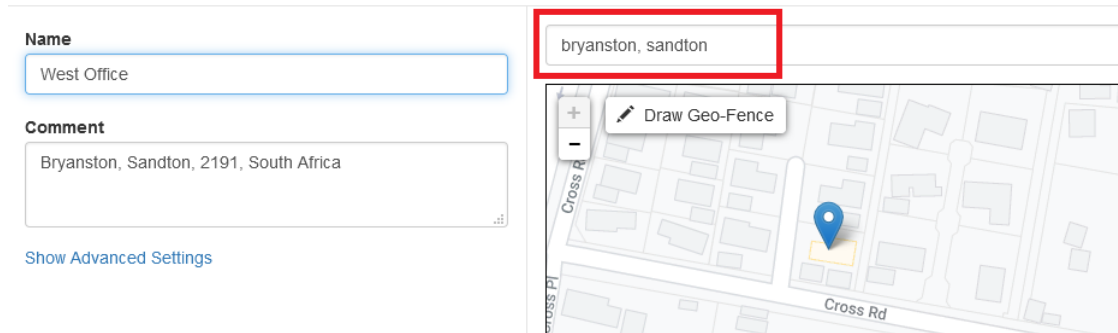
This link then opens to the main geofence screen with the desired area zoomed to fit.



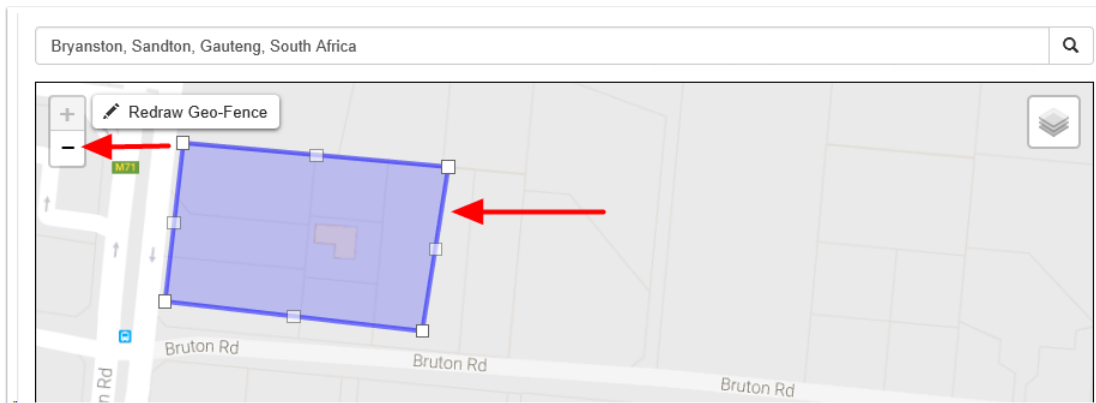
Creating a Geofence through the Admin Menu

- From the Main Menu, click on the Geofences Icon.
- Click "New Geofence".
- You can type an address into the "search for location" bar and hit enter to be taken to that location on the map.

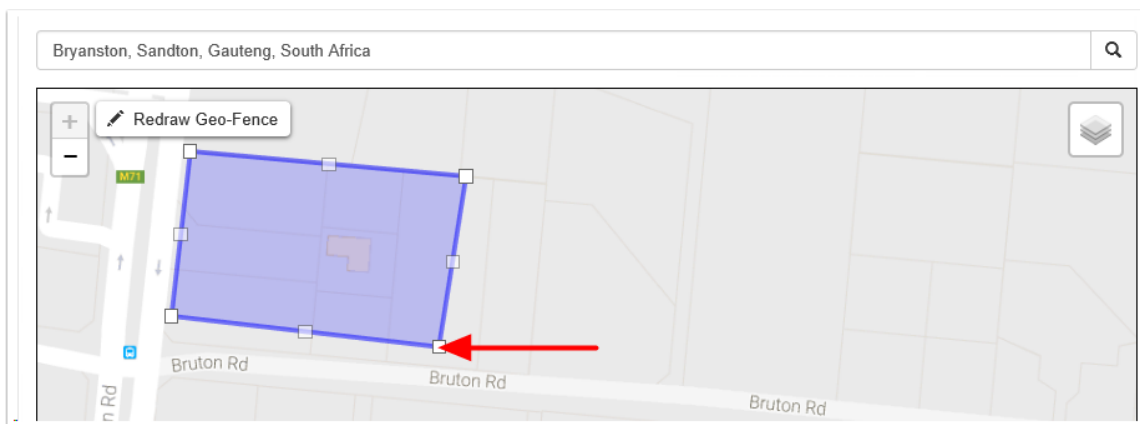
Create Geo-Fence



You can now adjust the zoom level using the plus (+) and minus (-) functions on the bottom right corner of the map, and once you see the area that you wish to create a zone for, use your cursor to click points outlining the shape, ensuring that your last point meets the first point you created, as show below:



