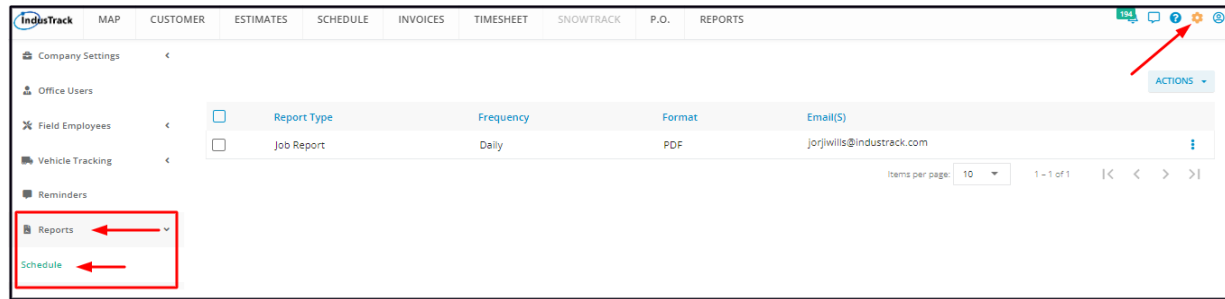


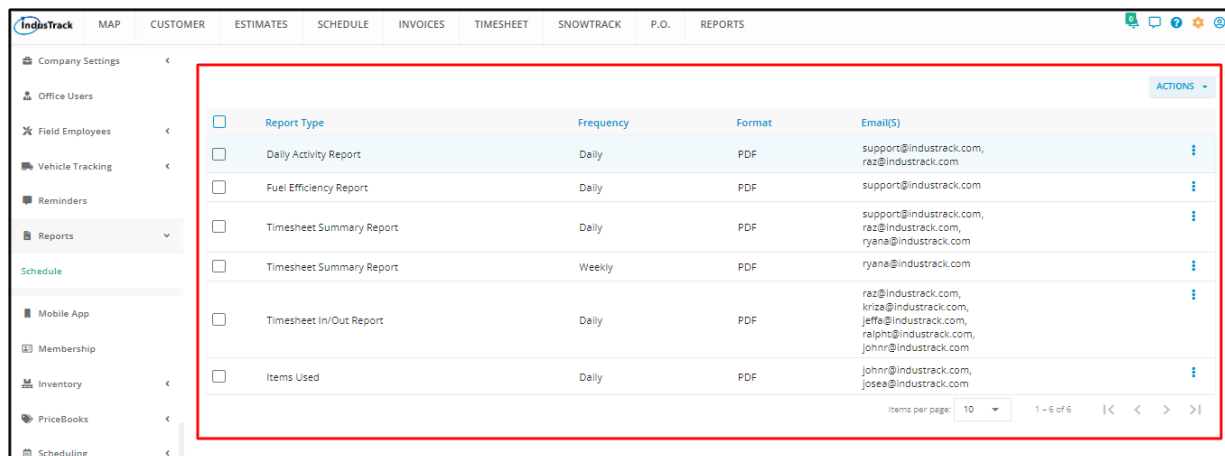
Report Scheduling

With the Report Schedule settings, you get to set up what reports you want IndusTrack to create at a specified frequency and sent to specific team members.

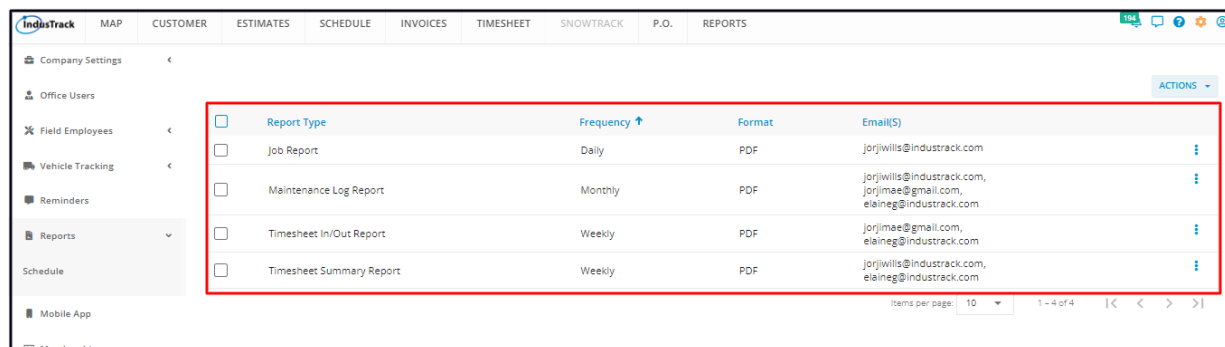
To set up report schedules go to **Settings > Reports > Schedule**.



