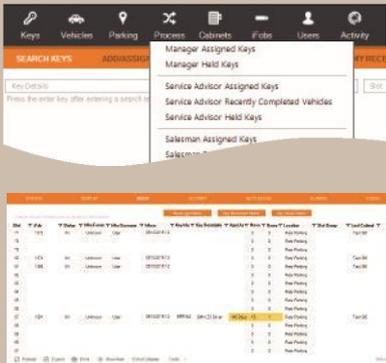


# TRAKA AUTOMOTIVE HOW TO REPORT GUIDE

Common Error messages  
How to use data grids  
Cabinet Audit  
Cabinet Activity  
User Activity  
Key Activity

Stock Age Report  
Stationary Vehicles  
Handing over Key Incorrectly  
User report  
iFob report

V1.2



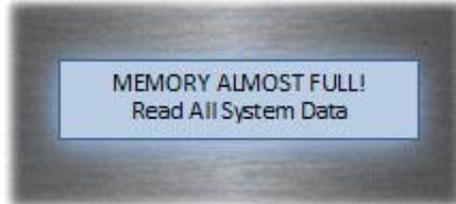
## ID NOT RECOGNISED

If you access the cabinet and this message shows, you will need to speak to the person responsible for user administration of the key cabinet. They will be able to determine what is preventing you from accessing the key cabinet.



## MEMORY ALMOST FULL

If you see this message displayed on the key cabinet, then please alert the person responsible for administration of the key cabinet immediately. They will be able to resolve the problem.



## BROKEN IFOB IN CABINET

If you access the cabinet and this message shows you will need to go through a process of removing iFobs in the cabinet until the message is gone. You can then return each iFob and see which one causes the issue. It may be a specific iFob or could be a specific slot. Please speak to the person responsible for administration of the key cabinet if you are unsure of what to do.



## IFOB IN WRONG SLOT – Fixed Return System

If you return an iFob to a fixed return key cabinet and see this message, you MUST remove the iFob and return it to the correct slot indicated by the display. Failure to do this will result in the iFob not being able to be found and subsequent users being told to do it. If you see this message for multiple iFobs that does not seem to be right, then please alert the administrator for the key cabinet immediately as it could indicate a fault with the cabinet.



## IFOB NOT RECOGNISED

If you return an iFob to the key cabinet and see this message, you MUST notify the person responsible for administration of the key cabinet immediately. Failure to register the iFob will result in the iFob not being able to be found and subsequent users being told to do it.



Drag a column header here to group by that column.

Site	User	Position
Somewhereville	User 02, Traka	Technician
None	Admin 03, Traka	
Anytown	User 03, Traka	Sales
Anytown	User 06, Traka	Driver
None	GuestUser, Guest	
Anytown	System Admin, Traka	Software Engineer
Somewhereville	User 09, Traka	Technician

Reload Export Print View Item Extra Columns Tools 16 rows

## ROW GROUPING

Drag a column header here to group by that column.

You can group rows within the grid by dragging a column header (bold text) to the space above the columns. You can also have sub-groups by dragging subsequent column headers alongside the others. To remove grouping, simply drag the group off the grid.

- Site** ↑
- + Site : Anytown (9 items)
  - + Site : None (3 items)
  - + Site : Somewhereville (4 items)

## COLUMN SORTING

You can order by clicking on the column header and clicking again will reverse the sort order. Holding the shift key and clicking will secondary sort.

## COLUMN FILTERING

You can filter rows by clicking on the "funnel" icon to the far right of the column you wish to filter which will show a menu of all the items to pick from or define a custom filter.

- Site** ↑ ▾
- (All)
  - (Blanks)
  - (Custom)
  - (NonBlanks)
  - Anytown
  - None
  - Somewhereville

## ACTIONS

- Reload—This will request the complete dataset from the server again so it is up to date with the latest information
- Export—This will save the data in the grid to a CSV file which you can open in Excel
- Print—Clicking this will show a preview of the grid as it is to be printed to the selected printer
- View Item—Select a row first then clicking this will open a new tab with the details for that iFob, Key or User
- Extra Columns—This will toggle additional data that is downloaded but for clarity is not displayed by default but may be useful for investigating
- Tools—This will show a menu allowing you to toggle the group by and filtering options of the grid

## DATE FILTER

Show: Last 90 Days Apply Filter

Drag a column header here to group by that column.

