



# iWorQ

# Fleet Management

Quick Start Guide

# Welcome to Fleet Management

iWorQ is designed so you can customize the software to meet your fleet management needs. This guide was created to help you start performing common tasks in the Fleet Management system through step-by-step explanations and screen shots.

For additional help or questions, please call technical support at **888.655.1259**.

**Technical support and training are always free!**

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# Managing Fleets

**FLEET** WORK ORDERS SCHEDULE PARTS EMPLOYEE FUEL FIELDS REPLACEMENT REPORTS EMAIL SETTINGS  
Fleet Advanced Search Open Saved Search Add to Fleet

## Adding to Fleet

1. Click **Add to Fleet** in the sub-menu.

**FLEET** WORK ORDERS SCHEDULE PARTS EMPLOYEE  
Fleet Advanced Search Open Saved Search **Add to Fleet**

### CREATE FLEET CREATE

Name:	<input type="text"/>	VIN #:	<input type="text"/>
Fuel Key:	<input type="text"/>	Assigned Driver:	-- ▾
Department:	-- ▾	Mileage:	0.0
License Plate:	<input type="text"/>	Hours:	0.0
Year:	-- ▾	Original Purchase Date:	12/09/2020
*Status:	Operative ▾	Original Purchase Price:	0.00
Description:	<input type="text"/>	Fleet Class:	-- ▾
Make:	<input type="text"/>	Fleet Condition:	-- ▾
Model:	<input type="text"/>		

- 2. Fill out the fleet vehicle information. This can be changed later if necessary.
- 3. Click the **Create** button.

To add additional fields or items to drop-down menus, see page 11.



# Modifying Fleet Data

1. To edit an existing fleet vehicle, click on the fleet vehicle's row within the Fleet View table.
2. The Fleet Information window will display all the information attached to the fleet vehicle. Edit the necessary information.

The screenshot shows a web interface for editing fleet vehicle information. The main area is titled "FLEET" and contains a grid of input fields. At the top right of this area are "HISTORY" and "SAVE" buttons. A sidebar on the right contains a list of actions: Copy Fleet, Email Fleet, Print Fleet, Notes, Work Order, Schedule Maintenance, Assign Parts, Fuel Usage, Downtime, and Upload File. The input fields are as follows:

Fleet #:	12178	Model:	
Name:		VIN #:	
Fuel Key:		Assigned Driver:	--
Department:	--	Mileage:	0.0
License Plate:		Hours:	0.0
Year:	--	Original Purchase Date:	12/09/2020
*Status:	Operative	Original Purchase Price:	0.00
Description:		Fleet Class:	--
Make:		Fleet Condition:	--

3. Click the **Save** button to preserve any changes made to the fleet vehicle.

# The Fleet Information Window

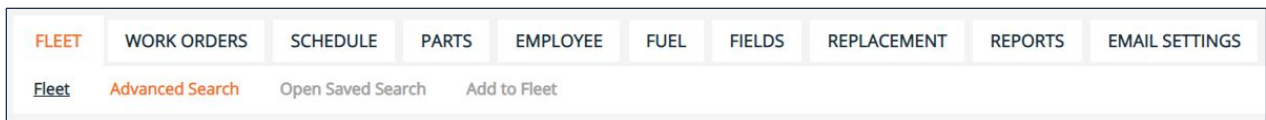
The screenshot shows the 'FLEET' information window. On the left, there are input fields for: Fleet # (12178), Name, Fuel Key, Department, License Plate, Year, \*Status (Operative), Description, Make, Model, VIN #, Assigned Driver, Mileage, Hours, Original Purchase Date (12/09/2020), Original Purchase Price (0.00), Fleet Class, and Fleet Condition. At the top right, there are 'HISTORY' and 'SAVE' buttons. On the right side, there is a vertical menu with icons and labels: Copy Fleet, Email Fleet, Print Fleet, Notes, Work Order, Schedule Maintenance, Assign Parts, Fuel Usage, Downtime, and Upload File. A hamburger menu icon is also present at the top right of the window.

Callout boxes provide the following descriptions for the features:

- Opens the quick find menu for the fleet
- Saves changes to the fleet vehicle
- Creates a copy of the fleet vehicle, assigns it a new number, and immediately displays the new fleet vehicle
- Emails the fleet vehicle to employees
- Prints any recorded data on the fleet vehicle
- Adds detailed notes to the fleet vehicle
- Adds a work order to the fleet vehicle
- Schedule a maintenance for the fleet vehicle
- Assign parts and inventory to the fleet vehicle
- Tracks fuel usage by the fleet vehicle
- Tracks downtime for the fleet vehicle
- Uploads files or attach pictures which can display upon opening the fleet vehicle

**Pop-up blockers must be disabled for iWorQ in order for many of these features to function.**

# Advanced Search



## Using the Advanced Search

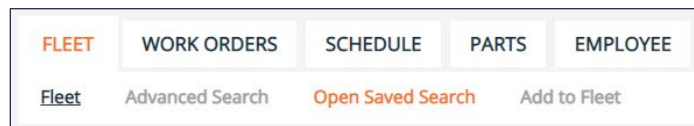
1. Click the **Advanced Search** button in the sub-menu.
2. The Advanced Search allows the user to search by any fields in the application. Enter the desired search parameters and click **Search**.