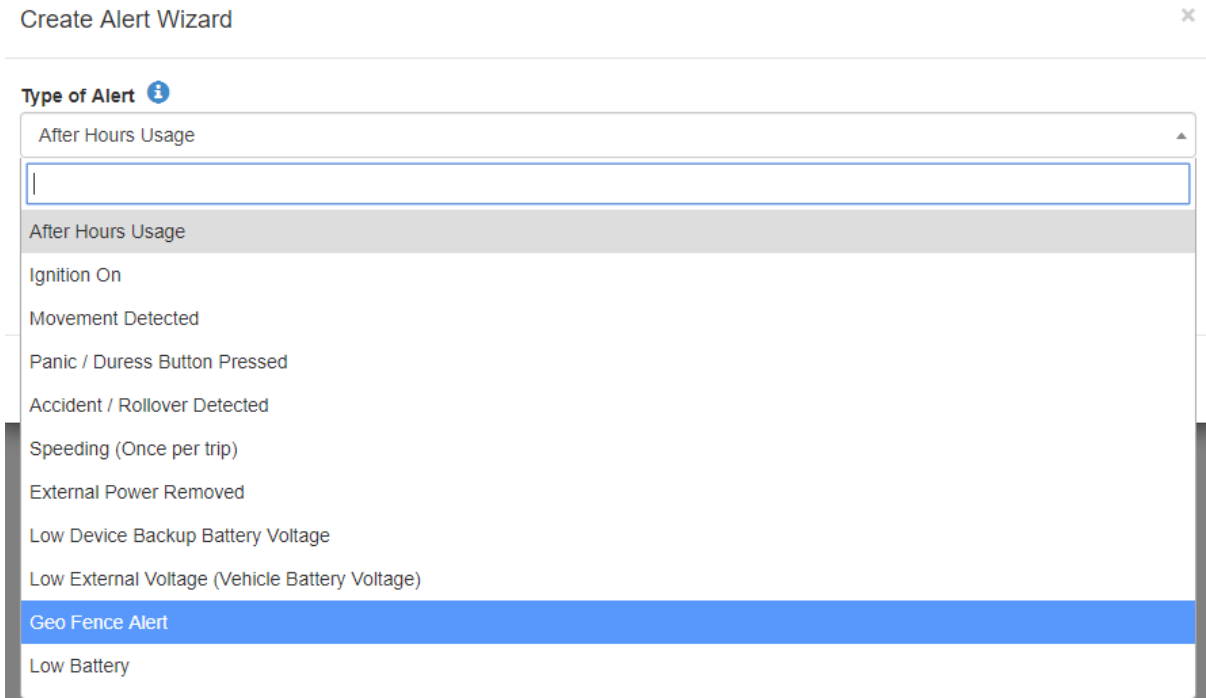
Once you have clicked on your starting point the Geofence shape will appear and you can adjust the shape by dragging any of the nodes shown by arrows below:



Lastly, name your Geofence and then click save, now the name given to your Geofence will appear in all your trip history and reports.

Setting Up a Geofence Alert

A Geofence alert is one of the pre-made alerts so creating one is super simple. On the top menu bar, click on Admin -> Alerts and then select "New Alert Wizard" and you will see this screen. Alerts will be covered in the next section, but the steps for a Geofence alert are below.

