

# New Reporting Tool

Version 1.2

17 June 2025

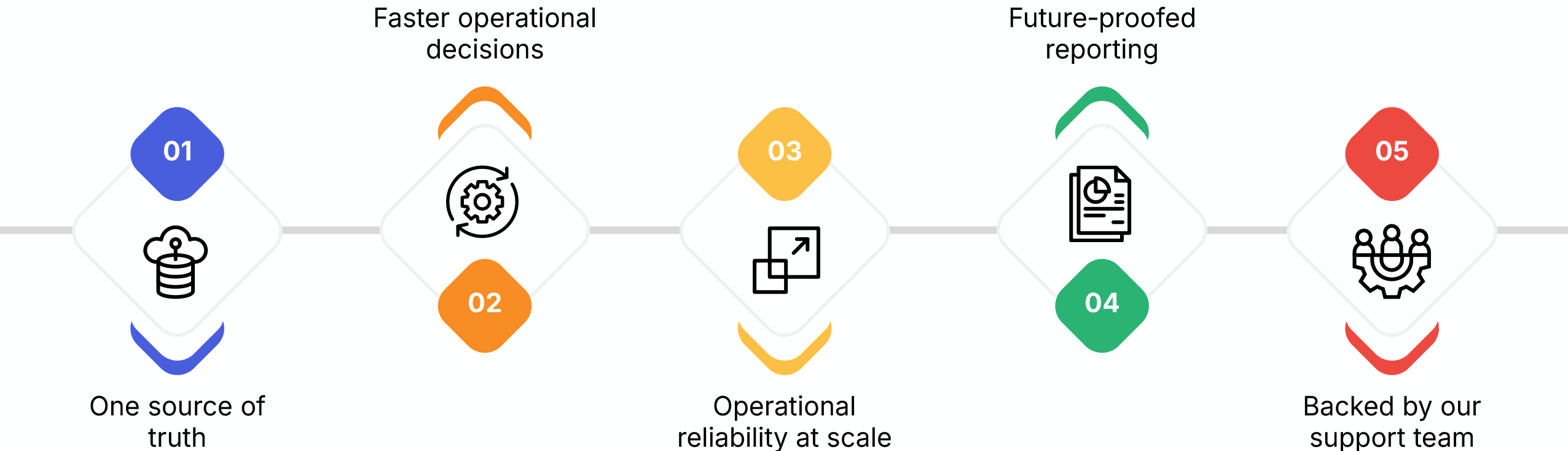
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# Report Upgrade

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We've upgraded our reporting foundation to provide a single, reliable source of fleet data — improving accuracy, consistency, and performance. The old tool was no longer scalable and lacked acceptable performance and newer technology.

## BENEFITS OF UPGRADE



# Everything you need to know about the upgrade?

Everything you need to know about the upgrade?

Introduction to the new landing page & how users will experience the upgraded reports

1

Overview of the report folder structure, base reports, and total number of available reports

2

Enhanced user interface: layout and new features

3

In-depth review of report functionality

4

Report export and scheduling capabilities

5

Explanation of report user roles and their permissions

6

More about custom reports and associated schedules

7

Impact on existing schedules – base and custom

8



# Landing Page

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# Introducing the new landing page

## Old Landing Page

Logistics IoT [ MIX20605 (Total: 1) ] Home Visibility People Groups Assets Reporting Settings

**Reporting**

Search folders  Search Text  | 9 results for Reports: All

**Recent Reports** ^

**Folders**

- All Folders
- My Reports
- Public Reports
- Asset History
- Asset List**
- External Associations
- Landmark Status
- Mileage
- Service

**Reports List (Asset List)**

Name	Folder	Last Modified	Schedules	Actions
<a href="#">Asset List</a>	Asset List	Jul 20, 2018		▼
<a href="#">Asset List by Landmark Owner</a>	Landmark Owner	Jan 6, 2020		▼
<a href="#">Asset List by Landmark Type</a>	Landmark Type	Sep 27, 2017		▼
<a href="#">Assets Dormant</a>	Dormancy	Jun 7, 2017		▼
<a href="#">Assets Dormant Summary</a>	Dormancy	Aug 25, 2017		▼
<a href="#">Assets Dormant Summary Chart</a>	Dormancy	Aug 25, 2017		▼
<a href="#">Assets List with Sensors</a>	Asset List	Feb 1, 2023		▼
<a href="#">At Landmark</a>	Asset List	Jul 19, 2023		▼
<a href="#">Reefer List</a>	Asset List	Aug 25, 2017		▼

# Introducing the new landing page

## New Landing Page

### NEW

- Report schedule will only show icon in that column if there are actual schedules for that report.
- Counter also provided to show how many schedules exist
- Folder structure exactly the same

The screenshot shows the 'Reporting (new)' interface for 'Logistics IoT [Pow00960 (Total: 1)]'. The top navigation bar includes 'Home', 'Visibility', 'People', 'Groups', 'Assets', 'Reporting', and a settings icon. Below the navigation, there are search fields for 'Search folders' and 'Search Text', with a result count of '25 results for Reports: All'. The main content area is divided into two sections: a sidebar on the left and a main table on the right.

**Recent Reports**

- Asset List

**Folders**

- All Folders
- My Reports
- Public Reports
- Asset History
- Asset List
- External Associations
- Landmark Status
- Mileage
- Service

**Reports List (All Folders)**

Name	Folder	Last Modified	Schedules	Actions
<a href="#">Tire Inflation Activity Summary</a>	Service	Jun 2, 2026		▼
<a href="#">Asset History</a>	Asset History	Jun 2, 2026		▼
<a href="#">Trouble History</a>	Service	Jun 2, 2026		▼
<a href="#">At Landmark</a>	Asset List	Jun 2, 2026		▼
<a href="#">Asset List for Site A</a>	My Reports	Jun 2, 2026		▼

Navigation: « 1 2 3 »

Page Size: 10 25 50

# Landing page features and functionality

- The page consists of a left and right panel, the left panel influences the right panel
- Left panel displays folder names and Recent reports opened
- Right panel displays the reports within the selected folder
- The UI and functionality is basically exactly same as original landing page to ensure users experience familiarity.

The screenshot shows the 'Reporting (new)' interface for 'Logistics IoT [Pow00960 (Total: 1)]'. The top navigation bar includes 'Home', 'Visibility', 'People', 'Groups', 'Assets', 'Reporting', and a settings icon. Below the navigation bar, there are search fields for 'Search folders' and 'Search Text', with a result count of '25 results for Reports: All'. The left sidebar is divided into 'Recent Reports' (showing 'Asset List') and 'Folders' (showing a tree structure with 'All Folders' selected). The main content area displays a 'Reports List (All Folders)' table with columns for Name, Folder, Last Modified, Schedules, and Actions. The table contains five rows of report data. At the bottom, there is a pagination control showing page 3 of 3, and a filter control set to 10 items per page.

Name	Folder	Last Modified	Schedules	Actions
<a href="#">Tire Inflation Activity Summary</a>	Service	Jun 2, 2026		▼
<a href="#">Asset History</a>	Asset History	Jun 2, 2026		▼
<a href="#">Trouble History</a>	Service	Jun 2, 2026		▼
<a href="#">At Landmark</a>	Asset List	Jun 2, 2026		▼
<a href="#">Asset List for Site A</a>	My Reports	Jun 2, 2026	1	▼

# Landing page features and functionality

Logistics IoT [ Ame12618 (Total: 1) ]

The screenshot shows the reporting interface with the following features highlighted:

- 1**: Search folders input field.
- 2**: Search Text input field.
- 3**: Recent Reports list.
- 4**: Folders tree view.

