



**Global Telematics,
Just Easier**

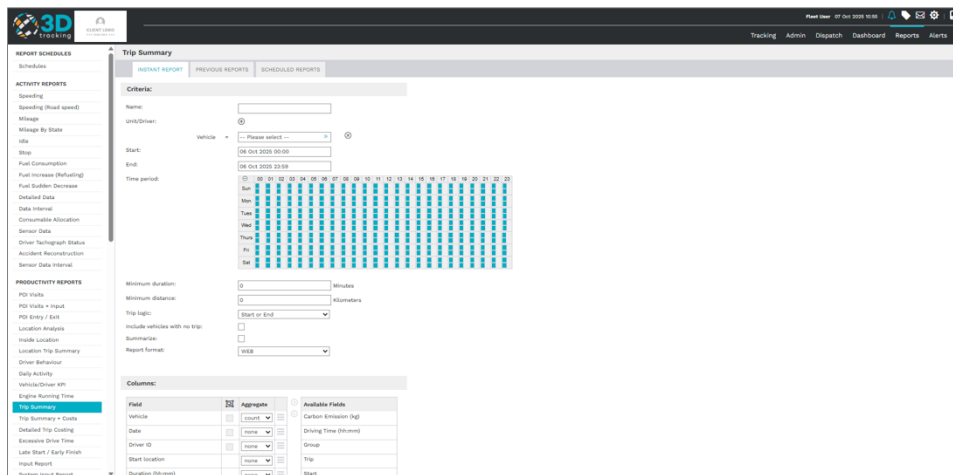
Tutorial: How to Generate and Schedule Reports

How to Generate and Schedule Reports

This guide walks you through how to generate **Instant Reports** and how to schedule **recurring reports** using the 3Dtracking platform's easy-to-use reporting tools.

Getting Started

To begin, click on the **Reports** tab.



On the left-hand side, you'll see a list of all the reports your user profile has access to. Every report on the platform gives you the option to either:

- **Generate it instantly**
- Or **schedule it to run automatically**

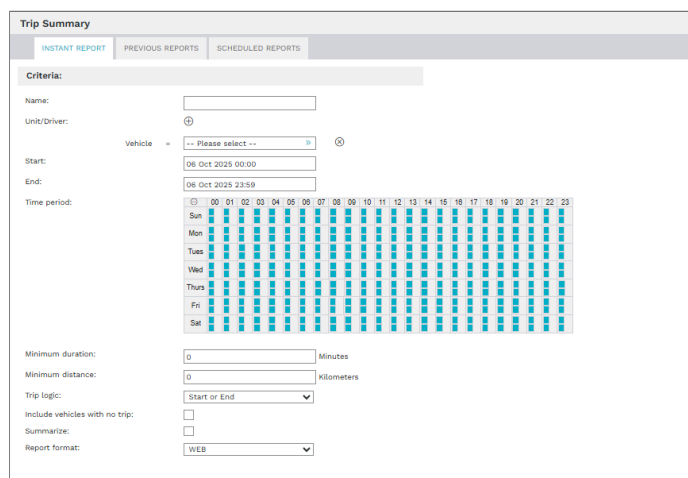
We'll walk through both options using the **Trip Summary Report** as an example.

Instant Reports

Instant Reports let you generate real-time data at the click of a button. This is ideal for getting quick insights into things like vehicle location, current speed, or trip activity.

Steps to Create an Instant Report:

- Select a report (e.g. **Trip Summary Report**)
- You'll see three tabs:
 - **Instant Report**
 - **Previous Reports**
 - **Scheduled Reports**



The screenshot shows the 'Trip Summary' configuration page with the following fields and options:

- Criteria:**
 - Name:
 - Unit/Driver:
 - Vehicle:
 - Start:
 - End:
 - Time period: A grid showing days of the week (Sun-Sat) and hours (00-23). All cells are currently selected (blue).
- Minimum duration: Minutes
- Minimum distance: Kilometers
- Trip logic:
- Include vehicles with no trip:
- Summarize:
- Report format:

- In the **Instant Report** tab:
 - Enter a **Report Name** (e.g. *Trip Summary – All*)
 - Select a **vehicle**, a **group**, or **all vehicles**
 - Set the **Date Range**
 - Define a **specific time period** (e.g. to exclude after-hours trips)
 - Complete any **required fields**—for example:
 - *Minimum Duration*
 - *Minimum Distance*