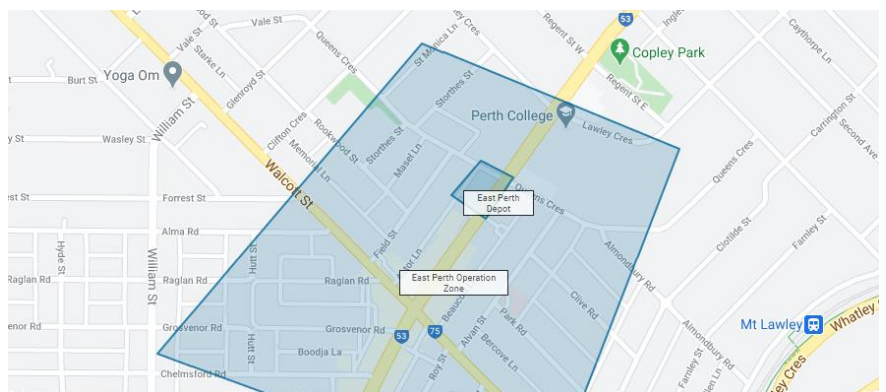


1. Select the Geofence alert from the drop-down menu.
2. Select your Geofence name under the left box and choose either to send the alert when an asset enters or leaves the Geofence.
3. Select the asset(s) that the alert will apply to.
4. Nominate the contact for the alert.
5. Name your Geofence, Click save.

FAQ

When you have overlapping Geofences, which takes priority?

Geofences with a Higher priority are shown preference over those with a Lower priority. Where two Geofences overlap with the same priority, the fence with the smallest area will be shown preference.



Alerts

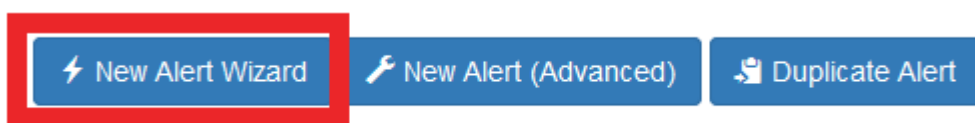
The Alerts system allows you to send notifications on one or a set of criteria or record specific occurrences into events to report on. The most common alerts that all organisations should look at setting up are detailed in this article. This is not an exhaustive list by any means but is just to give an idea of what the function can facilitate.

Using the Wizard

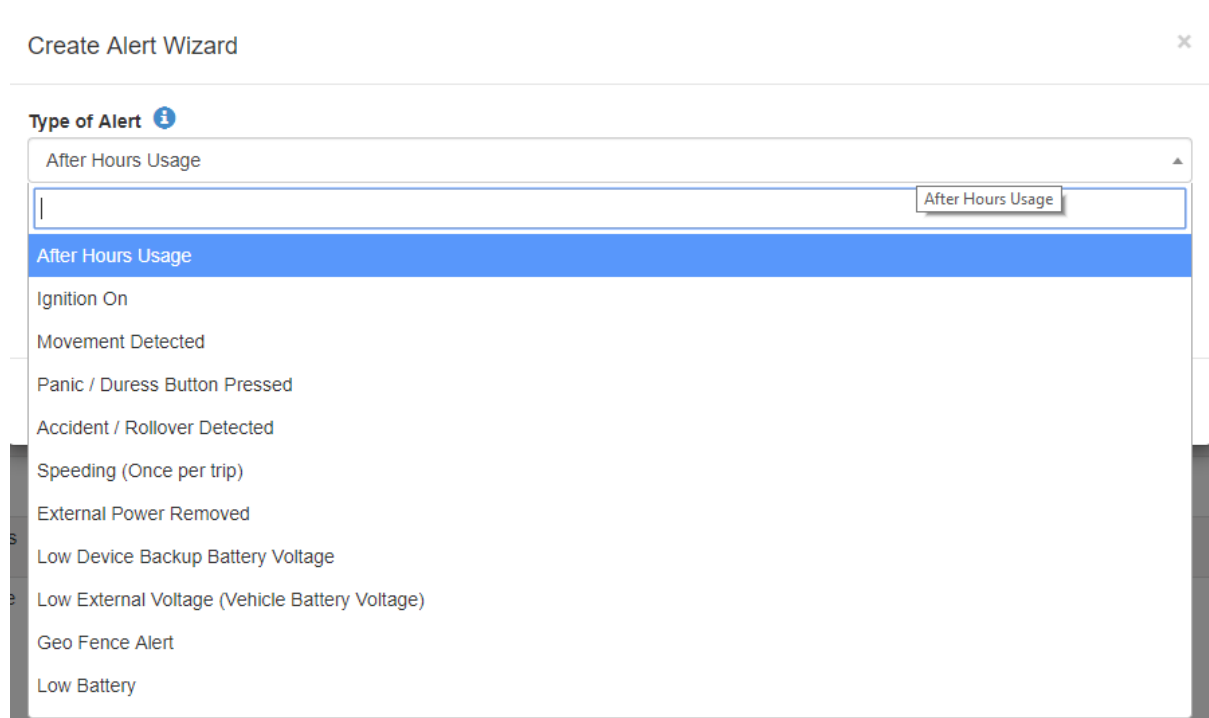
Commonly used alerts are already pre-configured, for easy set up with our Alert Wizard.

