+ Fleet Reporting

As you look for ways to manage your fleet costs and streamline operations, be sure to take advantage of the valuable reports in ePlan. From gaining insight into the financial aspects of your fleet to viewing a comprehensive list of the vehicles and drivers, you can access it all from the Fleet Reporting section.

Let's take a look at some of the most popular reports in ePlan.

Executive Summary

If you're focused on financial analysis, the **Executive Summary** report provides a view of your fleet's total cost of ownership by month. Many fleet managers use this report to get a comprehensive look at their overall fleet costs and to forecast future expenses.

Use this report to view your lease expenses, operating costs, maintenance and fuel transactions, remarketing results and more. The Executive Summary report also offers an overview of your active vehicle inventory, new vehicle orders, active drivers and total miles driven.

To access this report in **Fleet Reporting**, click **Expenses**, then **Cost of Ownership**.
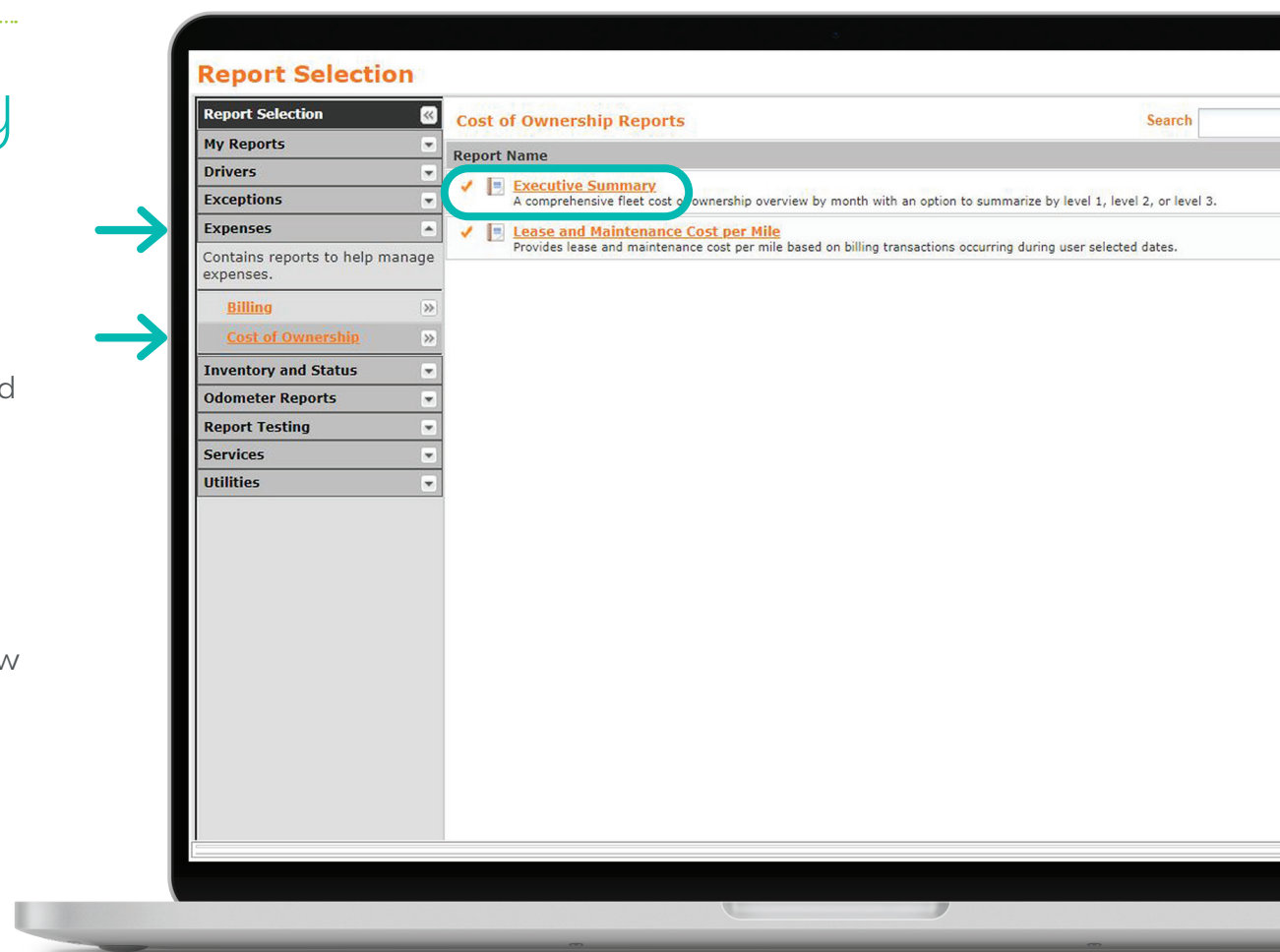
expert tip