3. Searches can be saved for later ease of access. To save a search, click **the Save Search** button before clicking Search.

## Saved Searches

There are two methods to open a saved search.

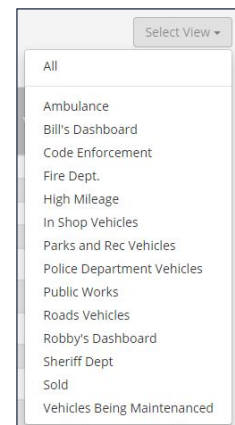
1. Click the **Open Saved Search** button in the sub-menu.
2. Select the saved search from the drop-down menu and click **Open**.
3. The user can also edit the search parameters of the saved search by clicking **Edit**.



Or

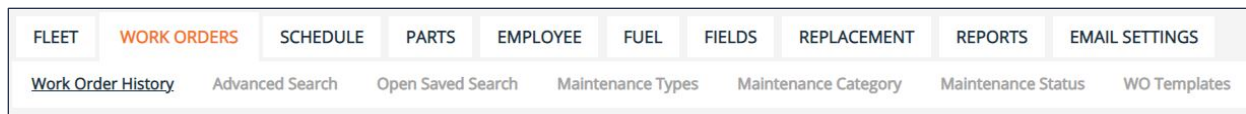
1. Select the saved search from the **Select View** drop-down menu in the upper right-hand corner of the Fleet View table.

Saved Searches can also be used when creating reports.



**If you have questions about saved searches, contact iWorQ for assistance: 888.655.1259.**

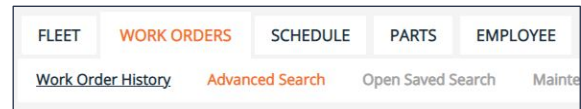
# Work Orders



The Work Orders tab tracks all work orders created for fleet vehicles. Work orders can be created either from the Fleet Information window for a fleet vehicle or from the WO Templates button in the sub-menu of the Work Orders tab.

## Advanced Search

1. Click the **Advanced Search** button in the sub-menu.
2. The Advanced Search allows the user to search by any fields in the application. Enter the desired search parameters and click **Search**.

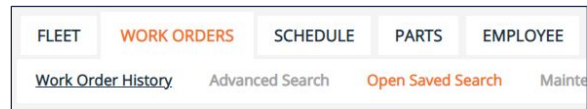


3. Searches can be saved for later ease of access. To save a search, click the **Save Search** button before clicking Search.

## Saved Searches

There are two methods to open a saved search.

1. Click the **Open Saved Search** button in the sub-menu.
2. Select the saved search from the drop-down menu and click **Open**.
3. The user can also edit the search parameters of the saved search by clicking Edit.



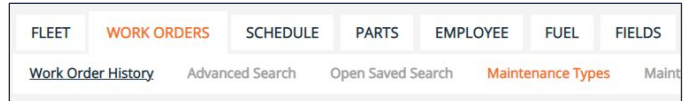
Or

1. Select the saved search from the **Select View** drop-down menu in the upper right-hand corner of the Fleet View table.

Saved Searches can also be used when creating reports.

# Maintenance Types

1. To add a Maintenance Type, click the **Add Type** button within the side menu.
2. Enter the Maintenance Type name, select the category for the new type, and enter a brief description.
3. Click **Add**.
4. To add items to a Maintenance Type, click the blue **Items** button in the Type's row in the table.



Add Maintenance Type

Name:

Category:

Description:

**ADD**

Maintenance Type Items

**ADD NEW**

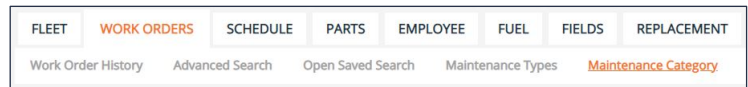
Add Value	
	<b>x</b>
Check Air Conditioner	<b>x</b>

Maintenance Type	Description	Category			
Ambulance Assets		General	Items	<b>x</b>	
A-PM (3K Miles)	Ford Crown Vic (<2008)	PM Service	Items	<b>x</b>	
A-PM (3K Miles)	GM Pickup Truck 3K-Mile	oil change	Items	<b>x</b>	

5. Enter the Maintenance Type Items and click **Add New**. Repeat for all necessary items.

# Maintenance Category

1. To add a Maintenance Category, click the **Add Category** button within the side menu.
2. Enter the category name and check whether or not to count the maintenance category toward unanticipated repair costs.
3. Click **Add**.