Navigate to Admin >> Alerts, and choose to create an alert from the wizard:

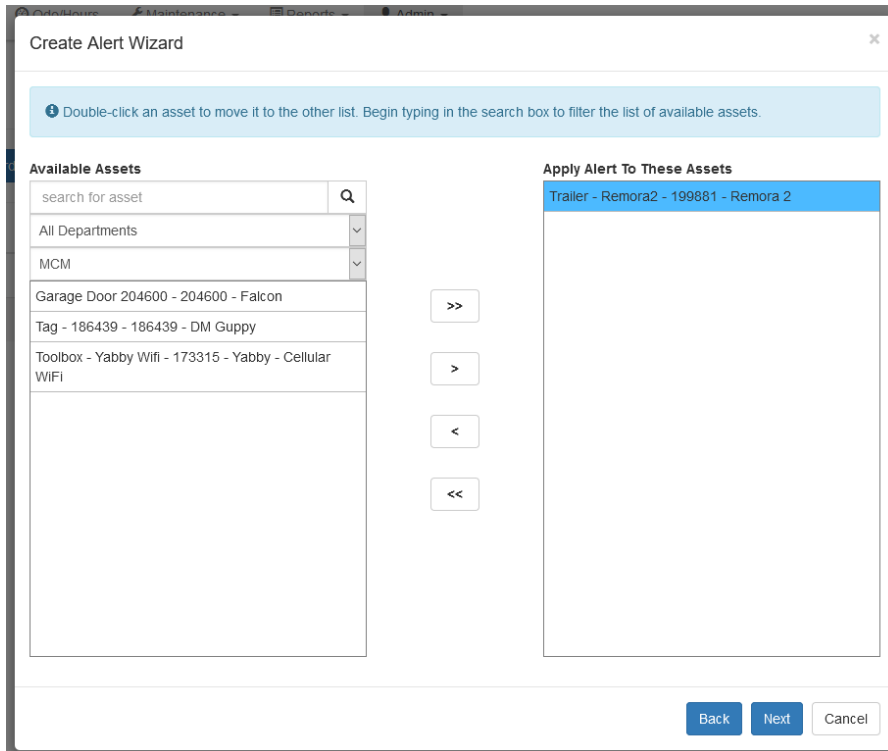
Alert Setup



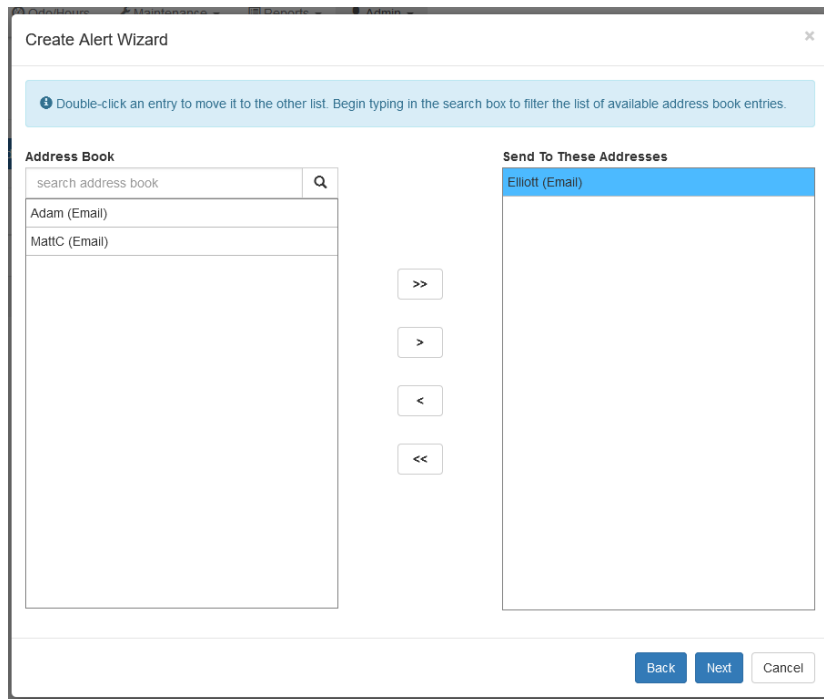
There are several options available in the dropdown list. Select your chosen alert.



