# Reports

*GSAfleet.gov User Guide* Updated February 2024

## Table of Contents

What is GSAFleet.gov.       3         Creating an Account and Logging In       3         Reports Overview       3         Download Vehicle Reports       4         Bulk Update Vehicle Data       6         Schedule a Report.       10         Edit a Scheduled Report       15         Suspend/Unsuspend a Scheduled Report       16         Delete a Scheduled Report       19	Introduction	3
Reports Overview	What is GSAFleet.gov	3
Download Vehicle Reports       4         Bulk Update Vehicle Data       6         Schedule a Report       10         Edit a Scheduled Report       15         Suspend/Unsuspend a Scheduled Report       16	Creating an Account and Logging In	3
Bulk Update Vehicle Data    6      Schedule a Report    10      Edit a Scheduled Report    15      Suspend/Unsuspend a Scheduled Report    16	Reports Overview	3
Schedule a Report	Download Vehicle Reports	4
Edit a Scheduled Report	Bulk Update Vehicle Data	6
Suspend/Unsuspend a Scheduled Report16	Schedule a Report	10
	Edit a Scheduled Report	15
Delete a Scheduled Report19	Suspend/Unsuspend a Scheduled Report	16
	Delete a Scheduled Report	19

## Introduction

### What is GSAFleet.gov

The General Service Administration Office of Fleet Management's (GSA Fleet) mission is to provide safe, reliable, low-cost vehicle solutions that assist federal agencies in effectively and efficiently meeting their mission and federal mandates. GSA Fleet manages mandatory Government-wide vehicle acquisition programs, provides Federal agencies full-service vehicle leases, and offers short-term vehicle rentals. GSA Fleet users currently use 19 disparate system applications to meet this mission. GSAFleet.gov consolidates those 19 systems into a single integrated system enabling value-added fleet management services through enhanced automation provided to agencies as service offerings to improve their fleet management. GSA Fleet's modernization will allow agencies across the government to reap the benefits of the resulting solution and enhance a widely leveraged shared service.

### Creating an Account and Logging In

This document details how to create an account in GSAFleet.gov and how to log in.

## **Reports Overview**

Whether you need to run a report for your entire Agency fleet or a single vehicle, "Run reports" is where GSAFleet.gov users can search for and extract vehicle data for fleet management needs. The table below lists which reports are currently available in GSAFleet.gov and outlines which type of data is available.

Report Name	Data Type Available	Schedulable?
FAST report	Agency Owned Vehicles	No
Vehicle repair order report	Agency Owned Vehicles	No
Vehicle Inventory Report	Agency Owned Vehicles	No
Vehicle fuel use report	Agency Owned and GSA Leased Vehicles	Yes
Agency incurred expense (AIE) report	GSA Leased Vehicles	Yes
CRASH (accident data)	GSA Leased Vehicles	Yes
Customized Inventory Report	GSA Leased Vehicles	Yes

## **Download Vehicle Reports**

Step 1. From the home screen, select *Run Reports* from the main menu bar at the top of the screen.

HI OLICIAL MEDRICE OF THE OLITEOR STATES KOALTHINELLE UNERS HOM ADD KHOM .	
GS☆ Fleet®	
Home Manage my fleet V Run reports Help	

## **Get Started**

Here are some links to get you started. Please keep an eye out for new features and updates as we will roll them out regularly.

### Your voice matters.

**Note:** As of right now, agency owned and leased reports must

run separately.

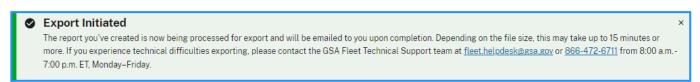
Help us improve GSAFleet.gov by taking a quick survey.

Step 2. Select between agency owned and GSA leased and the desired report type.

	can also schedule rep	your desktop via an ema ports.
For more information, pl	ease see the <u>Vehicle Inventory M</u>	anagement User Guide.
Required fields are mark	ked with an asterisk (*).	
0	2	3
Report selection	Agency selection	Report filters
Vehicle ownership optic	ons *	
Agency owned		
◯ GSA leased		
Choose from available r	reports *	
		\$

**Step 3.** Complete the Agency/Vehicle Selection and report filters as listed. Then click *Export report to email.* Once clicked, a confirmation message will appear showing the export has been initiated and will be emailed to the user.