**Reporting (new)**

Search folders  Search Text

**Recent Reports**

- Landmark Status
- Landmark Dormant Status
- Landmark Pool Status
- Asset History
- Asset List
- Reefer History
- Tire Inflation Activity Detail
- External Entity Association History
- Mileage
- Asset List with Sensors

**Reports List (All Folders)**

Name
<a href="#">3G devices for replacement in PNW</a>
<a href="#">3G devices for replacement ONEY-LH RFR</a>
<a href="#">3G/EOL PF devices for replacement in HOU</a>
<a href="#">Asset History</a>
<a href="#">Asset List</a>
<a href="#">Asset List by Landmark</a>
<a href="#">Asset List FLX v2</a>
<a href="#">Asset List with Sensors</a>
<a href="#">Asset List with Sensors (Chart)</a>
<a href="#">Assets Dormant</a>

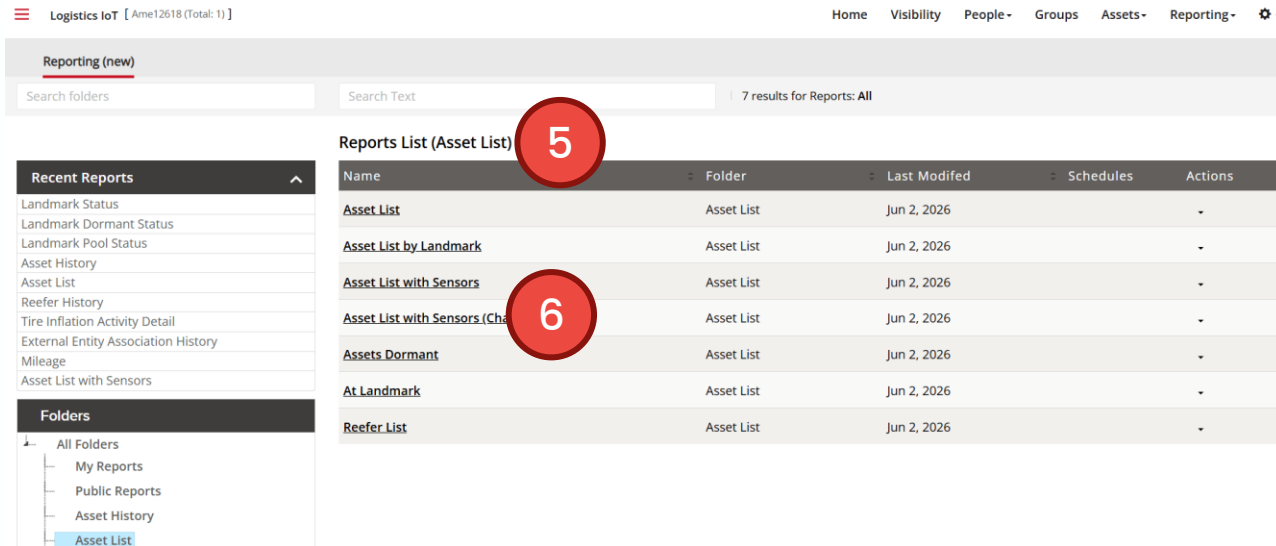
« 1 2 3 4 »

**Folders**

- All Folders
  - My Reports
  - Public Reports
  - Asset History
  - Asset List
  - External Associations
  - Landmark Status
  - Mileage
  - Service

Nr	Description	Expected behaviour and functionality
1	Search folders	User can type any folder name and it will reduce the folder list to that one folder and user can then click on that folder and see which reports are in that folder on the right panel
2	Search text	User can type any text and it will filter the right panel accordingly
3	Recent reports	Will show a list of recently opened reports. If it reaches nr 11 it drops off the oldest item so maintains a rolling list of max 10.
4	Folder list	<p>This list shows the various folders that are available. All users see all folders. If you have report permission you see all.</p> <p>More about the folders:</p> <p>Custom folders:</p> <ul style="list-style-type: none"> <li>• My Reports (only visible to me in UI but I can share it via schedules).</li> <li>• Public Reports (Report that was created by me or someone else and saved to be shared in UI with all users who have access to the site)</li> </ul> <p>Base folders are the same as before:</p> <ul style="list-style-type: none"> <li>• Asset History</li> <li>• Asset List</li> <li>• External Associations</li> <li>• Landmark Status</li> <li>• Mileage</li> <li>• Service</li> </ul>


# Landing page features and functionality

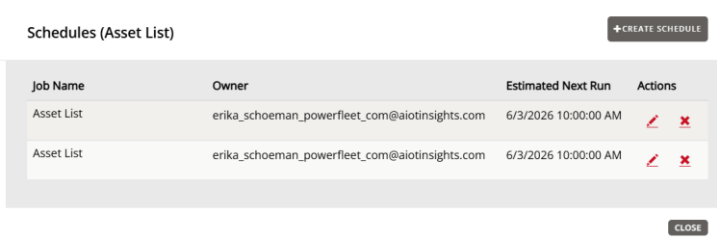


Nr	Description	Expected behaviour and functionality
5	Report list	<p>This list will display the reports within the particular folder that is selected on the left panel. This panel has 4 columns namely:</p> <ul style="list-style-type: none"> <li>• Name - name of the report</li> <li>• Folders - in which folder that report resides</li> <li>• Last modified - when it was created and/or updated with a release</li> <li>• Report schedule - there will be an icon inside with a nr next to it which indicates that a schedule/s exist and how many. This icon is clickable, will be described under a different point</li> </ul> <p>At the end is an action dropdown icon which allows a user to either schedule and delete depending on user's permission. BASE reports cannot be deleted and will not have such an action</p> <p>All columns can be sorted as required.</p>
6	Report names	<p>This is the entry portal into a report by clicking on it to open it up</p>

# Landing page features and functionality

## Reports List (All Folders)

Name	Folder	Last Modified	Schedules
<a href="#">Asset History</a>	Asset History	Jun 2, 2026	
<a href="#">Asset List</a>	Asset List	Jun 2, 2026	 <b>7</b>
<a href="#">Asset List by Landmark</a>	Asset List	Jun 2, 2026	
<a href="#">Asset List with Sensors</a>	Asset List	Jun 2, 2026	
<a href="#">Asset List with Sensors (Chart)</a>	Asset List	Jun 2, 2026	
<a href="#">Assets at Maritime Paper Moncton</a>	Public Reports	Jun 2, 2026	
<a href="#">Assets Dormant</a>	Asset List	Jun 2, 2026	
<a href="#">At Landmark</a>	Asset List	Jun 2, 2026	
<a href="#">Drive Segments at Low External Voltage Detail</a>	Service	Jun 2, 2026	
<a href="#">Drive Segments at Low External Voltage Summary</a>	Service	Jun 2, 2026	

Nr	Description	Expected behaviour and functionality
7	Schedule indicator	<p>Indicates to user that a schedule/s exist and counter show how many. User can click on the icon which will open a modal which looks like this:</p>  <p>On this modal a user has the following info at hand and can perform certain actions:</p> <p>NOTE: A read only user will not see this at all</p> <ul style="list-style-type: none"> <li>• <b>Header</b> - Schedules(the name of the report)</li> <li>• <b>Job Name</b> - Name of report</li> <li>• <b>Owner</b> - User who created the schedule</li> <li>• <b>Estimated Next run</b> - when it will run again. Time zone will be that of the site</li> <li>• <b>Action button to edit</b> - opens schedule modal</li> <li>• <b>Delete action button</b> - performs deletion, user is prompted if they are sure they want to do it? Super users can delete any custom report (Public or My Reports). Delete is disabled for non-owners of public reports. Only Owner of public report or Superuser can delete it.</li> <li>• At top next to header a user can create a schedule directly from here for that specific report.</li> <li>• Close button - closes modal</li> <li>• There is no limit in how many schedules you may create and Job name and Owner number of characters in modal is not limited and it will just wrap</li> </ul>

# Landing page features and functionality

Reports List (All Folders)

Name	Folder	Last Modified	Schedules	Actions
<a href="#">Asset History</a>	Asset History	Jun 2, 2026		⌵
<a href="#">Asset List</a>	Asset List	Jun 2, 2026	🔔 2	⌵
<a href="#">Asset List by Landmark</a>	Asset List	Jun 2, 2026		⌵
<a href="#">Asset List with Sensors</a>	Asset List	Jun 2, 2026		⌵
<a href="#">Asset List with Sensors (Chart)</a>	Asset List	Jun 2, 2026		⌵
<a href="#">Assets at Maritime Paper Moncton</a>	Public Reports	Jun 2, 2026		⌵
<a href="#">Assets Dormant</a>	Asset List	Jun 2, 2026		⌵
<a href="#">At Landmark</a>	Asset List	Jun 2, 2026		⌵
<a href="#">Drive Segments at Low External Voltage Detail</a>	Service	Jun 2, 2026		⌵
<a href="#">Drive Segments at Low External Voltage Summary</a>	Service	Jun 2, 2026		⌵