Remember to customize your date ranges to analyze specific periods. You also have the option to summarize or filter data by levels, which is especially handy when comparing different segments of your fleet.

did you know?

You can schedule any of ePlan's reports to be sent to you on a regular cadence, including monthly, weekly or daily. From Fleet Reporting, click the Schedule List icon at the top right of the screen. Then click the Create Schedule icon to select email recipients and schedule details.

best practices

If you ever need to make changes to your scheduled report, visit your Schedule Reports List and select the Edit Schedule icon. To Delete a report's schedule, select the report, and click the Delete icon.

Fleet Inventory

The **Fleet Inventory** report is one of the most foundational reports fleet managers can use to find valuable information about the vehicles in their fleet. It should be your first source of information if you have a question about a vehicle in your fleet.

This report is also helpful when you need to validate driver assignments, driver contact details, vehicle location and more.

best practices

We recommend using the Fleet Inventory report to track important data points such as odometer reading, lease term, who is assigned to the vehicle, and location of the vehicle.
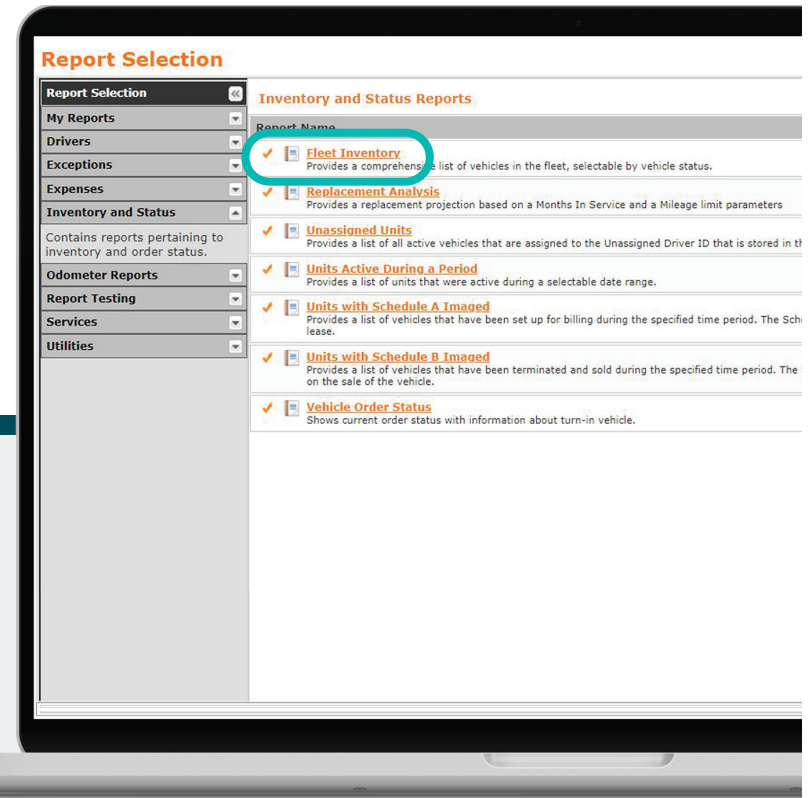
expert tips

You can analyze the exact information you want to view by configuring report parameters. Start by setting the filter criteria like vehicle status, usage or equipment to narrow down your report results.