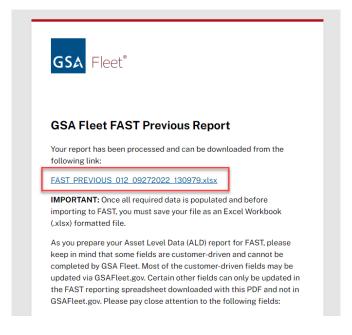
Home > Vehicle Reports Manager > Export	Vehicle Reports
---	-----------------



**Step 4.** The user will receive an email from <u>do-not-reply@gsa.gov</u> with a download link to the report. The link is available for 7 days.

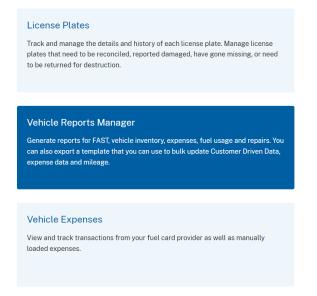
#### Note:

- The downloaded spreadsheet contains an *Instructions* and a *Reference* sheet to help users quickly identify the appropriate responses for columns within the template.
- The title row (Row 1) of each spreadsheet template contains a note that defines the column description and also defines if that could should be updated.



## **Bulk Update Vehicle Data**

Step 1. From the home page, navigate to the Vehicle Reports Manager page.



#### Step 2. From here, click Export Template for bulk updates.

Home > Vehicle Reports Manager

## Vehicle Reports Manager

#### **BULK UPDATES**

This tool allows you to bulk update the vehicle data.

- 1. First export the template provided, complete all the required steps
- 2. Populate the template with vehicle data in your desktop
- 3. Import the template back to the system



#### Export template for bulk updates

Download vehicle templates for Customer Driven Data (CDD), mileage and expense.



#### Import template for bulk updates

Use the exported template to import and bulk update vehicle reports.

**Step 3.** Select the template type for the information to be updated. Vehicle data for the agency/bureau/office selected will be pre-populated on the template.

**Note:** Users also have the option to immediately download blank expense and mileage templates by clicking the hyperlinks at the top of the page.

Home > Vehicle Reports Manager > Export Template for Bulk Updates					
Export Template for Bulk Upda	tes				
This tool allows you to export vehicle template for bulk updates. Please complete all the required steps to export the template via an email or download a blank template to your desktop. Once you complete populating the template, please <u>import the template for bulk updates</u> .					
Required fields are marked with an asterisk (*).					
Download blank expense template  Download blank mile	age template ⊻				
Choose from available templates *	_				
-Select- 🗘					
-Select- Customer Driven Data (CDD) template Vehicle mileage history template Vehicle expenses template					

**Step 4.** Users will see a notification confirming that the template will be emailed. Once received, the email will contain a download link that is available for 7 days.

#### NOTE:

- All templates have an *Instructions and Reference* sheet to help users quickly identify the appropriate responses for columns within the template.
- The title row (Row 1) of each spreadsheet template contains a note that defines the column description and also defines if that could should be updated.

#### Your template is ready for bulk update

Customer Driven Data (CDD)

The Customer Driven Data (CDD) template you requested via GSAFleet.gov is now available for download:

#### CDD\_09282022\_120970.xlsx

Please note: the link will expire in 7 days. If you cannot access this link, copy and paste the entire URL into your browser:

https://s3.amazonaws.com/afp-doc-store-stage/vms/reportexport/\_1b119bb3-b65c-4e16-8226-e258bd77cb73/CDD\_ 09282022\_120970.xlsx?X-Amz-Algorithm=AWS4-HMAC-SHA256&X-Amz-Credential=AKIA5WCN60TJM50E23FM%2F20220928%2Fus-east-1%2Fs3%2Faws4\_reguest&X-Amz-Date=20220928T180319Z&X-Amz-Expires=604800&X-Amz-Signature=646d39219c567faa34c6336499414f 39bf6fb5714e6125ddb8c40c7efdcdf540&X-Amz-SignedHeaders=host& response-content-type=application%2Fvnd.openxmlformatsofficedocument.spreadsheetmi.sheet

