

## New Administrator To-Do List

- ☐ Add roles to the account and assign privileges. Click Settings > Roles.
- ☐ Add users to the account and assign them roles. Click Settings > Users.
- ☐ Create any custom configuration profiles needed. Click Settings > Configuration Profiles.
- ☐ Add the trip information fields that you want your users to complete when they are configuring loggers. Click Settings > Trip Information.
- ☐ Set up alarm notifications so that you can be alerted when an alarm trips. Click Settings > Alarm Notifications.

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## Searching Basics

Use the searching feature to narrow the logger deployments list and to build reports.

To create and save a search for future use:

1. Click Devices and Data and then click the Devices tab.
2. Make selections in any of the search fields. The deployments list is refined to only show the logger deployments that meet the search criteria. For some fields, you can add multiple entries. Click the plus icon (if available) to add an entry for a search field.
3. Type a name for the search and click Save Search As.
4. Click Build Report if you are ready to run a report.

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## Frequently Used Searches

To search for late shipments:

1. Use the Dates fields to search for late shipments (for example, a week late). Under Event, select Configured.
2. Under Range, select Before.
3. Under Date, select a day from the calendar (for example, to show shipments that are week late, select the date from a week ago).
4. Click the plus icon to the right of the date field to add another set of fields.
5. Under Event, select Last Downloaded.
6. Under Range, select Never.

The deployments list is updated to show the applicable deployments. Save the search for future use if needed. Click Build Report to run a report on these deployments.

## Building a Multiple Device Report

1. Click Devices and Data.
2. Click the Report Builder tab
3. Select a saved search or select individual deployments from the list.
4. Select Raw Data to include all logged sensor data (this option is not available for PDF reports).
5. Select Summary Stats to include the combined statistics based on how the deployments are grouped for the report (as selected in Group By).
6. Select Multi-Graph to include all deployments plotted on a single graph in the report (this option is not available for XLSX reports).
7. Select Tabular Data to include details on each individual deployment in the report.
8. Select a time zone or use the default time zone listed.
9. Select either PDF or XLSX for the file format.
10. Select how you want the tabular data grouped (if trip information fields exist).
11. Click Run Report. Once the report is ready, it is downloaded to the location determined by your browser.

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