**Identifi** ▾

- Today Only
- Yesterday
- Last 7 Days
- Last 14 Days
- Last 30 Days
- Last 60 Days
- Last 90 Days
- This Week

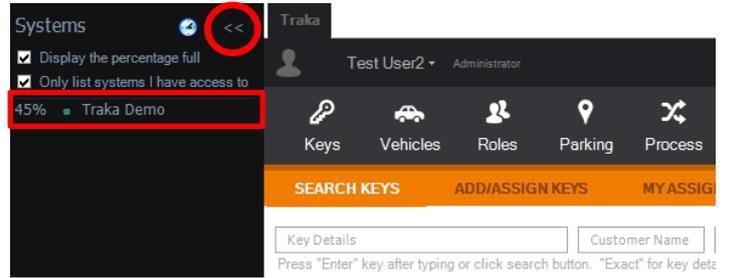
12 1

# TRAKA AUTOMOTIVE: CABINET AUDIT & ACTIVITY

## ACCESSING CABINET REPORTS

Cabinet Audit and Activity reports are available on individual cabinet levels. To access them, click on the cabinet icon located within the black ribbon on the left-hand side of the main screen. You might need to expand this section by clicking the double arrow.

The percentage next to the cabinet name refers to how full the cabinet is.



## CABINET DISPLAY VIEW

To access the cabinet view, select the **DISPLAY** tab on the orange ribbon. This gives a graphical overview of the status of keys in or out of the key cabinet. Clicking on a position will present the actions available allowing you to view the related key/iFob, the activity of the slot or perform an emergency release. On the right-hand side you will also find a legend explaining what each of the symbols mean as well as when the cabinet display was updated.



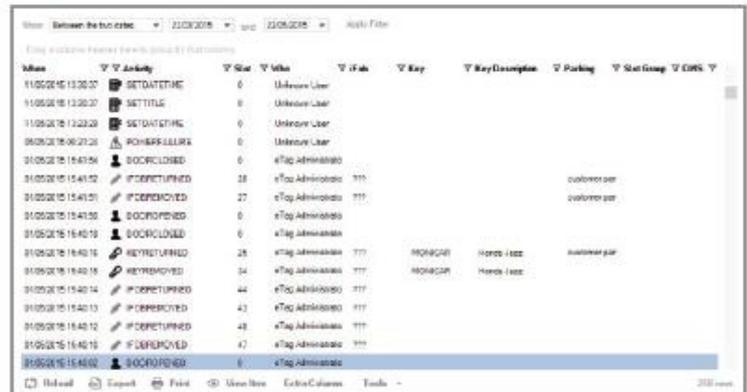
## CABINET KEY AUDIT

To access the Cabinet audit, select the **AUDIT** tab on the orange ribbon. This feature allows you to check what keys are in the cabinet with key information such as Age of the car, number of key movements and number of different users accessing the key. The report can also be printed and compared to the physical cabinet to ensure that keys are physically present.



## CABINET ACTIVITY AUDIT

To access the cabinet activity, select the **Activity** tab on the orange ribbon. All activity on the key cabinet is logged and visible in this report. It shows you when iFobs are removed and returned, or if a key is assigned to the iFob then it will show the details related to the key being removed and returned. Any alarms or commands sent to the unit are also logged. The key cabinet also records when the door was opened by which user and when that user closed the door. This allows you to easily see which actions related to that user.



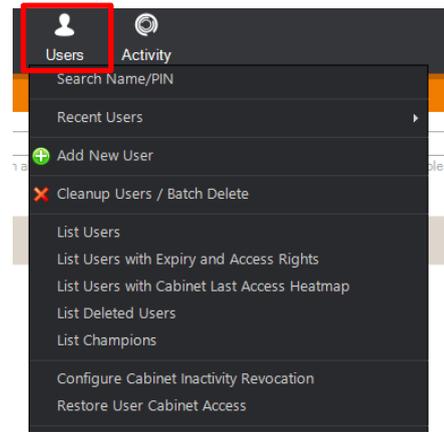
# TRAKA AUTOMOTIVE: USER REPORTS

V1.2

## INTRODUCTION

The purpose of this section is to highlight the most common reports on Users' data that is tracked BY Traka. To access all user related reports, click on the **Users** icon on the black ribbon.

