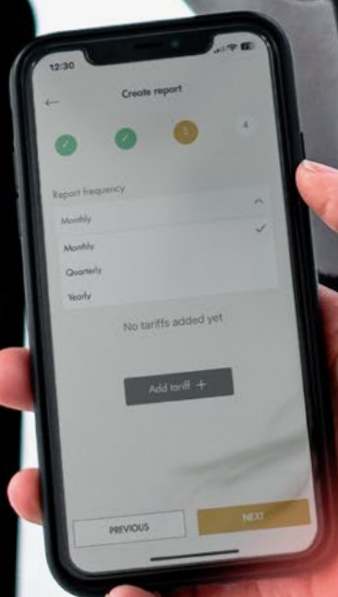


GARO Connect - Report tool



GENERAL

This manual describes some of the functions in the area of report generation.



Purpose of this function is to provide a general, relatively easy way to export historical consumption data from charging sessions. All setup is done through the GARO Connect app.

Source of information is charging registered from charging stations and users connected to the GARO Connect system. Service will continue to send out reports until stopped.

The GARO Connect app is available for Android and Apple devices.

FINDING THE REPORT TOOL

In the GARO Connect app, the tool settings are found under:

1. Manage locations in the "hamburger main menu"  in right upper corner.
2. Select a location, click the "settings cogwheel." 
3. Click the "Report tool" button.

ACCESS TO THE TOOL

The tool is linked to a location. This means one report per location is generated.

Since location has always one or several owners, any owner of the location can use and edit the tool.

If location is linked to an organization, then all owners in organization has access to the tool.

NOTE

An example is a company that owns several locations. Same owner/administrator can easy access all locations within the organization.

USING THE TOOL

The main view consists of three tabs:

1. REPORT TOOL

This is where all created reports are shown. This is where you can select a report for editing (see next chapter).

NOTE

All stations and users that should be included in the report must be chosen under "Charging Stations" and "Users".

2. CHARGING STATIONS

This is where all charging stations in the location are listed.

- A charging station can be given a separate name (Object ID) in the reporting tool, so this is where you can create and edit the name (Object ID) of each charging station.
- Recommendation is to use same name as used in rest of GARO Connect, i.e. the name of the charging station.
- A button "Use default" will copy name from Chargingstation.
- Each "Object ID" is recommended to be unique, but no limitation.

Press "Save" to update the entered name (Object ID).

NOTE

All stations and users that should be included in the report must be chosen under "Charging Stations" and "Users".

3. USERS

This is where all "Users" that has access to any of the charging stations in the location are listed.

- A "User" can be given a separate name (Object ID) in the reporting tool, so this is where you can create and edit the name (Object ID) of each charging station.
- A button "Use default" will copy user name from the GARO Connect user. i.e. the e-mail of the user. What name to use is up to each case to decide. In some cases, it could be the employee number.
- Each "Object ID" is recommended to be unique, but no limitation.

Press "Save" to update the entered name (Object ID).

NOTE

All stations and users that should be included in the report must be chosen under "Charging Stations" and "Users".

CREATE A REPORT

This takes you to a 4-step guide for setting up the report.

1. REPORT NAME

Any name could be used. Avoid same name as used before.

Press "Next" to proceed.

2. FORMATS/TEMPLATES

The tool offers a number of pre-defined formats/templates. On request to GARO, additional formats could be created.

Some of the formats comes with different variants of Source type. Typically:

- "Chargers". Typically listing consumption of selected charging stations, regardless of who/what user did use the station.
- "Users". Typically listing consumption of selected users, regardless of what charging station charging is done at.

Press "Next" to proceed.

3. REPORTING INTERVAL

Report frequency = interval of reporting

Available choices today are:

- monthly
- quarterly
- yearly.

REPORT START DATE

- Date for first report getting created.
- To test the created report, select a date like yesterday or first day of the present month.
- This will generate a report until next morning.
The report will be sent during the morning, 07:00-09:00 CET.

TARIFFS

- Using a tariff's for reporting cost.
- Tariffs can be created to set a cost for energy.
- A tariff is defined by a startdate. This will be valid until any new tariff start date is entered and valid. The tariff is the cost per kWh consumed (charged). A currency information is available in some report templates.

Press "Next" to proceed.

4. PUBLICATION/DISTRIBUTION OF REPORT

This is where you enter information about how report should be published or sent. A report can either be sent as an e-mail or published/uploaded by FTP.

FILE NAME

- A filename to be used for the report.
- The filename can either be static, always the same, or created by dynamic elements.
- Default name is suggested by the chosen report template.

Syntax for dynamic data that can be used in filename and as subject in e-mail:

Those dynamic datas, limited by their <> can be combined with staic text.

<areacode:>

Organization code = A unique identity, not same as organization in GARO Connect.

<current::mini-iso-date>

Date when report is generated and sent. Format: YYMMDD

<report::start-date>

Start date of report. Format: YYYY-MM-DD

<report::end-date>

End date of report. Format: YYYY-MM-DD

EXAMPLE

My monthly charging report generated <current::mini-iso-date> containing last month's charging.

This would result in the text: My monthly charging report generated 230822 containing last month's charging.

5. SEND USING

This is where you choose if report file should be sent as an e-mail or uploaded by FTP.

- If e-mail is chosen, the relevant settings for e-mail is listed.
- E-mail address is entered as normal text.
- Several e-mail addresses can be used.

NOTE

Press "Enter" after typing an e-mail to add it to the address list.

- As Subject for the e-mail can either be static (always the same content) or use same dynamic syntax as can be used for the filename. Described above.
- If FTP is chosen, the relevant settings for FTP needs to be entered.

EDIT A REPORT

Selecting an existing report, takes you to the same 4-step setup as when creating, but you are able to edit all steps.

TESTING A REPORT

In order to test a created report:

1. Edit the report
2. Select a date like yesterday or day of the last month.
Up to one month back from today will result in a report next morning.

NOTE

There is no function available today to immediately generate the report.

HINTS AND RECOMMENDATIONS:

For a general-purpose report use the:

- Format (template) called Excel (csv)
- Sourcetype: Users

This will generate a general excel-based report.

Use e-mail for distribution. If the dynamic filename syntax is confusing, just use "normal" static names. You will anyway get separate e-mails.

FAQ

I can not enter e-mail. Why?

Double check e-mail and remember to press enter to save each registered e-mail.

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