The Reports Schedule page defaults to the list of report types that have already been set up and are to be sent at a specified frequency.



Using the Report Schedule table

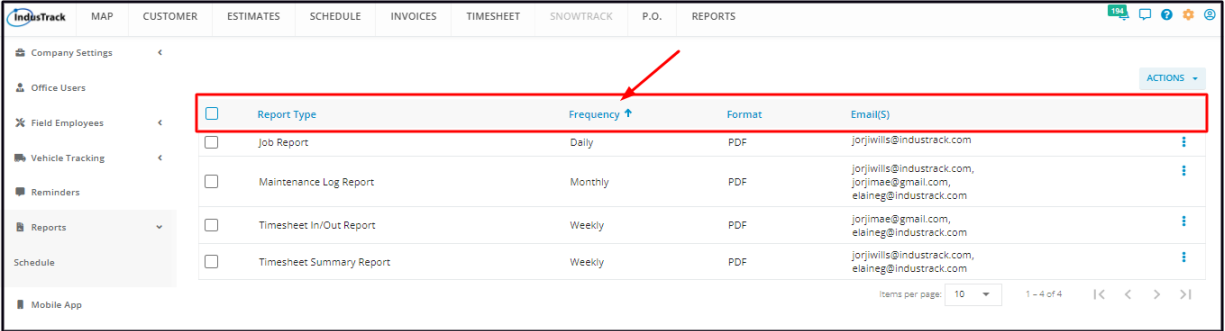


The Reports Schedule table has 5 columns. Details are based on what has been entered into the scheduler.

- Report Type – Refers to the specific report to be generated at the specified schedule.
- Frequency – Refers to how often a specific report is to be generated and sent by the system.
- Format – Refers to the report file type.
- Email(s) – Refers to the officers/supervisors/team members who will receive the reports on the specified frequency.
- 3-dot Menu – This is used to edit or delete a schedule.

Sort the Reports Schedule list

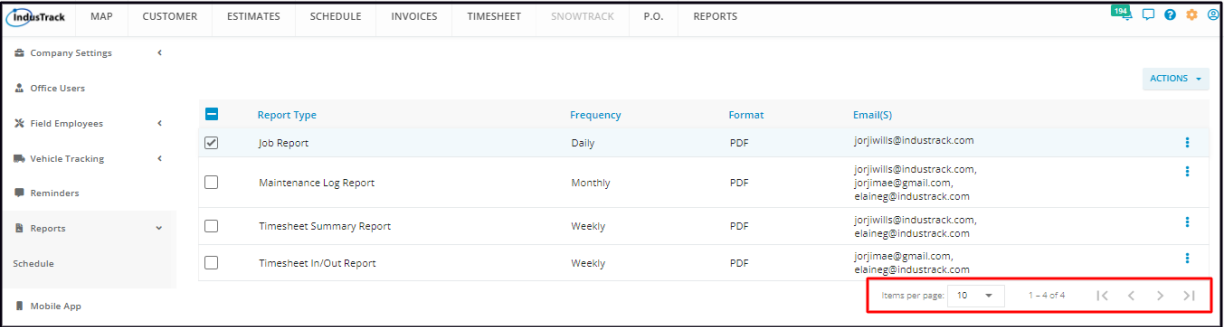
Click on the column header to sort the list according to the preferred field.