From the drop-down menu, select the report that you are interested in. Some reports are explained in more depth below. However, should you have more questions please contact your account manager or email support@traka.com.



## USER ACTIVITY

To view a user's activity, click on the **Users** icon on the black ribbon. From the drop-down menu select Search Name/PIN. Search for the user. To access their record, double click on their name. From the orange ribbon select **Activity** tab. All activity logged against the user is visible within this report. Traka keeps an audit trail of all search history carried out by the user from viewing to assigning and unassigning vehicle keys. The report also shows when the user has accessed the cabinet and what keys/iFobs were removed/returned as well as flags if any alarms were triggered.

SUMMARY	STATS	HELD IFOBS	EDIT DETAILS	SECURITY	ACTIVITY	RECENT KEYS	ALARMS
Showing back to 22 November 2022 <a href="#">View an additional 30 days prior</a> (Oldest activity is 9 September 2022)							
Drag a column header here to group by that column.							
When	Site	Forename	Surname	Action	Action Detail	Type	
21/12/2022 16:38:54	(Any)	Test	User2	Viewed		User	
21/12/2022 16:38:54	(Any)	Test	User2	Viewed		User	
21/12/2022 16:38:20	Test Centre	Test	User2	Returned		iFob	
21/12/2022 16:38:18	Test Centre	Test	User2	Returned		iFob	
21/12/2022 16:38:16	Test Centre	Test	User2	Removed		iFob	
21/12/2022 16:38:14	Test Centre	Test	User2	Removed		iFob	
21/12/2022 16:38:12	Test Centre	Test	User2	Removed		iFob	
21/12/2022 16:38:08	Test Centre	Test	User2	Logged In		Cabinet	
21/12/2022 16:38:02	Test Centre	Test	User2	Nothing Taken		Cabinet	
21/12/2022 16:38:02	Test Centre	Test	User2	Door Closed		Cabinet	
21/12/2022 16:38:00	Test Centre	Test	User2	Logged In		Cabinet	
21/12/2022 16:37:55	Test Centre	Test	User2	Nothing Taken		Cabinet	

## INACTIVE USERS

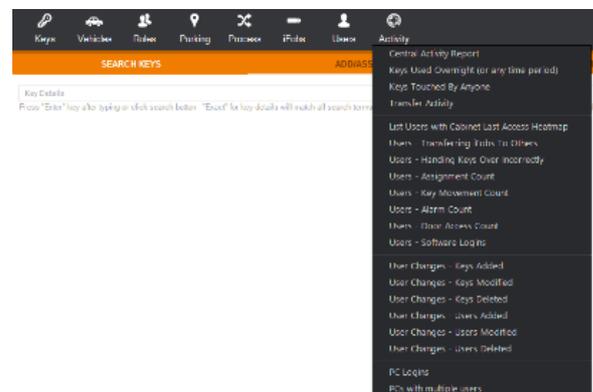
To identify which users have not accessed the software or the cabinet for X number of days, click on **Users** and select **Cleanup Users/Batch Delete**. Within this report you will be able to set your filters and report on inactive users. For more information on this report, please visit our support website for a dedicated document.

### Report - Cleanup Users / Batch Delete

User has no activity after  days  Auto-Tick inactive users  
Hide users created less than  days ago