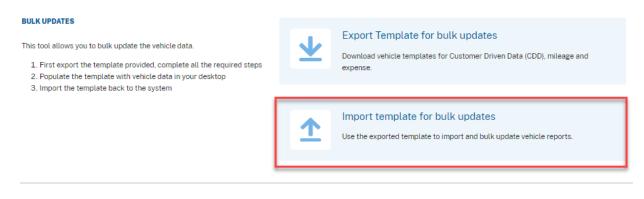
#### INSTRUCTION

- Download this file above and make all necessary updates to your data. There is a guide on sheet 1 to help with data validation and standards
- When you are done updating your report, <u>upload your data</u> back by navigating to Bulk Import in Vehicle Reports Manager

If you have any difficulties, please try your export again or contact GSA Fleet Technical support at 866-472-6711 from 8:00 a.m. – 7:00 p.m. ET, Monday–Friday. Or email <u>fleet.helpdesk@gsa.gov</u>

**Step 5.** Users can bulk upload the updated data in GSAFleet.gov either by clicking the *Upload your data* hyperlink contained in the email or by clicking on the *Import template for bulk updates* box in the *Vehicle Reports Manager.* 

#### Vehicle Reports Manager



Step 6. Select the template type and add the updated template file to the upload space.

You must first <u>export the template</u> pro bulk updates.	cords at once, this tool allo ovided, complete all the rec	-	1	
Required fields are marked with an as	terisk (*).			
UPLOAD FILE				
Please indicate which vehicle report y	ou would like to update. Yo	u must use	the template generat	ted from
Export Template for Bulk Update.				
Choose from available templates * Customer Driven Data Supporting file * Accept .xlsx and .xls file below 30 MB	\$	]		
Accept .xtsx and .xts file below 30 Mb	,		e	
		<u>Change file</u>		
Selected file				
Selected file CDD_09282022_130900.xlsx2F20220 &X-Amz-Date=20220928T192601Z&X-Am Signature=.xlsx		<u>Delete</u>		

Step 7a. A successful data upload update will result in a notification that the upload was processed.

Home > Vehicle Reports Manager > Import Template for Bulk Upd	dates	
Your Vehicle Mileage Data (MILEAGE) has successfully bee	en processed.	
mport Template for Bulk Update	s	
f you would like to update multiple records at once, this tool allows y fou must first <u>export the template</u> provided, complete all the require sulk updates.		
Required fields are marked with an asterisk (*).		
JPLOAD FILE		
Please indicate which vehicle report you would like to update. You m Export Template for Bulk Update.	sust use the template generated from	
Choose from available templates *		
-Select-		
Supporting file * Accept .xlsx and .xls file below 30 MB		
Drag file here or <u>choose from folder</u>		
Save		

**Step 7b.** An unsuccessful upload will result in a notification with a download link for an error report which will list all of the items that need to be corrected.

H	me > <u>Vehicle Reports Manager</u> > Import Template for Bulk Updates
I	We found some issues with your data
	Out of 15 records, we were not able to process <b>12 records</b> . Download the error log to view the details. Once you address all the errors, please re-upload your report to validate the data.

Import Template for Bulk Updates

If you would like to update multiple records at once, this tool allows you to bulk update the vehicle data. You must first <u>export the template</u> provided, complete all the required steps, and upload the template for bulk updates.

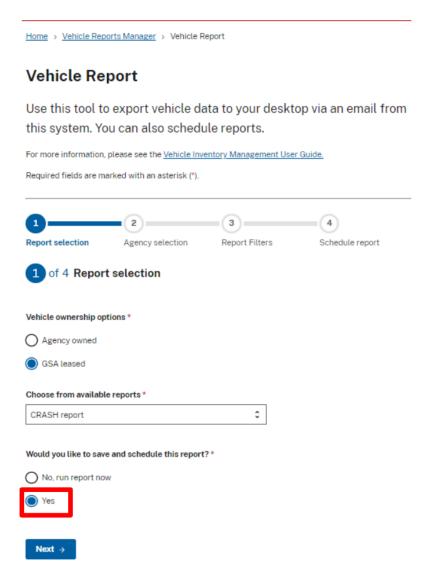
Required fields are marked with an asterisk (\*).

## **Schedule a Report**

Note: As of November 2023, report scheduling only functions for leased vehicle reports.

**Step 1.** Begin the process to download a report. When you select GSA Leased, an option will appear that asks if you would like to schedule the report. Select *Yes.* 

Note: FAST Report can not be scheduled.