Many fleet managers find it useful to filter by their custom levels. And, if you need to trim down the report results, simply select – or deselect – the data to display in each column.
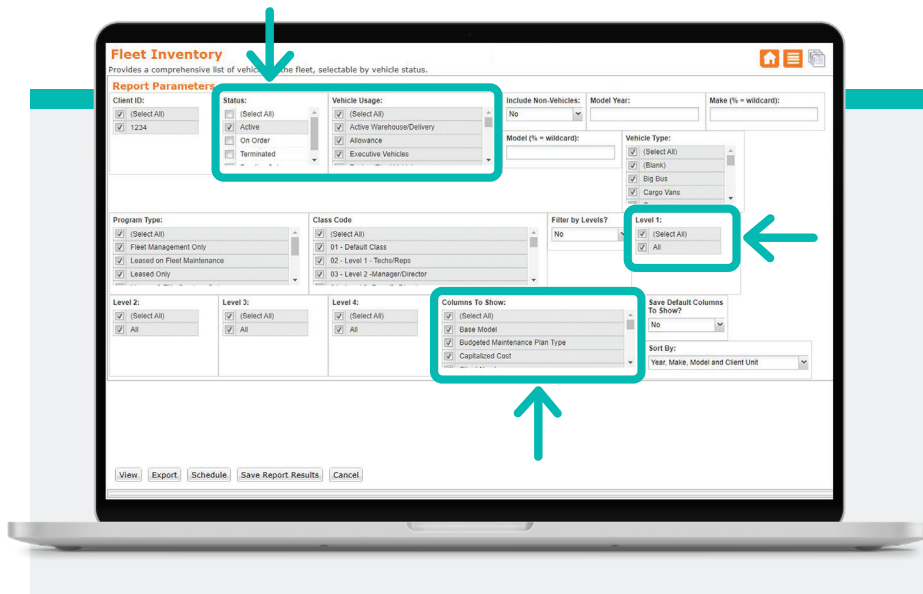
Lease Accounting Standards