Add Maintenance Category

Category

Check this box if you would like this maintenance category to count toward unanticipated repair costs.

**ADD**



4. In the Maintenance Category table, select which category to act as the default category upon creation of a new work order.

Maintenance Category				
Default	Name	Unanticipated Repair Cost (Yes/No)		
<input checked="" type="radio"/>	Accident	Yes	x	/
<input type="radio"/>	Driver Responsibility	Yes	x	/
<input type="radio"/>	Emergency		x	/

## Maintenance Status

1. To add a new Maintenance Status, click the **Maintenance Status** button in the sub-menu.
2. Enter in the new Maintenance Status and click **Add New**.
3. Click the red X at the end of a status' row in the table to delete the status.

Maintenance Status

Add Value	
001: Open	x
002: Closed	x
003: In Process	x

# Schedule

[FLEET](#) | [WORK ORDERS](#) | **SCHEDULE** | [PARTS](#) | [EMPLOYEE](#) | [FUEL](#) | [FIELDS](#) | [REPLACEMENT](#) | [REPORTS](#) | [EMAIL SETTINGS](#)

[Schedule Dashboard](#) | Schedule

The Schedule tab tracks all upcoming work orders scheduled to be needed for fleet vehicles by date, hours, or mileage. Under each section, fleet vehicles with an upcoming scheduled maintenance display in black. Fleet vehicles with an overdue scheduled maintenance display in red.

1. To open the Information window for the fleet vehicle, click the View button near the end of the fleet vehicle's row in the table.
2. To schedule the maintenance using the preset template, click the **Create WO** button at the end of the fleet vehicle's row in the table.
3. To extend or reduce the frame of scheduled work orders being shown, enter in the desired amount in the Due In box at the upper right-hand corner of the section.

Maintenance Schedule By Date Due in  Days [GO](#)

ID	Name	Maintenance Type	Last Date	Next Date		
9049	Ford Fiesta	A-PM (3K Miles)	03/13/2019	03/12/2020	View	Create WO
9028	Police Truck	Oil Change	12/23/2019	03/22/2020	View	Create WO
1210	Building Inspection Truck	Oil Change	02/03/2020	06/07/2020	View	Create WO
9036	45216	State Inspection	09/05/2019	09/04/2020	View	Create WO
12167	Police Chief	Non Routine Maint.	07/31/2020	10/29/2020	View	Create WO
200	200	Brakes	08/20/2020	11/18/2020	View	Create WO
150	Steve's Work Truck	Rotate Tires	01/01/2020	12/31/2020	View	Create WO

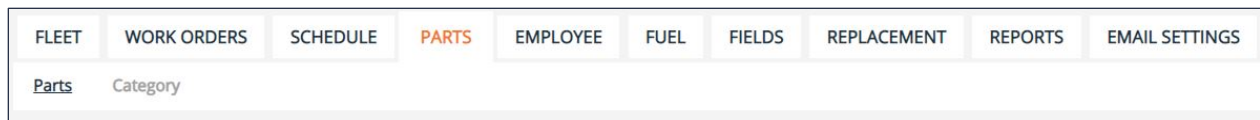
Maintenance Schedule By Hours Due in  Hours [GO](#)

ID	Name	Maintenance Type	Current Hours	Next Hours		
12176	003	Sharpen Blades	378	350	View	Create WO
9031	State Case Manager	Oil Change	26	51	View	Create WO
9	9	Non Routine Maint.	700	800	View	Create WO

Maintenance Schedule By Mileage Due in  Miles [GO](#)

ID	Name	Maintenance Type	Current Mileage	Next Mileage		
12167	Police Chief	Oil Change	97,500	3,000	View	Create WO
12167	Police Chief	Oil Change	97,500	3,000	View	Create WO
12167	Police Chief	Oil Change	97,500	3,000	View	Create WO
12167	Police Chief	Oil Change	97,500	3,000	View	Create WO
12167	Police Chief	Non Routine Maint.	97,500	25,000	View	Create WO
12167	Police Chief	Non Routine Maint.	97,500	90,005	View	Create WO
9078	Road and Bridge	Oil Change	10,000	5,320	View	Create WO
44	44	Rotate Tires	145,000	145,750	View	Create WO
3002	3002	Ambulance Assets	190	1,190	View	Create WO
1217	Gray Ranger	Fire Truck Maintenance	80,000	81,000	View	Create WO

# Parts



## Adding Inventory

The screenshot shows a table with columns: Inventory Name, Inventory Number, Category, Description, Vendor, Location, Purchase Order, Units, On-Hand, Average Cost/Unit, Inventory Value, Notification Quantity, and Active. The table contains two rows of data. Above the table, there are filters for 'Select Location', 'Select Vendor', and 'Select Category'. Summary statistics are shown: 'Total Inventory Value \$761,503.77' and 'Inventory Value This Page \$558,968.57'.