Then you can select the assets to apply the alert to:



Then click Next and select who to send the notifications to. Notifications can be sent via Email, SMS or the App can send push notifications.



Finally, give the alert a name. This name will be sent in the subject line of the notification, along with the asset name.

Advanced Alerts

For more advanced alert setups, we can use the New Alert (Advanced) button.

This will allow us to customise the specific message sent. Tokens can be used to add in specific asset data when the alert is sent (e.g., the current driver), or as per the image below, the length of the trip.

Create Alert - x

General **Assets** Conditions Notifications Advanced

Name

Message (The Asset Name is prefixed to this text) i

 Add Token i

Email Message Text i

long message

Add Token i

Is for health tracking

Save
Cancel

The “Conditions” tab shows us what we can set alerts based on.

Create Alert x

General **Assets** **Conditions** Notifications Advanced

This tab is used to set up the conditions under which an alert is triggered.
The alert can include any combination of the condition types, but all must be true for the alert to be triggered.

Use Analogue Input

Use Digital Input i

Use Device Data Log Reason

Use Device Data Value

Use Geo-Fence

Use Driver

Use Time

Only (In/Out) Trip

Overall Duration

Save
Cancel

Reporting

Your Telematics platform has pre-built reports which cover off most required scenarios. These include reports such as:

- Trip list.
 - Asset Run Hours.
 - Data Exports.
 - Fleet Activity Reports.
 - Maintenance schedule history & Job Reports.
 - Speeding Reports.
 - Sensor Analog Reports.
 - Assets not connecting.
- ...and many more

Scheduling Reports

The 'Devices Not Connecting Report' serves as a useful device 'Health Check' and can identify device issues quickly. The report can be scheduled to run, and only send an email if there are devices not connecting.

To do so, follow the steps below:

1. Go to Reports -> Scheduled Reports
2. Click New

Scheduled Reports				New
Name	Report	Next Send Date	Enabled	
Asset Analogue report		23/11/2020 08:00 (+08:00)	<input checked="" type="checkbox"/>	Test Edit Delete
Devices not Connecting		21/11/2020 08:00 (+08:00)	<input checked="" type="checkbox"/>	Test Edit Delete
Hours Worked Report		23/11/2020 08:00 (+08:00)	<input type="checkbox"/>	Test Edit Delete
Overnight Door Activity Report		23/11/2020 08:00 (+08:00)	<input checked="" type="checkbox"/>	Test Edit Delete

3. Select the Devices Not Connecting Report and set the number of hours for the device to be reported. You can also limit the report to specific Device types, projects, or departments.

Report General Schedule Recipients Advanced

Report Type
 Asset Last Connected Report

Custom Report ⓘ
 Default Report

Output Format
 CSV **Excel** Excel Pivot HTML PDF

Wrap Column Heading Text

Freeze Header Panel

Hours Since Last Connection
 24

4. Under the General Tab, give a name and email subject/body to be sent. Leave Send if No Data unticked to only receive a report if there are devices not connecting (nothing will be sent if everything is OK).

- Under the Schedule Tab, select when you want the report to run, in this example it will be run at 8am each day in the time-zone of the user selected in the Advanced tab.

Create Scheduled Report ×

Report General **Schedule** Recipients Advanced

Schedule Type

Daily ▼

Time

08:00 🕒

Local to the time zone of the selected user in the Advanced tab (AWT (+08:00)).

- Select the recipients for the report to be emailed to.
- Select the user to run the report as. The report will only be run for assets/organisations which they have access to.

Create Scheduled Report ×

Report General Schedule **Recipients** Advanced

Report Sending Provider

Sendgrid SMTP ▼

Run Report As User ⓘ

customerName@Hirecompanys.com (AWT (+08:00)) ▼

Customising Reports

The Telematics platform allows the customisation of reports, with certain limits. The underlying data available in the report is fixed, but the way it is shown can be customised. This usually means that you need to find an existing report that provides the data that you require and from there you can customise that report to show what you need.