Cancel vehicle report

Step 2. A new step will appear at the end of the stepper above, titled Schedule a report. Continue with the second and third steps for downloading the report, which will allow you to select your agency and filters for the report.

#### Vehicle Report

Use this tool to export vehicle data to your desktop via an email from this system. You can also schedule reports.

For	more	information,	please s	see the	Vehicle In	ventory I	Management	User	Guide.	

Required fields are marked with an asterisk (\*).



Agency *	
-Select -	¢
Bureau	
-Select-	÷
BOAC	
Select an Agency and Bureau first	~
Legacy customer number	
Select an Agency and Bureau first	~
Agency indicator	
-Select -	¢



Cancel vehicle report

Home > Vehicle Reports Manager > Vehicle Report

#### Vehicle Report

Use this tool to export vehicle data to your desktop via an email from this system. You can also schedule reports.

For more information, please see the Vehicle Inventory Management User Guide.

Report	Required fields are marked with an asterisk (*).
GSA Leased CRASH report	Report       GSA Leased     CRASH report
eport selection     Agency selection     Report Filters     Schedule report       2 of 4 Agency selection	1     2     3     4       Report selection     Agency selection     Report Filters     Schedule report
gency selection	<b>3</b> of 4 Report Filters
ecords in the report will only include those that match the scope selected below.	CRASH Report Options
gency *	Select status *
Select - 🗘	History of all accidents
ureau	
Select -	← Previous Next →
DAC	Cancel vehicle report
Select an Agency and Bureau first	
egacy customer number	

**Step 3.** The fourth step on the stepper is to schedule the report. On this page, you will be asked to fill out the following fields:

- Report name
- Report frequency. You will select from the dropdown either weekly, monthly, or quarterly
- End date for the report
- Any additional recipients you would like to receive the report at the requested frequency. You can add up to 9 email addresses

Once you have completed these fields, select the Schedule report button.

Report			
GSA Leased	CRASH report		
1 Report selection	Agency selection	Report Filters	Schedule report
4 of 4 Sched	lule report		
Report name *			
CRASH Monthly Re	port		

#### Frequency

Select your reporting frequency, and then select the start and end dates for the period you wish to receive the recurring report.

Reporting Frequency *	
Monthly	Ŷ
You will receive this report ea the month after your start dat	ch month starting on the 1st of te.
Start date 11/13/2023	End date * mm/dd/yyyy 11/16/2024
Additional recipients Besides yourself, who else sh report? Enter up to 9 email ad comma. mickey.mouse@gsa.gov	ould receive a copy of this Idresses below, separated by a
Cancel vehicle report	dule report

**Step 4.** Success! A green banner will appear at the top of the *Schedule Reports* page to show that you have successfully scheduled a report.

The page you have been taken to is the *Schedule Reports* page, which will list all of your scheduled reports in a table with filters on the left-hand side to sort through your reports. There is also a button on the top right corner of the table that reads *Create scheduled report*, giving you another way to schedule/run any reports.

Note: Report status definitions are as follows:

- ACTIVE Active report
- INACTIVE Report has passed its "end date" can be reactivated by going to "Edit" and updating the report.
- SUSPENDED User requested to "suspend" the report. You can go back to actions and "unsuspend"

Home > Vehicle Reports Manager > Scheduled Reports

Your recurring report CRASH Monthly Report has been created. To make changes, edit this report from the table below.

## Scheduled Reports

▼ Hide filters						+ Create sch	eduled report
ILTERS			Report name	Start date	End date	Report status	Actions
0 filters applied	-	>	CRASH Monthly Report	11/13/2023	11/16/2024	Active	
No filters applied							
Email address	+	>	AIE REPORT	11/13/2023	11/15/2023	<ul> <li>Active</li> </ul>	
Organization	+	>	Test Cron 3	07/08/2023	03/21/2024	Active	
Report status	+		Test Gron G	07/00/2020	55,21/2024	• Active	•••
Report type	+	>	Carol Test 93016	11/07/2023	11/15/2023	Active	
		>	test5	11/06/2023	11/14/2023	<ul> <li>Active</li> </ul>	