Inventory Name	Inventory Number	Category	Description	Vendor	Location	Purchase Order	Units	On-Hand	Average Cost/Unit	Inventory Value	Notification Quantity	Active
#1 oil filter	123456	Oil Filter					20	334.0	\$10.89	\$3,636.80	180,000	Active
#2	6665	Accessories		Midas / Napa	Logan Utah		10.0	\$5.00	\$50.00	\$50.00	1,000	In-Active

The Parts tab tracks all inventory for fleet vehicles, with options to add or purchase new inventory. To add a new part:

1. Click the **Add Inventory** button within the side menu.
2. Enter in the part information.
3. Click **Add Inventory**.

To purchase a new part and add it to the inventory:

1. Click the **Nexpart - United** button within the side menu.
2. Search for and purchase the desired part. The part will populate into the Parts table after purchase.

The 'Add Inventory' form contains the following fields: Inventory Name (text input with 'New Inventory'), Inventory Number (text input), Category (dropdown menu with 'A/C'), Description (text input), Vendor (text input), Location (text input), Purchase Order (text input), Purchase Date (date picker with '12/18/2020'), Quantity (text input with '1'), Units (dropdown menu with 'Each'), Cost/Unit (text input with '0'), and Notification Quantity (text input with '0'). An orange 'ADD INVENTORY' button is at the bottom right.

## Adding Categories

1. To add a new inventory category, click the **Category** button in the sub-menu.
2. Click **Add Category**.
3. Enter the Category Name and select whether to add the category only to the Fleet Management application or to all application. Click **Add**.

The 'Categories' table has a '+ Add Category' button and three rows of categories: A/C, Accessories, and Ambulance. Each row has an edit icon (pencil) and a delete icon (red X).

Category Name	Type	Actions
A/C		[Edit] [Delete]
Accessories		[Edit] [Delete]
Ambulance		[Edit] [Delete]

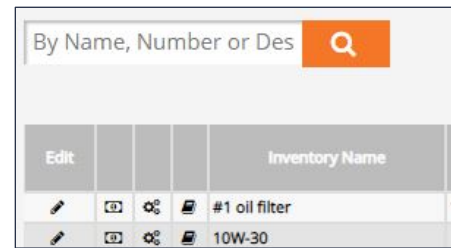
The 'Add Category' form contains the following fields: Category Name (text input) and Type (dropdown menu with 'This application only'). There are orange 'ADD' and 'CANCEL' buttons at the bottom.

4. To edit an existing category, click on the category's row in the table. Click the red X at the end of the category's row to delete the category.

# Viewing Inventory

## Search Inventory

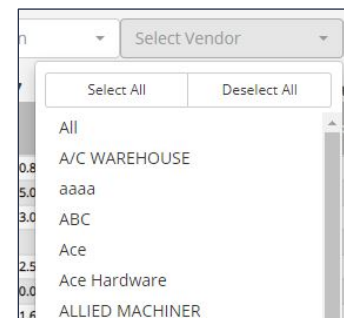
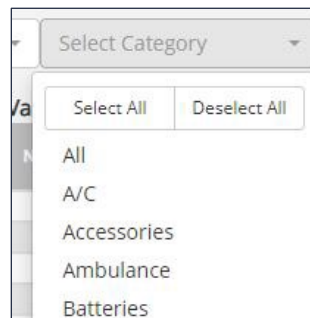
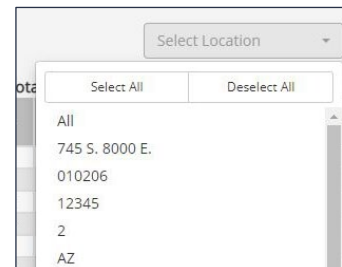
1. To search for a part, enter in the inventory name, number, or description to search by in the search bar in the upper left-hand corner of the table.



2. Click the search icon.

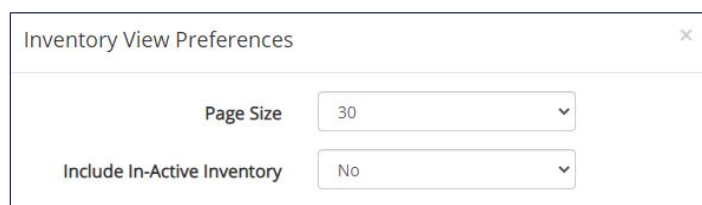
## Filter Inventory

1. In the upper right-hand corner of the table are three options to filter inventory: **Select Location**, **Select Vendor**, and **Select Category**.
2. In the drop-down menu for each option, select the various information to filter the inventory. The table will automatically update.
3. Click **Deselect All** in each filter drop-down list to remove all filters.