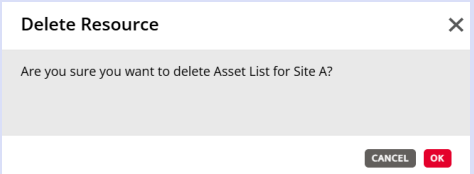
« 1 2 3 »

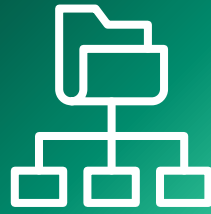
10 25 50

⌵ Schedules
Actions

📅
⌵

📅
⌵

Nr	Description	Expected behaviour and functionality
8	Action dropdown icon	<p>Depending on a user's permissions and type of report the user can perform a Schedule and Delete action.</p> <ul style="list-style-type: none"> <li>Read only users cannot see schedule and cannot delete either.</li> <li>No one can delete a base report so that option will not show.</li> <li>Super users can delete any custom report (Public or My Reports). Delete is disabled for non-owners of public reports so only Owner of public report or Superuser can delete it.</li> <li>We do show this pop up for custom reports as the delete action does have implications for people receiving the schedule.</li> </ul> 
9	Page indicator	Displays how many pages exist within the folder
10	Indicate nr of rows per page	User can opt to display 10, 25, 50, 100 rows per page. If there are less rows than the number it will not show the higher options



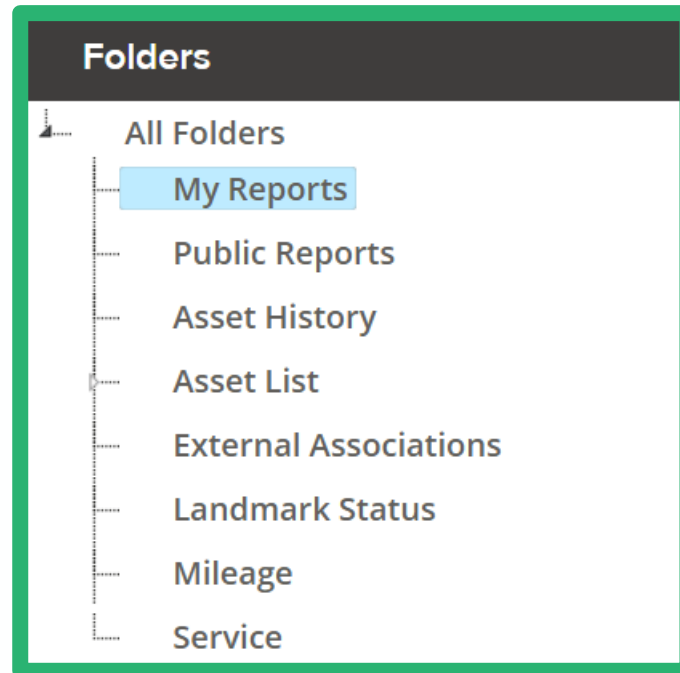
# Report Folder Structure

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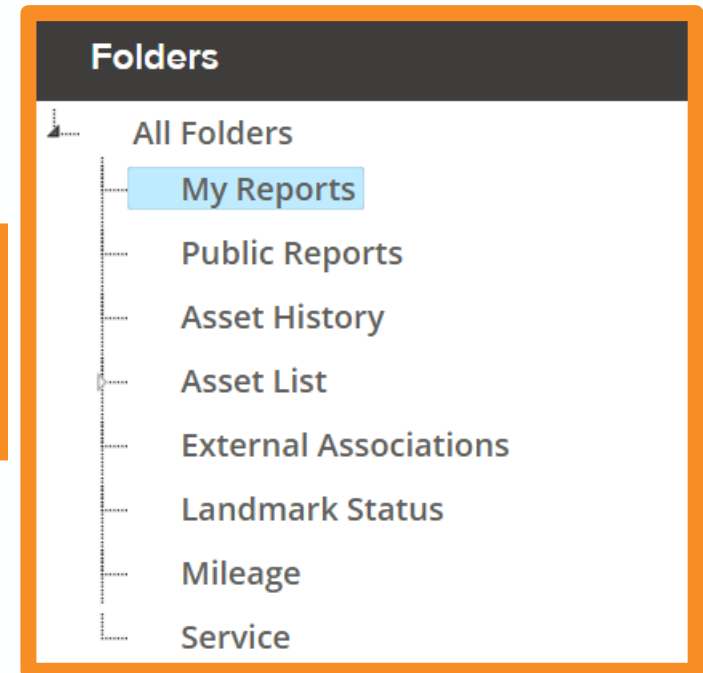
# Old vs New folder structure

The **report folder names remained unchanged**, and where appropriate, **similar reports have been consolidated**. This has resulted in a smaller set of base report folders while still providing the same range of reporting options as before.

OLD



NEW



# Asset List folder (7 reports)

Old Folder	Old Report Name	New Report Folder	New Report Name	Notes
Asset List (9)	Asset List	Asset List (7)	Asset List	
	Asset List by Landmark Owner		Asset List by Landmark	
	Asset List by Landmark Type		Asset List by Landmark	
	Assets Dormant		Assets Dormant	
	Assets Dormant Summary		Assets Dormant	
	Assets Dormant Summary Chart		Assets Dormant	
	Assets List with Sensors		Assets List with Sensors	
			Assets List with Sensors (Chart report)	New report
	At Landmark		At Landmark	
	Reefer List		Reefer List	

## What changed?

- Asset List by Landmark Owner and by Landmark Type have been combined into one report named Asset List by Landmark
- All reports with words Assets Dormant were combined into one report named Assets Dormant
- We added a new report named Asset List with Sensors (Chart report)

# Asset History folder (2 reports)

Old Folder	Old Report Name	New Report Folder	New Report Name
Asset History (2)	Asset History	Asset History (2)	Asset History
	Reefer History		Reefer History

## What changed?

- No changes

# External Associations folder (1 report)

Old Folder	Old Report Name	New Report Folder	New Report Name
External Associations (1)	External Entity Association History	External Associations (1)	External Entity Association History

## What changed?

- No changes

# Landmark Status folder (5 reports)

Old Folder	Old Report Name	New Report Folder	New Report Name
Landmark Status (5)	Dormant at Landmark	Landmark Status (5)	Landmark Dormant Status
	Landmark Dwell Status Detail		Landmark Dwell Status Detail
	Landmark Dwell Status Summary		Landmark Dwell Status Summary
	Landmark Pool Status		Landmark Pool Status
	Landmark Status		Landmark Status

## What changed?

- Dormant at Landmark now named Landmark Dormant Status

# Mileage folder (1 report)

Old Folder	Old Report Name	New Report Folder	New Report Name
Mileage (2)	Mileage Status	Mileage (1)	Mileage
	Mileage Traveled		Mileage

## What changed?

- The two old reports were combined into one report named Mileage

# Service folder (8 reports)

Old Folder	Old Report Name	New Report Folder	New Report Name
Service (10)	Drive Segments at Low External Voltage Detail	Service (8)	Drive Segments at Low External Voltage Detail
	Drive Segments at Low External Voltage Summary		Drive Segments at Low External Voltage Summary
	Need Service		Need Service
	Need Service with Associated Entity		Need Service
	Planned Maintenance Forecast		Planned Maintenance Forecast
	Tire Inflation Activity Details		Tire Inflation Activity Details
	Tire Inflation Activity Summary RPT		Tire Inflation Activity Summary RPT
	Trouble History		Trouble History
	Trouble History All Assets		Trouble History
	User Login Activity		User Login Activity

## What changed?

- Need Service and Need Service with Associated Entity are now combined in one report named Need Service
- Trouble History and Trouble History All Assets are now combined into one report named Trouble History



