

# NETSTAR

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## **AVM Scheduling Reports**

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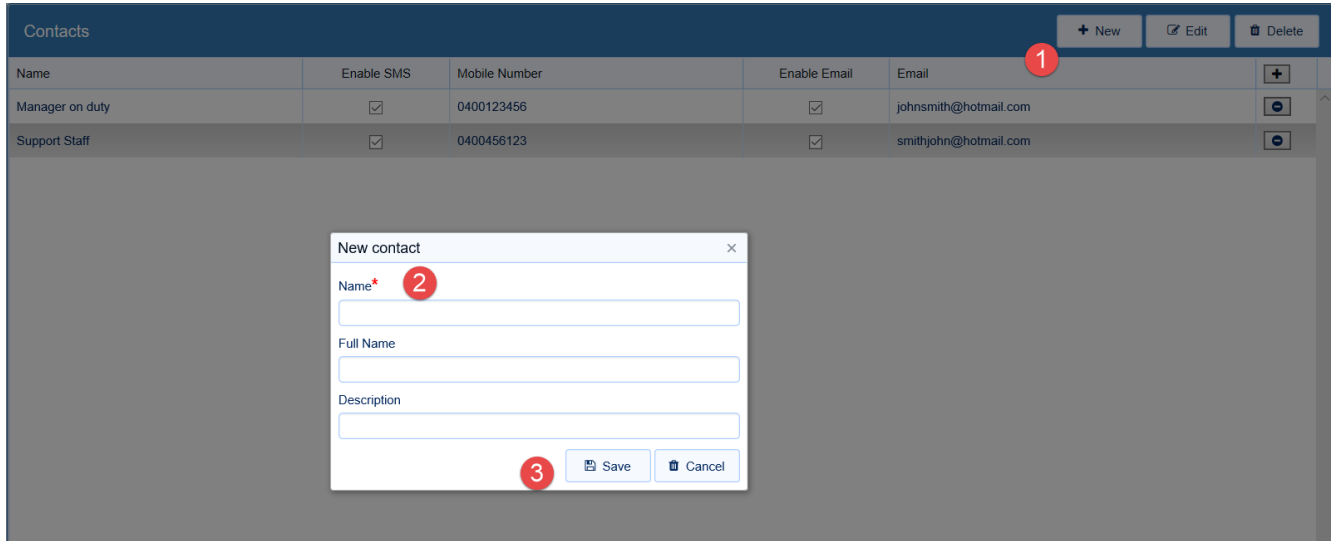
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Reports can be scheduled to be emailed to customers who have set up their details in under the Contacts tab.

## 1 CONTACTS

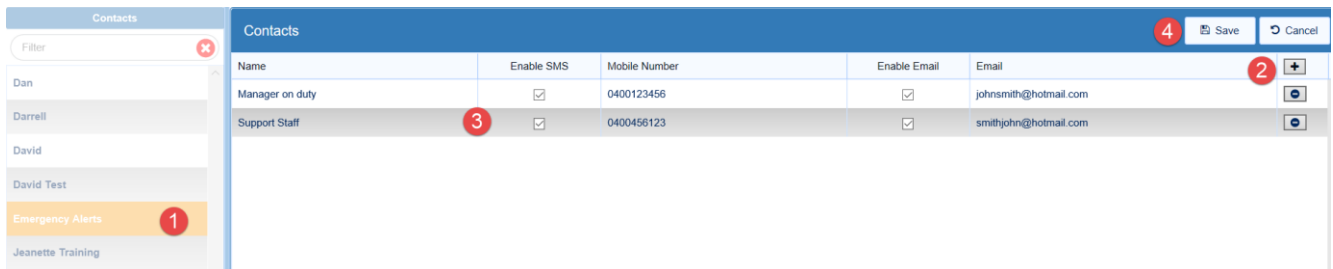
The first thing you need to do to schedule reports is to set up contacts for the reports to be sent to.

To create a new contact in the system:



1. Click on “New” button on the top right of the window.
2. Fill in the form, (“Name” is the only mandatory field), the best practice is to create a group and add individuals to that group.
3. Click Save, the contact now appears in the list to the left.

To enable scheduled reports, you need to add the email address to the contact:



1. Choose the contact from the left-hand side tree.
2. Click on the ‘+’ button at the end of the titles bar.
3. Fill the name, email address.
4. Click ‘Save’

The contact you created is now able to receive scheduled reports.

## 2 SCHEDULE REPORTS

To set up a scheduled report, you need to click on the “Schedule” bar at the end of the report configuration; this opens the Schedule set up.

The screenshot shows the 'SCHEDULE' configuration window. It has an orange header bar with the word 'SCHEDULE' in white. Below the header, there are several sections: 'Schedule this report:' with a checked checkbox (1); 'Name:' with a text input field (2); 'Schedule:' with a dropdown menu set to 'Daily' (3); 'Select days to run:' with checkboxes for Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday (4); 'Run time:' with a time input field set to '11:03 AM' (5); 'Output format:' with a dropdown menu set to 'PDF' (6); 'Send reports to:' with a dropdown menu set to 'Admin' (7); and 'Notes:' with a large text area (8). At the bottom, there are three buttons: 'Save' (9), 'Save As', and 'Cancel'.