<input type="checkbox"/>	Report Type	Frequency	Format	Email(S)
<input type="checkbox"/>	Job Report	Daily	PDF	jorjiwills@industrack.com
<input type="checkbox"/>	Maintenance Log Report	Monthly	PDF	jorjiwills@industrack.com, jorjimee@gmail.com, elaineg@industrack.com
<input type="checkbox"/>	Timesheet In/Out Report	Weekly	PDF	jorjimee@gmail.com, elaineg@industrack.com
<input type="checkbox"/>	Timesheet Summary Report	Weekly	PDF	jorjiwills@industrack.com, elaineg@industrack.com

List Per Page

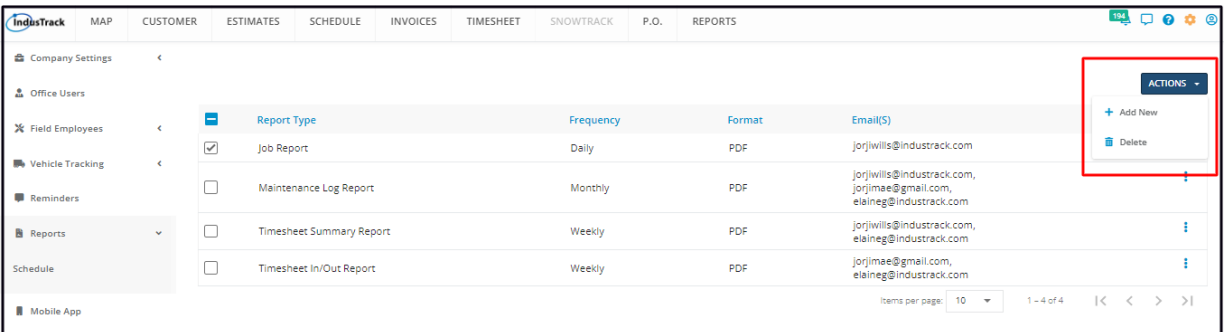
Select the number of report schedules to be displayed per page. Options to choose from are 10, 25, 50, and 100. Use the Previous and Next buttons to move from one page to another (if there is more than one page).



<input type="checkbox"/>	Report Type	Frequency	Format	Email(S)
<input checked="" type="checkbox"/>	Job Report	Daily	PDF	jorjiwills@industrack.com
<input type="checkbox"/>	Maintenance Log Report	Monthly	PDF	jorjiwills@industrack.com, jorjimee@gmail.com, elaineg@industrack.com
<input type="checkbox"/>	Timesheet Summary Report	Weekly	PDF	jorjiwills@industrack.com, elaineg@industrack.com
<input type="checkbox"/>	Timesheet In/Out Report	Weekly	PDF	jorjimee@gmail.com, elaineg@industrack.com

Actions Button

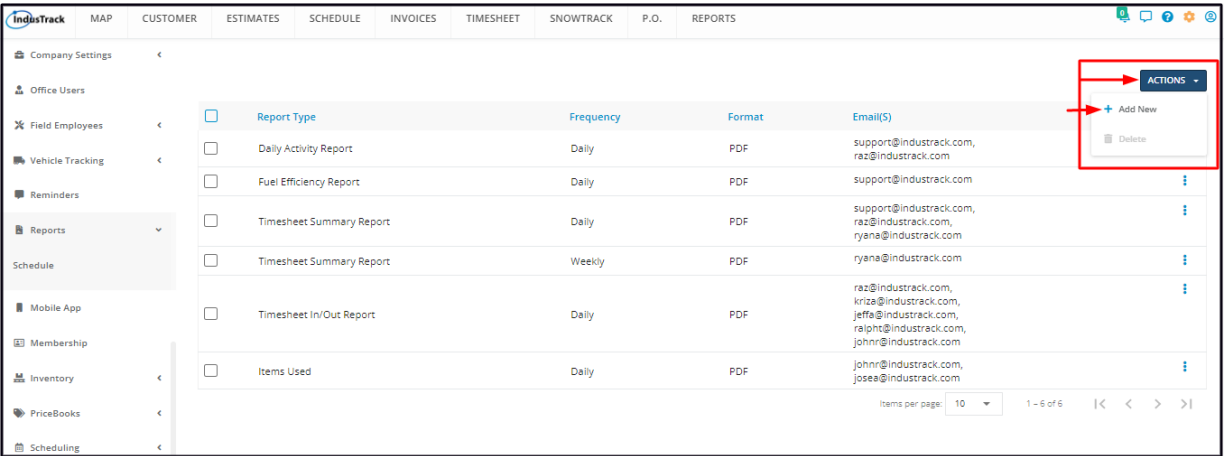
Use this button to add a new schedule or delete an old/obsolete one.