# Report layout & features

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# Layout & features

OLD

Reporting » View EDIT GO BACK

**Asset List\_report** Data refreshed 2026-04-21 at 08:16:48

100% search report Page 1 of 15

**Asset List**

Asset ID	Device Serial Number	Device Type	Event Reason	Hooked	Report Time	GPS Time	Speed/Dir	Landmark	Address, City, State, Zip Code
16105	4631615	GSMD100	Beginning of Drive	n/a	Mar 3, 2022 11:46:33 PM	Mar 1, 2022 8:29:34 PM	17 E		2218 Britt Road, Mount Dora, FL, 32757
17412	4662276418	GSMD300	Low Battery Suspend	n/a	Feb 15, 2025 6:42:47 AM	Jan 19, 2025 1:13:32 AM	0		879 Bell Road, Lake City, FL, 32055
17430	4662280738	GSMD300	End of Drive	n/a	Jan 23, 2025 7:21:32 PM	Jan 17, 2025 1:48:26 PM	0		879 Bell Road, Lake City, FL, 32055
17441	4662282695	GSMD300	Low Battery Suspend	n/a	Jan 10, 2025 6:13:18 AM	Jan 17, 2024 7:05:15 PM	0		2798 Haywood Street, Lakeland, FL, 33801
17458	4662319152	GSMD300	Low Battery Suspend	n/a	Aug 4, 2024 6:56:13 AM	Mar 19, 2024 5:32:32 PM	0		824 Combee Road South (FL-659), Lakeland, FL, 33801
17447	4662319366	GSMD300	Low Battery Suspend	n/a	Feb 1, 2025 6:17:47 AM	Jan 30, 2025 4:09:44 PM	0	HOOD TAMPA	Oldsmar, FL, 34677
570047	4662338423	GSMD300	Boot-up Report	n/a	Apr 2, 2022 2:02:17 AM	Apr 1, 2022 8:26:27 PM	0	AMCOR ORLANDO	10260 Ringhaver Dr., Orlando , FL, 32824
18491	4662337926	GSMD300	Inactivity Report	n/a	Feb 17, 2025 1:30:44 PM	Feb 17, 2025 1:31:24 PM	0		879 Bell Road, Lake City, FL, 32055
18480	4662319348	GSMD300	Inactivity Report	n/a	Apr 20, 2026 12:41:59 AM	Mar 23, 2026 12:20:55 AM	0		Avon, IN, 46123
18485	4662334436	GSMD300	Ext Power Off	n/a	Jun 30, 2025 9:04:05 AM	Jun 30, 2025 9:00:37 AM	0		I-10, Desert Center, CA, 92239
18471	4662334503	GSMD300	Low Battery Suspend	n/a	Mar 11, 2024 6:32:48 AM	Nov 15, 2023 3:13:00 AM	0		1497 Delta Drive, Gastonia, NC, 28052
18483	4662319048	GSMD300	End of Drive	n/a	Dec 19, 2022 2:37:36 AM	Dec 19, 2022 2:15:23 AM	0	WI - TMS CEDAR GROVE	238 South Commerce Street, Cedar Grove, WI, 53013
18496	4662334605	GSMD300	End of Drive	n/a	Apr 21, 2026 8:49:41 AM	Apr 21, 2026 8:17:19 AM	0		Clear Lake, IA, 50428
18500	4662334226	GSMD300	In transit	n/a	Apr 21, 2026 12:08:31 PM	Apr 21, 2026 12:08:29 PM	64 SE		I-80, I-94, US-6, Lake Station, IN, 46405
18506	4662334497	GSMD300	Ext Power Off	n/a	Dec 31, 2024 2:27:58 AM	May 22, 2024 4:37:32 PM	0		824 Combee Road South (FL-659), Lakeland, FL, 33801
18494	4662334440	GSMD300	Ext Power On	n/a	Mar 31, 2025 5:08:15 PM	Mar 19, 2025 11:25:02 AM	0		Lakeland, FL, 33801
18502	4662334044	GSMD300	End of Drive	n/a	Apr 21, 2026 3:57:44 AM	Apr 21, 2026 3:37:19 AM	0		2661 South Willow Avenue, Fresno, CA, 93725
18507	4662334564	GSMD300	Low Battery Suspend	n/a	Jan 9, 2025 11:32:26 PM	Mar 22, 2024 5:52:35 PM	0		824 Combee Road South (FL-659), Lakeland, FL, 33801

Page 1 of 15

# Layout & features

NEW

The screenshot shows the 'Reporting (new) » Asset List' page in the PowerFleet LVS system. The interface includes a navigation bar at the top with links for Home, Visibility, People, Groups, Assets, and Reporting. Below the navigation bar, there are 'Input Controls' (a red button), 'Reset', 'Sort By', and a 'Filter...' search box. The main content is a table with columns for Asset ID, Device Serial Number, Hooked, Report Time, GPS Time, Speed Dir, Landmark, Address City State Zip Code, Dist Dir From Nearest Major City, and Nearest Major City. The table contains three rows of data. At the bottom of the table, there is a 'SUMMARY' section showing '3 rows - 20 columns'. A toolbar at the bottom right contains 'GO BACK', 'EXPORT', and 'SCHEDULE' buttons. Callouts highlight the following features:

- Reset, Sort and Filter/Search**: Callout pointing to the 'Reset', 'Sort By', and 'Filter...' controls.
- Date range, if applicable**: Callout pointing to the 'Filter...' search box.
- Input controls in easy reach**: Callout pointing to the 'Input Controls' button.
- Row & column counter**: Callout pointing to the 'SUMMARY 3 rows - 20 columns' text.
- Toolbar at the bottom**: Callout pointing to the 'GO BACK', 'EXPORT', and 'SCHEDULE' buttons.
- User will see options based on their assigned role**: Callout pointing to the 'GO BACK', 'EXPORT', and 'SCHEDULE' buttons.

Asset ID	Device Serial Number	Hooked	Report Time	GPS Time	Speed Dir	Landmark	Address City State Zip Code	Dist Dir From Nearest Major City	Nearest Major City
2320468*		Jul 30, 2025 10:06:02 AM	Jun 07, 2025 07:25:59 PM	0		1729 Hudson Drive Prosper TX 75078	52.206 N	Dallas, TX	
Hester LV100		Jan 13, 2025 07:00:44 PM	Apr 29, 2024 08:01:59 AM	0		7034 Michaels Mill Road Adamstown MD 21710	10.515 S	Frederick, MD	
2250923P		Jun 14, 2023 11:21:30 AM	May 25, 2023 11:19:59 PM	0		Plano TX 75024	31.645 N	Dallas, TX	



# Report export and scheduling capabilities

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# Layout and features

The following buttons exist in the bottom toolbar, and some will not be visible if user has Read-Only permissions:

- **Go Back** – this navigates the user back to the Landing Page
- **Export** – this enables the user to export the report
- **Schedule** – This enables a user to Schedule the report. ONLY Users with Edit permissions will see this button. ie. Read-only users will not see this.
- **Save** – this button enables a user to save the report if they made any changes to column orders, names or input controls and wish to keep it. They will then save it as a Custom report which is either Private ie. My Reports or Public ie. shared with other users in this site. Read-Only users cannot perform save function. Save button is disabled until a change was made which will make it usable.
- As soon as user makes a change on the input controls, a **Cancel** button appears replacing the Go Back button



Go Back Export Schedule Save

# Export

The screenshot shows an 'Export' dialog box with the following elements:

- 1**: Destination dropdown menu showing 'Download'.
- 2**: Attachments dropdown menu showing 'Asset List'.
- 3**: More options section with checkboxes for 'Repeat header labels' and 'Include metadata'.
- 4**: 'Cancel' and 'Export' buttons at the bottom right.