## Inventory Preferences

1. Click the **Preferences** button within the side menu.
2. Select from the drop-down menu the amount of inventory to display on each page.
3. Select whether to include inactive inventory. Changes are automatically applied to the table.

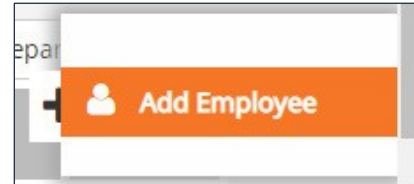


# Employees

FLEET	WORK ORDERS	SCHEDULE	PARTS	<b>EMPLOYEE</b>	FUEL	FIELDS	REPLACEMENT	REPORTS	EMAIL SETTINGS
Employee	Department								

## Adding an Employee

1. Click the **Add Employee** button within the side menu.
2. Fill in the employee information.
3. Click **Add Employee**.



**NOTE: Employees must have an attached email to appear in a check list when using the Email Work Order option.**

A screenshot of the 'Add Employee' form. It includes fields for Employee Name (New Employee), Email, Department (Bridge Crew), Employee #, Rate (0.00), and Active (Active). An orange 'ADD EMPLOYEE' button is at the bottom right.

## Adding a Department

1. Click the **Department** button within the submenu.
2. Click **Add Department**. Enter a name and choose whether to apply the added department only to the Work Management application or to all applications.
3. Click **Add**.
4. To edit an existing department, click on the department's row within the table.

A screenshot of a table titled 'Departments'. It has columns for 'Update Default', a radio button, an edit icon, a department name, and a delete icon. The rows are: Public Works, Animal Control, Chief Deputy, and City Hall. A '+ Add Department' button is in the top right.A screenshot of the 'Add Department' form. It has a 'Department Name' field and a 'Type' dropdown menu set to 'This application only'. There are 'CANCEL' and 'ADD' buttons at the bottom.

# Fuel

FLEET	WORK ORDERS	SCHEDULE	PARTS	EMPLOYEE	<b>FUEL</b>	FIELDS	REPLACEMENT	REPORTS	EMAIL SETTINGS
<u>Fuel Usage History</u>	Upload Fuel File	Fuel Type							

The Fuel tab tracks fuel usages and keeps a history of all entered fuel records.

## Adding Fuel Usage

1. In the Enter Fuel Usage table, select the fleet vehicle from the drop-down menu in the first column labeled Fleet.
2. Enter the date the fuel was used.
3. Select fuel type from the drop-down menu and enter the gallons and total cost of the fuel.
4. Enter the mileage and hours of the fleet vehicle.
5. Repeat for necessary fuel usages. Click **Add Fuel Usage**.
6. Past fuel usage records are tracked in the Fuel Entry History table. Click **View** at the end of the record's row to view the fuel entry or click the red X to delete the record. Select the time frame from the drop-down menu to expand or narrow the history list.

Enter Fuel Usage						
Fleet	Date	Fuel Type	Gallons	Total Cost	Mileage	Hours
Select Fleet	12/18/2020	Select Fuel Type	0	0	0	0
Select Fleet	12/18/2020	Select Fuel Type	0	0	0	0
Select Fleet		Select Fuel Type	0	0	0	0
Select Fleet		Select Fuel Type	0	0	0	0
Select Fleet		Select Fuel Type	0	0	0	0
Select Fleet		Select Fuel Type	0	0	0	0
Select Fleet		Select Fuel Type	0	0	0	0
Select Fleet		Select Fuel Type	0	0	0	0
Select Fleet		Select Fuel Type	0	0	0	0
Select Fleet		Select Fuel Type	0	0	0	0

**ADD FUEL USAGE**

Fuel Entry History					Last Month
Date	File Name	User	Entries	Unread Lines	
11/19/2020		ty@iworq.com	1		<b>X</b> View

Fuel Usage								
ID	Name	Date	Fuel Type	Gallons	Total Cost	Mileage	Hours	Description
1219	Police Chief's Car	11/19/2020	Unleaded	25.0	75.00	89,100	0.0	

**DONE**

# Adding Fuel Types

1. To add a fuel type, click the **Fuel Type** button in the sub-menu.
2. Click **Add Type**.
3. Enter the Fuel Type name and click **Add**.
4. To edit an existing fuel type, click on the type's row in the table.
5. To delete an existing fuel type, click the red X at the end of the type's row in the table.



The screenshot shows a window titled "Fuel Types" with a close button (X) in the top right corner. Below the title bar is a table with two rows. The first row is highlighted and contains the text "BioDiesel", a red "X" icon, and a pencil icon. The second row contains the text "CNG", a red "X" icon, and a pencil icon. Above the table is a button labeled "+ Add Type".