If you require something that does not fit one of the existing reports, please contact Home of IoT. If we cannot help with one of the existing reports, we may be able to develop a new report for the task.

What can be Customised?

- Select columns to be either shown or hidden.
- Select column totals – min, max, average, total, count, and count unique are options depending on the data type. These totals appear at the bottom of the groupings and the bottom of the report.
- Select groupings. This allows common columns to be grouped together. For example, in a trip list for an organisation, group the rows by asset to show all trips for an asset together or by date to show all trips by all assets for that day.
- Select sort order. This allows rows to be sorted according to value, either ascending or descending.

Setting it up

There are two ways to create a custom report.

You can go to Reports -> Custom Reports, click new and follow the steps through the wizard.

Custom Reports allow you to create a **customised version** of the report by selecting which **columns** (and their order) you want in the report, the data **sort order**, and how the data rows are to be **grouped and summarised**.
The output formats can also be selected from a number of options including **Excel, Excel Pivot, PDF, HTML, CSV** and others (available options will depend on the type of report).
Report Views can be selected as **Favourites** to allow you to access them quickly, and can also be used in **Scheduled Reports** to provide you with push reporting that is tailored to how you want to see the data.

Custom Report Setup

Description	Report
By Region, Order by Size	Admin Billing Report

[New](#) [Edit](#) [Delete](#)

Or you can go to Reports -> All Reports and click on the report you wish to customise. Under Advanced Options, click "Customise Report" then follow the steps through the wizard.

Run Hour Report

Output Format

CSV **Excel** ExcelPivot HTML PDF

Show Advanced Settings

Advanced Options

Schedule Report

Customise Report

Running the report

Once the custom report is setup and saved you can find it saved under the original default report type. If you need to edit a customised report, you can do this through Reports > Custom reports > Edit.

Fleet Reports

- Asset Analogue Graph
- Asset Geofence Activity - Detail
- Asset Geofence Activity - Summary
- Asset Last Connected Report
- Asset List**
 - Default Asset List
 - Custom Reports**
 - PDF Odo Totals
 - Steves Cars PDF
 - Test Layout Name Change

Reports Admin

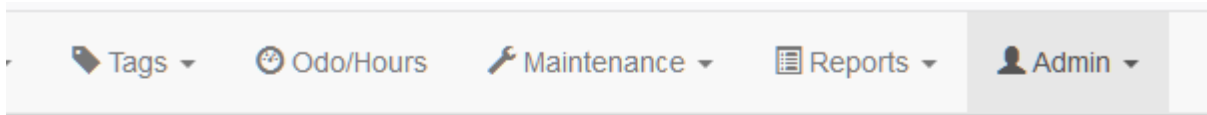
- All Reports
- Favourites**
- Asset Run Hours
- Custom Events - Detail
- Custom Events - Summary
- Daily Run Hour Usage
- Speeding Report
- Trip List
- Custom Reports
- Scheduled Reports
- Scheduled Report Logs

Creating User Accounts

If your account has the right permissions, you may be able to create other users for your organisation.

To access the Users page, navigate to Admin menu and select 'Users' from the drop down.

Once in the Users page, click on 'Invite User'.



Users

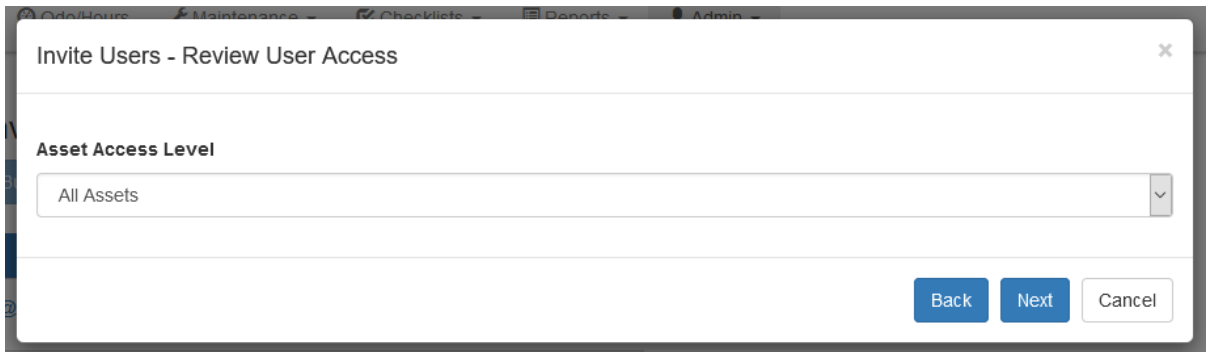
[Invite User](#)[Create New User](#)[Map Existing User \(to this organisation\)](#)[Bulk Update](#)A modal dialog box titled 'Invite Users' with a close button (X) in the top right corner. It contains an information message: 'You are busy creating an invitation link that you can send to new users or choose to have the system send the link automatically.' Below this is a text input field labeled 'Email Address(es)'. A note below the field says 'You can enter up to 20 comma separated email addresses.' Underneath, it says 'Base settings, permissions and reports on:' followed by two radio button options. The first is 'Template' (selected), with a dropdown menu showing 'Organisation Manager'. The second is 'Existing User', with a dropdown menu showing 'AAA - Example Account (aaaexample@user.com)'. At the bottom right are 'Next' and 'Cancel' buttons.