## USER CENTRAL ACTIVITY

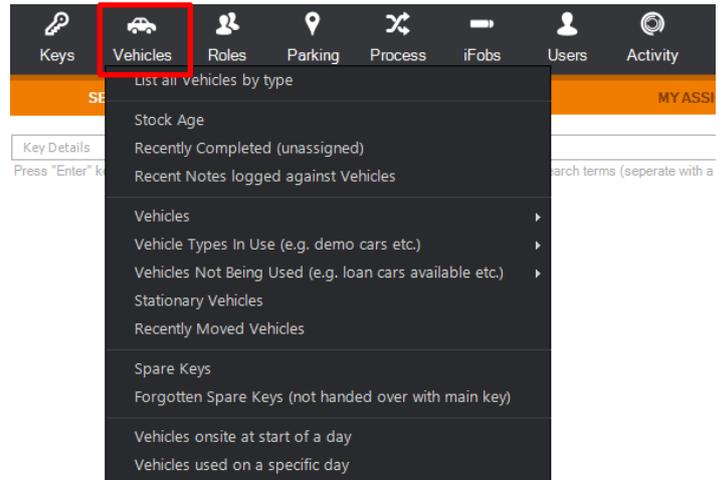
To compare different users in terms of their Traka software usage, you can use activity reports. All summary activity reports are found under activity tab located on the black ribbon, Once clicked on, you will be presented with a drop-down menu highlighting different comparison reports for the users.



## INTRODUCTION

The purpose of this section is to highlight the most common reports on vehicle data that is imported into Traka. To access all vehicle related reports, click on the **Vehicles** icon on the black ribbon.

From the drop-down menu, select the report that you are interested in. Some reports are explained in more depth below. However, should you have more questions please contact your account manager or email support@traka.com.



## STOCK AGE REPORT

This report shows you all currently assigned vehicles with how long they have been assigned for, how many movements they had and how long ago their last movement was.

To access this report, click on **Vehicles** icon on the black ribbon. From the drop-down menu select **Stock Age**. If you are on multi-site server i.e. can see cars from different sites, you will need to filter for your dealership in the first column **Site**.

Drag a column header here to group by that column.

Site	Type	Age (D)	Move	Registration	Chassis	StockNo	Customer	Description	Status	Assigned By	Users	iFob	Key Cabinet	Slot	Last User	Last Location
Test Centre	Used	85 Days	8	TEST 1					IN	Test User2	1	1010	Traka Demo	20	Test User2	Trade Cars
Test Centre	Customer	85 Days	0	TEST 6					OUT	Traka Engineer	0	1008	Traka Demo	6	Test User2	Loan Cars
Test Centre	Used	84 Days	0	TEST 3	123456789	001	Traka Test		IN	Traka Engineer	0	1003	Traka Demo	19	Test User2	Trade Cars

## STATIONARY VEHICLE REPORT

This report shows you all keys that were not removed from the cabinet for certain amount of time. This report is especially useful in identifying vehicles which are not popular and are not getting customer attention.

To access the report, click on the **Vehicles** Icon on the black ribbon. From the drop-down menu select **Stationary Vehicles**.

The default filter is set to last 30 days which will show all vehicles which were not removed from the cabinet for more than 30 days. You can however filter it to smaller time frame as well as set your own custom dates.

Show: Last 30 Days Apply Filter

Drag a column header here to group by that column.

Site	Key Cabinet	Type	Identifier	Description	iFob	Days
Test Centre	Traka Demo	Used	TEST 1		1010	66
Test Centre	Traka Demo	Used	TEST 3		1003	66

## VEHICLES/SPARE KEYS + VEHICLES FORGOTTEN SPARE KEYS

If you track spare keys with a separate iFob, then you can link the main key to the spare key by using the **Create spare key** link from the main key. This report will then show you all the spare keys and where they are. You can also use the forgotten spare keys report to show which spare keys are still being tracked and which main key has been unassigned from an iFob.

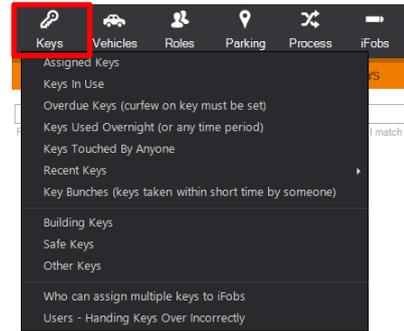
## VEHICLES/RECENT NOTES LOGGED AGAINST VEHICLES

This shows the vehicle records that have been recently updated and have note/fault information against them.

## INTRODUCTION

The purpose of this section is to highlight the most common reports on Keys data that is tracked by Traka once a vehicle has been added to the system. To access all key related reports, click on the **Keys** icon on the black ribbon.