Trip Summary

INSTANT REPORT PREVIOUS REPORTS SCHEDULED REPORTS

Criteria:

Name:

Unit/Driver:

Vehicle:

Start:

End:

Time period:

	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23
Sun																								
Mon																								
Tue																								
Wed																								
Thurs																								
Fri																								
Sat																								

Minimum duration: Minutes

Minimum distance: Kilometers

Trip logic:

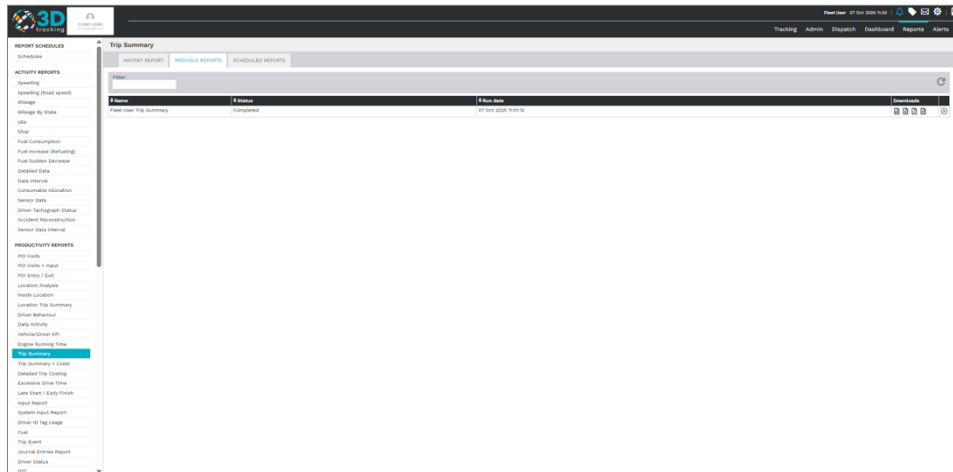
Include vehicles with no trip:

Summarize:

Report format:

- Click **OK** to generate the report

Your report will be instantly created and will appear under the **Previous Reports** tab.



From here, you can:

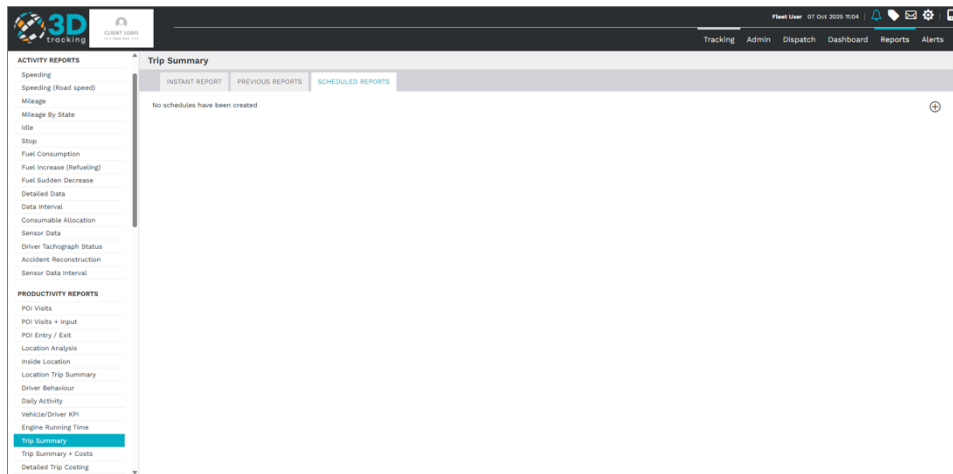
- Check the **Status**
- See the **Run Date**
- Download the report in your preferred **format**

Scheduled Reports

Scheduled Reports allow you to automate reporting—ideal for recurring tasks like weekly summaries or monthly fuel tracking.