Nr	Description	Expected behaviour and functionality
1	Destination	Dropdown box to select Download
2	Attachments	<p>A dropdown listing all the components of the report. More on this – the user will see the following: Entire workbook and below that the report name. If user wants everything within the report, they will select Entire workbook but if the user only wants to export certain parts of the report they click on the report name and then the elements they want to export. This differs from report to report on how many elements exist. An icon next to each element indicates if it is a table or chart which makes selecting the export format easier.</p> <p>Note that Entire workbook only has excel and Pdf options, individual items have more options.</p>
3	More options	Metadata is only applicable when user selects excel as output. Metadata will be displayed in the first row of the excel sheet. Repeat headers is only applicable if the document has more than one page in PDF
4	Cancel or Export	After user made selections, they can either export or abort by pressing Cancel

# Save

The screenshot shows a 'Save Report' dialog box with a close button (X) in the top right corner. It contains two main sections: 'Name' and 'Location'. The 'Name' section has a text input field containing 'Asset List', with a callout '1' pointing to it. The 'Location' section has two radio button options: 'Public Reports' and 'My Reports', with 'My Reports' selected and a callout '2' pointing to it. At the bottom right, there are two buttons: 'Cancel' and 'Save', with a callout '3' pointing to the 'Save' button.

Nr	Description	Expected behaviour and functionality
1	Name	This is the name the user gives the report, mandatory field
2	Location	This is where the user wants the report to be visible and to whom. Public means all users in this database will see it and My Reports means only the report owner (one who created it) will see it.
3	Cancel or Save	After user made selections they can either proceed to save or abort by pressing Cancel

- Only Edit users has the Save functionality
- Save only becomes available if any changes were made to a report
- After a report is saved, it appears in the relevant folder ie. Public or My Reports.
- Certain special characters used in the names of custom reports caused the reports to not open. Code was added to prevent users from using characters that could cause issues. The following characters are allowed:
  - \_ known as underscore
  - . Full stop
  - , Comma
  - And Hyphen -
  - = Equal
  - >Greater than
  - < Smaller than

# Schedule

**Add report schedule (Asset List)** 1

Recipients 2  
erikas1077@gmail.com,erika.schoeman@powerfleet.com

Subject 3  
Asset List

Message 4  
Weekly report

**Include in schedule**

Include 5 Asset List Format 6 EXCEL

+ Add

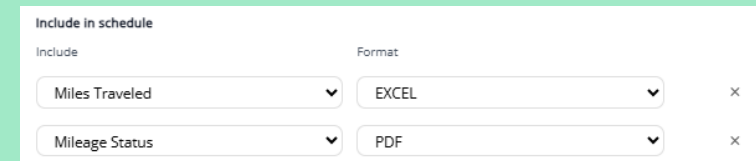
**Frequency**

Frequency Daily At 13:00

Do not send emails for emotv reports

Cancel Add

Nr	Description	Expected behaviour and functionality
1	Header	Will always show the report from where user navigated in brackets.
2	Recipients	User can add list of recipients comma separated. No limit to nr of recipients and also can be any valid email.
3	Subject	Will always be the name of the report but user can amend it
4	Message	Here a user can add the input parameters of the specific report so that the recipients knows what they are looking at when they receive the mail. Ie. All Vehicle Groups, last 7 days and filtered for Critical Severity only.
5&6	Include in schedule (include and format)	<p>With this section a user can decide if they want to receive the entire report or only parts/sections of it. The content of the report will determine how many items are visible in this dropdown and may sometimes only be one.</p> <p>There are rules linked to how this will be handled in the email :</p> <ol style="list-style-type: none"> <li>1. If user selects entire workbook it will send it in the most appropriate format for the specific report and user cannot select the format but they can select the various parts or sometimes just one part and then select their preferred format.</li> <li>2. If user selects various components with various formats (as shown here below) then the user will receive them all added in a Zipped file. If they are all the same format it will be received in a merged file with various tabs/pages. This way we ensure the user always receives the report in the best possible format.</li> </ol>



# Schedule

**Add report schedule (Asset List)**

Recipients

Subject

Message

**Include in schedule**

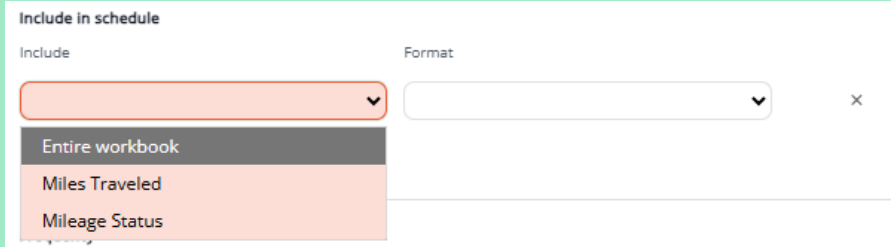
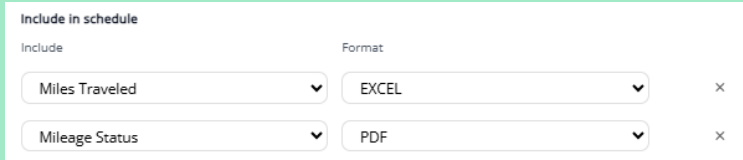
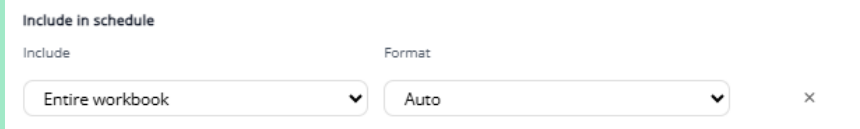
Include 5 Format 6 EXCEL

+ Add

**Frequency**

Frequency Daily At 13:00

Do not send emails for empty reports

Nr	Description	Expected behaviour and functionality
5&6	Include in schedule (include and format)	<p>Below user can select one or multiple of these items.</p>  <p>In this example 2 items were selected with various formats and therefore the file received in the email will be a Zipped file</p>  <p>If user selects entire workbook it means they are selecting the entire report and the format will always be Auto format.</p>  <p>The system will send it in the best format as per the layout of the report.</p>

# Schedule

**Add report schedule (Asset List)**

Recipients

Subject

Message

**Include in schedule**

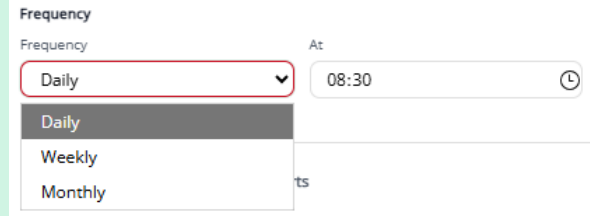
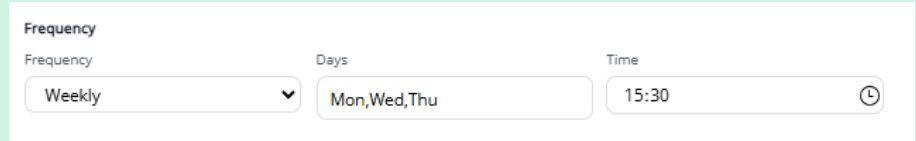
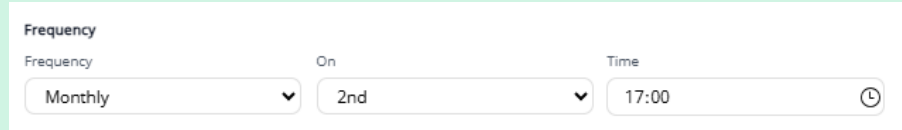
Include  Format

+ Add

**Frequency**

Frequency  At

Do not send emails for empty reports

Nr	Description	Expected behaviour and functionality
7	Frequency	<p>A user has three options:</p> <p>Daily – User can select at which time. Note the time is always that of the Site's time zone</p>  <p>Weekly – User can select one or multiple days and only one time each day and again it will be in time zone of the Site</p>  <p>Monthly – User can select to receive on any day of the month</p> 

# Schedule

**Add report schedule (Asset List)**

Recipients

Subject

Message

---

**Include in schedule**

Include  Format

+ Add

---

**Frequency**

Frequency  At

---

Do not send emails for empty reports

**8** **9**

Nr	Description	Expected behaviour and functionality										
8	Empty reports	<p>If users select this check box,</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;"> <input type="checkbox"/> Do not send emails for empty reports         </div> <p>the mail will not be sent if the report is empty</p>										
9	Cancel or Add	<p>A user can cancel the task at hand or add to proceed in creating the Schedule.</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;"> <p>Reports List (Mileage)</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Folder</th> <th>Last Modified</th> <th>Schedules</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Mileage</td> <td>Mileage</td> <td>Jun 3, 2026</td> <td></td> <td></td> </tr> </tbody> </table> </div> <p>Once a schedule is created it will appear next to the relevant report on the landing page like shown above with red icon and counter.</p>	Name	Folder	Last Modified	Schedules	Actions	Mileage	Mileage	Jun 3, 2026		
Name	Folder	Last Modified	Schedules	Actions								
Mileage	Mileage	Jun 3, 2026										

## Further info and logic used in the Scheduled reports:

The schedule modal addresses the frequency of the reports and what needs to be included but the actual report parameters like date range and filters etc. are represented by what was selected in the input controls.