From the drop-down menu, select the report that you are interested in. Some reports are explained in more depth below. However, should you have more questions please contact your account manager or email support@traka.com



## KEYS USED OVERNIGHT

This report allows you to easily identify which keys were left unsecured overnight or were removed during the night.

To access this report, click on the **Keys** icon located on the black ribbon. From the drop-down menu, select **Keys Used Overnight** (or any time period).

Within the new window you will be able to set your filters. Once complete, click **Run Report**.

### Report - Keys out at night (or any time period)

Day: 21/12/2022 | Hour when night starts: 19 | Hour when night ends: 5 | Exclude not recently moved (days): 30

## KEYS BEING HANDED OVER INCORRECTLY

To keep an accurate audit trail for all keys, a user who removes the key should be also responsible for returning it. To handover keys from one user to another, users should return the key to the cabinet and then the other user login and immediately remove it.

However, this is not always possible and, in such cases, key transfer in Mobile app is available to all users as well as, authorised user can use desktop app to record the transfer of keys on behalf of others.

To identify which users are handing keys incorrectly or identify areas where the key handover is happening incorrectly, please select **Keys** from the black ribbon followed by **Users- Handing Keys Over Incorrectly**. The report lists all users and compares how many correct and incorrect keys handovers they have completed in the set time frame using the filter at the top.

Incorrect Key Handovers

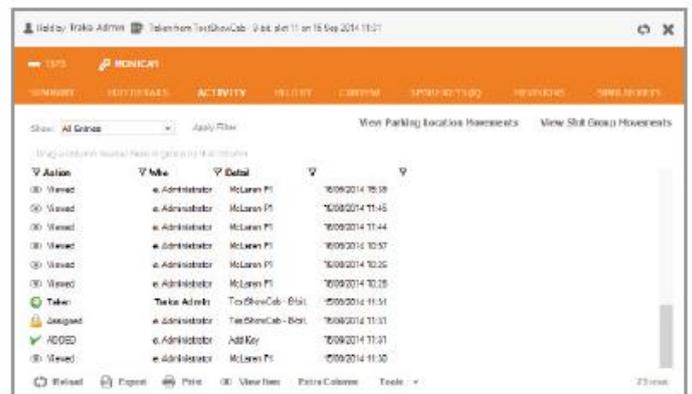
Show: Last 7 Days | Apply Filter

Drag a column header here to group by that column.

Forename	Surname	Position	Site	Incorrect Handover %	Correct	Incorrect
User2			None	67	1	2
Test	User2	Sales	Test Centre	40	3	2

## KEY ACTIVITY

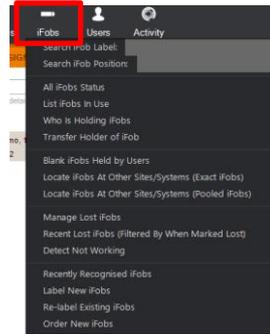
To view a key activity, search for the desired key using normal search process. Double click on the key and click on **ACTIVITY** tab on the orange ribbon. All activity against the key is logged and visible in this report. It shows you when the key was removed and returned, when it started to be tracked (assigned) or stopped being tracked (unassigned). It also shows when the key has been viewed by users within the software.



## INTRODUCTION

The purpose of this section is to highlight the most common reports on iFob data that is tracked in Traka. To access all user related reports, click on the iFob icon on the black ribbon.

From the drop-down menu, select the report that you are interested in. Some reports are explained in more depth below. However, should you have more questions please contact your account manager or email support@traka.com



## LIST IFOB IN USE

List iFobs in use report is especially useful in identifying how many iFobs with or without a key attached to it are still in circulation and not returned to the cabinet. This report should be run at least on weekly basis if not daily to prevent any iFobs and keys not being returned to the cabinet. To run the report, select the **iFobs** icon, followed by **List iFobs in use** from the drop-down menu.

All iFobs that are out

Drag a column header here to group by that column.