Fuel Types		
+ Add Type		
BioDiesel	X	✎
CNG	X	✎



The screenshot shows a window titled "Add Fuel Type" with a close button (X) in the top right corner. Below the title bar is a form with a label "Fuel Type:" followed by an empty text input field. At the bottom right of the form is an orange button labeled "ADD".

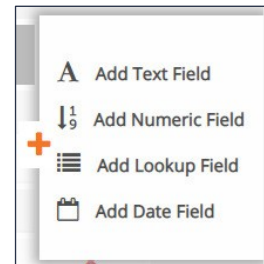
Add Fuel Type	
Fuel Type:	<input type="text"/>
<b>ADD</b>	

# Customizing Data Fields



## Adding Fields

In the Fields tab, the side menu on the right-hand side of the screen contains four options to add a new field: Text, Numeric, Lookup, and Date.



### Text Fields

The Text Field accepts text, symbols, and numbers.

1. Click **Add Text Field**.
2. Enter in the Field Name and a default value to display upon creation of a new fleet vehicle.

### Numeric Fields

The Numeric Field accepts numbers and decimals.

1. Click **Add Numeric Field**.
2. Enter in the Field Name, the number of decimal places to be displayed, and a default value to display upon creation of a new fleet vehicle.

### Date Fields

The Date Field accepts numbers formatted as dates.

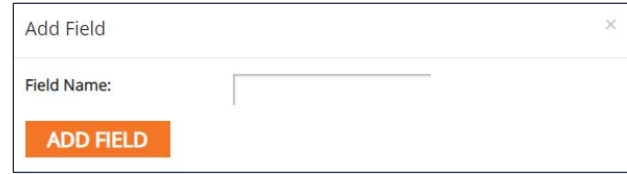
1. Click **Add Date Field**.
2. Enter in the Field Name and enter a default number of days away from creation date of the fleet vehicle to display.



## Lookup Fields

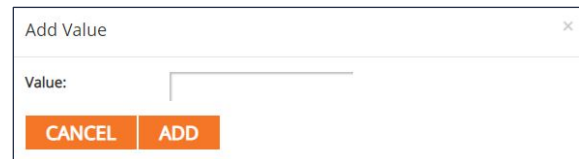

The Lookup Field creates a drop-down menu box.

1. Click **Add Lookup Field**.
2. Enter in the Field Name and click **Add Field**.
3. To add options in the drop-down menu, click on the blue **Values** button in the new field's row in the table.



Edit/View	Field ID	Field Name	Lookup Values	Type	Order	
	71545	Department	Values	lookup	1	
	83560	License Plate		text	2	

4. Click **Add Value**.
5. Enter in a value and click **Add**.
6. To edit an existing value, click the blue **Edit** button in the value's row. To delete an existing value, click the red X at the end of a value's row.



## Deleting Fields

To delete a field, click the red X at the end of a field's row and click Yes to delete the field.

**NOTE: Fields cannot be deleted if data has been entered into the field.**

## Reordering Fields

To reorder fields, click and drag fields within the table into the desired order. Changes to the order of fields are automatically saved.

## Downtime Reasons

1. To add a downtime reason, click the **Downtime Reason** button in the sub-menu.
2. Enter the new reason into the text box and click **Add New**.
3. To delete an existing downtime reason, click the red X at the end of the reason's row in the table.



# Replacements

FLEET	WORK ORDERS	SCHEDULE	PARTS	EMPLOYEE	FUEL	FIELDS	<b>REPLACEMENT</b>	REPORTS	EMAIL SETTINGS
<b>Replacement</b>	Fleet Class	Fleet Condition	Recalculate						

## Replacement

The Replacement tab displays tables of all fleet vehicles by fleet class. The tables are ordered by their Replacement Rating, a calculation derived from the vehicle's age, activity, usage, cost, and condition. The higher the Replacement Rating, the closer the vehicle is to necessitating replacement according to the application. Vehicles that are highlighted red have been deemed to need replacing.

Class: Fire Department				Class: Heavy Equipment			
Class Rank	Fleet #	Fleet Name	Replacement Rating	Class Rank	Fleet #	Fleet Name	Replacement Rating
1	12172	Ladder 571	5.2	1	9079	Weed Sprayer Truck	5.0
2	12163	Ambulance #13	6.5	2	9068	Debbie's Work Truck	5.3
3	12165	Ambulance #03	11.6	3	12176	003	5.3
4	12162	Ambulance #07	26.6	4	9078	Road and Bridge	6.0
5	12164	Ambulance #08	26.8	5	9047	Loader #5	6.2
				6	9043	John Doe	7.3

## Fleet Class

1. To add a new Fleet Class, click the **Fleet Class** button within the sub-menu.

Class	Activity Level (1-5)	Mileage Replacement	Hour Replacement	Age Replacement			
Fire Department	4	0	0	0	x	/	+ <
Heavy Equipment	3	250000	10000	15	x	/	
Heavy Loaders	4	300000	15000	20	x	/	

2. Click the **Add Fleet Class** button within the side menu.
3. Enter the Class Name and the Activity Level (1-5 where 5 is high activity).
4. Enter in the replacement benchmarks for mileage, hours, and age. These represent the points of usage where a fleet vehicle within the class will need to be replaced. Click **Add**.