### This section explains how that works and tests can be performed to validate the scenarios:

Whatever the Date range was on the report is what will be used in the report schedule. Let's look at some scenarios.

#### Scenario 1

User's date range on the report was set to last full week and he creates the schedule to deliver weekly on a Monday at 10am.

The email they receive on Monday's at 10am will include the data for the previous full week starting the Sunday

#### Scenario 2

User's date range on the report was set to Last 7 days and he creates the schedule to deliver weekly on a Tuesday at 11am.

The email they receive on Tuesday's at 11am will include the data for the rolling 7 days ending on the Monday.

#### Scenario 3

User's date range on the report was set to Current month and he creates the schedule to deliver Monthly on the 10th.

The email they receive on the 10th will include the data up until the 9th.

# Schedule - Email

This is an example of how the email will look like:

Asset List\_Weekly report



Powerfleet Inc. <donotreply@powerfleet.com>

To: Erika Schoeman

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)



**Here's your scheduled report on "Asset List\Asset List"**

Asset List Weekly report, for Demo group

Document



[Asset List\Asset List](#)

[Open workbook](#)

External User ([schitla\\_id\\_systems\\_com@aiotinsights.com](mailto:schitla_id_systems_com@aiotinsights.com)) subscribed you to receive this report at 06:42 PM, only on Wednesday IST.

**Yours Sincerely,**

Powerfleet Inc.

[www.powerfleet.com](http://www.powerfleet.com)

## GENERAL INFO

- Schedules will **no longer have attachments but links** to attachments
- If a link is not clicked on it will **expire after 90 days**
- Anyone that receives the mail will be able to open the link
- Clicking on link does not require to login

# Schedule - Email

Recap on zipped or merged files \ There are rules linked to how the report will be provided in the email :

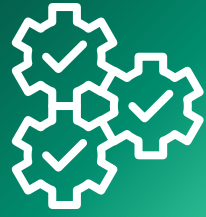
- **Selecting the entire workbook:** The report is sent in the most appropriate format automatically. The user cannot choose the format.
- **Selecting individual parts:** The user can select one part and choose the preferred format although the system will select the most appropriate format.
- **Multiple parts selected:**
  - Different formats → files are delivered in a ZIP folder (as shown below)
  - Same format → files are delivered as one merged file with multiple tabs/pages.

This ensures the report is always delivered in the best possible format.

The image shows an email interface with a report attachment. The attachment is titled "UtilizationLockouts Summary and Graphs Report\_20260415T0900.zip" (52.3 KB). Below the attachment, a file explorer window is open, showing the contents of the ZIP file. The file explorer shows a folder named "UtilizationLockouts Summary and Graphs Report" containing three files: "Impact Summary Report\_null\_2026..." (Microsoft Excel Worksheet, 8 KB), "Impact Summary Report\_null\_2026..." (Adobe Acrobat Document, 41 KB), and "Impact Summary Report\_null\_2026..." (Adobe Acrobat Document, 27 KB). A red box highlights the "Open workbook" button in the email client. A red box highlights the file explorer window. A red box highlights the table of files in the file explorer. A red box highlights the "NOTE" text.

**NOTE:** This visual is just explaining the behaviour when zipped folder is received.

Name	Type	Compressed size	Password p...	Size	Ratio	Date modified
Impact Summary Report_null_2026...	Microsoft Excel Worksheet	8 KB	No	9 KB	10%	2026/04/15 09:00
Impact Summary Report_null_2026...	Adobe Acrobat Document	41 KB	No	71 KB	42%	2026/04/15 09:00
Impact Summary Report_null_2026...	Adobe Acrobat Document	27 KB	No	53 KB	50%	2026/04/15 09:00



# In-depth look at report functionality

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# Report functionality

The screenshot displays a web interface for a fleet report. At the top, there are controls for 'Input Controls', 'Reset', 'Sort By', and a 'Filter...' search box. Below this is a table titled 'Asset List' with columns for Asset ID, Device Serial Number, Device Type, Event Reason, Hooked, Report Time, GPS Time, Speed Dir, Landmark, Address City State Zip Code, Dist Dir From Nearest Major City, Nearest Major City, Load Status, Loaded, Mount Status, Mounted, and Internal Voltage. A 'Sort By' modal is open, showing a list of sort options: Asset ID, Days Dormant, Device Type, Event Reason, Landmark, Load Status, Nearest Major City, Report Time (selected), and Total Mileage. The modal also shows 'Sort Order' options: ASC and DESC (selected). A 'Close' button is at the bottom right of the modal. At the bottom left of the table, there is a 'SUMMARY' section with '20 rows - 20 columns'.

A user can select their Sort By option as well as sort order

Reset button takes the user back to the default report before any changes were made

Filter/Search allows a user to search by any word on the report to refine view

Column names can be renamed

Column orders can be changed by dragging the column to desired place

# Input controls

Reporting (new) » Mileage

The screenshot displays the 'Input Controls' modal in the PowerFleet reporting interface. The modal is titled 'Input Controls' and contains several sections for configuring a report:

- Report Period:** A dropdown menu set to 'Last 7 Days' and a 'Week/Month/Year' dropdown set to '0'.
- Custom Date Selection:** A dropdown menu with a calendar icon and the text 'Select date range'.
- Report Selector\*:** Radio buttons for 'Mileage Status' (selected) and 'Mileage Traveled'.
- Column Selector:** A dropdown menu showing '(8) Asset ID, Device Serial Number, Report Time, GPS Time, Landmark, Nearest A...'. There is a close icon (x) on the right.
- Scheduler Asset Groups:** A search bar with 'Select values' and a search icon. Below it are checkboxes for 'DEMO' and 'DayaComm Services'.
- Asset ID:** A dropdown menu with 'Select values'.

The background interface shows a table titled 'Miles Status for 2026-05-27 00:00:00 to 2026-06-02 23:59:59'. The table has columns for 'Asset ID', 'Device Serial Number', 'Report Time', and 'GPS Time'. At the bottom of the table, it says 'SUMMARY ^ 0 rows - 8 columns'. There are buttons for 'GO BACK', 'EXPORT', and 'SCHEDULE' at the bottom right of the interface.

- User can select from a few date range options on certain reports
- Some reports include a report selector which will render the selected report
- Column selector to add or remove available fields
- Scheduler Asset Groups selection options
- Filter options vary per report type like here it is for Asset ID

# Input controls

- Current week starts on the Sunday
- Last 7 Days is rolling 7 days up till yesterday
- Last full week is the previous week starting the Sunday
- Current month is month to date
- Last full month is the previous completed month

The screenshot shows a dialog box titled "Input Controls" with a close button (X) in the top right corner. It contains two main sections. The first section, "Report Period", has a dropdown menu currently open, displaying a list of radio button options: "Today", "Yesterday", "Yesterday and Today" (which is selected with a blue dot), "Current Week", "Last 7 Days", "Last Full Week", "Week of Current Year", "Current Month", "Last Full Month", "Month of Current Year", "Year-to-Date", and "Year". The second section, "Week/Month/Year", features a dropdown menu with the value "0" selected.

**Note** Week of current year works in conjunction with the Week/Month/Year dropdown and user can select the week of the year to be included. ONLY one can be selected  
If a user creates a Schedule with Week of Current Year date selection it will always return that selected week in the schedule.

**Note** Month of current year also works in conjunction with the Week/Month/Year dropdown and user can select the month of the year to be included. ONLY one can be selected  
If a user creates a Schedule with Month of Current Year date selection it will always return that selected month in the schedule.