<input type="checkbox"/>	Report Type	Frequency	Format	Email(S)
<input checked="" type="checkbox"/>	Job Report	Daily	PDF	jorjiwills@industrack.com
<input type="checkbox"/>	Maintenance Log Report	Monthly	PDF	jorjiwills@industrack.com, jorjimee@gmail.com, elaineg@industrack.com
<input type="checkbox"/>	Timesheet Summary Report	Weekly	PDF	jorjiwills@industrack.com, elaineg@industrack.com
<input type="checkbox"/>	Timesheet In/Out Report	Weekly	PDF	jorjimee@gmail.com, elaineg@industrack.com

Set Up a Report Schedule

From the Schedule page, click on the **Actions** button and select **+ Add New**.



<input type="checkbox"/>	Report Type	Frequency	Format	Email(S)
<input type="checkbox"/>	Daily Activity Report	Daily	PDF	support@industrack.com, raz@industrack.com
<input type="checkbox"/>	Fuel Efficiency Report	Daily	PDF	support@industrack.com
<input type="checkbox"/>	Timesheet Summary Report	Daily	PDF	support@industrack.com, raz@industrack.com, ryana@industrack.com
<input type="checkbox"/>	Timesheet Summary Report	Weekly	PDF	ryana@industrack.com
<input type="checkbox"/>	Timesheet In/Out Report	Daily	PDF	raz@industrack.com, kriza@industrack.com, jeffa@industrack.com, rajah@industrack.com, johnr@industrack.com
<input type="checkbox"/>	Items Used	Daily	PDF	johnr@industrack.com, josea@industrack.com

On the **Report Scheduler** window, set up the schedule or the frequency of when a specific report type should be generated and who should receive it.

Report Scheduler

Report Type Not Selected

Create Report Daily

☐ Exclude Weekends

Format PDF

Send To

Value required

Report Type

Select the type of report you would like to schedule from the drop-down list. The list contains different reports from Vehicles to Financials to Scheduling and more.

Report Scheduler

Report Type

Timesheet Overtime Report

Scheduling

Job Report

Items Used

Vehicle Tracking

Customer Activity Report

Create Report

Format

Send To

CANCEL SAVE

Depending on the selected type, additional information will have to be provided.

- Select which field employees or field employee groups will be included in the following reports:
 - Timesheet Reports
 - Job Report
 - Snowtrack Reports

Report Scheduler

Report Type Timesheet In/Out Report

Create Report Daily

☐ Exclude Weekends

Format PDF

Send To

Value required

Employees

4 SELECTED

Filter

☐ (Group — HVAC Installation Team)

☐ (Group — HVAC Service & Repair Team)

☐ (Group — Jorji Group)

☒ [1] Peter Richards

☒ [2] Dylan Frost

☒ [3] Aron Piper

☐ [4] Charles Brown

☒ [5] Steven Newsome

CANCEL SAVE

- Vehicles or Vehicle Groups are selected for the following reports:
 - Vehicle Tracking Reports

Report Scheduler

Report Type: Maintenance Log Report

Create Report: Daily

☐ Exclude Weekends

Format: PDF

Send To:
Value required

Vehicles

3 SELECTED

Filter

- ☐ (Group — South West Fleet)
- ☐ (Group — North East ACU Fleet)
- ☐ (Group — South West Electrical Fleet)
- ☐ [001] mu-X 1
- ☐ [002] Ford Raptor 1
- ☒ [003] Tow Truck 3
- ☒ [004] Cargo Van 1
- ☒ [005] Cargo Van 2

CANCEL SAVE

- Select which Inventory Items are selected for the following reports:
 - Items Used Report

Report Scheduler

Report Type: Items Used

Create Report: Daily

☐ Exclude Weekends

Format: PDF

Send To:
Value required

Inventories

3 SELECTED

Filter

- ☐ [1178902] Concrete slab
- ☐ [118952] Counter
- ☐ [118952] Door Frame
- ☐ [112457] Drywall
- ☐ [258474] Duct Work
- ☒ [29873] Electrical Installation service
- ☒ [117456] Electrical Materials
- ☒ [265451] Floor Plans
- ☐ [25875] Flooring

CANCEL SAVE

- No additional options are required for the Financials Reports.