Add Fleet Class x

Class Name:

Activity Level (1-5) 5 is high:

Mileage Replacement:

Hour Replacement:

Age Replacement:

**ADD**

5. Click on the row of an existing Fleet Class to edit. Click the red X near the end of the class' row to delete the existing class.

**NOTE: Fleet Classes cannot be deleted if they are attached to an existing fleet vehicle.**

## Fleet Condition

1. To edit the Fleet Conditions, click the **Fleet Condition** button in the sub-menu.
2. Enter the new Condition Name. The Fleet Management application allows for users to assign conditions a rating from 1-5 where 5 is poor. Select the Rating Value.
3. Click **Add New**.
4. Click on the row of an existing Fleet Condition to edit. Click the red X near the end of the condition's row to delete the existing condition.

Condition Name	Condition Rating Value (1-5) 5 is poor	
1. Excellent	1	X
5. Replace	5	X
3. Fair	3	X
2. Good	2	X
4. Poor	4	X
Average	2	X

# Creating Reports

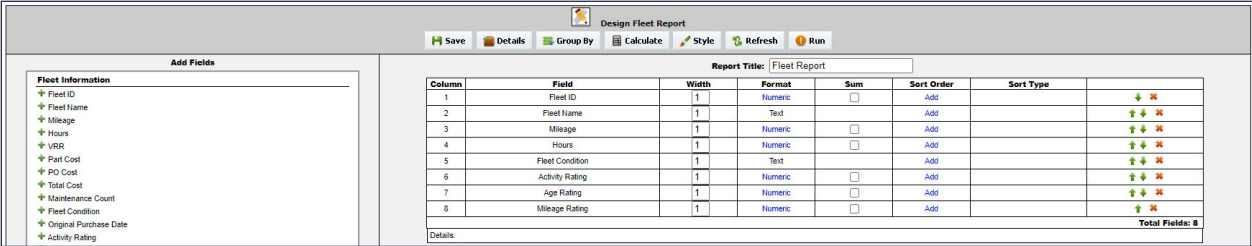


## Building a Report

1. In the Reports tab, choose from the list of options which report to run. Click the blue **Build** button at the end of the row of the report.

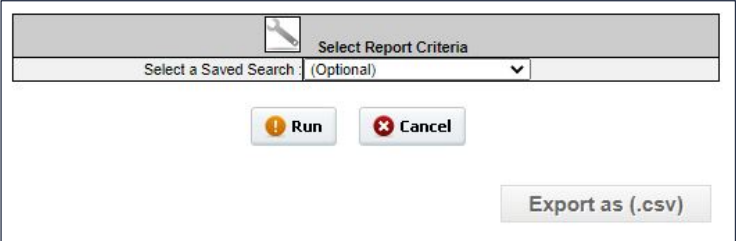
Fleet Reports		
Report Name	Report Description	
Fuel Usage Report	Provides fuel usage details between two dates	Build
Fleet Report	Reports general fleet information in grid format.	Build
Employee Summary	Summarizes the Employees used in the Work Orders for a specified date range.	Build
Fleet Usage Report (Beta)	Reports average miles per gallon and total miles between two dates.	Build
Fleet Cost Report	Reports general cost information between two dates	Build
Maintenance Reports		
Report Name	Report Description	
Maintenance Report	Reports work orders based on a date range in grid format.	Build

2. Select which data fields to display in the report. Reorder the fields into the desired order by clicking the up and down arrows for each field. Sorting and grouping rules are also available. Once finished, click the **Run** button.



3. Select the data range for the report. Use a saved search to further narrow results, if desired. Once the necessary criteria has been selected, click **Run** to view or print the report, **Cancel** to return and further build the report, or **Export as (.csv)** to download the data in a spreadsheet.

**Please contact iWorQ at 888.655.1259 for any questions on running reports.**



# The Report Interface

The screenshot shows the 'Design Fleet Report' interface. At the top, a toolbar contains icons for Save, Details, Group By, Calculate, Style, Refresh, and Run. Below the toolbar, the interface is divided into two main sections: 'Add Fields' on the left and a report preview table on the right.

**Callout Boxes:**

- Save the report to be accessed from the Report tab:** Points to the Save icon in the toolbar.
- Add a calculation to the report:** Points to the Calculate icon in the toolbar.
- Customize the color, font, and font size:** Points to the Style icon in the toolbar.
- Refreshes the page and removes any unsaved changes:** Points to the Refresh icon in the toolbar.
- Run the report:** Points to the Run icon in the toolbar.
- Edit the name of the report:** Points to the 'Report Title' field above the table.
- Add fields to the report:** Points to the 'Add Fields' list on the left.
- Change the width of the column for a field:** Points to the 'Width' column in the table.
- Include a sort order on the entries within each field:** Points to the 'Sort Order' column in the table.
- Edit the order of the fields using the up and down arrows:** Points to the up/down arrows in the rightmost column of the table.