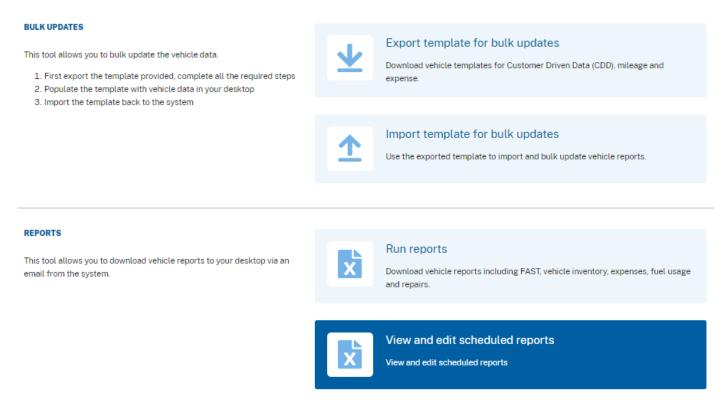
**Step 6.** To review additional information about your report, select the arrow to the left of the report name in the table. This will give you an overview of the selections you made when scheduling the report.

### **Scheduled Reports**

▼ Hide filters						+ Create schedu	iled report
FILTERS		\$	Report name	Start date	End date	Report status	Actions
0 filters applied	-	~	CRASH Monthly Report	11/13/2023	11/16/2024	Active	
No filters applied							
Email address	+		Report Type	CRASH report	Frequency	Monthly	
Organization	+		Email Address alexa	andra.stepanov@gsa.gov	Next cycle date	12/01/2023	
Report status	+		Agency	Agency 22	Last run date	_	
Report type	+		Bureau	Agency 22	Last run status	_	

**Step 7.** You can also get to the *Scheduled Reports* page by going to the *Vehicle Reports Manager* tile on the Home page and then selecting the *View and edit scheduled reports* tile at the bottom of the page.

#### Vehicle Reports Manager



## Edit a Scheduled Report

**Step 1.** From the table on the *Scheduled Reports* page, there is an *Actions* ellipses on the right end of the table for every report scheduled. Select the *Actions* ellipses, and then select the *Edit* option from the list of actions.

	\$ Report name	Start date	End date	\$	Report state	us Actions
~	CRASH Monthly Rep	ort 11/13/2023	11/16/2024		Active	•••
	Report Type	CRASH report	Frequency			© Suspend
	Email Address	alexandra.stepanov@gsa.gov	Next cycle da	ate	12	O Delete
	Agency	Agency 22	Last run date			-
	Bureau	Agency 22	Last run state	us		_

**Step 2.** You will be taken back to the second step in creating a report. Edit anything that needs to be changed within steps 2-4 of the process and then select *Update Scheduled report* button to save any changes.

#### Vehicle Report

Cancel vehicle report

Use this tool to export vehicle data to your desktop via an email from this system. You can also schedule reports.

For more information, please see the <u>Vehicle Inventory Management User Guide</u>. Required fields are marked with an asterisk (\*).

Report			
GSA Leased	CRASH report		
1	_2	3	4
Report selection	Agency selection	Report Filters	Schedule report
2 of 4 Ager	ncy selection		
Agency sele	ction		
Records in the repo	rt will only include those tha	t match the scope select	ed below.
Agency *			
-Select -		\$	
Bureau			
-Select -		\$	
BOAC			
Select an Agency	and Bureau first	~	
Legacy customer n	umber		
Select an Agency	and Bureau first	~	
Agency indicator			
-Select -		0	
← Previous	Next →		

## Suspend/Unsuspend a Scheduled Report

**Step 1.** From the table on the *Scheduled Reports* page, there is an *Actions* ellipses on the right end of the table for every report scheduled. Select the *Actions* ellipses, and then select the *Suspend* option from the list of actions.

	Report name	Start date	End date	Report stat	us Actions
~	CRASH Monthly Report	11/13/2023	11/16/2024	Active	
					✓ Edit
	Report Type	CRASH report	Frequency		O Suspend
	Email Address a	lexandra.stepanov@gsa.gov	Next cycle date	12	O Delete
	Agency	Agency 22	Last run date		-
	Bureau	Agency 22	Last run status		-

**Step 2.** A modal will pop up asking if you're sure you would like to suspend your report. Select *Suspend Report*.

	×
Suspend scheduled report	
Are you sure you want to suspend Scheduled Report CRASH Monthly Report?	
Cancel Suspend report	

**Step 3.** Success! A green banner will appear saying that you have successfully suspended your report, and the report status on the table will also reflect the change.

