CUSTOMER GUIDE: Using Custom Reports and Extracts

Overview

When you purchase one or more custom reports, or "csv" data extracts, we will send you one or more files that have an "rd_" filename prefix, followed by an XML file extension. Some example filenames are below.

Filename	Purpose
rd_fuel.XML	This file will contain one or more custom reports, or data extracts, that relate to fuel transactions.
rd_per.XML	This file will contain one or more custom reports, or data extracts, that relate to personnel.
rd_veh.XML	This file will contain one or more custom reports, or data extracts, that relate to assets.

You will run your custom reports (*or custom data extracts*) using the Report Viewer window in FLEETMATE, very similar to the way you run the existing FLEETMATE production reports.

Installation

Please follow the steps below.

1. Start FLEETMATE.
2. Click Options | Preferences…, and then choose the Printing tab.
3. Note the value in the **Reports Folder** field.
4. Close FLEETMATE.
5. Save the custom report XML file(s) that you received in your email, into the folder that you noted in step #3.

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Running a Custom Report

Follow the steps below.

1. Start FLEETMATE.
2. Click the Reports toolbar button to open Report Viewer.
3. Change “Base” to “Custom.”
4. Select your Category (Customer, Maintenance, Personnel, etc.).
5. Click on the custom report you need to run.
6. In some cases, you will need to adjust the records selected, and Date Range values (*if applicable*). Afterwards, click the name of the custom report once again to refresh your display.
7. Your custom report may also prompt additional information, such as a date. If so, specify the value(s), and then click OK.
8. If you need hardcopy, click the Print button to print your report.

Running a Custom Extract

Follow the steps below.

1. Start FLEETMATE and click the Reports button to open Report Viewer.
2. Change “Base” to “Custom”, and then select your Category (Customer, Fuel Economy, Maintenance, Vehicle, etc.).
3. Click on the custom extract you need to run.
4. Your extract may prompt for additional information, such as a date. If so, specify the value(s) and then click OK.
5. Your data will be pre-viewed on-screen, so that you may confirm the results contain the data that you need.
6. Click the Export button, and then choose “Plain Text” as your export format.
7. Choose the folder where you want the extracted data file to be stored, and then specify a filename with a “csv” file extension for comma-delimited data. If your extract was designed to produce tab-delimited data, specify a filename with a “txt” file extension.
8. Click Save.
9. Your extract may prompt for additional information, such as a date. If so, specify the value(s) and then click OK.
10. The file with your extracted data will have been created in the folder you defined in step #7. You may now open the extracted data file in Excel or other third-part software product.