**Table Data:**

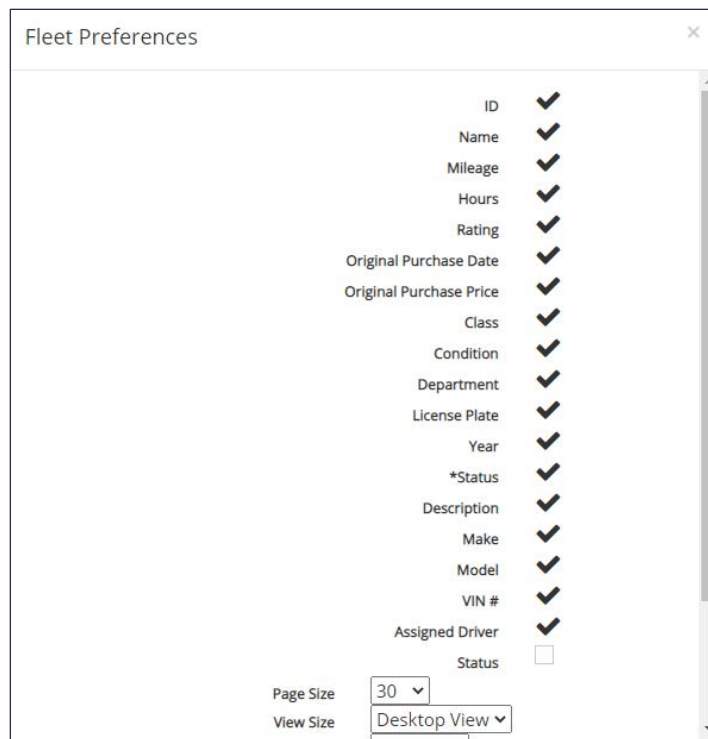
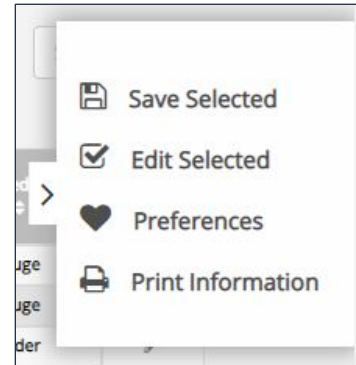
Column	Field	Width	Format	Sum	Sort Order	Sort Type	
1	Fleet ID	1	Numeric	<input type="checkbox"/>	Add		↑ ↓ ✕
2	Fleet Name	1	Text	<input type="checkbox"/>	Add		↑ ↓ ✕
3	Mileage	1	Numeric	<input type="checkbox"/>	Add		↑ ↓ ✕
4	Hours	1	Numeric	<input type="checkbox"/>	Add		↑ ↓ ✕
5	Fleet Condition	1	Text	<input type="checkbox"/>	Add		↑ ↓ ✕
6	Activity Rating	1	Numeric	<input type="checkbox"/>	Add		↑ ↓ ✕
7	Age Rating	1	Numeric	<input type="checkbox"/>	Add		↑ ↓ ✕
8	Mileage Rating	1	Numeric	<input type="checkbox"/>	Add		↑ ↓ ✕

Details: Total Fields: 8

# Dashboard Preferences

## Setting Preferences

1. To customize the display of the Fleet Management application, select the **Preferences** button within the side menu.
2. In the Fleet Preferences window, select which fields to display in the Fleet View table (this does not remove a field from the application and fields can still be viewed in the Fleet Information window if unchecked in the Preferences window). Select the number of lines displayed on each page as well as the size the information is displayed at.



# Dashboard Overview

Search for fleet vehicles by specific search parameters

Open a previously saved advanced search

Create a new fleet vehicle

View fleet vehicles through a previously saved advanced search

The screenshot shows a dashboard with a top navigation bar containing tabs: FLEET, WORK ORDERS, SCHEDULE, PARTS, EMPLOYEE, FUEL, FIELDS, REPLACEMENT, REPORTS, and EMAIL SETTINGS. Below the navigation bar is a search area with buttons for 'Fleet', 'Advanced Search', 'Open Saved Search', and 'Add to Fleet'. The main content area is titled 'ALL RECORDS' and features a table of fleet vehicles. On the right side of the table, there is a 'Select View' dropdown menu and a vertical toolbar with icons for list view, search, heart, and print.

Click on the row of a fleet vehicle to open the Fleet Information window

Save or edit selected fleet vehicles, edit preferences, and print information