The dialogue will allow you to enter up to 20 comma separated email addresses so that you can create multiple accounts at once.

Then you can copy the settings for this account from one of the templates in the list, or an existing user account.

After you hit next, you will be given the option to set the level of asset access for the user.

You can allow them to view all assets for the organisation, only a specific project, or only specific assets.

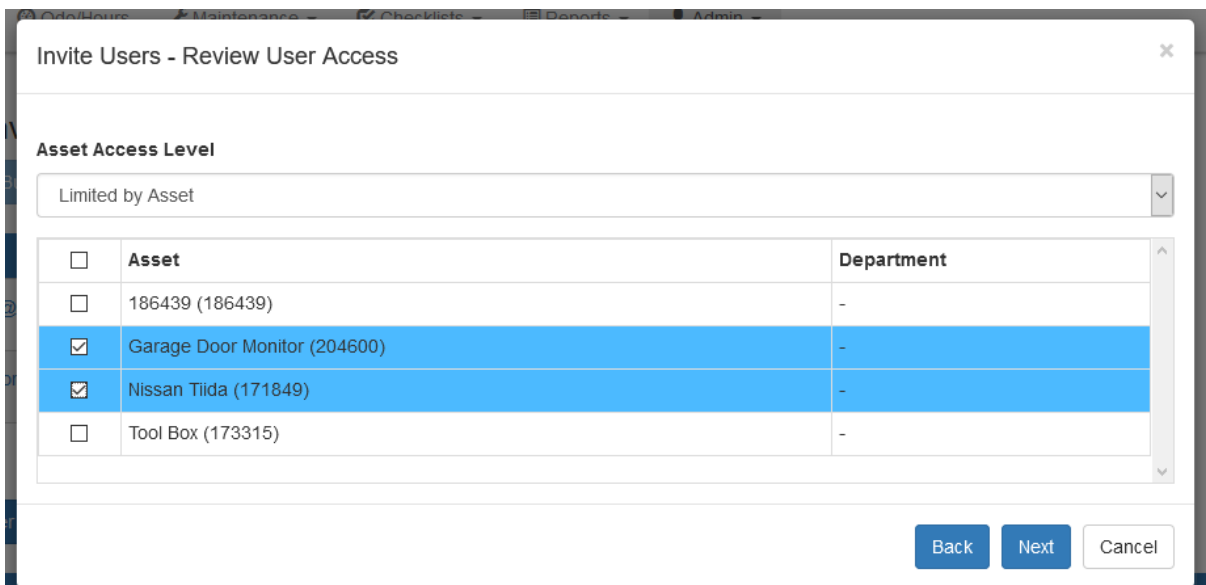


Invite Users - Review User Access

Asset Access Level

All Assets

Back Next Cancel



Invite Users - Review User Access

Asset Access Level

Limited by Asset

<input type="checkbox"/>	Asset	Department
<input type="checkbox"/>	186439 (186439)	-
<input checked="" type="checkbox"/>	Garage Door Monitor (204600)	-
<input checked="" type="checkbox"/>	Nissan Tiida (171849)	-
<input type="checkbox"/>	Tool Box (173315)	-

Back Next Cancel

Press next and you will be prompted to review their permissions – these have been copied from the user you selected in the first tab.

Finally, select what reports the user should be able to view, and you are done!