**Note** Year also works in conjunction with the Week/Month/Year dropdown and user can select the year to be included. ONLY one can be selected  
If a user creates a Schedule with this date selection it will always return that selected year in the schedule.

# Input controls

- This is useful if a user wants to check something for an odd date range not covered in the Report period options

**Note** if a user creates a Schedule with this date selection it will always return this range in the schedule.

Custom Date Selection

Select date range

Between

Apr 2026 < > Apr 2026 < >

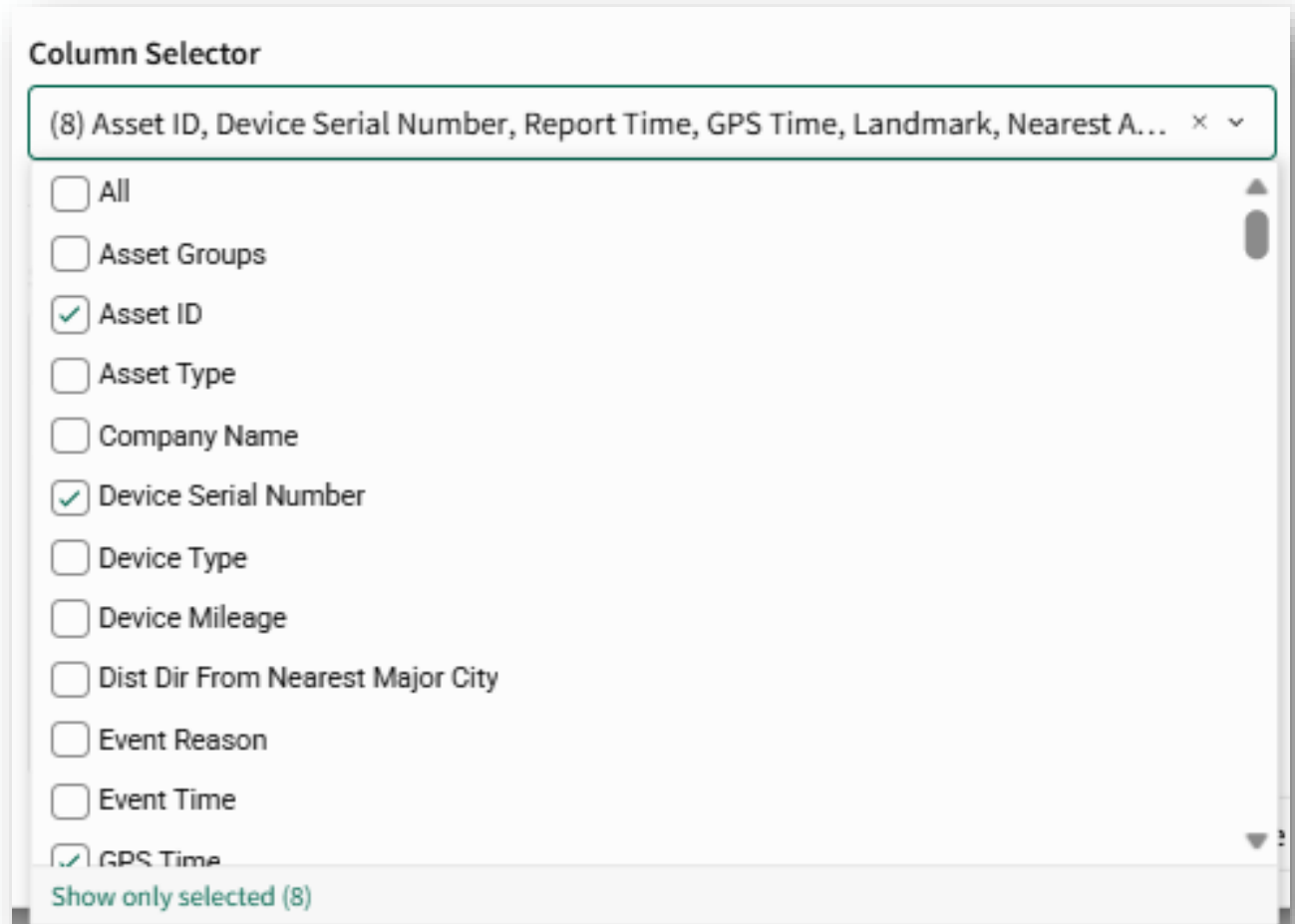
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4			1	2	3	4	
5	6	7	8	9	10	11	5	6	7	8	9	10	11
12	13	14	15	16	17	18	12	13	14	15	16	17	18
19	20	21	22	23	24	25	19	20	21	22	23	24	25
26	27	28	29	30			26	27	28	29	30		

HH:mm:ss

HH:mm:ss

# Input controls

- Flexibility to add or remove any columns.
- User can select all as well if required.
- It is indicated how many columns are selected
- Default columns display at the top of the list and then the optional columns after that in alphabetical order



Column Selector

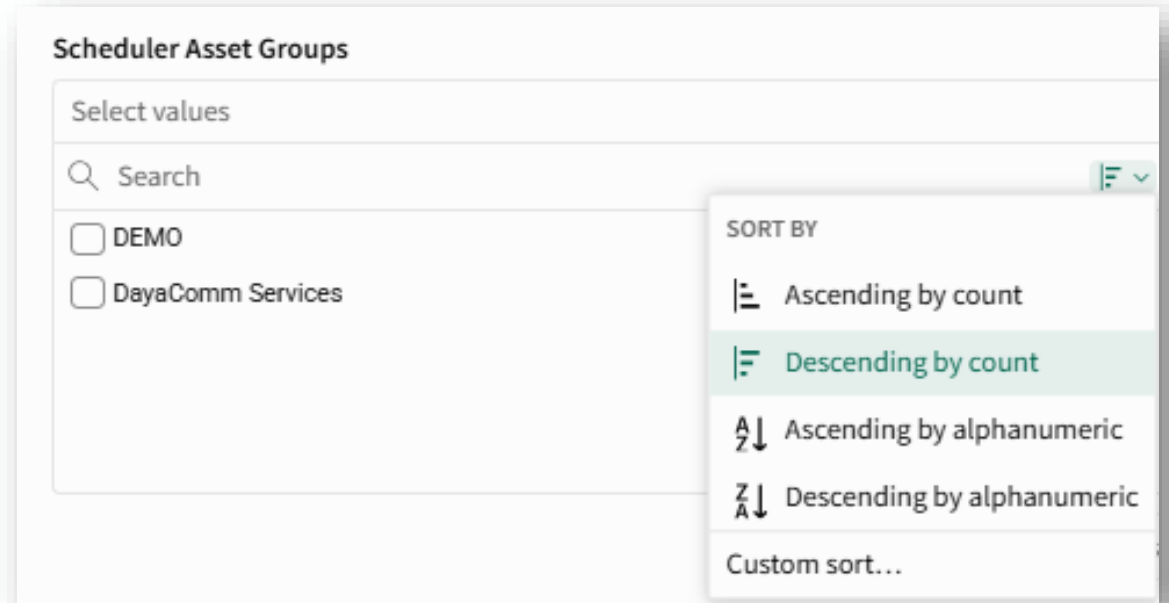
(8) Asset ID, Device Serial Number, Report Time, GPS Time, Landmark, Nearest A... × ▾

- All
- Asset Groups
- Asset ID
- Asset Type
- Company Name
- Device Serial Number
- Device Type
- Device Mileage
- Dist Dir From Nearest Major City
- Event Reason
- Event Time
- GPS Time

Show only selected (8)