Report Scheduler

Report Type: Accounts Receivable

Create Report: Daily

☐ Exclude Weekends

Format: PDF

Send To:
Value required

CANCEL SAVE

If all of the field employees, vehicles, or inventories are to be included in the report tick the checkbox for **Select All**. This will auto-select all items on the list.

Report Scheduler

Report Type: Timesheet In/Out Report

Create Report: Daily

☐ Exclude Weekends

Format: PDF

Send To:

Value required

Employees

ALL SELECTED

Filter

☒ Select All

☒ {Group — All Hands on Deck Group}

☒ {Group — HVAC Installation Team}

☒ {Group — HVAC Service & Repair Team}

☒ {Group — Jorji Group}

☒ [1] Peter Richards

☒ [2] Dylan Frost

☒ [3] Aaron Biner

CANCEL SAVE

Create Report

Select the reporting frequency or how often should the report be created and sent to the recipients. Options are daily, weekly and monthly.

Report Scheduler

Report Type: Timesheet In/Out Report

Create Report: Daily

Weekly

Monthly

Format: PDF

Send To:

Value required

Employees

7 SELECTED

CANCEL SAVE

If *Daily* is selected as the frequency, indicate if the report will also be sent during the weekends. If the preference is not to send the report on weekends, tick the checkbox of **Exclude Weekends**. Leave this box unchecked if weekend reports are preferred.

Report Scheduler

Report Type: Timesheet In/Out Report

Create Report: Daily

☒ Exclude Weekends

Format: PDF

Send To:

Value required

Employees

7 SELECTED

CANCEL SAVE

Format

The default format of the reports is PDF.

Report Scheduler

Report Type: Timesheet In/Out Report

Create Report: Daily

☒ Exclude Weekends

Format: PDF

Send To: Value required

Employees: 7 SELECTED

CANCEL SAVE

Send To

Select the recipient(s) of the generated report.

Report Scheduler

Report Type: Timesheet In/Out Report

Create Report: Daily

☒ Exclude Weekends

Format: PDF

Send To:

- ☒ krza@industrack.com
- ☒ jeffa@industrack.com
- ☐ schazrajput@gmail.com
- ☒ ralph@industrack.com
- ☒ johnr@industrack.com
- ☐ albertn@industrack.com
- ☐ ruthg@industrack.com

Employees: 7 SELECTED

CANCEL SAVE

Enable the report schedule by saving. This will be added to the list.

Report Scheduler

Report Type: Timesheet In/Out Report

Create Report: Daily

☒ Exclude Weekends

Format: PDF

Send To: 6 user(s) selected

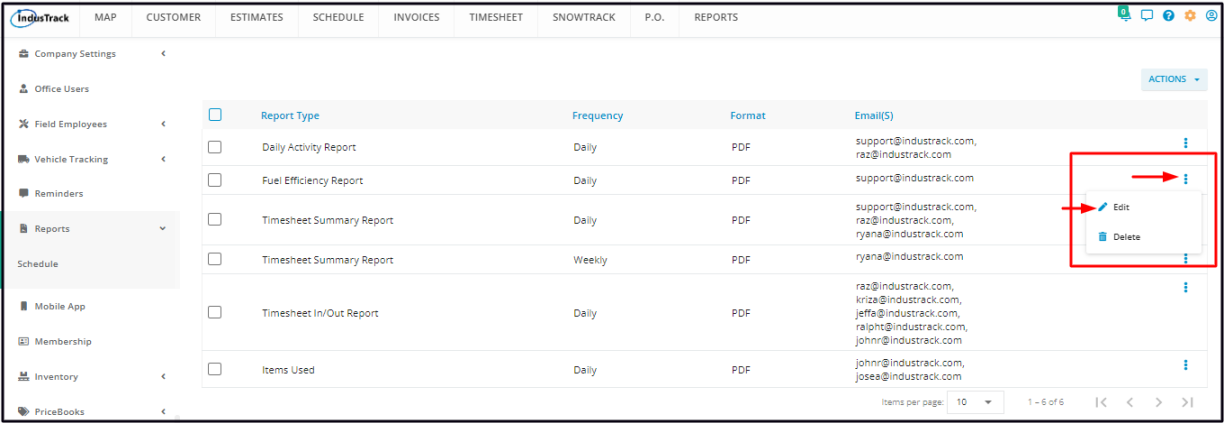
Employees: 7 SELECTED

CANCEL SAVE

Edit a Report Schedule

Want to change the reporting frequency or add another field employee? Simply edit the current report schedule.