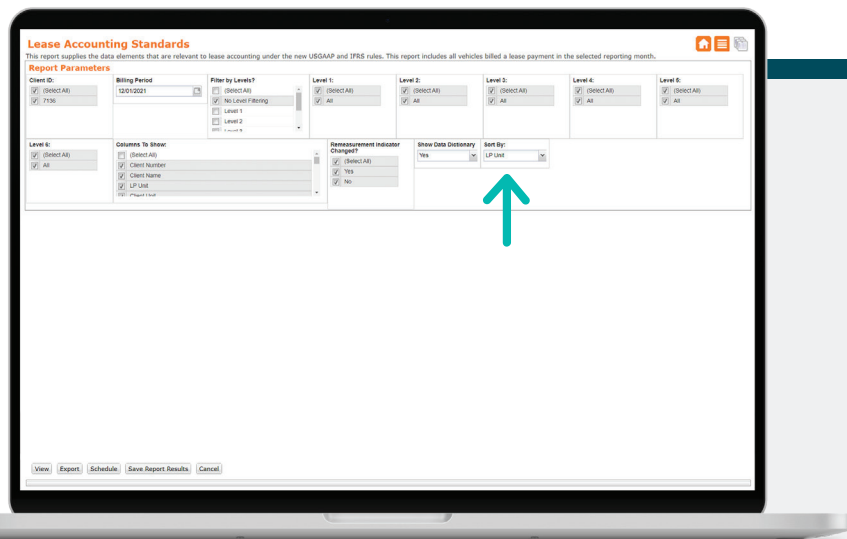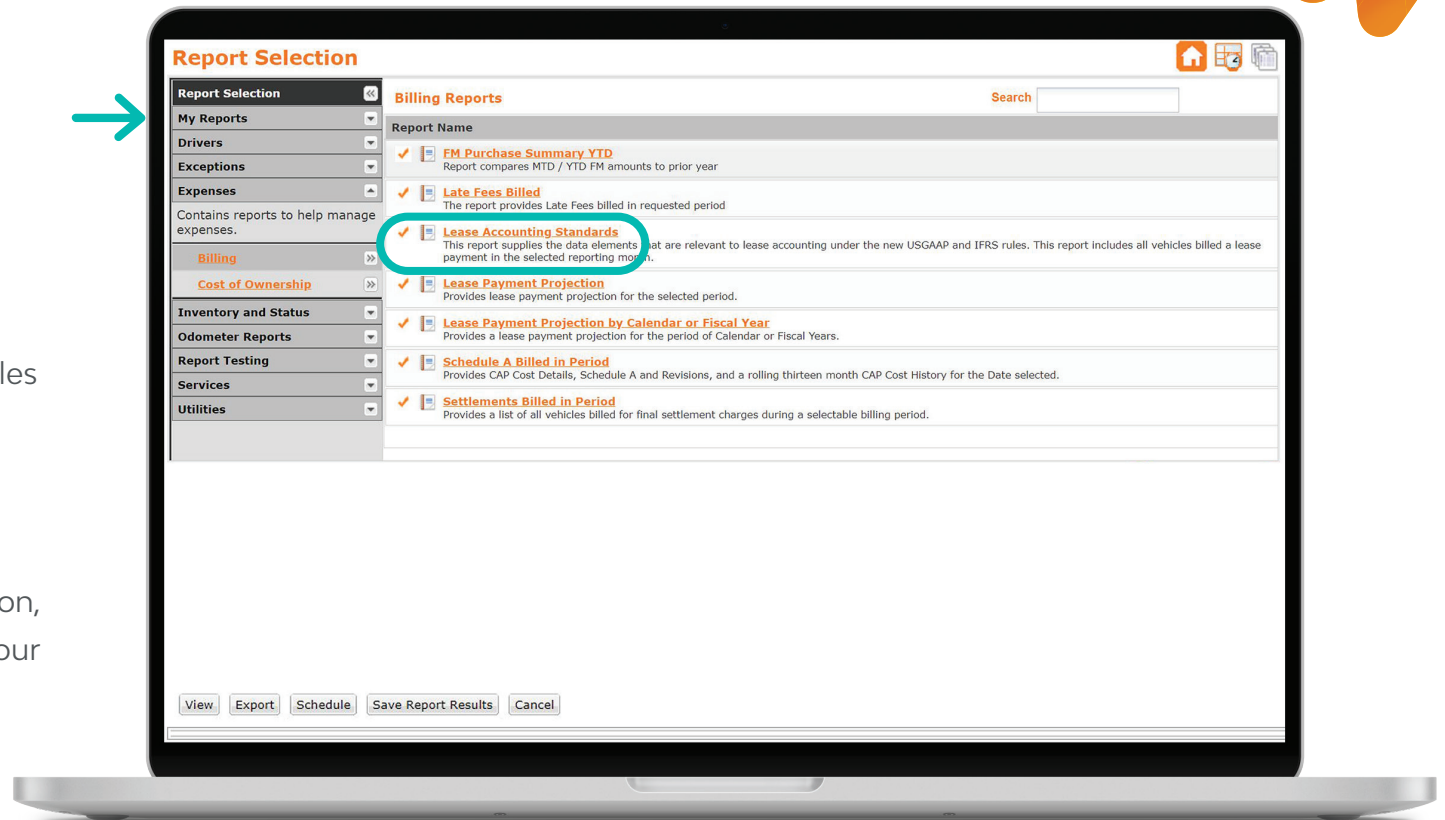The **Lease Accounting Standards** report provides data needed for lease accounting under the Financial Accounting Standards Boards (FASB) guidelines. It contains all vehicles that were billed for a lease payment in the reporting period.

This report includes key data points – like interest rate, book value, cap cost, depreciation, fees and taxes – that are needed to record your leases for accounting purposes.