Steps to Create a Scheduled Report:

- In the **Scheduled Reports** tab, click the **plus (+)** button to add a new schedule



- Fill in the following fields:
 - **Report Name**
 - **Vehicle or group selection**
 - **Date Range**
 - **Duration & Distance filters**

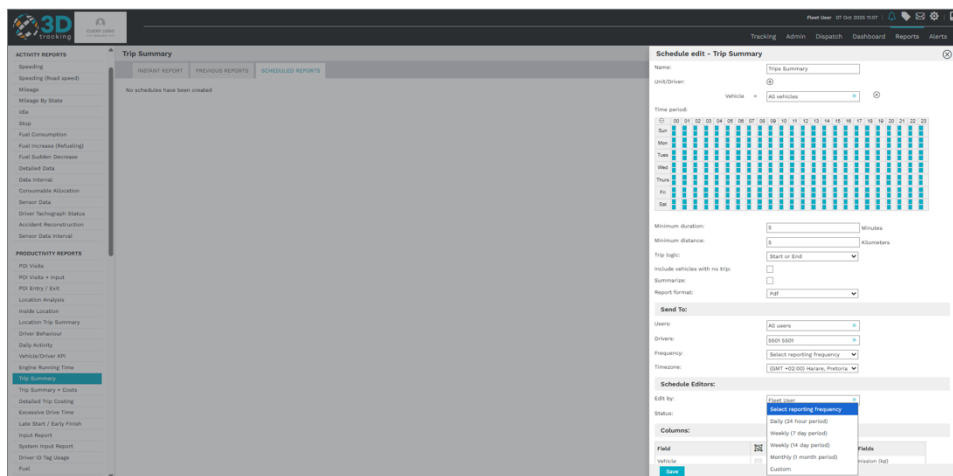
You'll also see new fields specific to scheduled reports.

Additional Scheduling Options

Send To:

Choose who should receive the report. You can send it to:

- Individual users
- User groups
- Specific drivers



Frequency:

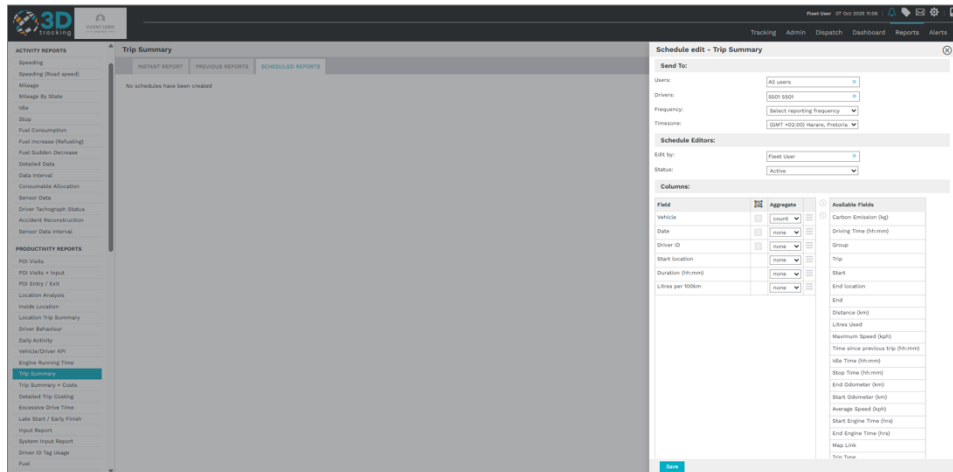
Decide how often the report is sent:

- Daily
- Weekly
- Monthly
- Custom (specific intervals)

Set the **Time Zone** to ensure the report runs at the correct time.

Final Scheduling Fields

- **Schedule Editor:** Assign users who can edit the report schedule
- **Status:** Set the schedule as *active* or *suspended*
- **Columns:** Choose which data columns appear in the report



























Once you're done, click **Save**.

Viewing Scheduled Reports

After saving, your scheduled report appears in the **summary list** with key info:

- Report Name
- Type
- Owner
- Frequency
- Last Sent Date
- Next Scheduled Date
- Status

Report Schedule Log ⓧ		
Schedule Name	Run Date	Download
Speeding	06 Oct 2025	   
Speeding	05 Oct 2025	   
Speeding	04 Oct 2025	   
Speeding	03 Oct 2025	   
Speeding	02 Oct 2025	   
Speeding	01 Oct 2025	   

You'll also see a **log of previously run scheduled reports**.

If you ever need to make changes, just click on the report to edit its settings.