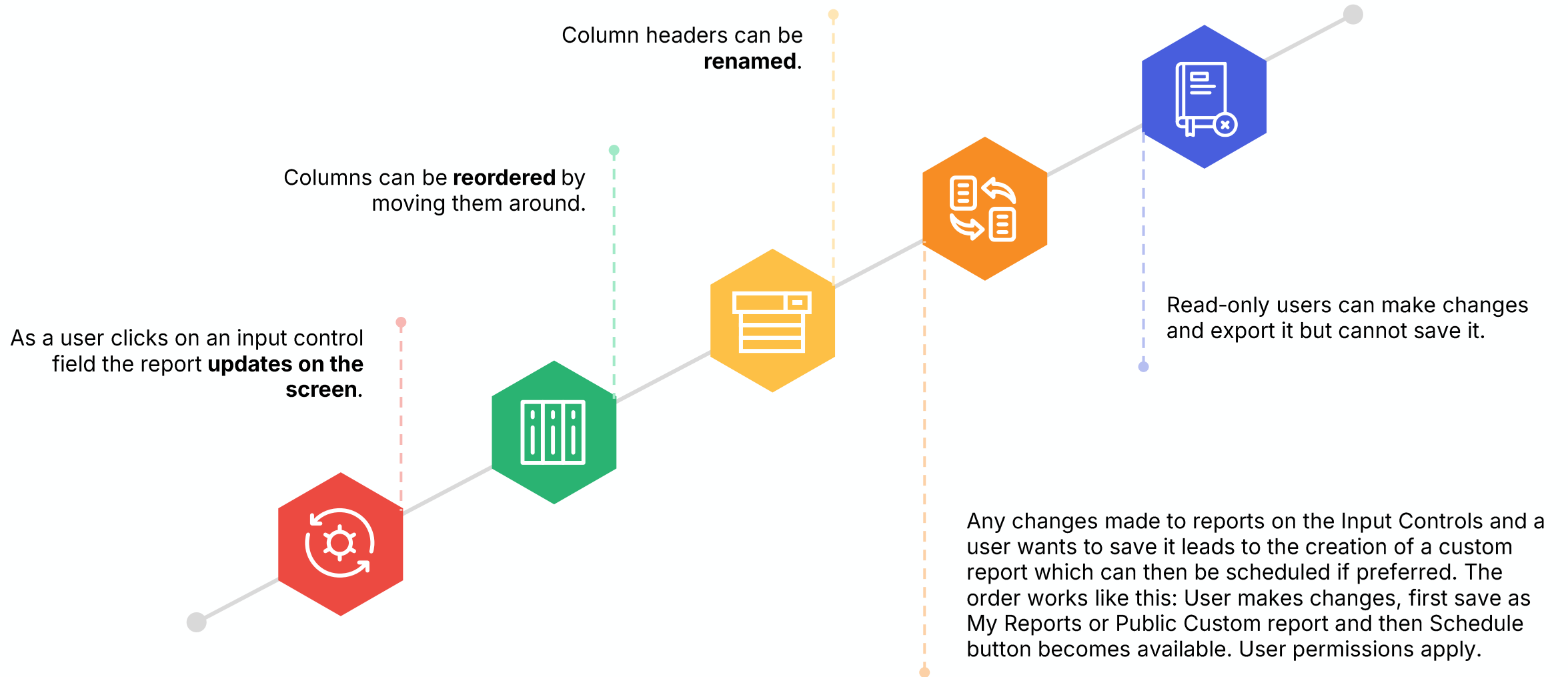
# Input controls

- Users can opt to select only certain groups to be displayed in the report.
- By selecting nothing it will display all
- In the top right corner user can select how they want the groups to sort for selection



The screenshot displays the 'Scheduler Asset Groups' interface. At the top, there is a 'Select values' section. Below this is a search bar with a magnifying glass icon and the text 'Search'. To the right of the search bar is a dropdown arrow icon. Below the search bar, there are two checkboxes: one for 'DEMO' and one for 'DayaComm Services'. To the right of the search bar, a dropdown menu is open, titled 'SORT BY'. The menu contains four options: 'Ascending by count', 'Descending by count' (which is highlighted in green), 'Ascending by alphanumeric', and 'Descending by alphanumeric'. At the bottom of the dropdown menu is the option 'Custom sort...'. The interface is clean and modern, with a white background and green accents.

# Input controls





# Explanation of new report user roles and their permissions

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# Permissions

Like previously there are the three basic permissions:

Permission	Description
No Access	This user will not have access to the reporting module
Read-only	User- <ul style="list-style-type: none"><li>• can ONLY view all Base reports and Public Reports</li><li>• can use input controls and other features on report BUT only has export option for that</li><li>• cannot save any changes NOR create schedules to any reports - base or shared/custom/Public reports and cannot create My Reports</li><li>• can change anything on the base report but can ONLY export it, not save it nor create a schedule</li><li>• can change anything on the public reports but can ONLY export it, not save it nor create a schedule.</li><li>• ONLY these two buttons are displayed in the bottom tool bar on reports: Export button and Go Back</li></ul>
Edit	User- <ul style="list-style-type: none"><li>• can view and save changes to any Base reports and/or Public Reports. Note a change to a base report creates a Public or my report. Base reports cannot be amended.</li><li>• can create public or My reports</li><li>• A change saved on a Public Report, creates a new shared report which can be private (My Reports) or Public (Public Reports)</li><li>• Once changes have been saved ie. My Reports or Public Reports, the user can also perform schedule actions.</li><li>• Bottom tool bar options: This user starts off with Export, Schedule (this schedule is if user wishes to schedule the reports without any changes) and Go Back buttons</li><li>• If user makes any changes Schedule button is greyed out and user is presented with Cancel, Export or Save</li><li>• If user saved a report the screen refreshes with saved view and user is presented again with Export, Schedule and Go Back buttons</li></ul>

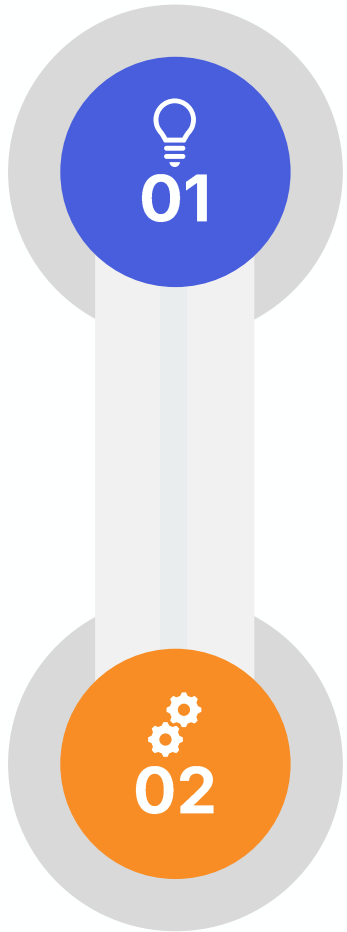
**Note** – Users will have same permissions when their site is migrated. Ie. if user was read-only they will remain so and same wrt to edit and no access permissions.



# Impact on existing schedules – base and custom

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# Existing schedules on base and custom reports



We developed a tool that ensures when a customer is transitioned to the new platform, their previously most-used custom reports appear in the public folder. Customers will continue to receive their existing schedules for these reports, with the reports now delivered in the new format.

All schedules for base reports will also continue to function as before.



# More about custom reports and associated schedules

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# Custom reports and associated schedules

- Due to system incompatibilities, we were unable to perform a programmatic migration.
- As a result, there was no automated way to recreate the thousands of custom reports that had accumulated over the years.
- We also wanted to avoid populating the new tool with a large number of reports that were no longer being used.
- To support customers during this transition, we will be available for a period of time to assist anyone who feels they are missing reports.
- Where needed, we will recreate those reports on their behalf.
- To further ease the transition, we identified the most frequently used custom reports based on execution count (not necessarily whether they were opened) and manually recreated the most used Public Custom Reports.
- In addition, we developed a tool that ensures when a customer is migrated to the new platform, their previously most-used custom reports appear in the public folder and continue to run on schedule—now using the new reporting format.



More info...

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# FAQ from session

## Who can change a public report?

Only the owner can override/change a report without renaming it. If the user does not own the custom report, the "Save Report" dialog shows after the user clicks Save, and the user can create their own custom report (without overriding the owner's custom report).

## What functions no longer exist?

For report designers, the ability to create a new field or measure directly from the UI no longer exists, however upon request these measures and fields can be added by Powerfleet as needed. Ability to change a table to a chart or cross-tab also no longer exist.

## Which reports were retired?

- None

**Thank**

**You**