best practices

We recommend providing the Lease Accounting Standards report to your finance team monthly. It can be especially helpful at year-end to reconcile your lease accounting.
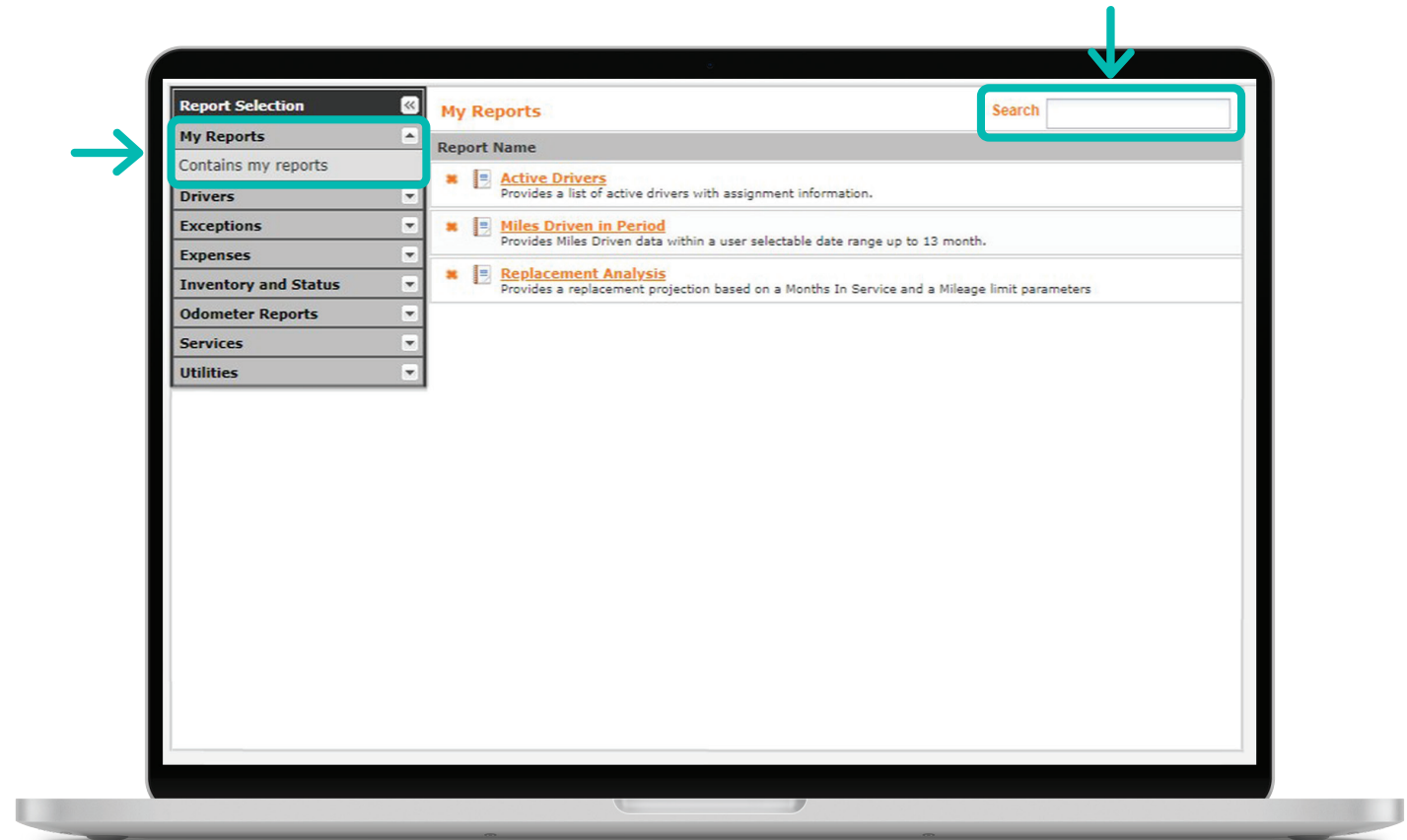
expert tip

To get a detailed look at what each data point means, select the option to "Show data dictionary". The dictionary will accompany your report on a new tab.

Other Reports We Like

Replacement Analysis: This report provides you with insight on what vehicles need to be replaced and when. We recommend using it when planning for your new order cycles.

Miles Driven in a Period: This is a great tool to assess mileage trends across drivers by role type, state or any other segment of your fleet. It can also help to identify employees who are driving over or under mileage terms.

Active Drivers: This is one of the most used reports that provides a list of all employees who are active within the fleet. The Active Drivers report can be useful to verify driver addresses and contact information is up to date, in addition to vehicle assignment.

Report Selection	«
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Report Name

✖ 📄 **Active Drivers**
Provides a list of active drivers with assignment information.

✖ 📄 **Miles Driven in Period**
Provides Miles Driven data within a user selectable date range up to 13 month.

✖ 📄 **Replacement Analysis**
Provides a replacement projection based on a Months In Service and a Mileage limit parameters

expert tip

These are just a few of the reports ePlan has to offer - there are many more you can use to gain insight into your fleet. We encourage you to explore all the reporting options in ePlan or use the search function to find a specific report.

did you know?

You can save your most frequently used reports to the My Reports section for quick access by clicking the check mark next to the report name.