Site	Label	Key System	Slot	Description	Who	Duration (D:H)	Customer
Test Centre	1009	Traka Demo	9	No key attached	U.	11D 21:55	
Test Centre	1008	Traka Demo	6	TEST 6	T. User2	77D 20:51	
Test Centre	1007	Traka Demo	10	No key attached	U.	11D 21:55	
Test Centre	1005	Traka Demo	6	No key attached	T. User2	11D 21:56	
Test Centre	1003	Traka Demo	7	TEST 3	T. User2	11D 21:56	Traka Test

## WHO IS HOLDING IFOBS

To identify which users are holding the most iFobs, you can either, use previous List iFobs in user report and drag **WHO** header to group a column or run a dedicate report. Click on the **iFobs** icon followed by **Who is holding iFobs** from the drop-down menu. To view exactly what iFobs are held by the individual, click on the little **+** icon against the person's name.

Who

- + Who : T. User 1 (5 items)
- Who : T. User2 (3 items)

Site	Label	Key System	Slot	Description	Duration (D:H)
Test Centre	1008	Traka Demo	6	TEST 6	77D 21:01
Test Centre	1003	Traka Demo	7	TEST 3	11D 22:05
Test Centre	1005	Traka Demo	6	No key attached	11D 22:05

- + Who : U. (2 items)
- + Who : U. User (1 item)

## MANAGING LOST IFOBS

Once an iFob has been declared as lost, it is a good practice for it to be removed from the system so that it does not appear in any reports. For full details on managing lost iFobs, please visit Traka support website and under iFob management you will be able to download detailed document.

Lost iFobs Management

MISSING LOST REDETECTED CHARGEABLE CHARGED REFUNDABLE ACTIVITY ALL

Show iFobs not removed/returned for more than  days  Exclude those with keys still attached [Apply Filter](#)

Group By Reason Group By Holder

Key System Reason

- + Key System : Traka Demo (2 items)

Reload Export Print View Item Extra Columns Tools 1 rows

WARNING: The iFobs may not be missing but stored outside of a key cabinet or unremoved for a long time. [Mark As Lost](#)

## INTRODUCTION

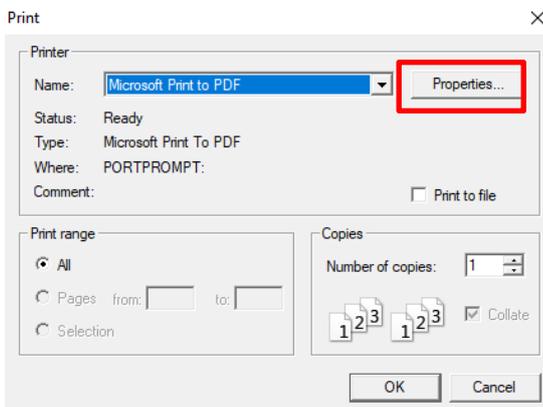
The purpose of this document is to help Traka Automotive user to export, filtered reports to PDF. Please follow the below guide however, should you have any questions please contact your Account Manager or email support@traka.com.

## HOW TO SAVE A REPORT IN PDF

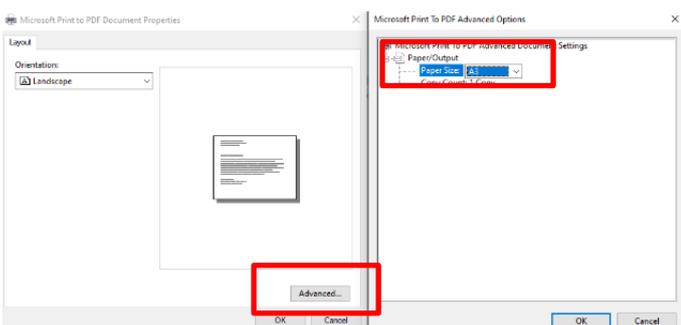
1. Select the report you wish to export.
2. In the bottom left corner, select **Print**.



3. From the drop down option, select **Microsoft Print to PDF**.
4. Next, click on **properties** to change paper size.



5. Click **advance** in the bottom right corner and then select your paper size. It is recommended to use A3 paper size as this allows for all columns to be visible on 1 page.



6. Click **OK**
7. Once the paper size has been set, click the print button in the top left corner.
8. Select your folder destination for the report to be saved in.