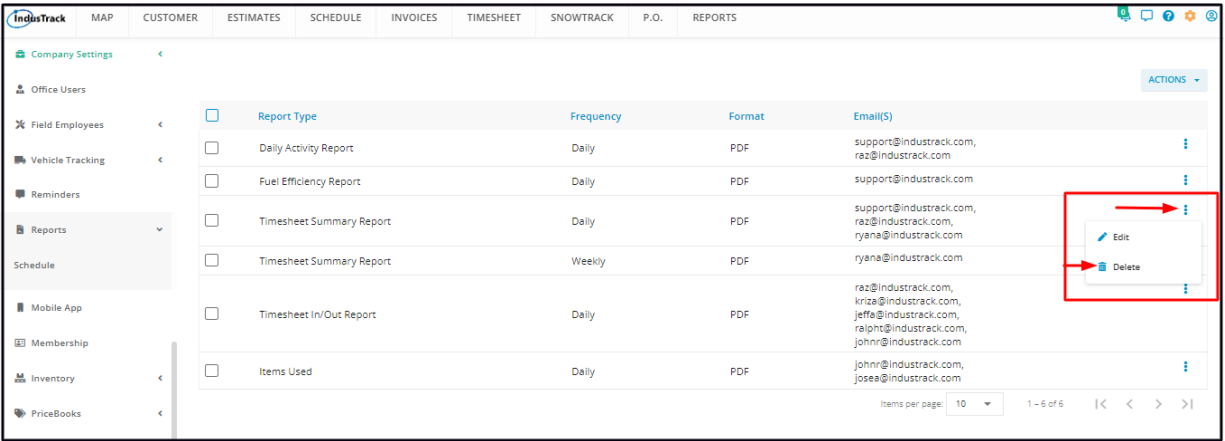
Find the report schedule to be edited from the list. Click the 3-dot menu and select **Edit**.



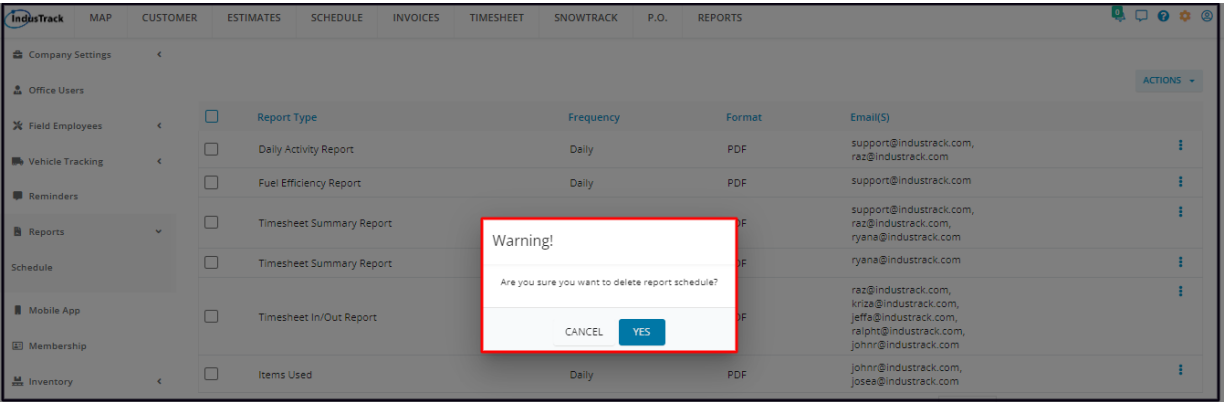
Edit the details as may be needed. Save once done.

Delete a Report Schedule

Find the report schedule to be removed from the list. Click the 3-dot menu and select **Delete**.



A confirmation window will come up. Select **Yes** to delete or **Cancel** to abandon the action.



The report schedule will be removed from the list.