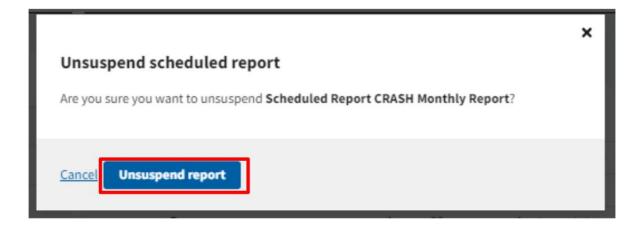
**Note:** Suspending the report will also suspend it for any additional recipients that were receiving the report.

Home > Vehicle Reports Manager > Sche	duled Rep	orts				
Your recurring report has been sus	pended. It	will not be emailed to recipients un	iil it is unsuspended. To u	nsuspend this report	, use the Actions menu in the	table below.
Scheduled Reports						
▼ Hide filters					+ Create sche	duled report
FILTERS		Report name	\$\$ Start date	End date	Report status	Actions
0 filters applied —	>	CRASH Monthly Report	11/13/2023	11/16/2024	Suspended	
No filtors applied						

Step 4. To unsuspend a report, select the Action ellipses and then the Unsuspend option.

~	CRASH Monthly Rep	ort 11/13/2023	11/16/2024	Suspended     Unsuspend
	Report Type	CRASH report	Frequency	Delete
	Email Address	alexandra.stepanov@gsa.gov	Next cycle date	-
	Agency	Agency 22	Last run date	-
	Bureau	Agency 22	Last run status	_

**Step 5.** A modal will pop up asking if you are sure you would like to unsuspend the report. Select the *Unsuspend report* button.



**Step 6.** Success! A green banner will appear at the top of the page to show that you have unsuspended the report and it is now active again. This will also be reflected in the table, under the report status header.

Your recurring report has been uns	suspended.					
Scheduled Reports						
▼ Hide filters					+ Create sche	eduled report
FILTERS	Repo	ort name	\$ Start date	End date	\$ Report status	Actions
0 filters applied -	> CRAS	H Monthly Report	11/13/2023	11/16/2024	Active	

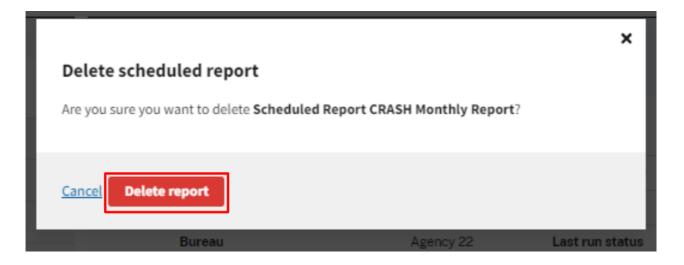
## Delete a Scheduled Report

**Step 1.** From the table on the *Scheduled Reports* page, there is an *Actions* ellipses on the right end of the table for every report scheduled. Select the *Actions* ellipses, and then select the *Delete* option from the list of actions.

	Report name	\$\$ Start date	End date	Report status	Action
~	CRASH Monthly Report	11/13/2023	11/16/2024	Active	•••
				1	Edit
	Report Type	CRASH report	Frequency	0	Suspend
	Email Address alexa	ndra.stepanov@gsa.gov	Next cycle date	12 🛛	Delete
	Agency	Agency 22	Last run date		-
	Bureau	Agency 22	Last run status		-

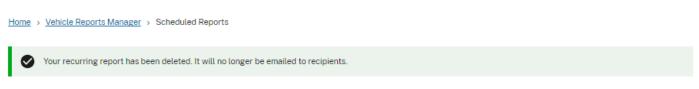
**Step 2.** A modal will pop up asking if you're sure you would like to delete the report. Select the *Delete report* button.

**Note:** This action cannot be undone. To recreate the report, you will need to create a new scheduled report.



**Step 3.** Success! A green banner will appear at the top of the page reading that you have successfully deleted the report.

Note: Any additional recipients will no longer receive the report after deletion.



## **Scheduled Reports**

▼ Hide filters

+ Create scheduled report