1. Click on the “Schedule this report.” checkbox.
2. Give the report a name that is descriptive.

Name:

3. Select the frequency of the report, Daily, Weekly or Monthly.

The screenshot shows the 'Schedule:' dropdown menu. The 'Weekly' option is highlighted in orange. The other options are 'Daily', 'Monthly', and 'Friday' (partially visible).

4. Select which day/s of the Week you want the report sent.
5. Select a time for the report to run; the best practice is to choose an out of hours time when there is reduced traffic, i.e. 03:00.

6. Choose the type the file you want to be sent, PDF, Excel or CSV.

Output format: PDF

Send reports to: PDF

Notes: Excel

CSV

7. Select what contact group you want the report sent.

Send reports to: Admin

Notes: None

Admin

Belconnen Region

Emergency

Gunghalin

Inner North

Inner South

Tuggeranong

Woden-McConnamara

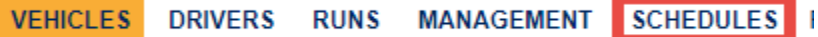
8. Add any notes you want.
9. Save the Schedule.

Save Save As Cancel

Your report will now be emailed to the selected Contact Groups on the day/s you have selected at a frequency you selected.

### 3 VIEW A LIST OF SCHEDULED REPORTS

To see a list of Scheduled reports from the reports page click on the Schedules button.



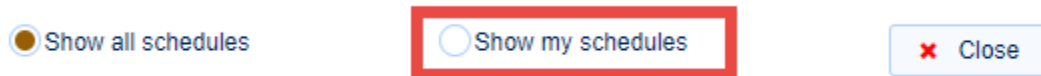
This displays a list of scheduled reports.

Name	Type	Schedul...	Output	Last run	Next run	Start	Stop	By	Recipient	Actions
Caddy Log Book Report	FBT Log Book	Weekly	PDF	1/09/2018 5:20 PM	8/09/2018 5:00 PM	1/09/2018 7:00 AM	7/09/2018 7:00 PM		Reports & Reminders	
Pinpoint Vehicle Performance Report	Vehicle Performance	Weekly	PDF	3/09/2018 5:48 AM	10/09/2018 5:30 AM	3/09/2018 12:00 AM	10/09/2018 12:00 AM		Reports & Reminders	
Pinpoint Weekly Operations Report	Operations with Sensor	Weekly	PDF	3/09/2018 5:48 AM	10/09/2018 5:30 AM	3/09/2018 12:00 AM	10/09/2018 12:00 AM		Reports & Reminders	
Run 1 Multi-Vehicle Utilisation-Equipment Usage	Equipment Usage	Daily	PDF	1/09/2018 5:21 PM	3/09/2018 5:00 PM	3/09/2018 6:00 AM	3/09/2018 6:00 PM		Reports & Reminders	
Run 2 Multi-Vehicle Utilisation-Equipment Usage	Equipment Usage	Daily	PDF	31/08/2018 5:20 PM	3/09/2018 5:00 PM	3/09/2018 6:00 AM	3/09/2018 6:00 PM		Reports & Reminders	
Run 3 Multi-Vehicle Utilisation-Equipment Usage	Equipment Usage	Daily	PDF	31/08/2018 5:20 PM	3/09/2018 5:00 PM	3/09/2018 6:00 AM	3/09/2018 6:00 PM		Reports & Reminders	
Run 4 Multi-Vehicle Utilisation-Equipment Usage	Equipment Usage	Daily	PDF	31/08/2018 5:20 PM	3/09/2018 5:00 PM	3/09/2018 6:00 AM	3/09/2018 6:00 PM		Reports & Reminders	
Run 5 Multi-Vehicle Utilisation-Equipment Usage	Equipment Usage	Daily	PDF	31/08/2018 5:21 PM	3/09/2018 5:00 PM	3/09/2018 6:00 AM	3/09/2018 6:00 PM		Reports & Reminders	
Run 6 Geofence	Location Activity	Daily	CSV	2/09/2018 6:21 PM	3/09/2018 6:00 PM	3/09/2018 6:30 AM	3/09/2018 5:30 PM		Camden & Saumil	
Run 6 Multi-Vehicle Utilisation-Equipment Usage	Equipment Usage	Daily	PDF	2/09/2018 5:21 PM	3/09/2018 5:00 PM	3/09/2018 6:00 AM	3/09/2018 6:00 PM		Reports & Reminders	

Show all schedules       Show my schedules     

From here you can see the name, the Type, when it is scheduled to run, the file type, when it was the last run, when it would run next, the start and stop, who created the report, what group receives the report and you can also edit or delete the report from here.

You can refine the list to just reports that you are scheduled to receive by clicking on the “Show my Schedules” at the bottom of the screen. You can also close the list from here.



**N.B.** The Pinpoint report generator sender will have this email address: [VTSSupport@netstaraus.com.au](mailto:VTSSupport@netstaraus.com.au).

Make sure you exchange server has “[VTSSupport@netstaraus.com.au](mailto:VTSSupport@netstaraus.com.au)” as safe sender from your exchange server.

Make sure their email server has added netstaraus.com.au to a “whitelist” it’s for emails that appear like spam but aren’t and add Netstar’s email to your contact list.